Keyhouse Case Management

User Manual

Keyhouse

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Contents

Typographical conventions

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

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

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

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

Chapter 1: Getting Started

Opening Case Management

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

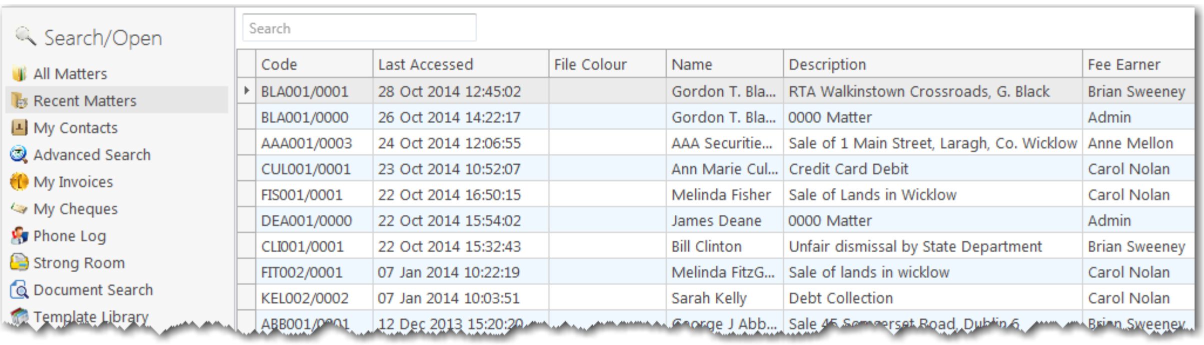
2. The first time you log in, you will have to use your **Handler Code and Password**. If you have previously enabled the use of your **Windows ID**, you may log in without having to enter your password.

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

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

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

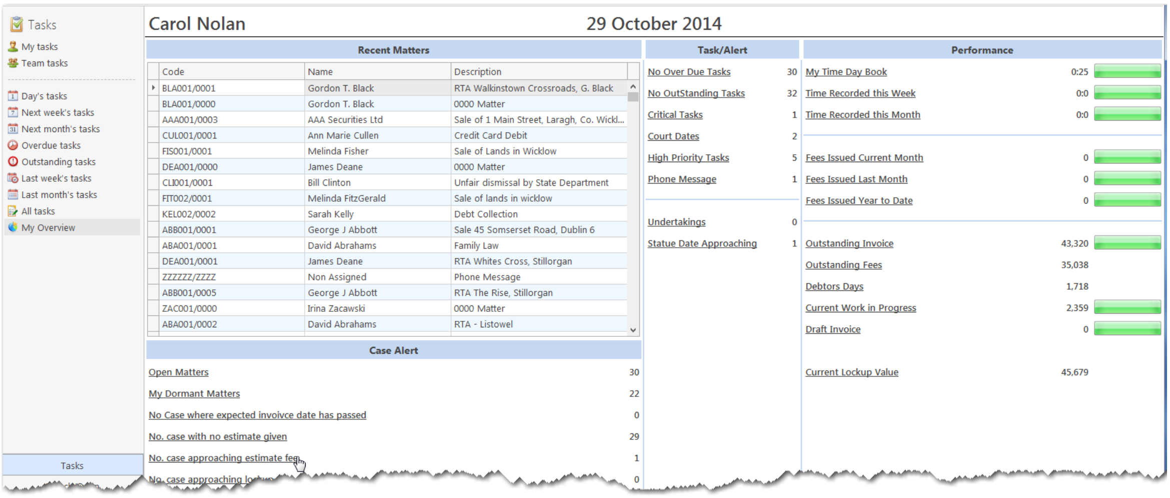
5. **Recent Matters** will allow you to view all your cases, with those most recently accessed at the top.



Code	Last Accessed	File Colour	Name	Description	Fee Earner
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
CLI001/0001	22 Oct 2014 15:32:43		Bill Clinton	Unfair dismissal by State Department	Brian Sweeney
FIT002/0001	07 Jan 2014 10:22:19		Melinda FitzG...	Sale of lands in wicklow	Carol Nolan
KEL002/0002	07 Jan 2014 10:03:51		Sarah Kelly	Debt Collection	Carol Nolan
ABB001/0001	12 Dec 2013 15:20:20		George J Abb...	Sale 45 Somerset Road, Dublin 6	Brian Sweeney

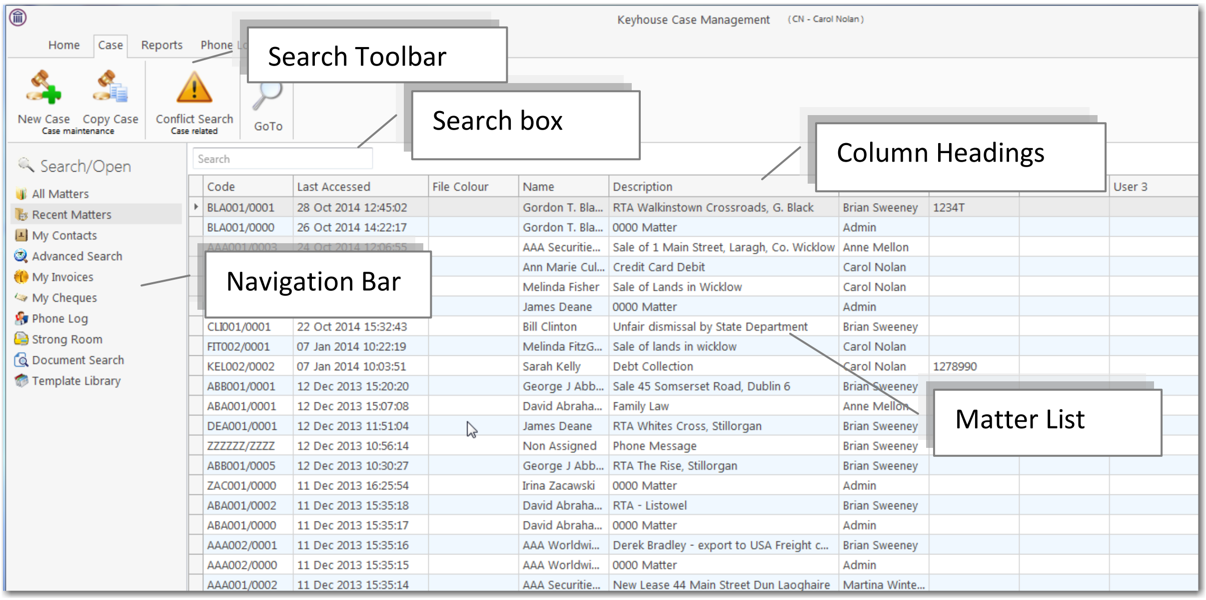
6. **Task Manager** will show you your task list.

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.



Chapter 2: Search & Open

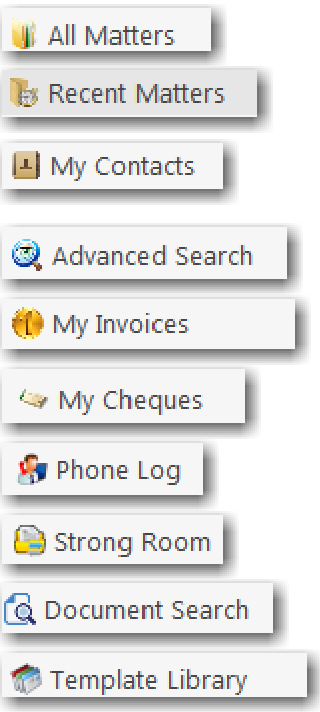
The Search Screen



Tip: Click on a column headings to sort alphabetically by that heading eg. Matter Description or click on the pin to apply a filter 

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.

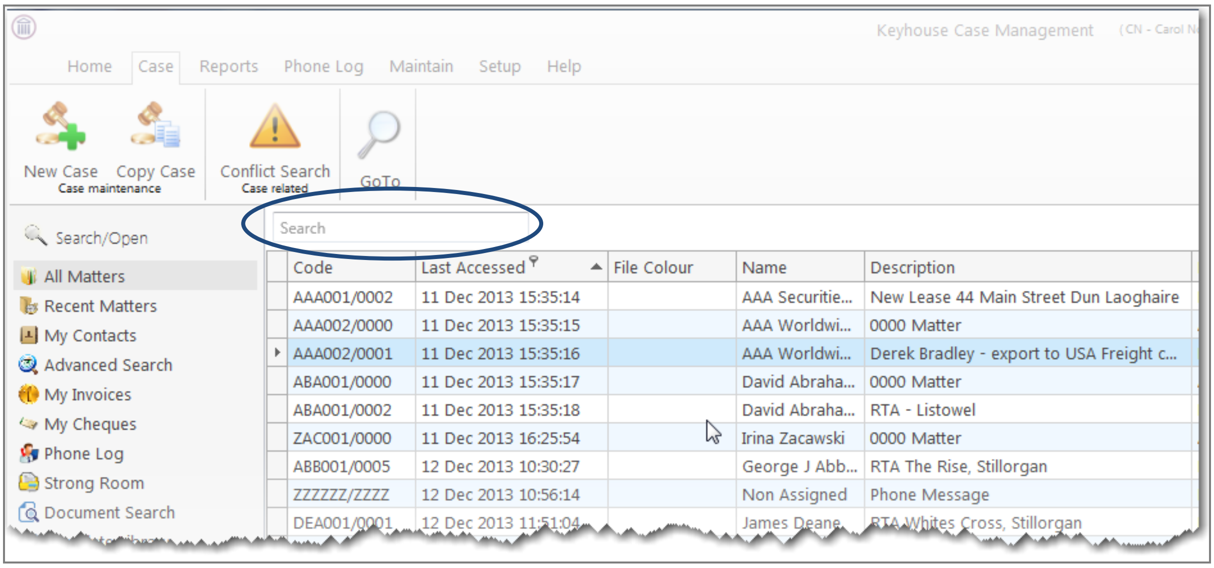
Click on **Template Library** to Search and preview your precedent bank of documents.

Search Lists

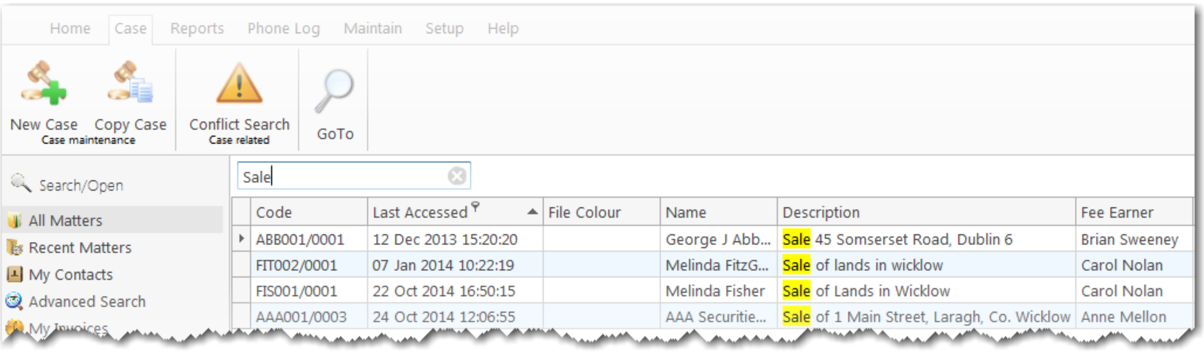
Search All Matters List

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.



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

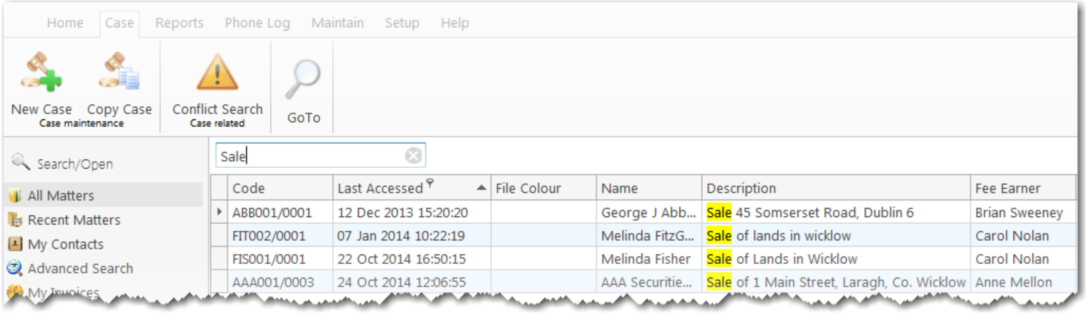


4. **Double click** the required matter to access the case diary for this matter.

Search Recent Matters

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

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



2. Click on Recent Matters in the Navigation panel.

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

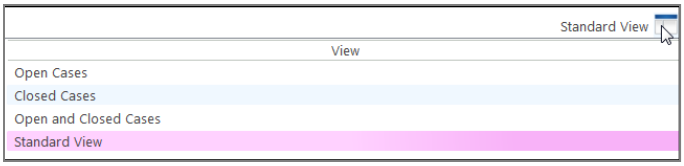
4. **Double click** the required matter to open the case diary for this matter.

How to Search Open and Closed Cases

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

2. Click on All Matters.

3. Click on **Standard view tool** located on the following list of views will appear.



- Click on Closed Cases to search only closed cases
- Click on Open Cases to search only open cases.
- Click on Open and Closed to search both lists.
- Click on Standard View to return to the default view.

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

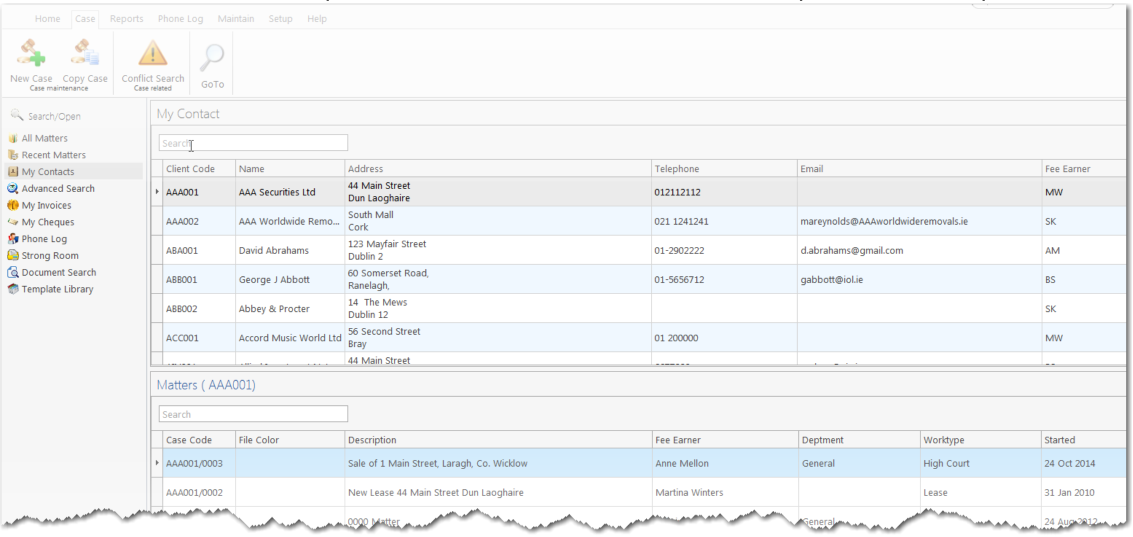
5. **Double click** the required matter to open the closed case diary for this matter.

Note no amendments can be made in the case diary until the case is re-opened. See the Chapter 16 for further details.

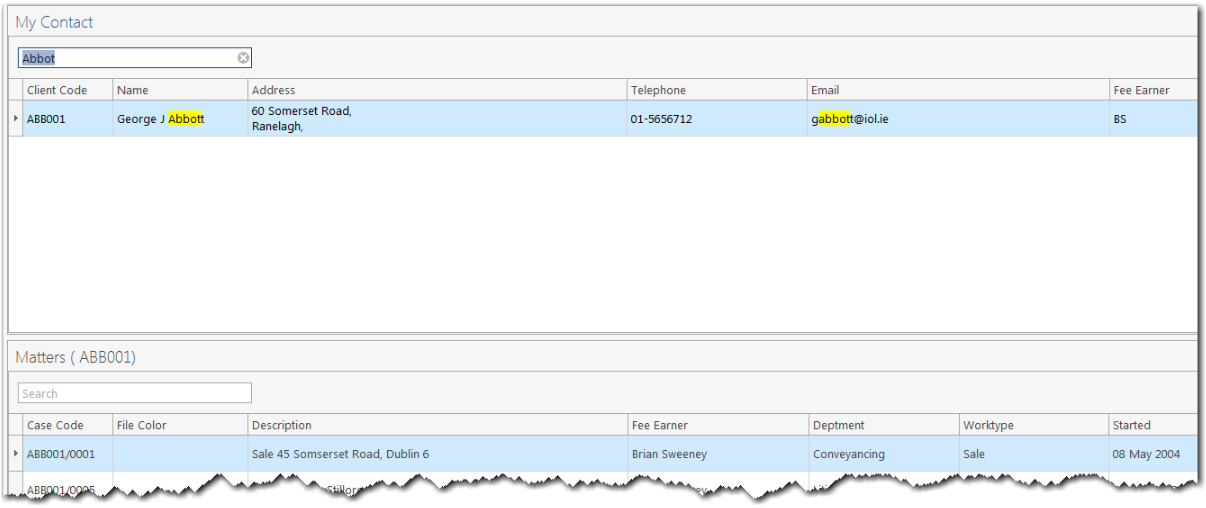
Search My Contacts

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 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”.



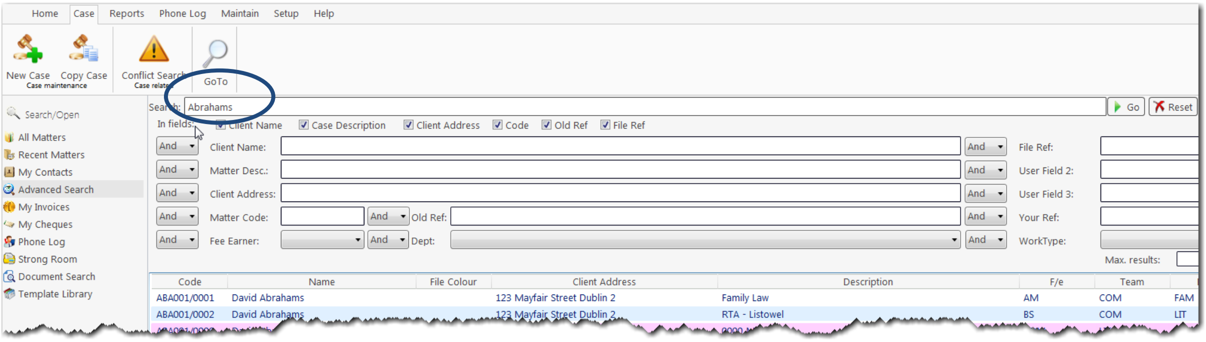
Tip: To view further details about a client double click the required client record.

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

The Advanced Search

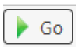
1. Click on Search/Open Cases.

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



Simple Search

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

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

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

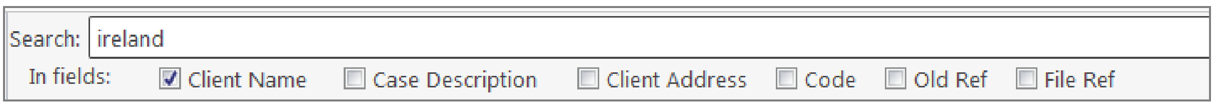
4. **Double click** the required case to open it in the case diary.

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

"OR" Search

This will refine the search to search for keywords in the specified columns only. E.g. 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.



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.

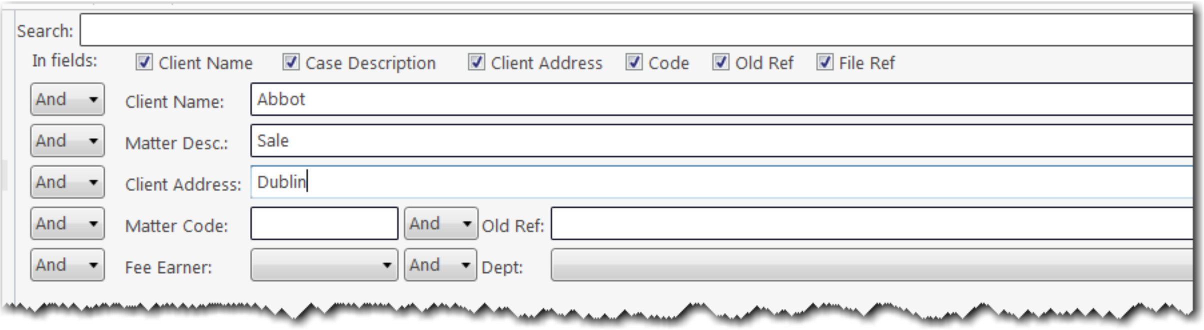
Sample Search:
Search For: **Ireland**
In fields: Client Name

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.



2. Click **Go**.

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

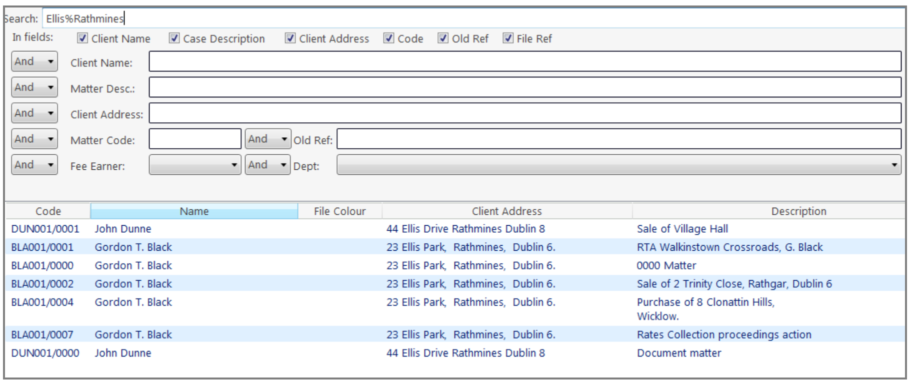
   Sample Search "And"
   Search for: "Abbot" in the client name
   and Search for "Sale" in the matter description
   and Search for "Dublin" in client address

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

Searching using a Wildcard

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

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



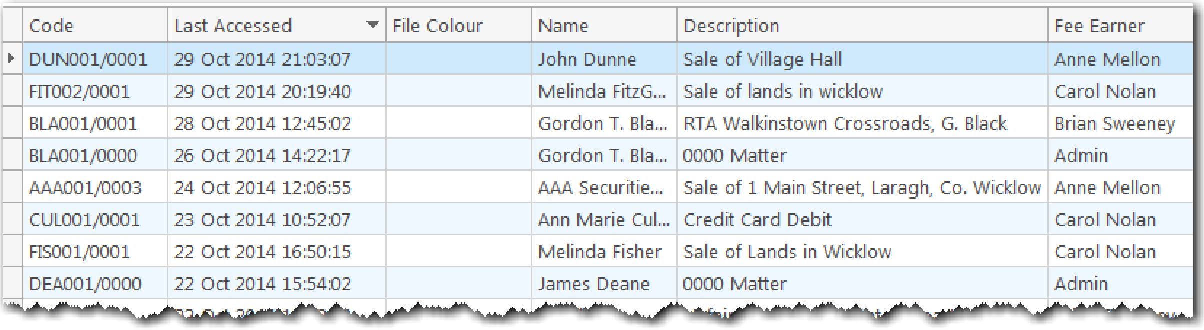
2. The system will return any client addresses beginning with **Ellis** ending with **Rathmines.** E.g. Ellis Park or Ellis Drive etc.

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.

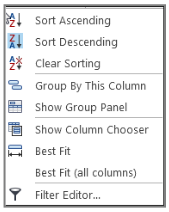
How to Sort Column Headings

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

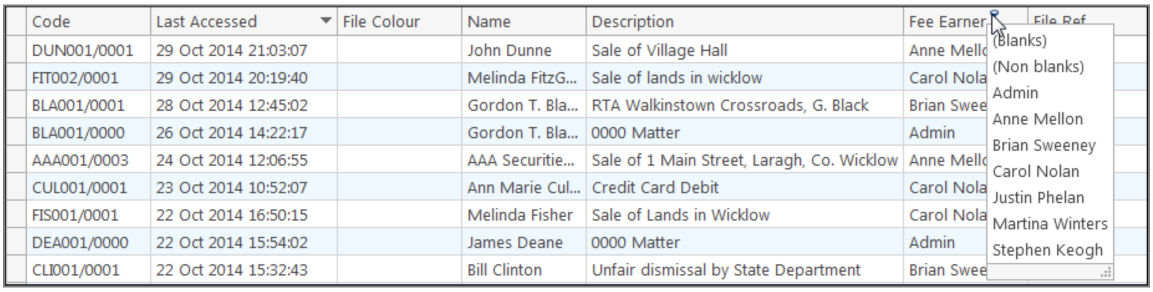
2. To remove the sort right-click on the column and select **Clear Sorting** from the resulting menu.



How to Filter Columns

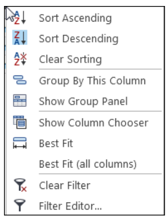
1. Move your cursor to the column heading required, until you see the filter pin.

2. Clicking on the filter pin will open a drop-down menu; select the required filter term.



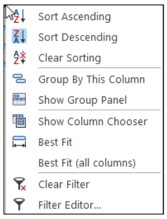
Code	Last Accessed	File Colour	Name	Description	Fee Earner
DUN001/0001	29 Oct 2014 21:03:07		John Dunne	Sale of Village Hall	Anne Mello
FIT002/0001	29 Oct 2014 20:19:40		Melinda FitzG...	Sale of lands in wicklow	Carol Nola
BLA001/0001	28 Oct 2014 12:45:02		Gordon T. Bla...	RTA Walkinstown Crossroads, G. Black	Brian Swee
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 Mello
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
DEA001/0000	22 Oct 2014 15:54:02		James Deane	0000 Matter	Admin
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).



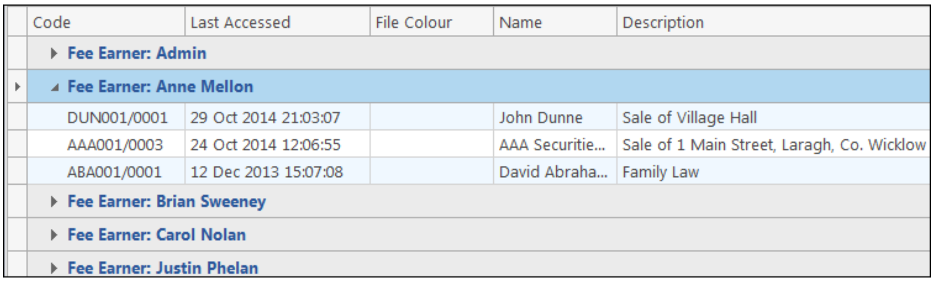
How to Group by Column

1. **Right-click** on the column you want to group by, to open the drop-down menu.



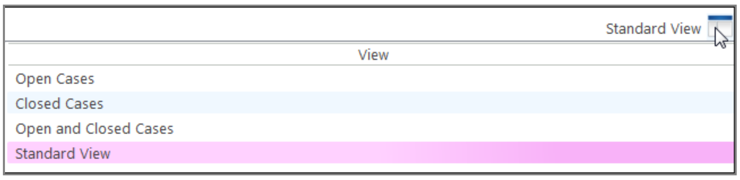
2. Select **Group By This column** from the menu. In the following example, grouping is by fee earner.

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



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

To return to the standard view click on the view tool located on the search bar to show a list of available views. Select **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**

2. 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.

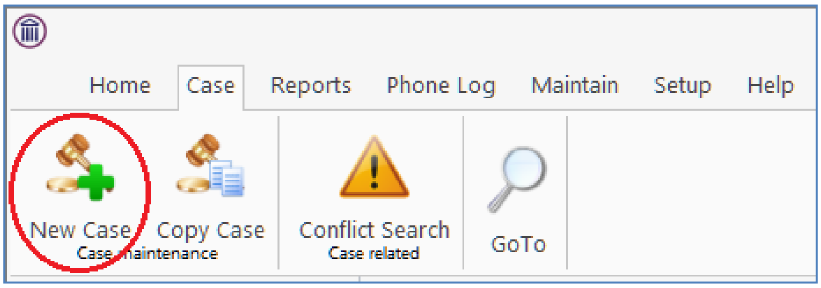
3. Click **Search**. A list of documents that match the criteria will be displayed

Chapter 3: Creating New Clients and Cases

The New Case Wizard

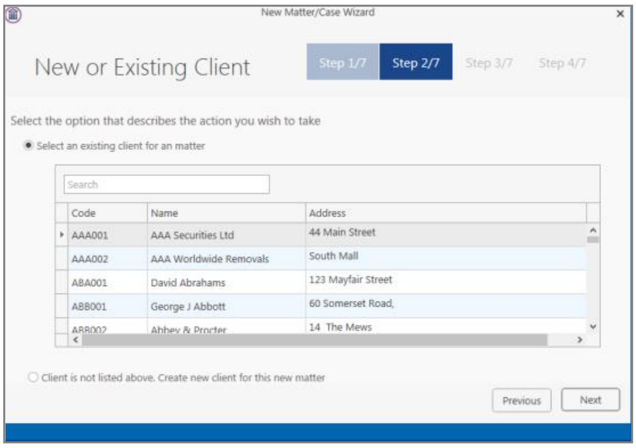
Create a New Case for an Existing Client

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



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

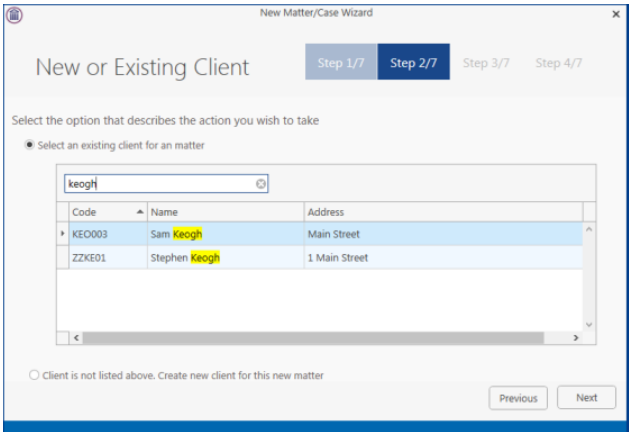
3. The default option is to set up a new case for an existing client or contact.



4. Input all or part of the client's name or code in the search box. The search results will update as you type.

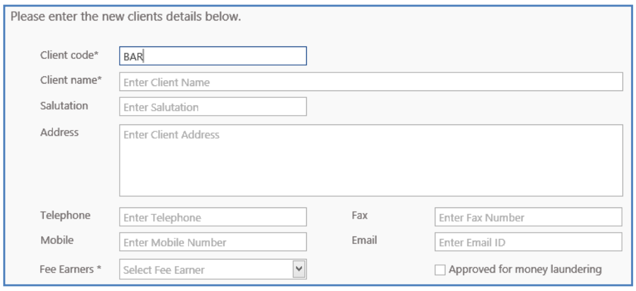
   You can sort the columns by clicking on the column headings.

5. **Select** the **client** required and click **Next**. In this case, the wizard will skip Step 3 and you will move immediately to Step 4.



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

7. The screen for Step 3 asks for details of the new client. Type the first three letters of the Client's surname into the box for ***Client code***. The system will complete the code by adding three digits.

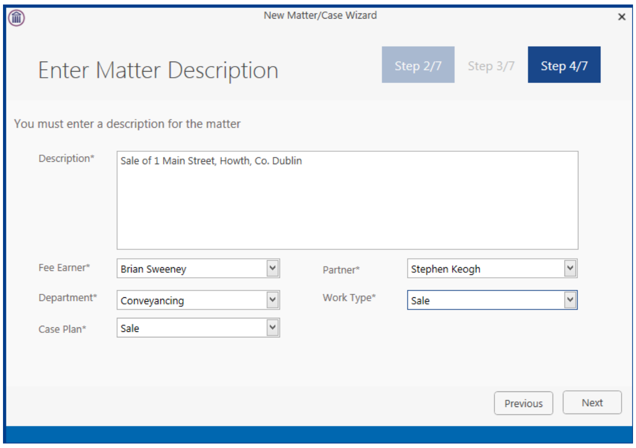


8. As well as ***Client code***, ***Client name*** and ***Fee Earners*** are required fields.

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

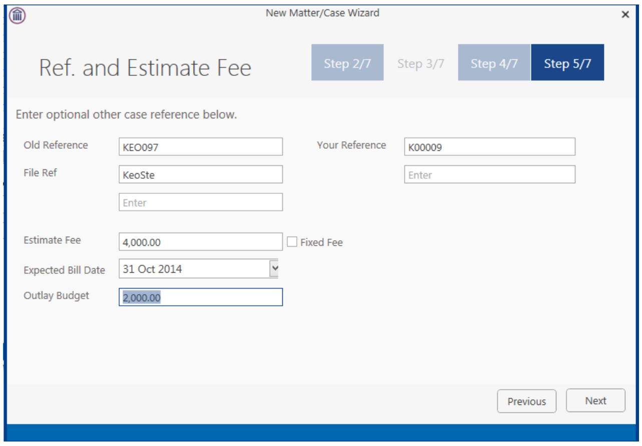
   Input the matter description, then select the following from the relevant drop-down lists:

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



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:

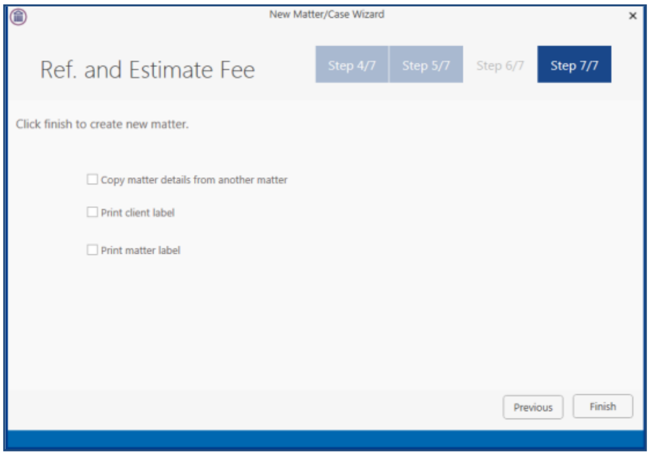
    - Old Reference
    - Your Reference (i.e. the client's reference, if any)
    - Three additional reference fields, the prompts for which may vary from one system to another
    - The ***Estimate of Fees*** – check the box if the fees are fixed
    - The ***Expected Bill Date***
    - The ***Budget Outlay***



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.

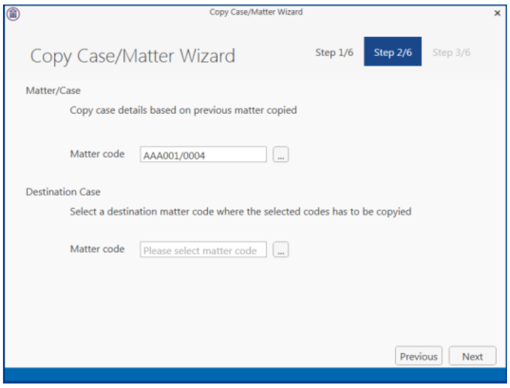


13. Click **Finish**. The matter has now been created and is available in the Case Diary.

Copy Case Details

1. Click on the **Copy Case tool** 

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

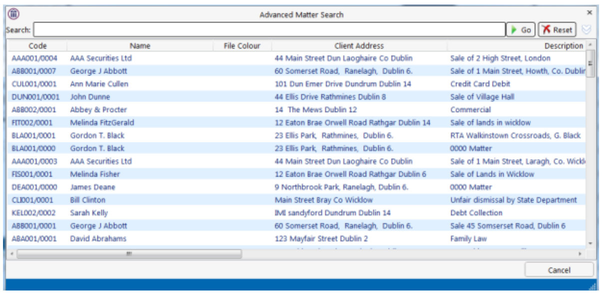


Note: As seen in the previous section, the **Copy Case Wizard** may also be started by checking the relevant box on the final screen of the **New Case Wizard**.

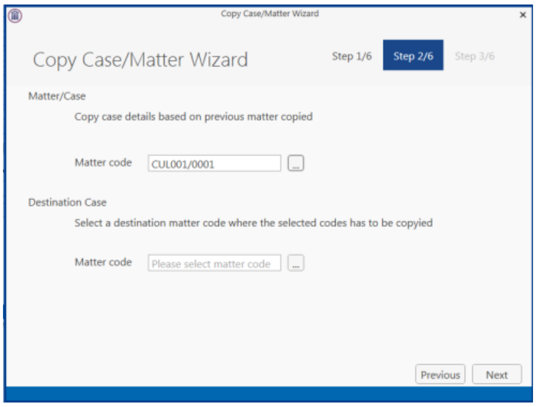
2. Click **Next** to continue to Step 2.

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.

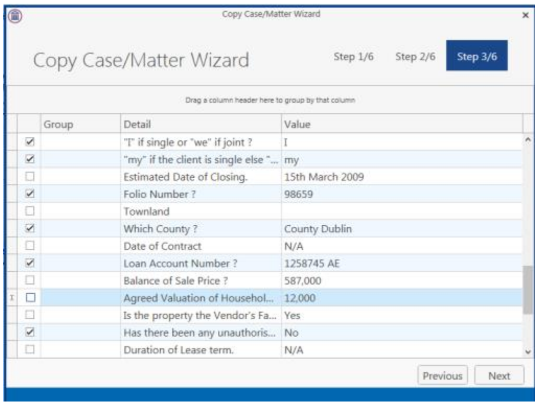


5. Select the destination matter in the same way.

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.

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

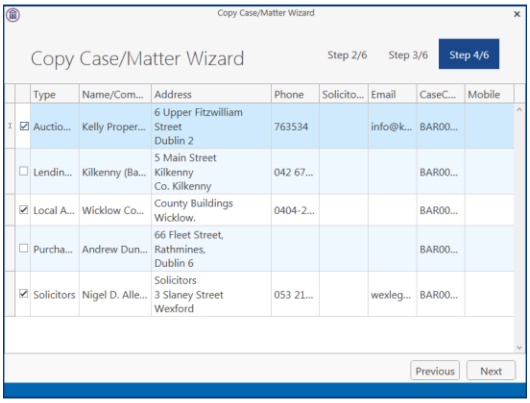
7. The **UDF**s can be sorted, grouped and filtered as required, to make it easier to find and select those which are to be copied to the destination matter.



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

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

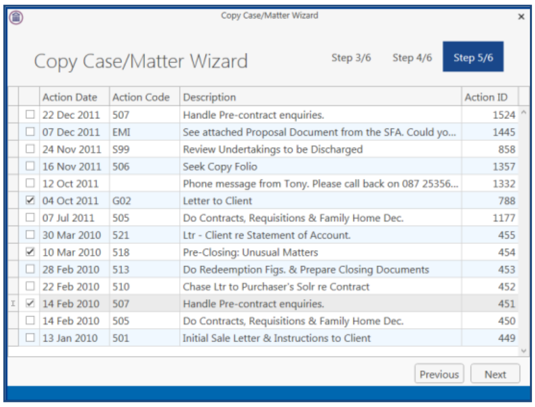
10. In Step 4, the **Case Associates** in the source matter are listed.



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

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

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

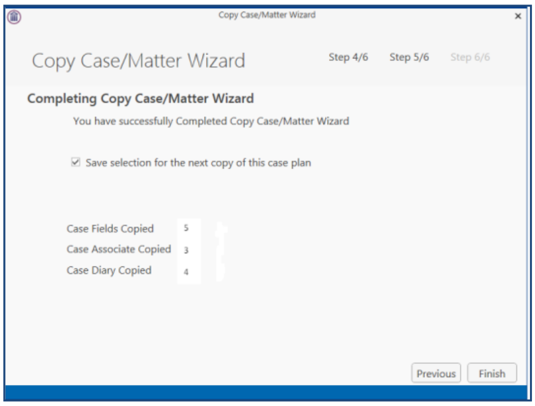


14. The procedure for selecting and copying the actions to the destination matter is similar to those for copying UDFs and Case Associates.

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

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

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



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

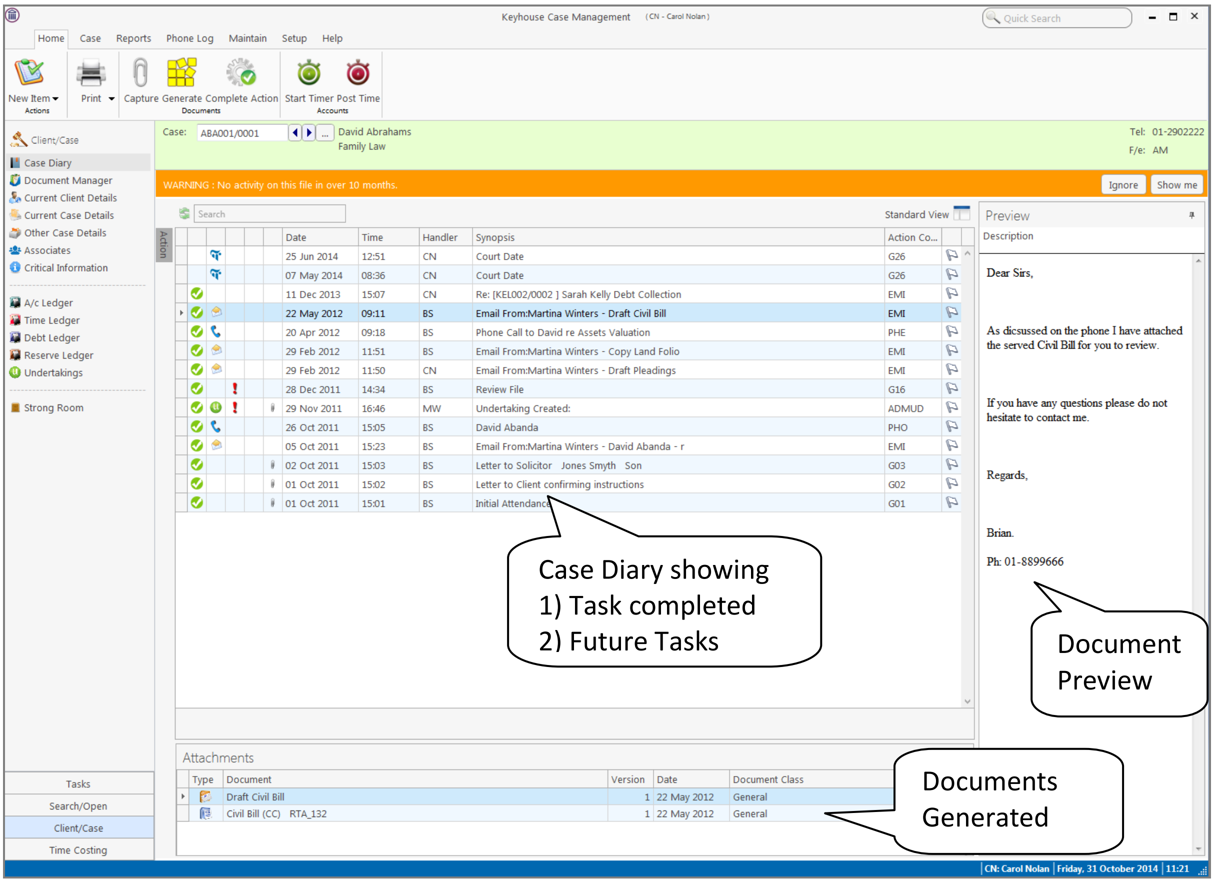
Chapter 4: The Case Diary

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

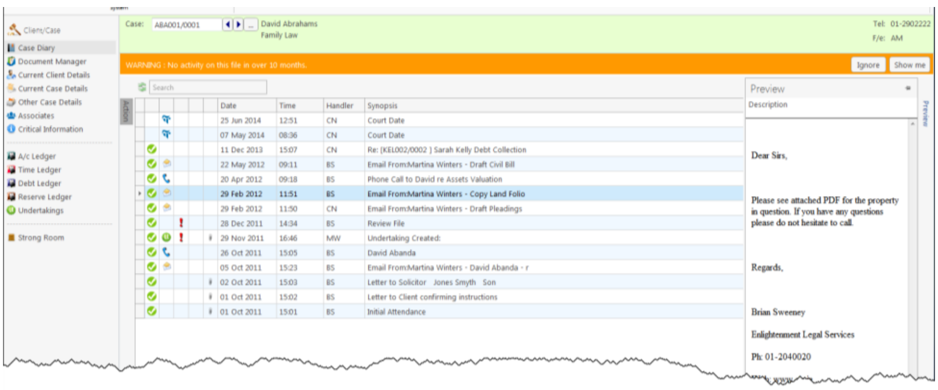
Now with the new version of the Case Diary each user can configure their diary screen according to their requirements. For example secretarial staff may generally prefer to view the case plan in their screen while solicitors might only need to see it occasionally.

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

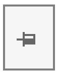
How to create this view:

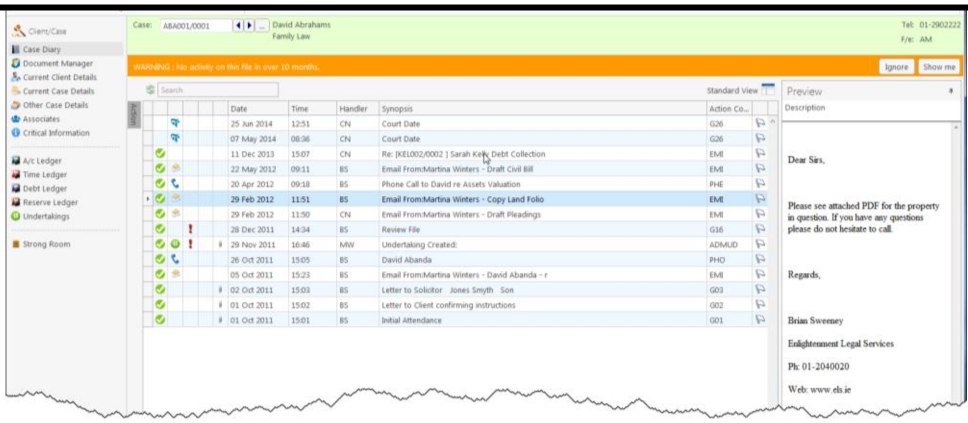
1. Move you mouse over **Preview** to the located to right of the Case Diary Screen the document preview pane will appear.



Sample 2: Standard view with fixed document preview pane

How to create this view:

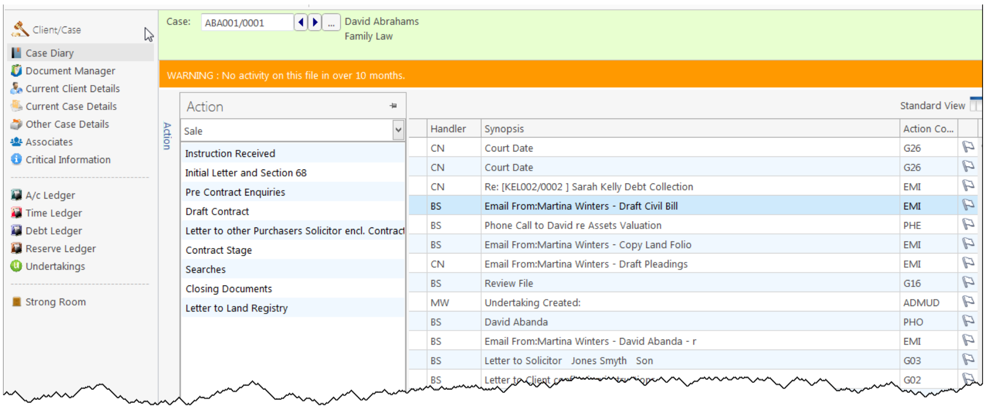
1. Move you mouse over **Preview** to the located to right of the Case Diary Screen the document preview pane will appear.
2. Click on the Pin  to make it permanently visible.



Sample 3: Case Diary with Floating Case Plan

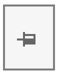
How to create this view:

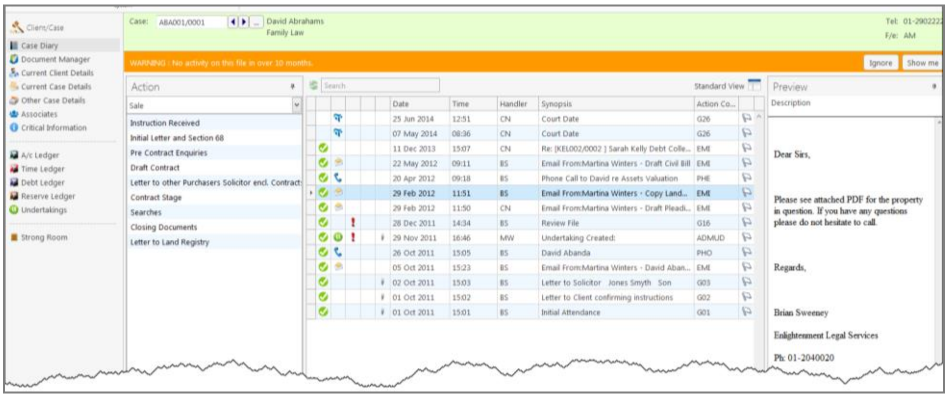
1. Move you mouse over **Action** to the located to left of the Case Diary Screen the Case Plan will appear.



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

How to create this view:

1. Move 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.



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.

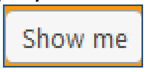
Caution: Please read any warnings specific to the file as they could be vital information specific to this case.

How to Show or Ignore a message

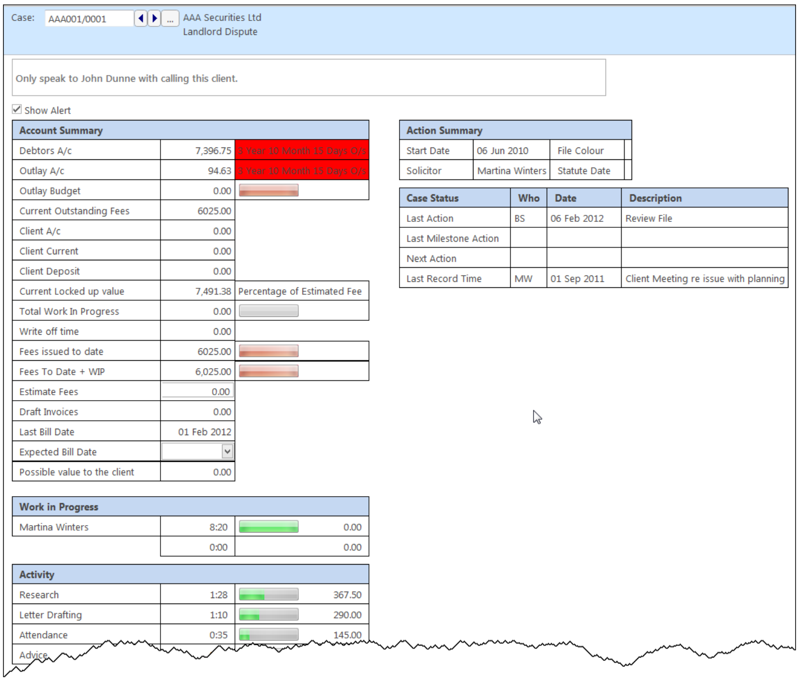
1. Search for the required case and double click it to open it in the **Case Diary**.

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

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

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

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



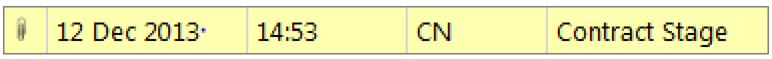
Note: The specific warning related to the case can be added via the **Critical Information** shortcut on the navigation panel. Type in message in text box and tick **show alert**.

4. Click on the **Ignore** 

to ignore the message and remove it from the case.

Case Diary Symbols

Tasks in Yellow denote milestone tasks.



Tasks with a Red Dot denote a high priority task.

!			10 Dec 2013	17:58	CN	Draft Contract

Tasks with a Calendar Symbol denote an appointment.

25			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 Brief

Tasks with a Broken Yellow Box denote documents processed.

				01 Nov 2014	11:36	CN	Searches

Tasks with a Blue Tick denote a completed task.

				24 Apr 2010	13:55	BS	Letter to Land Registry

Tasks with a yellow note denote a Note.

			01 Nov 2014	11:40	CN	Ring Client re. bank statements

Tasks with a hand denote a delegated task.

			01 Nov 2014	11:40	CN	Ring Client re. bank statements

Tasks with a blue arrow denote tasks of low importance.

			19 Jun 2010	14:22	BS	Check details on file

Tasks with U denote an Undertaking.

U	!			01 Nov 2014	11:49	AM	Undertaking Created:

Tasks with S denote a Statute of Limitation date or a critical date action.

S	!			27 Sep 2011	22:20	BS	Statute of Limitations Date = 7/10/2011

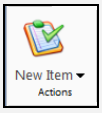
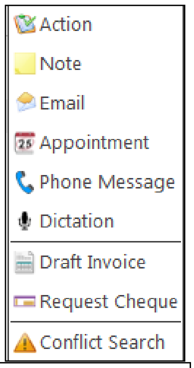
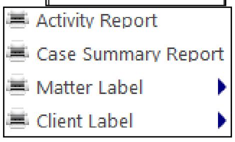
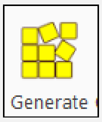
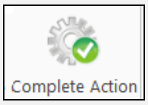
Tasks with an envelope denote an email sent or received.

				16 May 2012	11:13	BS	Email From:Martina Winters - Mutual Confident

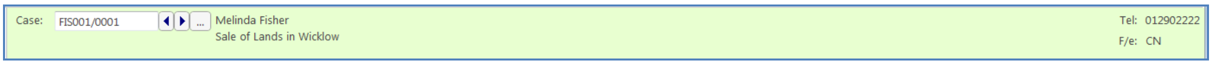
Tasks with a document attached

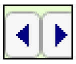
	16 May 2012	11:22	BS	Letter to Solicitor re title Letter to Allsop & Browne

The Case Diary Toolbar

	New	Click on the New to add any of these tasks.	
	Printer	Click to print any of the following reports:	
	Capture	Click on capture to launch the document capture program to import documents or folders of documents or images.	
	Generate	Click to generate a document for a selected action.	
	Complete Action	Click to mark a task as complete.	
	Start Timer	Click to start the timer for the current case.	
	Post time	Click to bring up a manual time slip.	

Navigation within the Case Diary



Case: FIS001/0001	Case Code	Case Code of current open case. Or To open a case input the case code and press enter.
	Navigation buttons	Move to the previous Case or go to Next Case.
...	Search Case List	Click to search for an existing Case. Double click the required case to open.

Case Diary Navigation Panel

Case Diary	Case Diary	Case Diary Screen
Document Manager	Document Manager	Click on this to launch the Document Manager
Current Client Details	Current client Details	Click on this to view or edit the current client details.
Current Case Details	Current Matter Details	Click on this to view or edit the current case/matter details.
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.
Critical Information	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.
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.
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

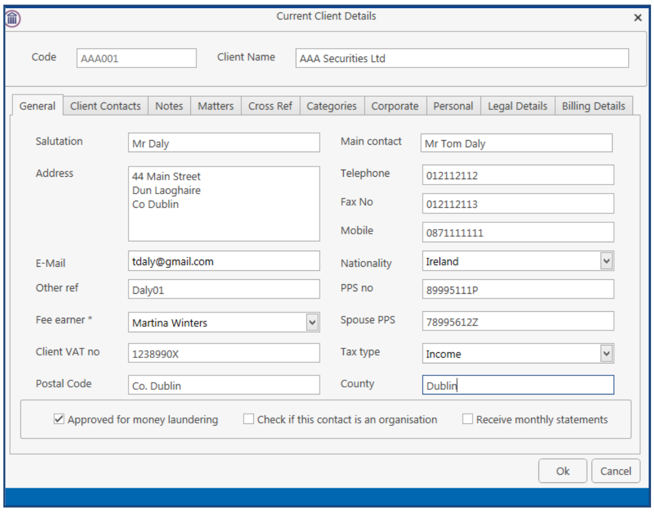
Updating Client Details

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

2. Click on **Current Client Details** 

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

   Input the following information as required:

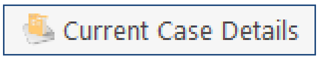


General	**Input/Amend** information on the client's name, address, telephone numbers etc.
Client Contacts	Click on **Client Contacts** to add additional client contacts for example the client's spouse or if the client is a company add an employee's details.
Notes	Click on the **Notes Tab** to enter notes relating to the client.
Matters	Click on the **Matters tab** to view a list of all active matters assigned to this client.
Cross Reference	Click on **Cross Ref tab** to cross reference the client with another for example a husband and wife.
Categories	Click on **Categories tab** to add the client to a category.
Personal	Click on the **Personal tab** to add the client's personal details for e.g. Date of Birth, Date of Marriage etc.
Legal Details	Click on the **Legal Details tab** to add the legal details about the client. E.g. Legal Name.
Billing Details	Click on the **Billing Details tab** to add information on the billing details of this client.

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

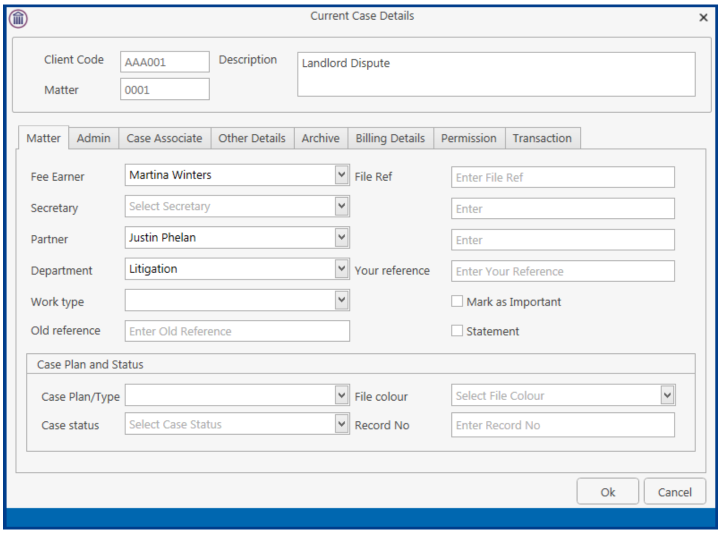
Updating Case Details

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

2. Click on **Current Case Details** 

located on the **Navigation** panel.

3. Input/Amend the following details as required:



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

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

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

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

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

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

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

Estimate of Fees	Check the box if an estimate of fees has been given.
Comments	Input any comments.
Charge Rate Level:	Using the option buttons, select a charge rate level
Effectively complete	Tick if the case is effectively complete.

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

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

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

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

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

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

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

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

Using the option buttons, select the billing type and default billing method.

Permissions Click on the **Permissions tab** to control access to this matter, for example to add or remove particular user groups.

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

Note the balance will automatically update.

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

Inserting a Statute of Limitations Date

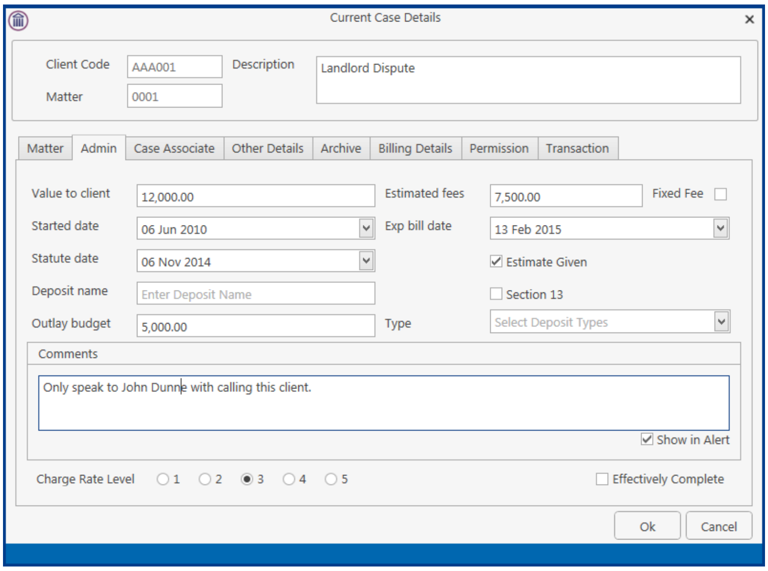
1. **Open** a case in the **Case Diary**.

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

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

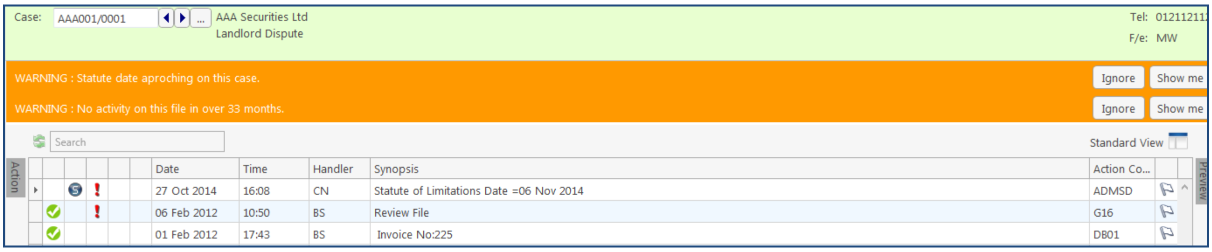
4. **Input** a Statute Date or click on the down arrow to select a date from the calendar.

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



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

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



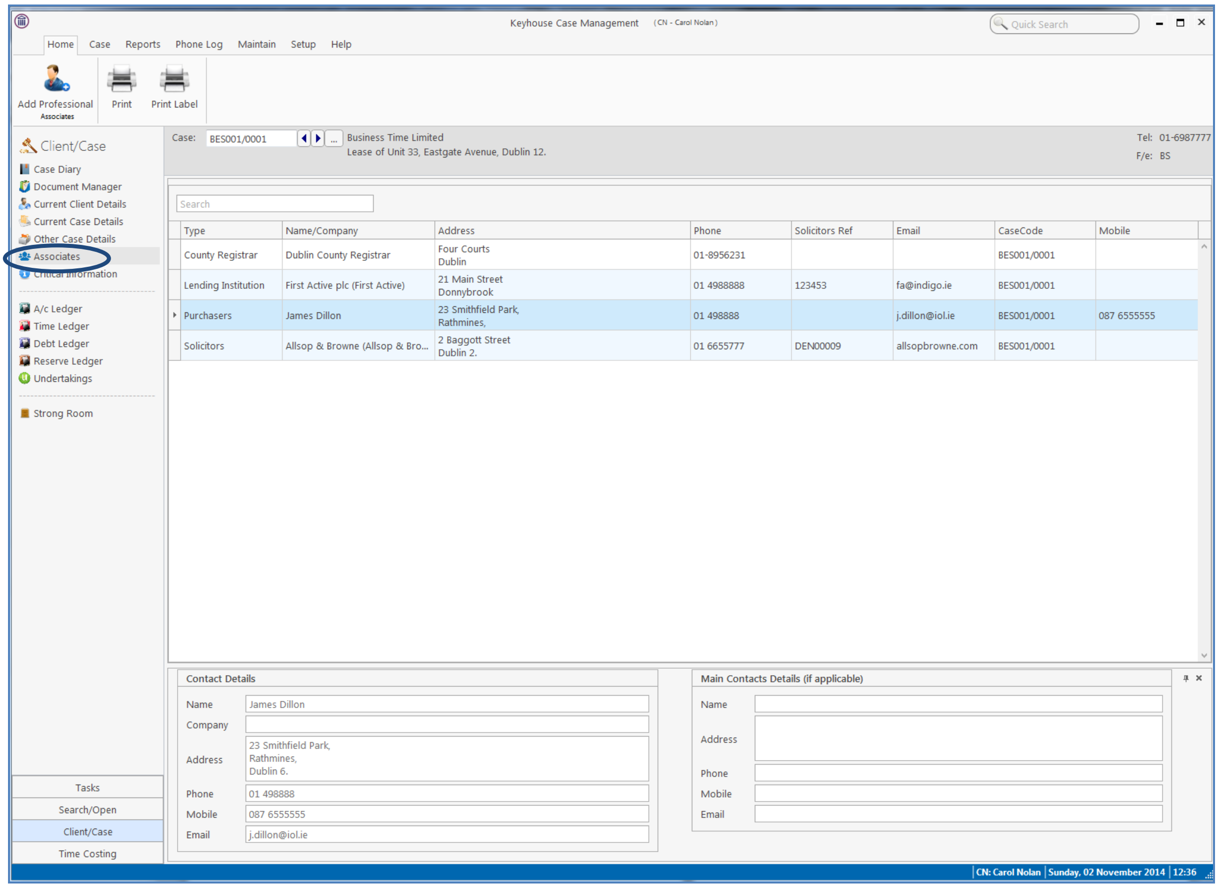
Case Associates

What are Case Associates?

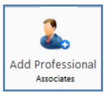
Case Associates are all individuals, companies, government departments, courts etc. connected with a case. For example the solicitor, the barrister, the defendant, the purchaser, the land registry, the lending institution and various others. By adding case associates to a case you can view their details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

How to add an existing case associate to a case

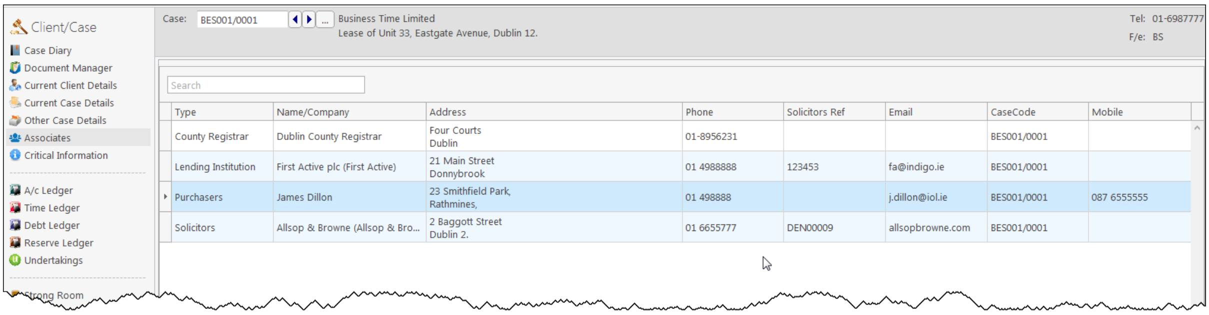
1. Open a case in the Case Diary.



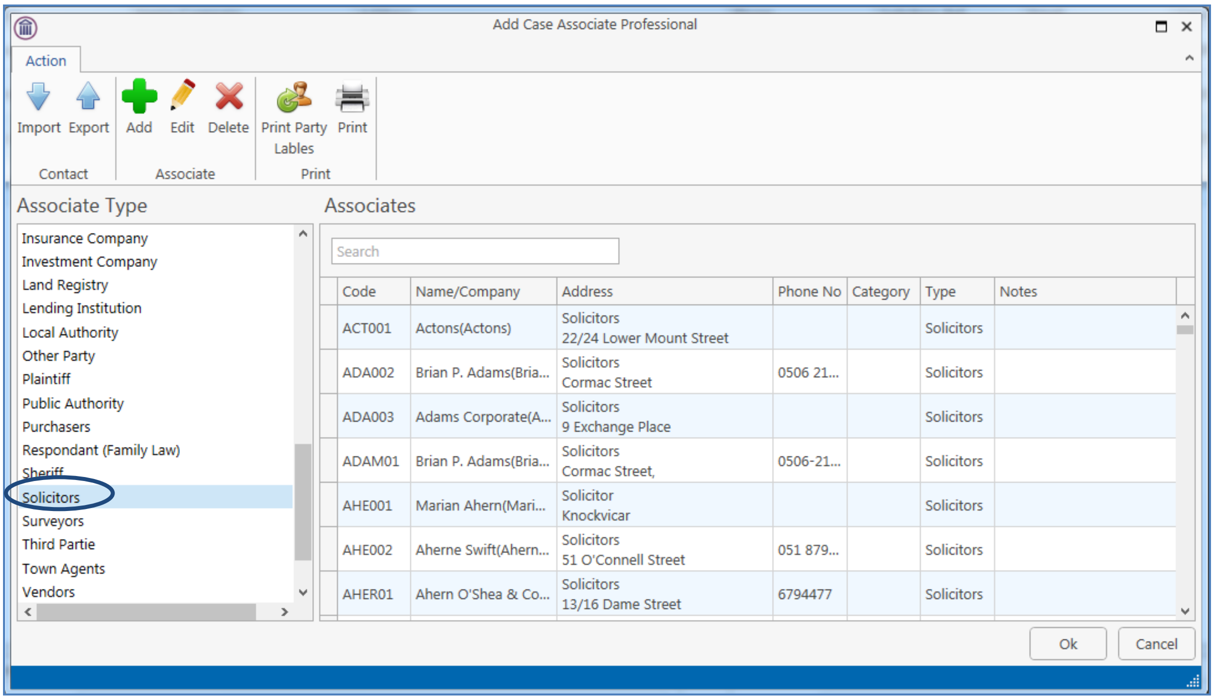
2. Click on **Associates** on the **Navigation** panel: a list of case associates assigned to case will appear.

3. Click on **Add Professional** 

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



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



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

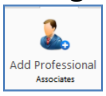
6. **Double Click** on the relevant Solicitor to assign it to the case.

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

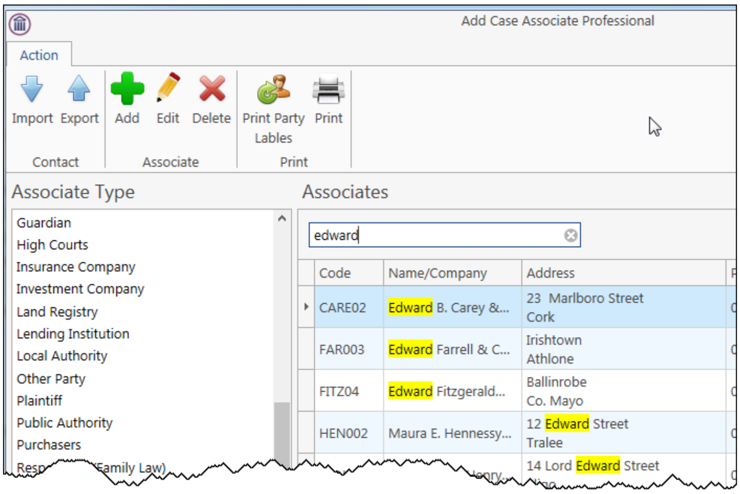
How to add a new case associate to a case

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

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

3. Click on **Add Professional** 

on the Home tab of the Ribbon.



4. Click on the **category** of case associate you want to add e.g. Bank.

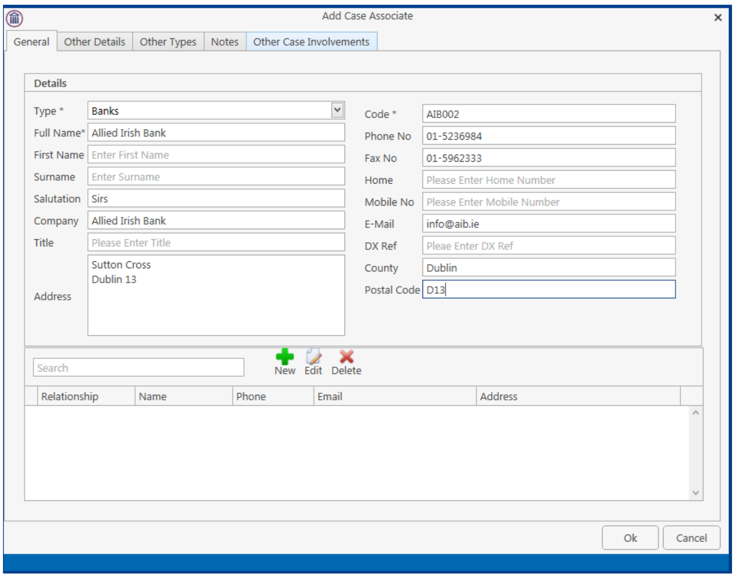
5. Click in the **search box** and **input** a key search word the search criteria will be applied as you type.

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

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

the following screen will appear.

8. **Input** the relevant information



Full Name: Input the Full Name

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

Salutation: Input the Salutation

Company: Input the company name

Title: Input the title ie. Mr, Mrs etc.

Address: Input the address

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

Phone No: Input the main phone number

Fax No: Input the fax number

Home: Input home phone number

Mobile: Input mobile phone number

E-Mail: Input e-mail address

DX Ref: Input the Document Exchange reference if applicable

Nominated: Tick is this is the nominated contact.

County: Input the county.

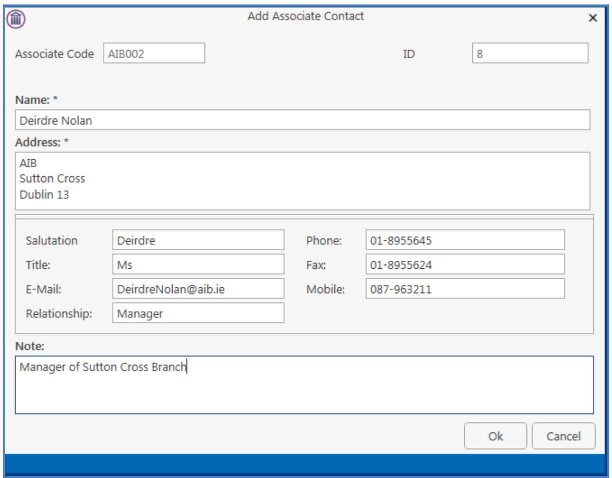
Post Code: Input the post code.

9. If you want to add a **contact** to this associate click on **new** 

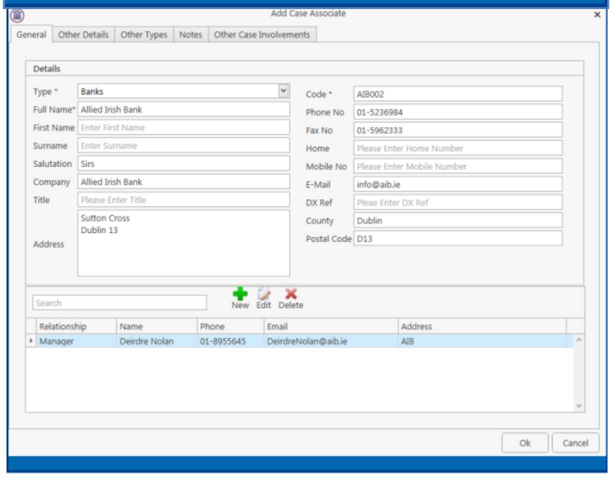
.the following window will appear.

Input the following details as required:

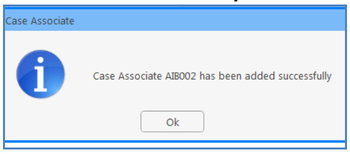
Name
Address,
Salutation
Title
Email
Relationship to the associate,
Phone number
Fax number
Mobile number
Notes



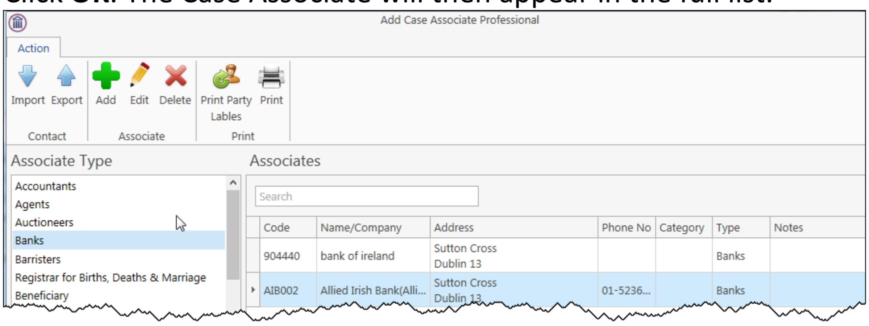
10. Click **OK** to save**.** You will return then to the **Add case associate** window. The contact will then appear at the bottom of the window see the following example.



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

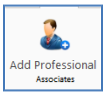


12. Click **OK**. The Case Associate will then appear in the full list.

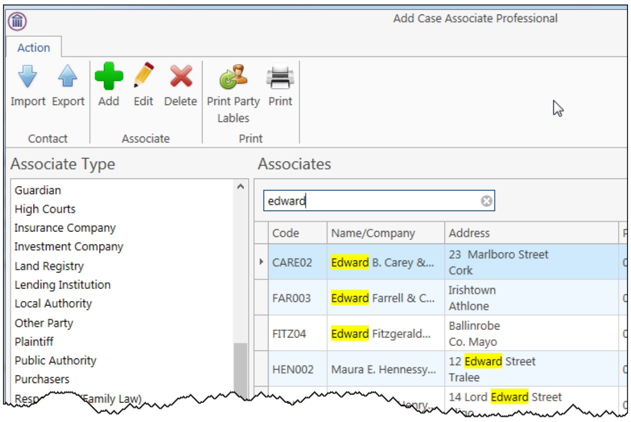


13. Then **Double click** the new associate from the list to assign to this case. The contact will then be assigned to the case and will appear in the case associate screen of this matter.

How to amend a case associates details

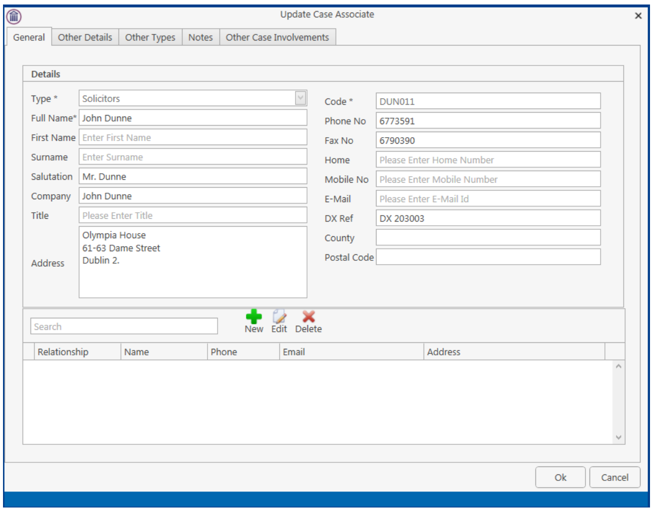
1. **Open** a case in the **Case Diary.**
2. Click on **Associates** on the **Navigation** panel**.**
3. If the Associate is assigned to the case **Double Click** to **amend**.
4. Otherwise click on **Add Professional** 

on the Home tab of the Ribbon.



5. Click on the **category** of case associate you want to add e.g. Bank.
6. **Search** for the associate you want to amend.
7. Click on the **Edit Tool** 

; the following dialogue box will appear.



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

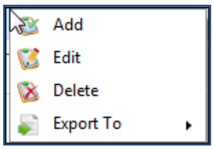
General	Click on the ***General tab*** to amend details such as name, address etc.
Details	Click on the ***Details tab*** to add personal information such as date of birth, occupation etc.
Other Types	Click on the **Other Types** tabs to see if this associate is a member of any other category.
Other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

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**.**



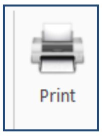
3. Right Click on the Associate to be removed. The following menu will appear.

4. Click on the ***Delete*** to remove it from the case.

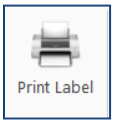
Note: To delete a case associate completely first remove it from all cases and then delete it from the case associate database. It is not possible to delete a case associate whle it is assigned to any case.

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.



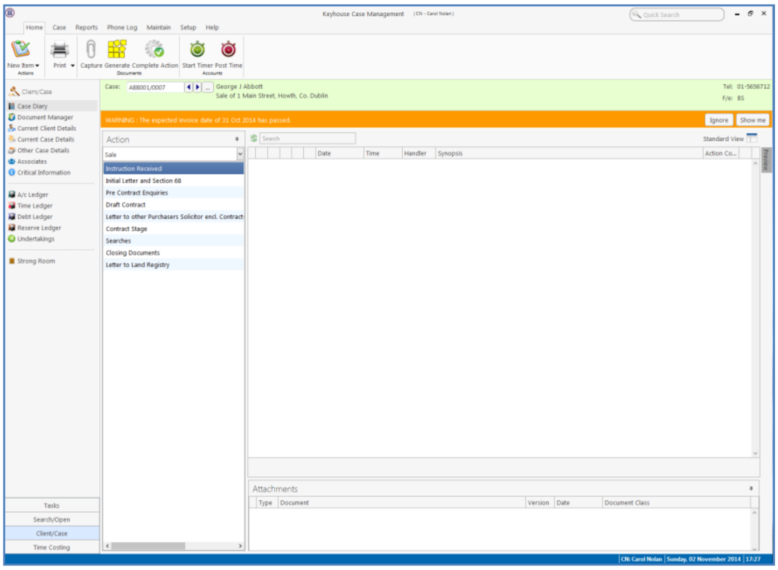
Select a Case Associate and then click **Print Label**.

Generating Tasks

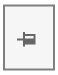
Each case has a specific case plan assigned to it when it is set up. Each Case Plan is made up of a series of Tasks; these tasks will often have attached documents, which will be processed when a task is generated. When a task is completed a follow-up task maybe inserted in the Case Diary for processing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



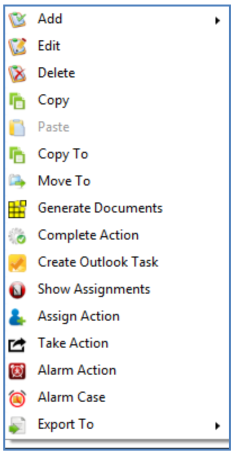
2. To view the case plan move your mouse over **Action** located to left of the Case Diary Screen the Case Plan will appear.

3. Click on the **Pin**  to make it permanently visible.

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

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

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



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

   1) Click on the task to select it.

   2) Click on **Generate** 

   on the case diary toolbar.

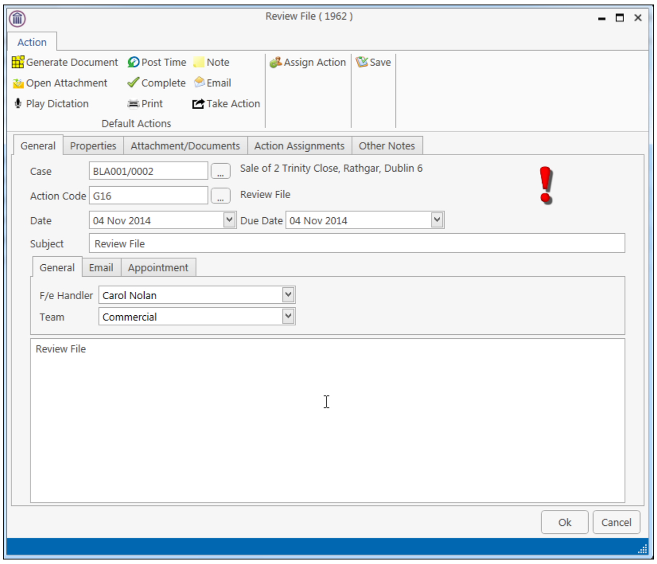
   Or

   1) Right click on the task

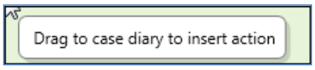
   2) Select Generate Documents from the pop-up menu.

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.

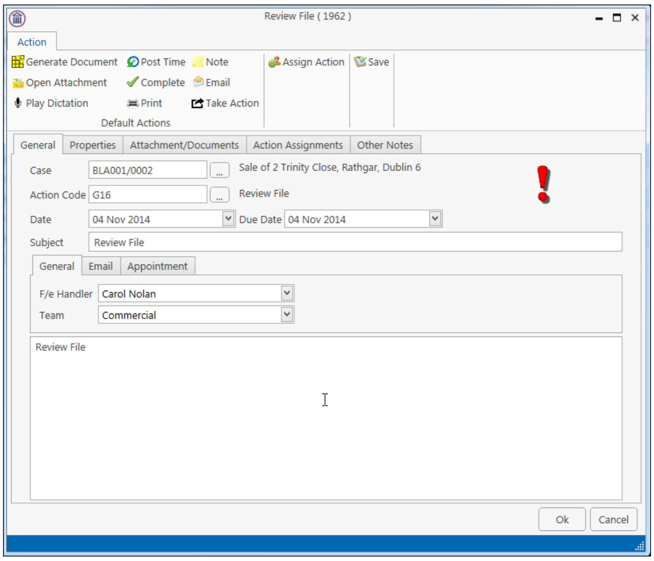


2. **Double Click** the Task and change the date for processing, the subject etc., as required

3. Click **OK**.

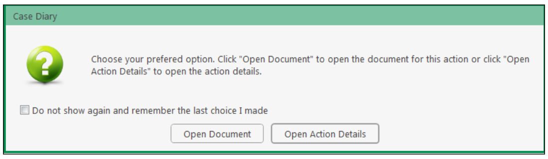
Changing Tasks

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**.



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

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

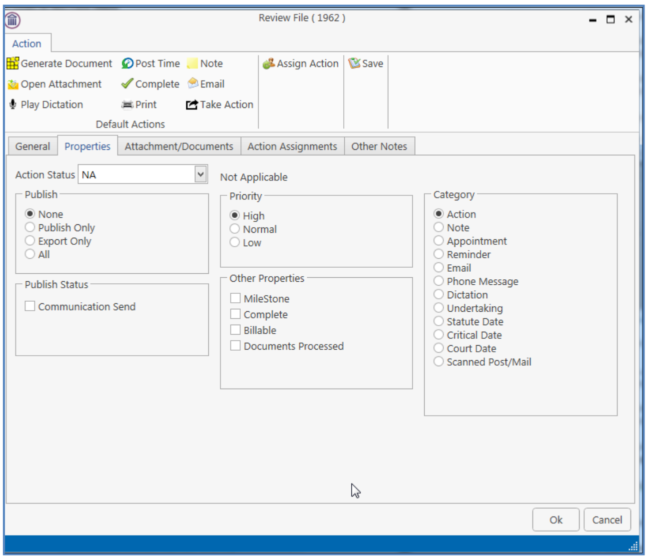
Case	This will default to the current case; to change click on the ... **button** and select the required case.
Action Code	This will default to the **current action code**.
Date	You can amend the date of task if required. Click on the down arrow to reveal a calendar. Click on the required date.
Due Date	Click on the **down arrow** to reveal a calendar click on the required due date.
Subject	Click in the subject box and **amend** as required.

F/e Handler	Click on the drop arrow to select a handler; it will default to the current handler.
Team	Click on the drop down arrow to select a team; it will default to the selected handler's team.

b. Click on the Properties tab to reveal the following screen.

Amend the following details as required:

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



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

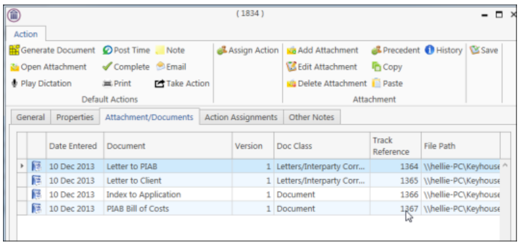
Publish Status — This applies only to data that is published to an external source. A **tick** will appear stating a communication has been sent.

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

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

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

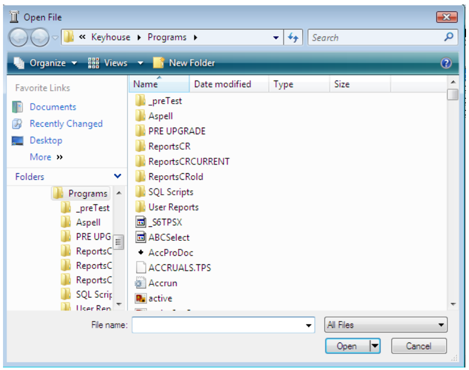
i. **Double Click** on the attachment you want to open.

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

i. Click on the **Add attachment** . The following dialogue box will appear.

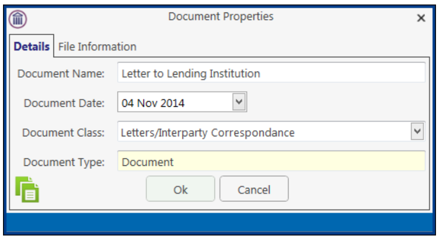


ii. **Browse** and locate the required document.

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

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

Document Name	Click in the **input box** and amend as required.
Class/Category	Click on the drop down arrow for a list of document classes, and select the required category, e.g. Letter, Pleadings, Inter-Party Correspondence etc.

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

Delete an attachment

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

ii. Click on **delete attachment** .

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

Copy and Paste an attachment

i. Select the attachment you want to copy.

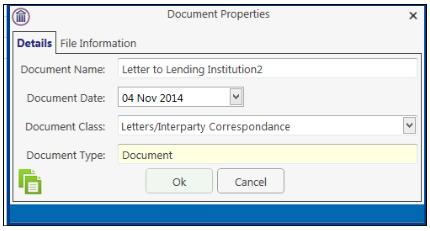
ii. Click on **Copy** 

.

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

iv. Click **Paste** 

. The following attachment properties box will appear.

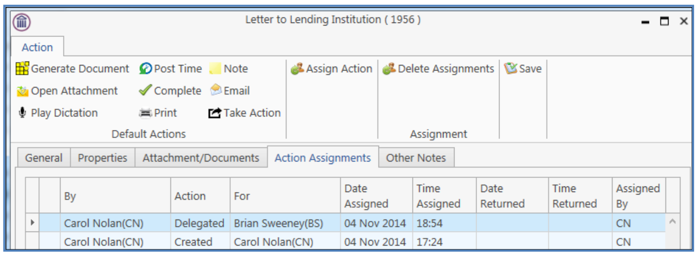


v. Amend the details as required and OK to confirm.

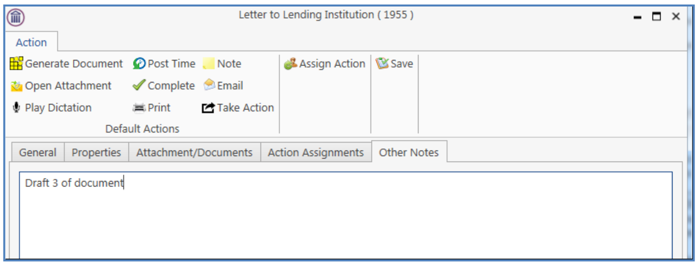
vi. A **message** will appear asking you to confirm the update, click **Yes** to confirm

vii. A copy of the document will then appear in the document list.

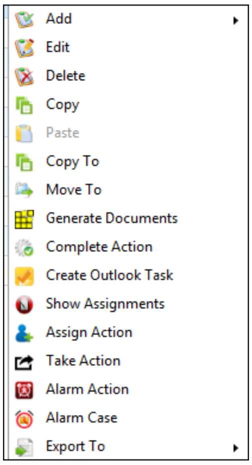
d. Click on the **Action Assignments tab** to show the assignment history of the task. See the section on Assigning Tasks for further information.



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



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



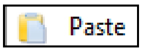
Deleting a Task

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

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

Copying a Task

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

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

Copying a Task to another matter

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

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

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

Moving a Task to another matter

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

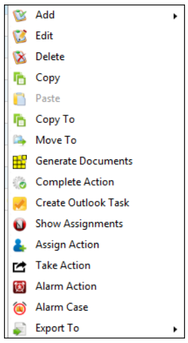
3. A list of cases will appear search for the required case.
4. Then **Double click** to select.

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

TIP: TO DELETE, MOVE OR COPY MULTIPLE TASKS :

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

Assigning a Task to Another Handler



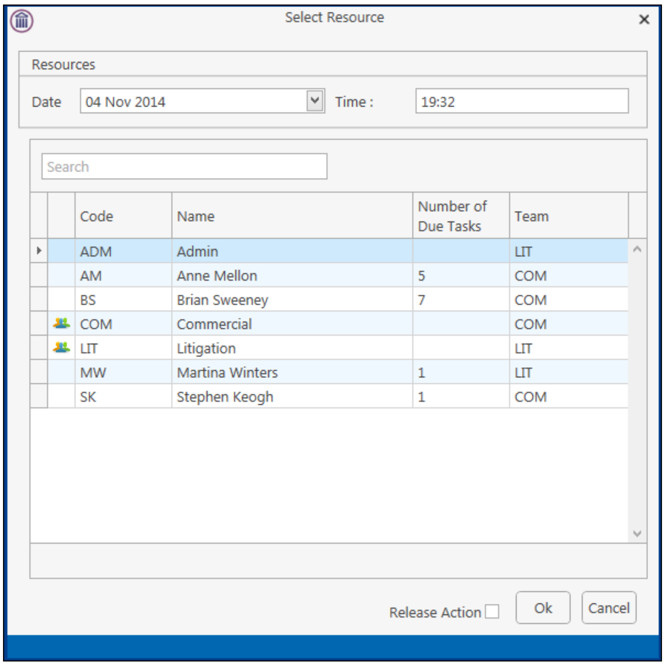
1. **Insert** the task in the case diary.

2. **Right click** on a task the following menu will appear

3. Click on **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 task leave the **Release Action** box checked.

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

7. You will return to the **action assignment** window.

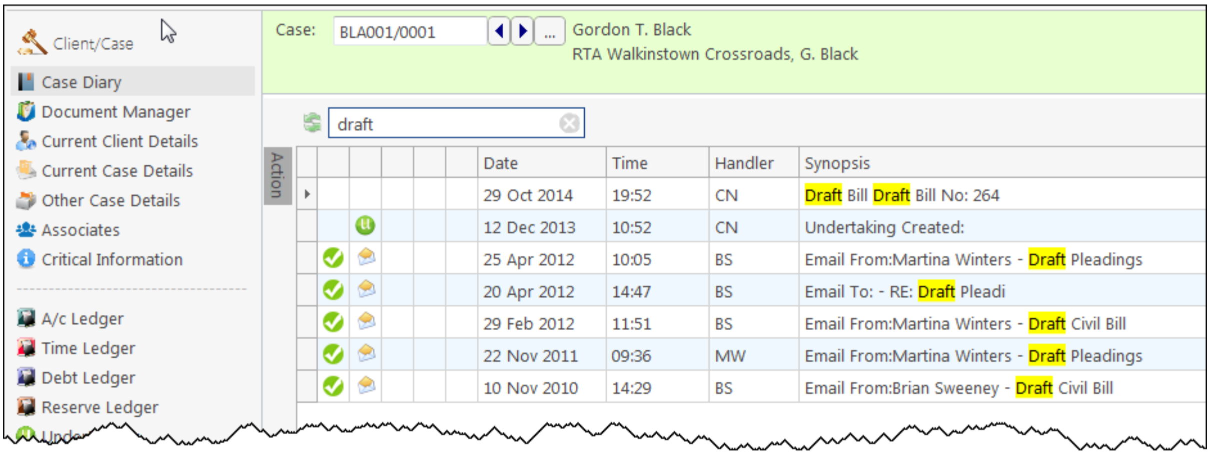
8. Click **OK** to save the changes.

Searching, Sorting and Filtering the Case Diary

How to Search the Case Diary

1. Open a case in the Case Diary.

2. **Click** in the Search box.



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

4. All tasks containing the search criteria will be displayed in the case diary below. See the example 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.

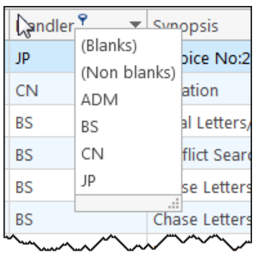
2. Click on the required **column heading** to sort by that column.

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 

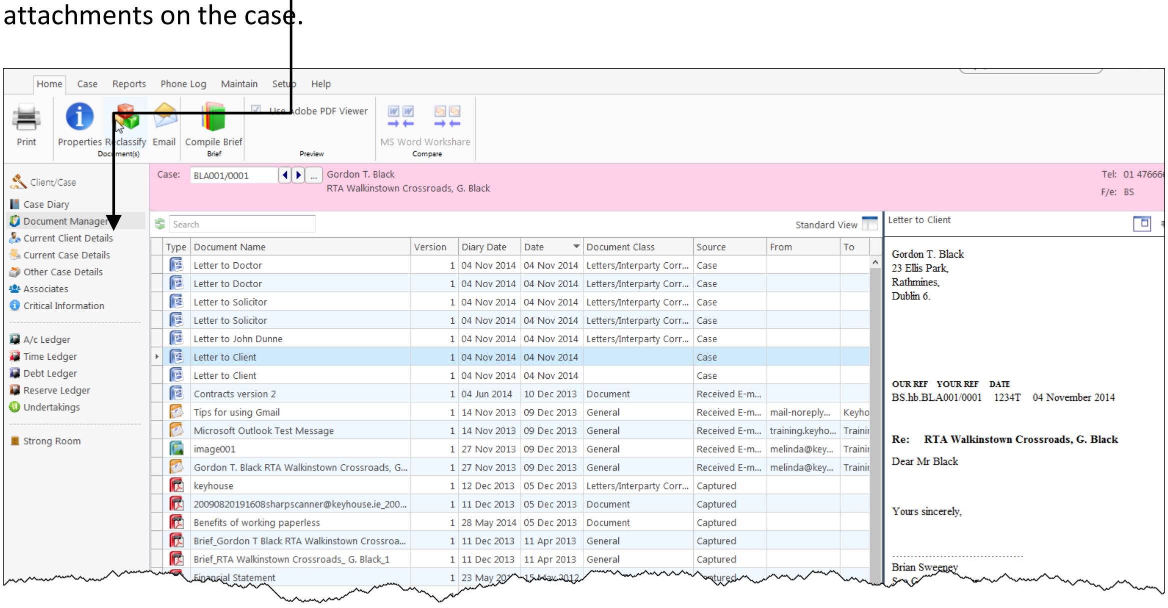
click on the pin and 

select the required category. See the following example.

How to view all documents on a case

1. Open a case in the case diary.

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

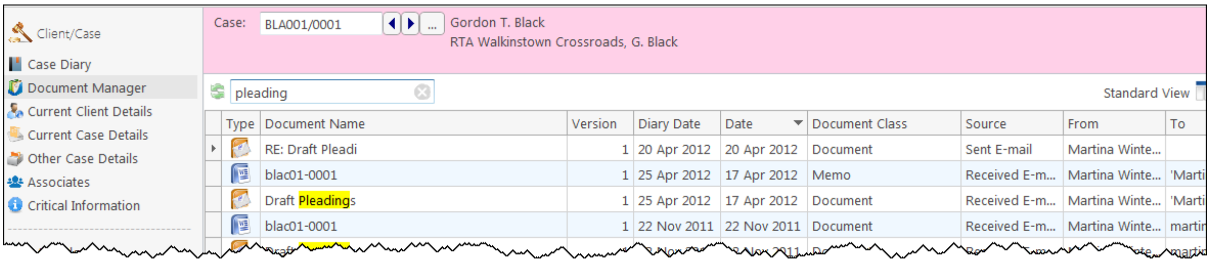


How to search for a document on a case

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

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

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



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

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

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

Processing Documents

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

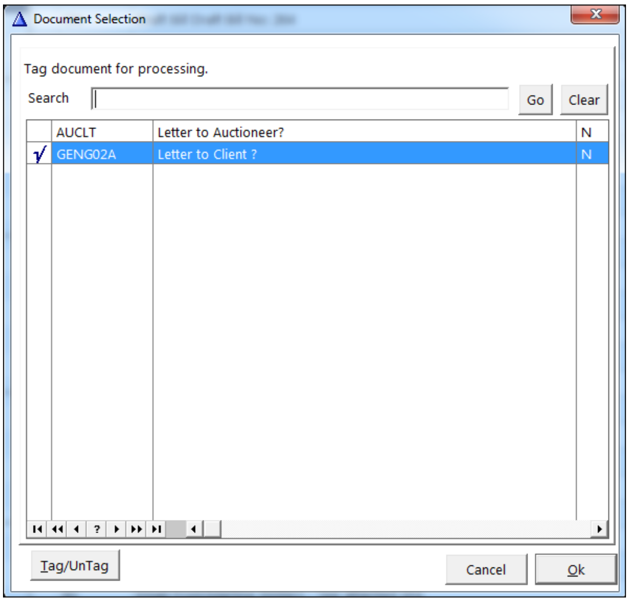
Precedent Documents usually contain codes which prompt the user for specific information needed in that document.

What type of information is requested when processing documents?

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

Select Documents to be processed

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



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

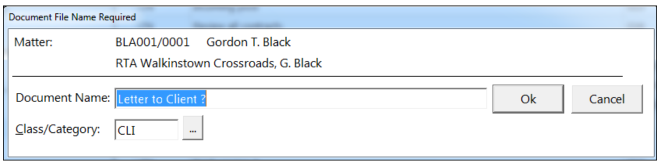
2. **Tag** the documents you want to process by putting a tick next to each document that is to be generated.

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

Naming and classifying a Document

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

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



2. To classify a document click the ... **button** and select a document class e.g. Pleadings.

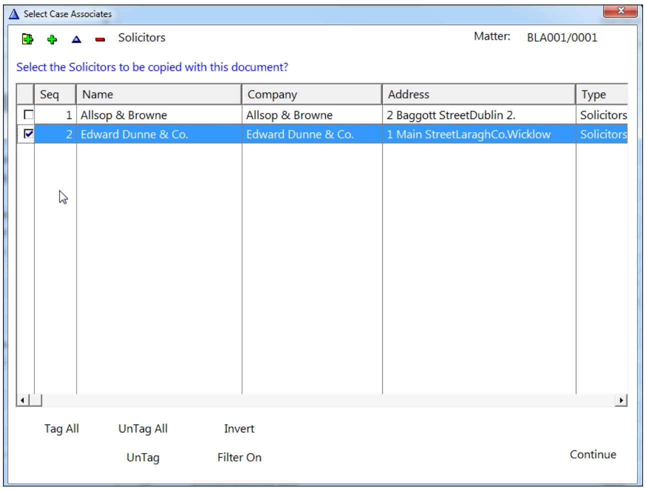
3. Click **OK**.

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

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

Adding Case Associates when generating a document

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

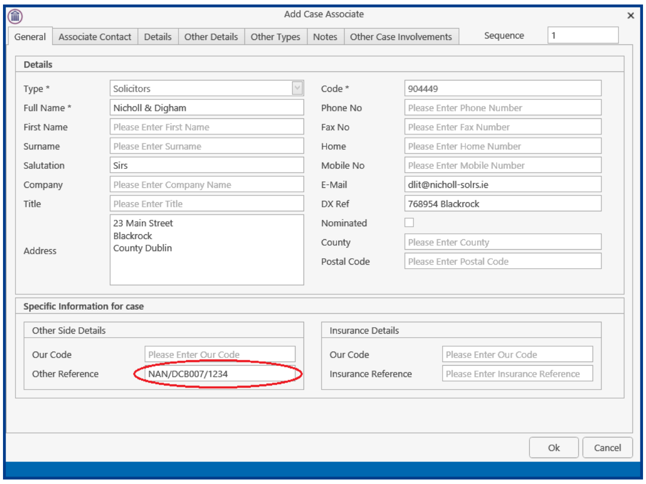


Example 1: Letter to Solicitor- Searching and Selecting an existing case associate

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

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

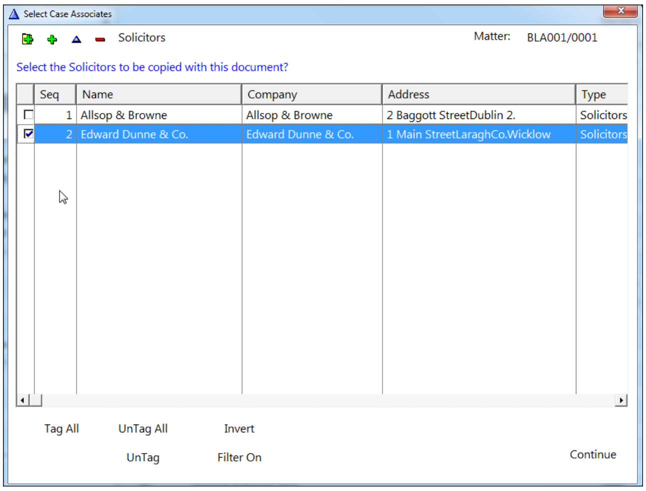
2. There is two solicitors assigned to this case you can tag the solicitor provided then click on the **amend** button Change to add a reference.



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

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

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



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

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

7. Click **Continue**.

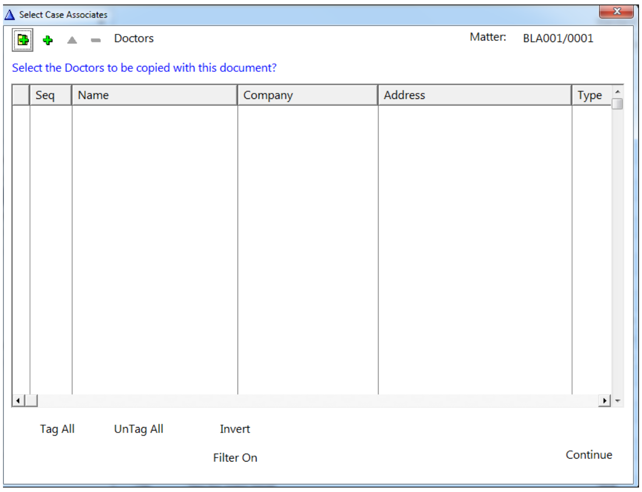
8. Word will open displaying the letter to solicitor.

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

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

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

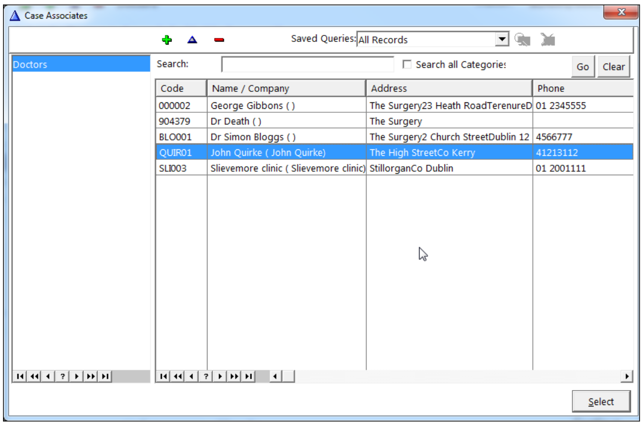
Example 2: Letter to Doctor – Setting up a new case associate



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

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

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



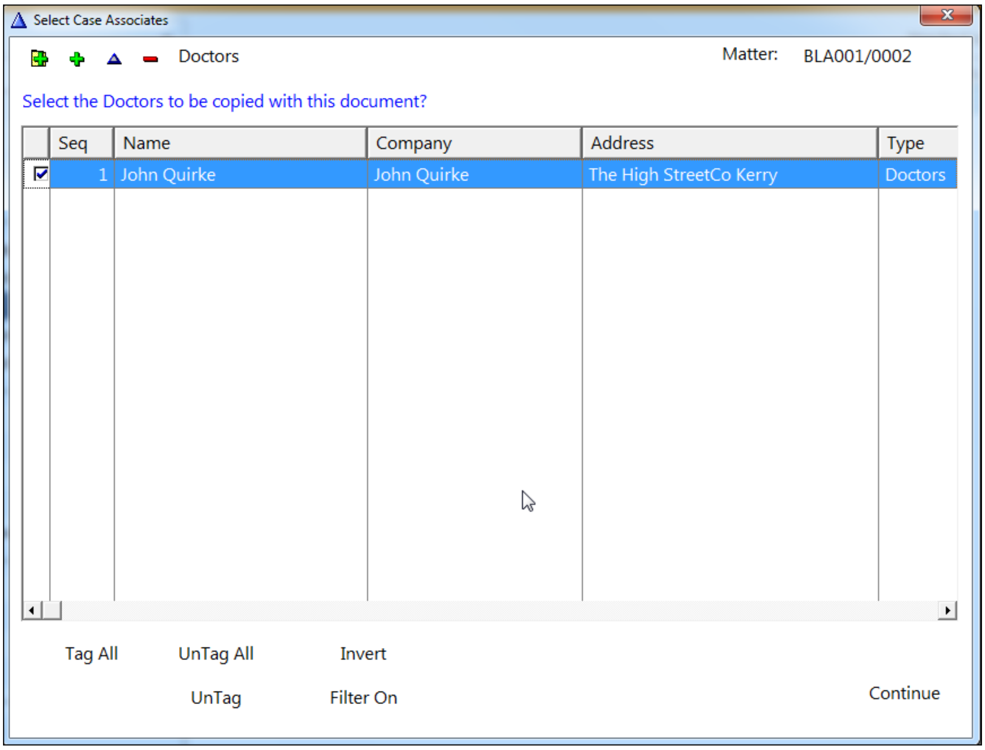
3. Click on the **Green Plus with the yellow folder** and the following screen will appear.

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.

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.



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.

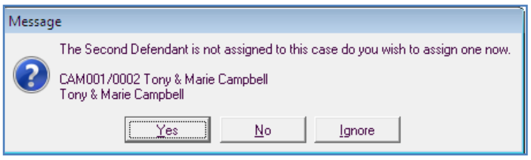
2. **Edit** the document in Word as normal if required.

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.

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



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

   Or
   Click **No** if you do not have the information at this time and want to be asked again in the future. In this case any future actions/tasks generated will pause and request this information again.

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

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

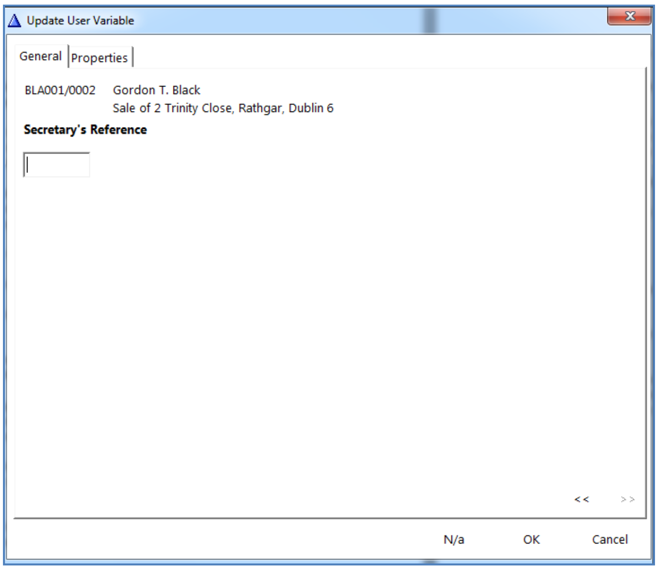
3. **Edit, Save** and **Print** in Word as normal.

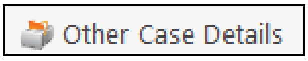
4. The action/task and document will then be present in the **Case Diary** for future review.

Answering UDF Questions

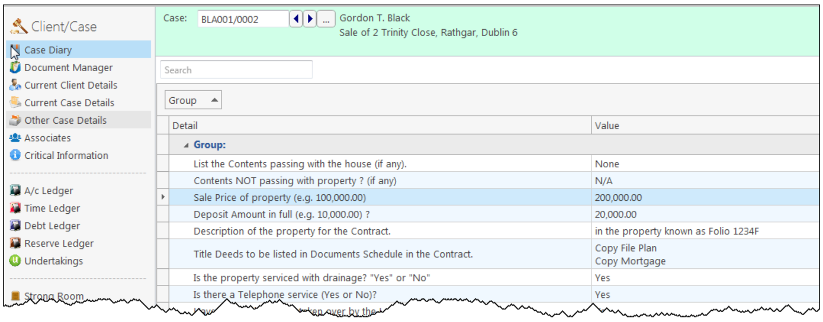
When generating a document, a user will often be asked specific questions pertaining to that document. For example a prompt might ask the user what is the purchase price of the property.

Example of UDF Question: Sale Price of Property

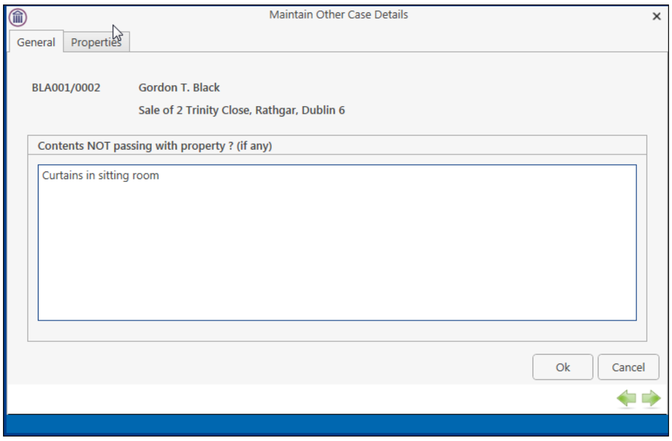


1. **Input** the answer in the input box provided.
2. Click **OK**.
3. If the question is not applicable click **N/A**.
4. The answer is then inserted in the Word document.
5. The answer will be stored in the **other case details screen**.
6. To amend click on the other case details shortcut 

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

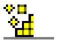


7. To edit **Double click** on an item, make your amendments and click **Ok** to save them.
   The next time any document containing this field is generated, it will include the amended answer.

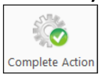


Working with Documents already Processed

Marking a Task as Complete

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

1. **Click** on the Task in the Case Diary.

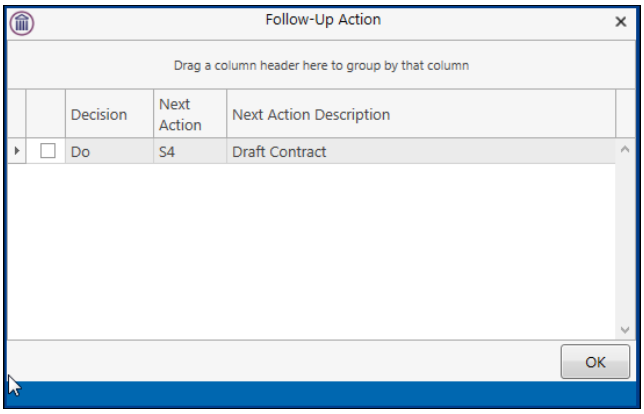
2. Click on **Complete Action** 

available on the Home tab of the Ribbon. A tick on a green disc will be shown beside the task/action, indicating that it is complete.

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

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

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



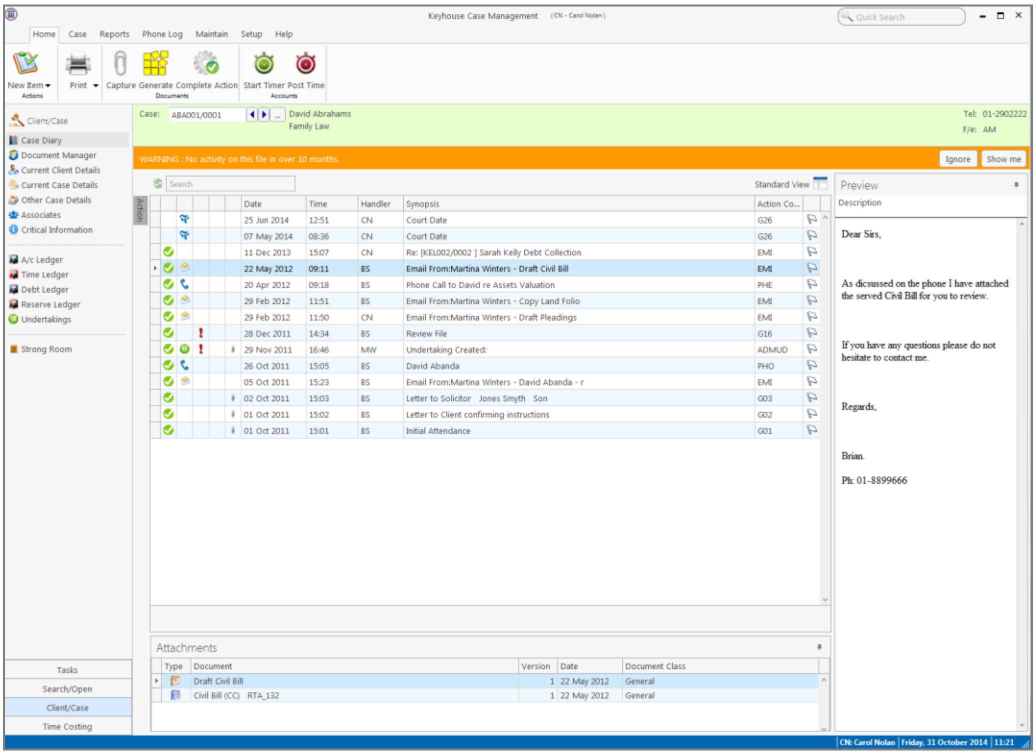
Or

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

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

Opening Documents Generated

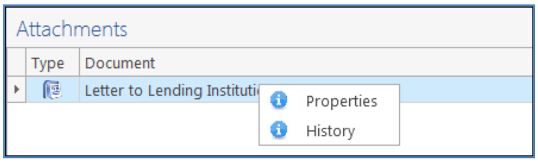
1. In the case diary click on the **task** containing the documents. See the following example

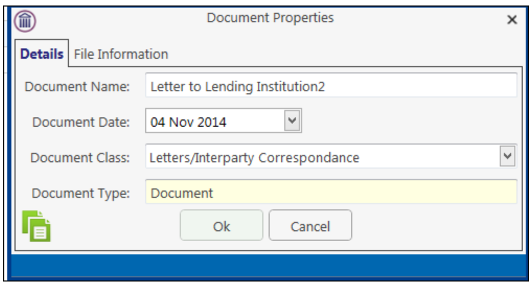


2. **Double Click** on the document in the attachment window. Word will launch and open the document.

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

Changing the Name and Class of a Generated Document





1. From the Attachment pane in the case diary. **Right Click** on the **Document**; the following menu will appear.

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.

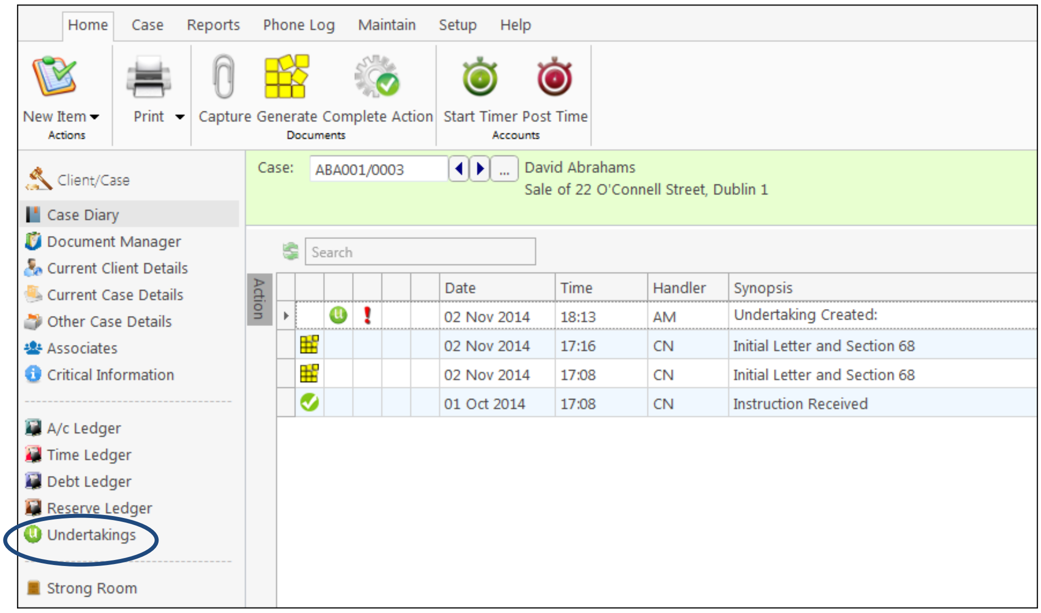
5. A **message** will appear asking you to confirm the update, click **Yes** to confirm.

Undertakings

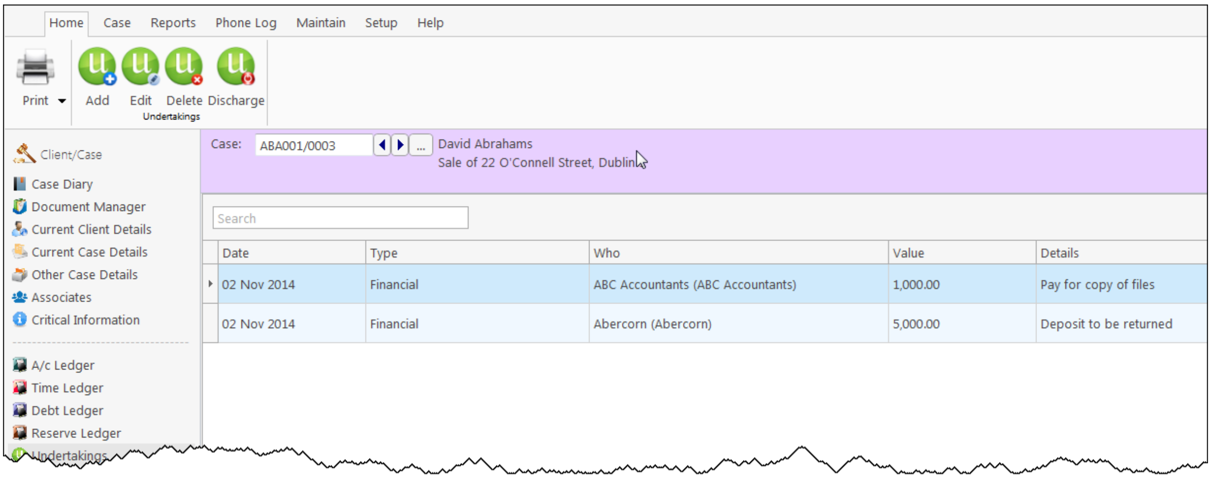
Viewing Undertakings

1. Open a case in the Case Diary.

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



3. Any Undertakings in the case will be displayed.

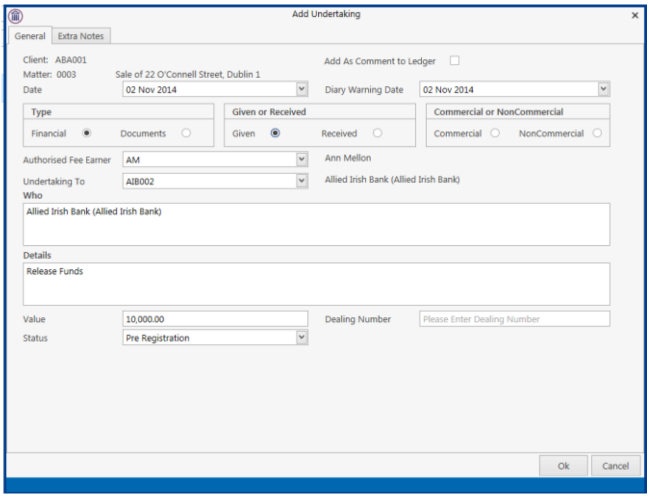


4. Double click on an entry to edit it or select the entry and click on the edit tool on the Home tab.

Adding and Viewing an Undertaking

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

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



Date: This is actual date of the undertaking. Click the ... **button** to select a date from the calendar.

Diary Warning Date: This is the date the Undertaking Action will appear on the Fee Earners Task List as a To Do Item. This will default to a system warning date to amend click on the **down arrow** to view a calendar and select a date.

Type: Check the appropriate button for the type of undertaking i.e. **Financial** or **Documents**.

Given or Received: Select whether the undertaking has been **given** by you or **received** by you.

Commercial: Select whether the undertaking is **commercial** or **non-commercial**

Authorised by FE: Click on the down arrow to select the relevant Fee Earner against the undertaking.

Undertaking to: Click on the down arrow to select the relevant Case to whom the undertaking is been given or received.

Who: This will default to the selected case associate.

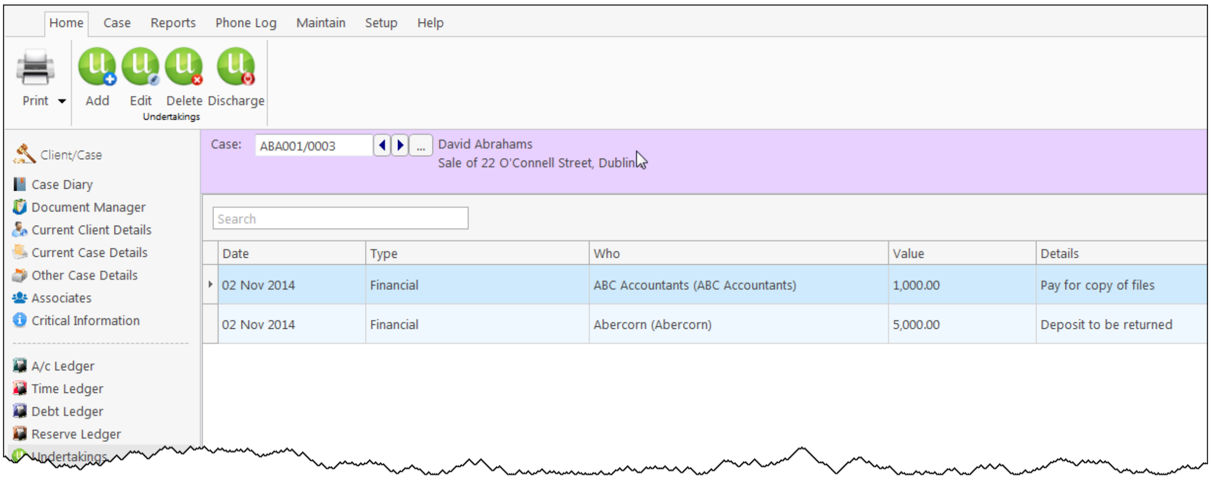
Details: **Input** a description of this undertaking.

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

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

Dealing Number: **Input** the dealing number

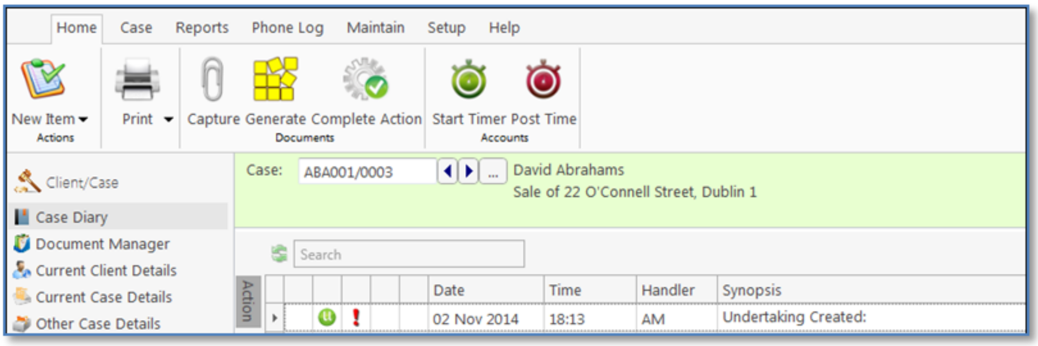
4. Click **OK** to save the undertaking will now be visible in the undertaking screen.



AND

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

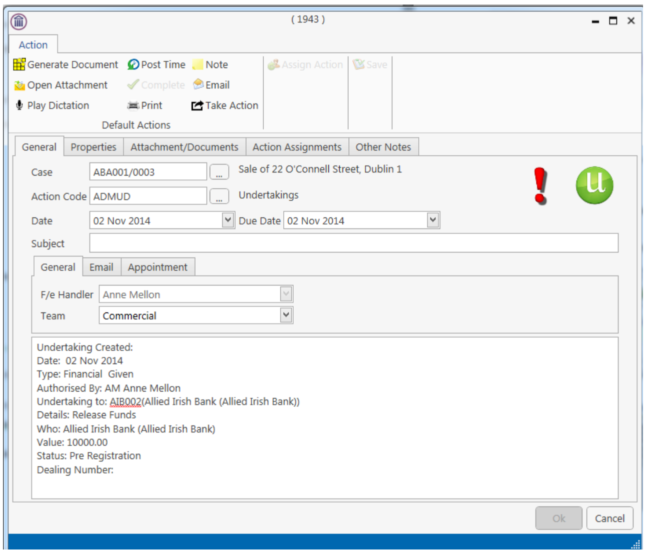
All Undertakings can be clearly identified by the Undertaking symbol



5. To view the Undertaking details **double click** the task the following Change Action dialogue box will appear.

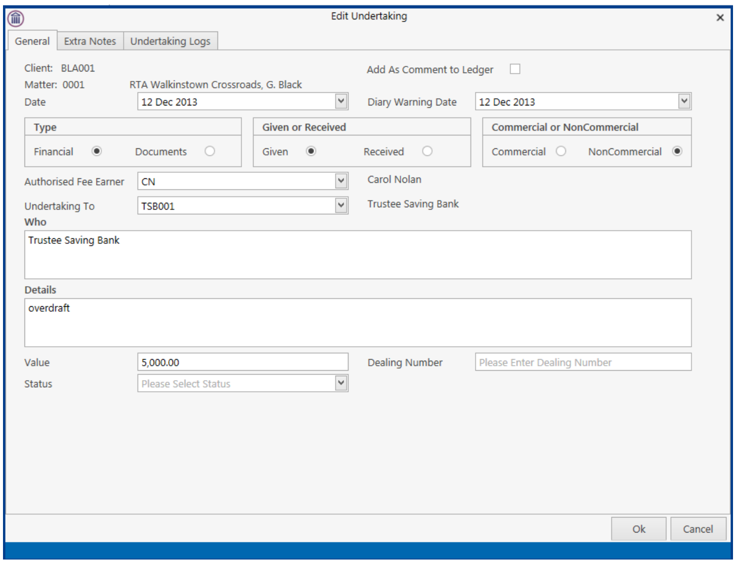
6. Click **OK** to close.

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



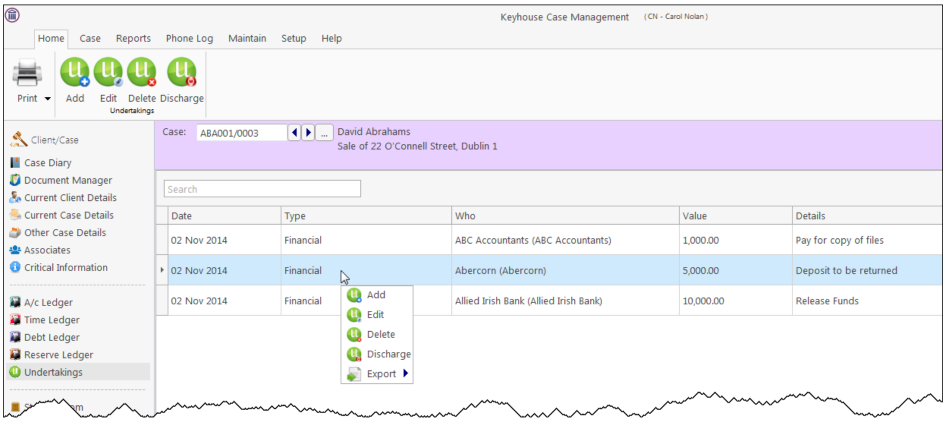
How to Edit an Undertaking

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

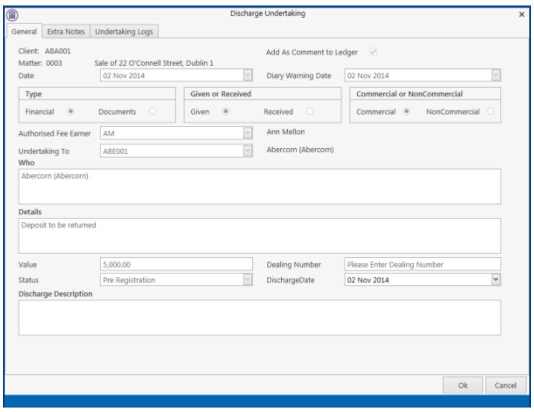


How to Discharge an Undertaking

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



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.

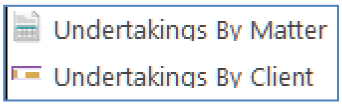


Note It cannot be edited beyond this point.

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

Undertaking Reports

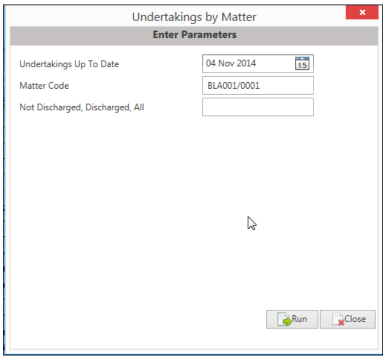
Undertakings by Matter



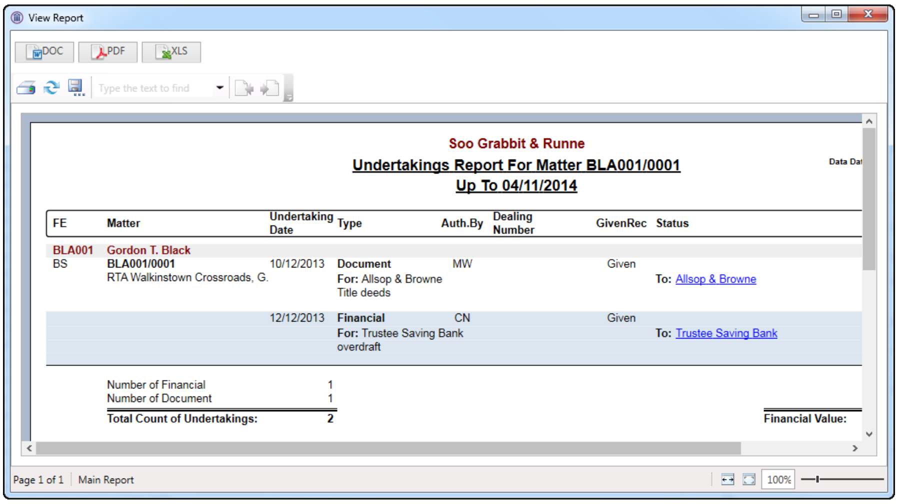
3. Click on **Print** on the Home tab to bring up a menu with two options:

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.



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



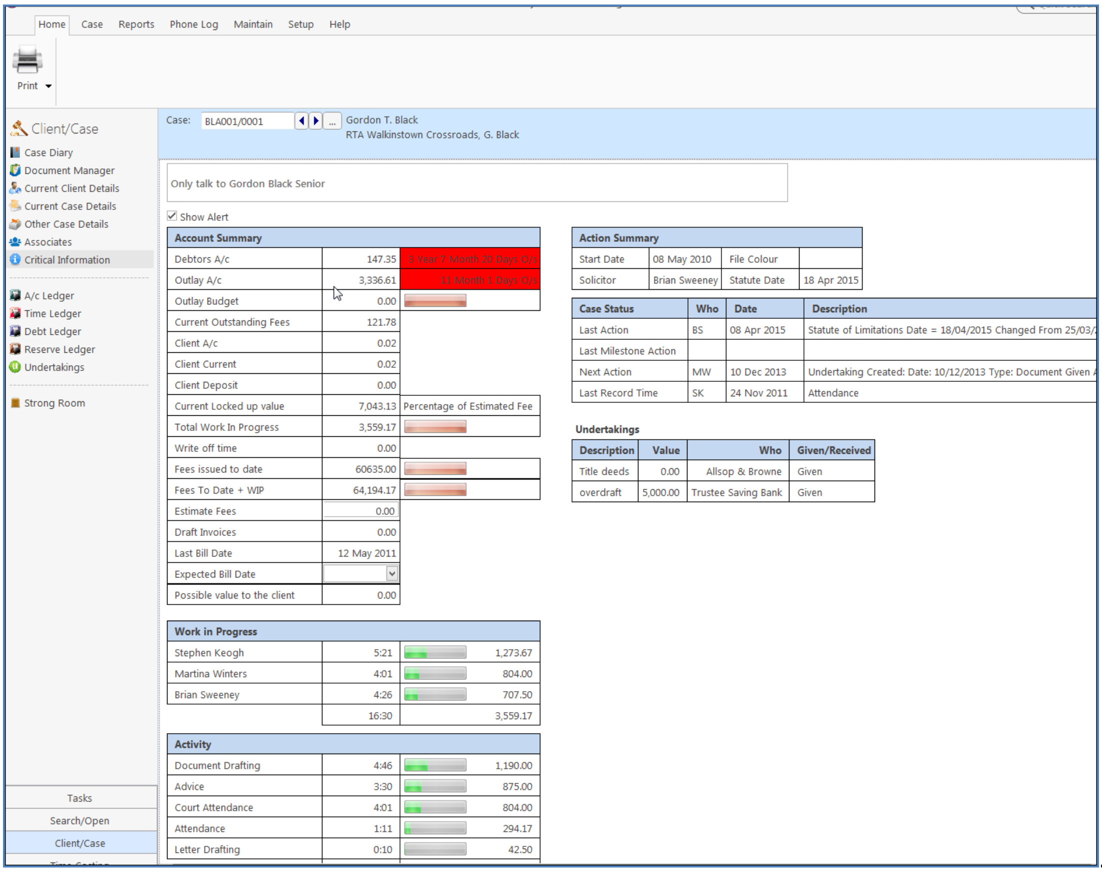
6. Click on print  or click on one of the following options available on the report toolbar:

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

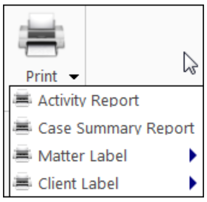
How to view Critical Information and Print Reports

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

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



3. To **Print** a report click on **Print** on the toolbar the following option will appear.



4. **Click** on the **Report** required

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

Other Case Diary Functions

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

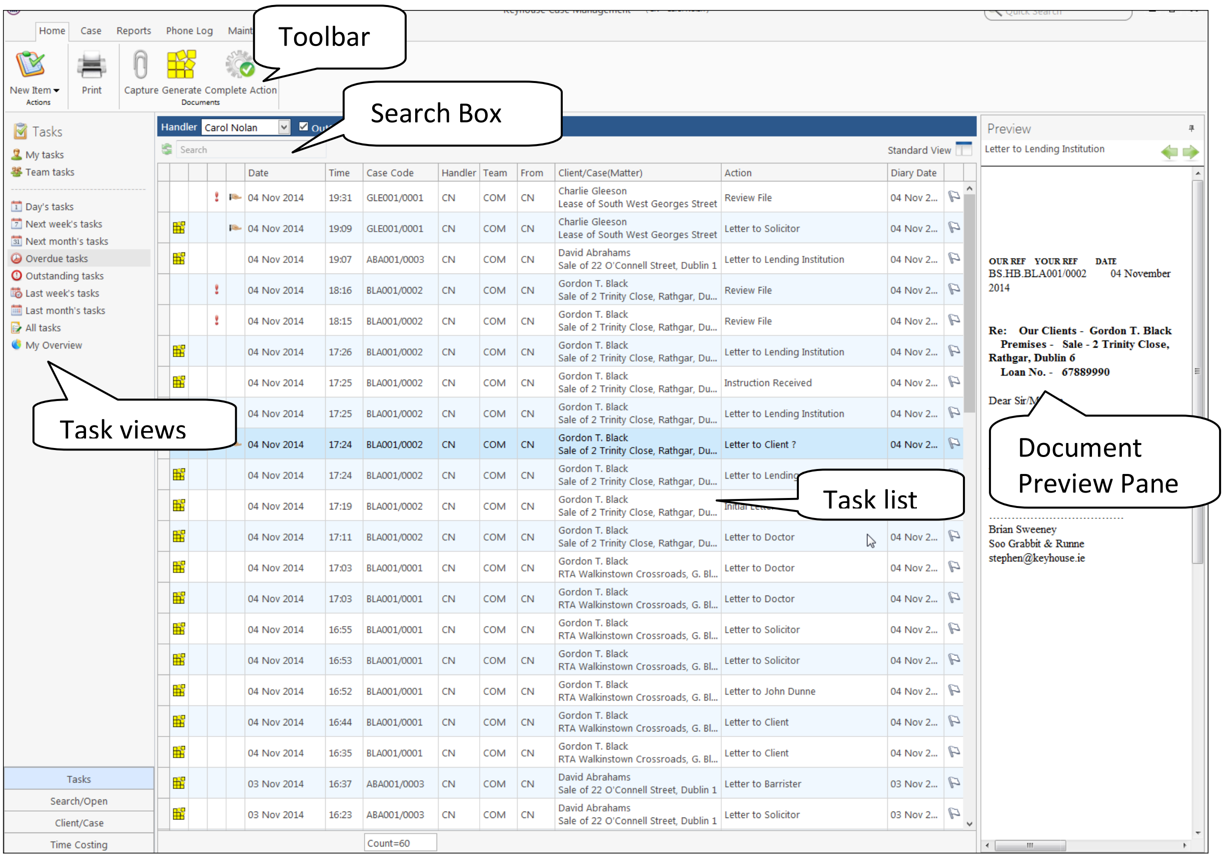
- Chapter 6 for the Keyhouse Capture
- Chapter 7 for the template Library
- Chapter 8 for the Conflict Search
- Chapter 9 for the Strong Room
- Chapter 10 for Time Recording
- Chapter 11 for Accounts
- Chapter 12 for the Debt Ledger
- Chapter 13 for the Reserve Ledger

Chapter 5: The Task Manager

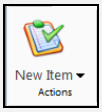
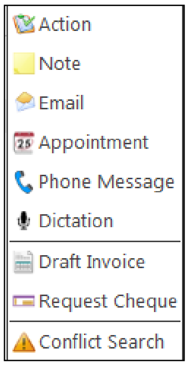
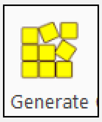
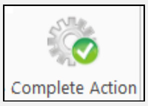
When you log in to the new version of the Keyhouse Destkop you can choose to login directly to the Task Manager (see the chapter 1 for further information). The primary function of the Task Manager is to act as a To-Do list displaying all tasks outstanding. It defaults to overdue tasks but you can navigate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



The Home tab in Task Manager

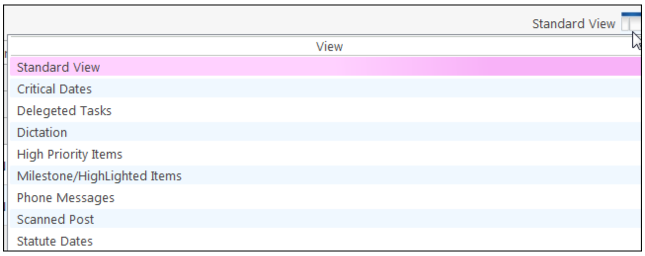
	New	Click on the New to add any of these tasks. 
	Printer	Click to print a reports on your task list.
	Capture	Click on capture to launch the document capture program to import documents or folders of documents or images.
	Generate	Click to generate a document for a selected action.
	Complete Action	Click to mark a task as complete.

Task Views

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
Day's tasks	Click on this to view today's tasks.
From 08 Nov 2014 To 08 Nov 2014	Select a range of dates.
Next week's tasks	Click to view next week's tasks.
Next month's tasks	Click to view next month's tasks
Overdue tasks	Click to view Overdue tasks
Outstanding tasks	Click to view outstanding tasks i.e. past, present or future.
Last week's tasks	Click to view Last Week's outstanding tasks.
Last month's tasks	Click to view Last Month's outstanding tasks.
All tasks	All Tasks shows all outstanding tasks
My Overview	Click to view the overview screen.

Using Different Layouts/Views



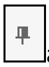
1. Click on **View** tool on the far right of the search bar. A list of available views will appear.

2. Click on the required view to apply it to the task manager.

How to Show/Hide the Preview Pane

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

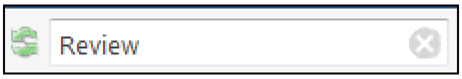
2. The Preview Pane will appear.

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

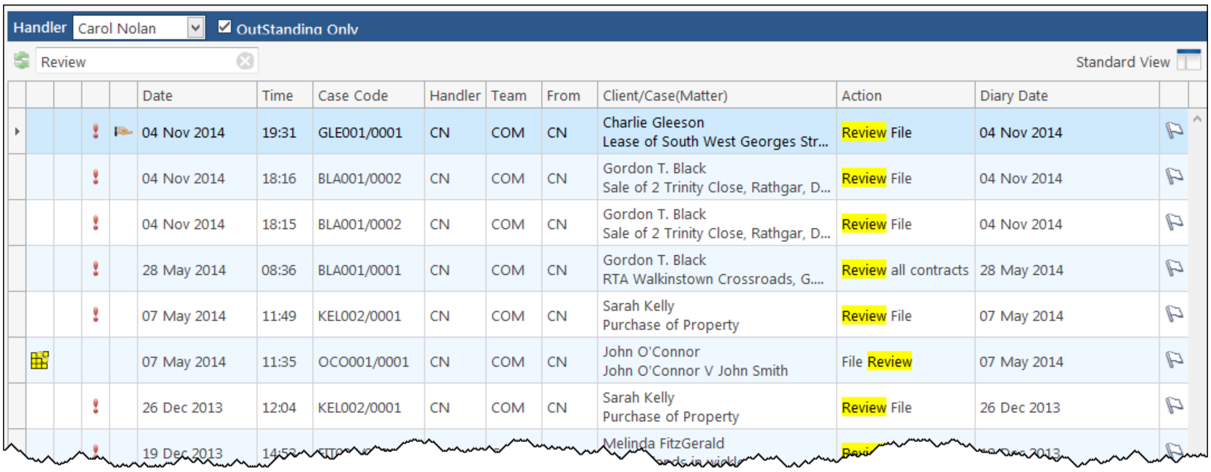
Searching, Sorting, Filtering and Grouping Tasks

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.



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



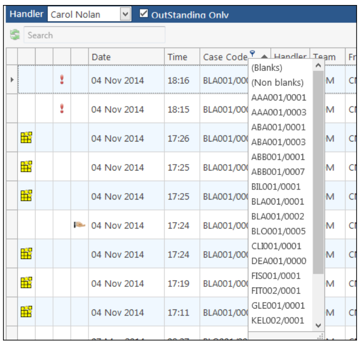
3. To clear the search results click **Clear**.

How to Sort Column Headings in the Task Manager

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

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

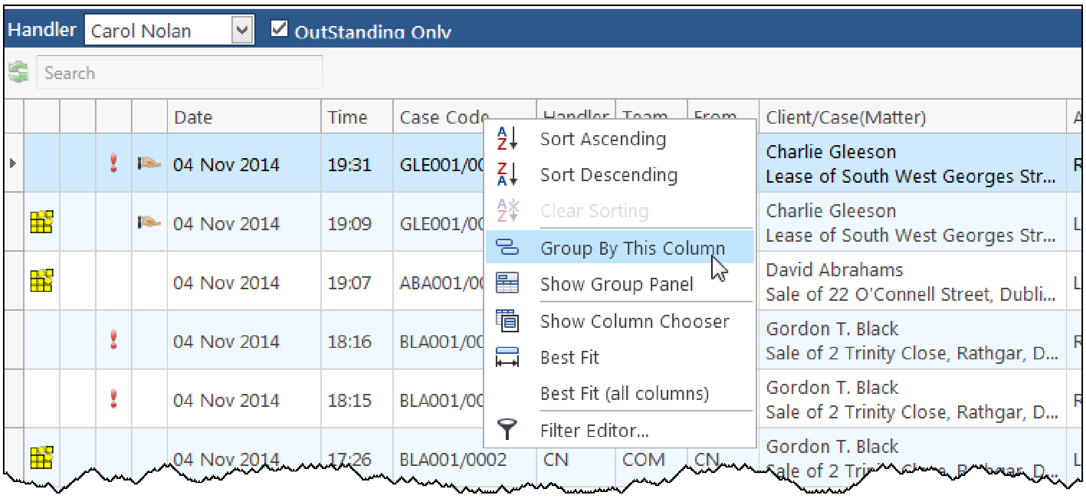
How to Filter the Task Manager



4. Move your mouse to the required column heading.
5. To view a list of filter categories Case Code click on the pin and select the required category. See the following example

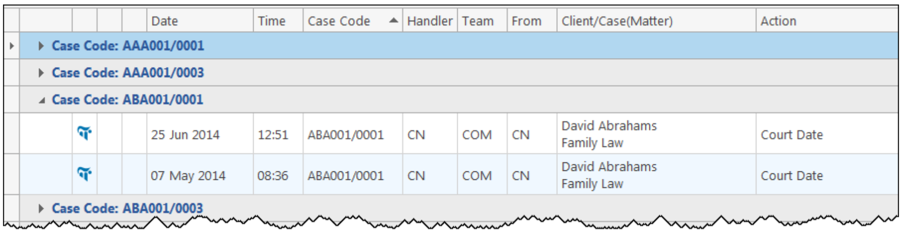
How to Group by a column heading in the Task Manager

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

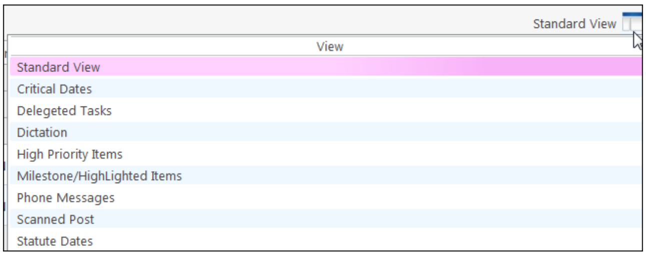


6. Click on **Group By This column**. See the following example of a grouping by fee earner

7. To expand/collapse a group click on the **arrow** to the left. See the following example.



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



Working with Tasks

Accessing a Case Diary from the Task List

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

How to Generate Documents

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

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

How to View the Documents of a Task

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

How to play a dictation

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

Note: This requires that Keyhouse Digital Dictation be installed.

How to Mark a Single task as Complete

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

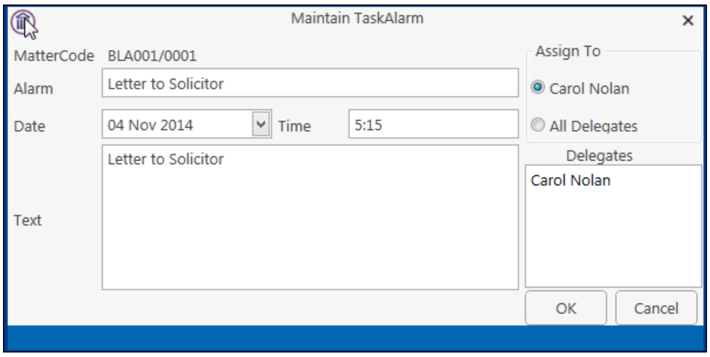
Note if there are any documents which have not yet been generated attached to the task, they will be generated when you complete the action.

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

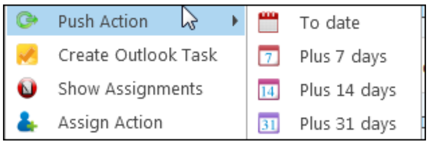
1. **Right click** on the task you want to alarm and select **Alarm Action** from the pop-up menu. The following screen will appear.



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.

How to Push a Task



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

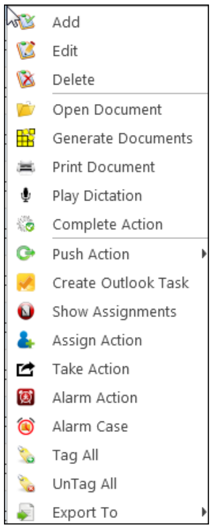
2. The task may be pushed back 7, 14 or 31 days or to a specified date selected from the calendar.

How to Create a Outlook Task

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

2. A task will be created in your Outlook task list which you may edit as required.

How to Tag All Tasks



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

1. **Right click** in the task list, to see the pop-up menu.

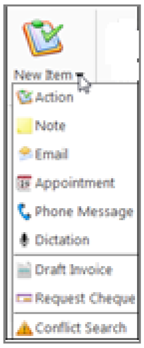
2. Click on **Tag All**.

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

3. **Right click** again in the task list to bring up the menu again.

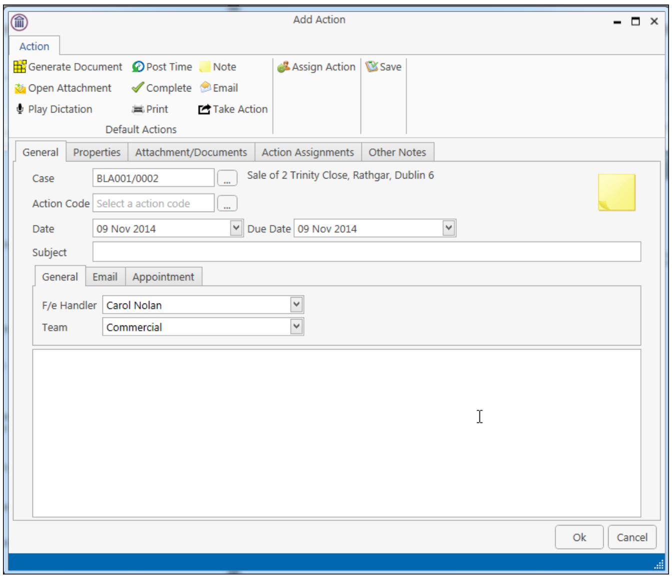
4. Click on the required function e.g. **Complete Action**.

How to Add a New Item



1. **Click** on New Item on the Home tab. The following options will appear.

2. Click on required item eg. Note. The following window will appear.



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.

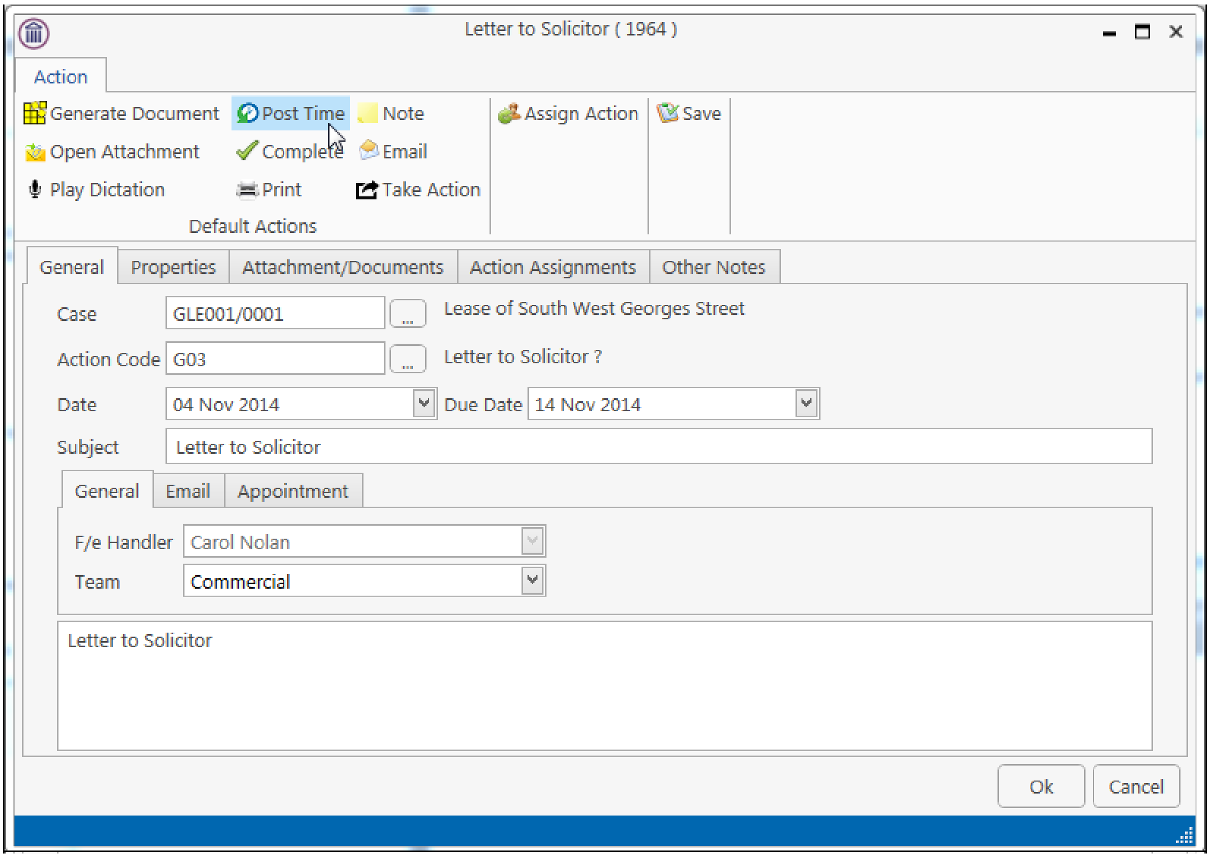
Description Input a description in the box provided.

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.



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

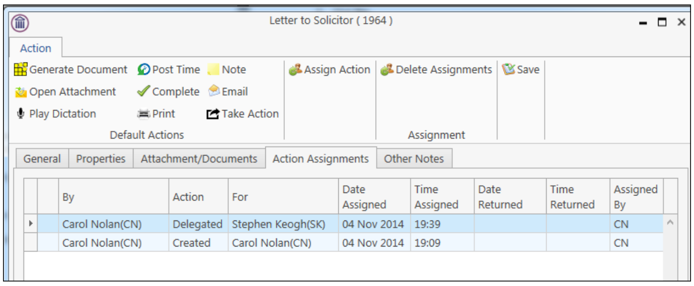
How to Recognise Assigned Tasks

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

		Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action
!		04 Nov 2014	19:31	GLE001/0001	CN	COM	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

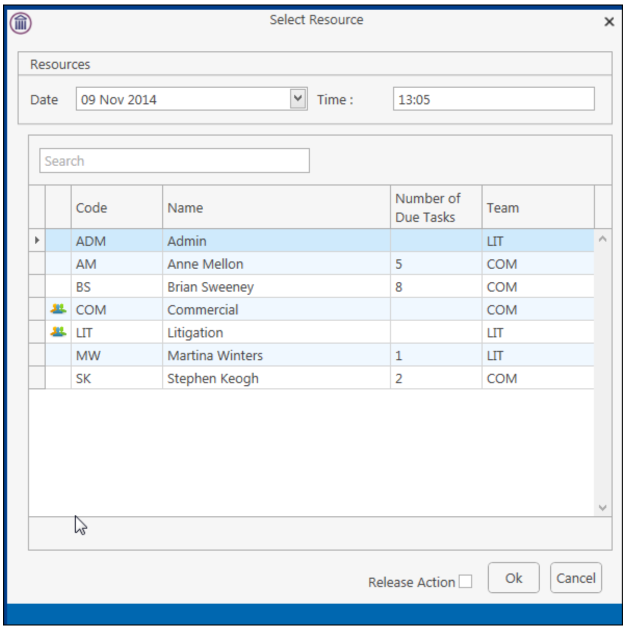


1. **Right click** on a task and select **Show assignments** from the pop-up menu.

2. The following screen will appear displaying the history of the task.

How to Assign a Task to Another Handler

1. **Right click** on a task And select **Assign Action** from the pop-up menu. The following screen will appear listing all resources.



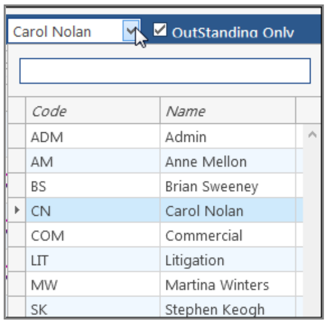
2. **Select** the resource you want to assign the task to.

3. Check the box marked **Release Action** to remove the task completely from your task list. Alternatively to continue to **own** the task, leave **Release Action** unchecked.

Note
If you are the owner of the task and do not release it, you will see this symbol next to the task when the assigned user has "completed" it.

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

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.

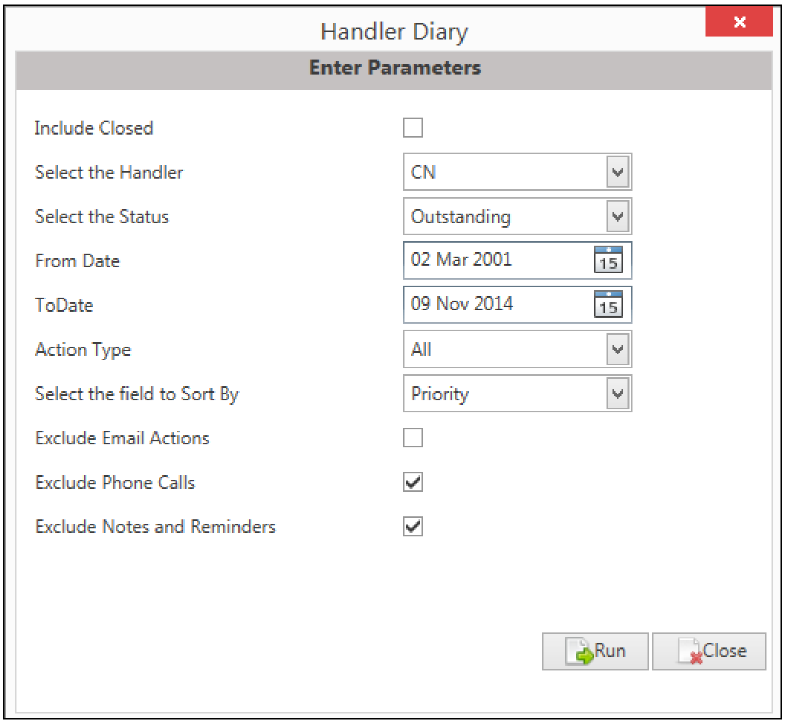
2. **Right click** on a task in the other user's list and select **Take Action** from the pop-up menu. The task will be removed from this user's task list.

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

Task List Options

Print your task list

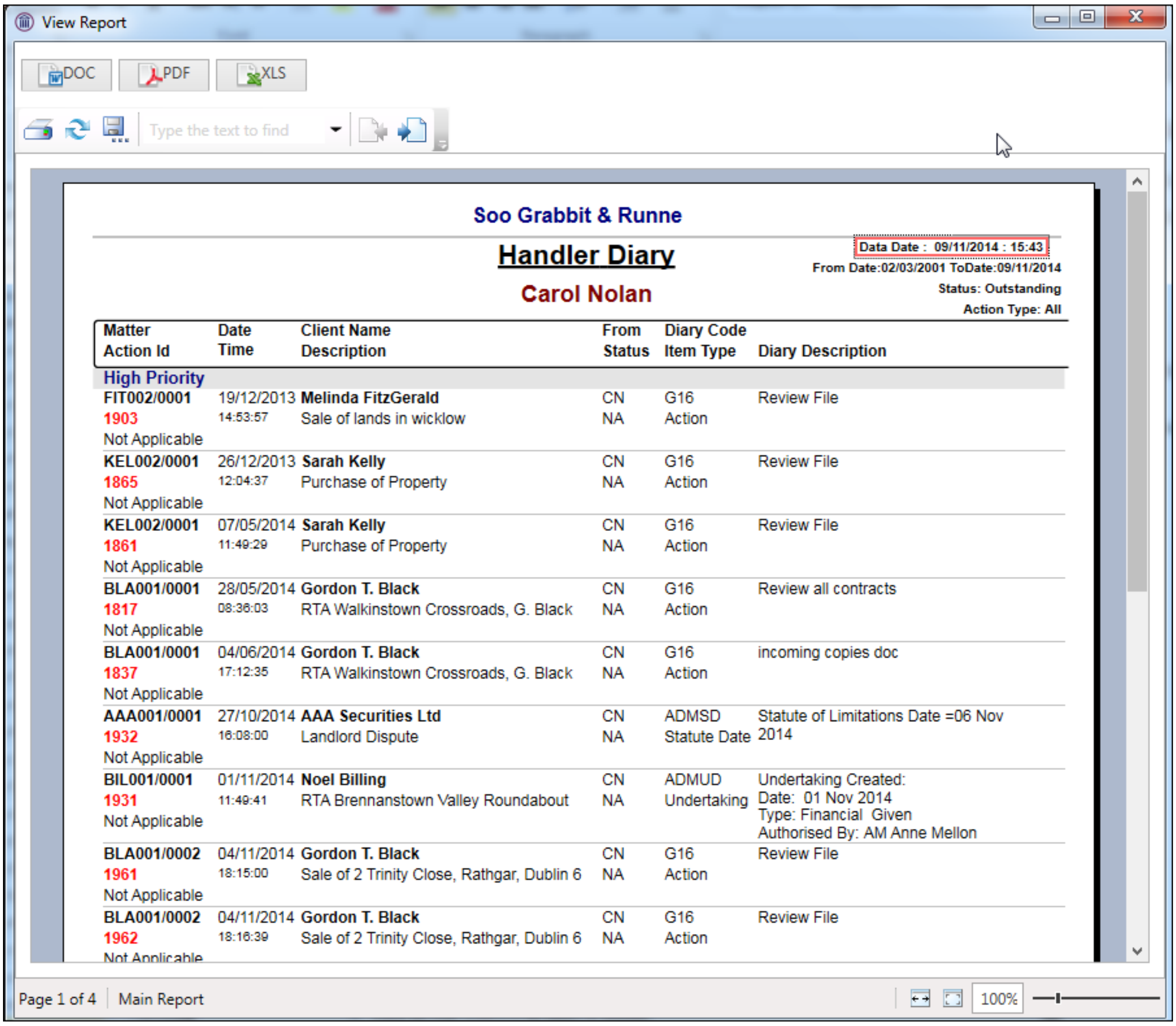
1. Click on **Print** on the Home tab. The following window will appear



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

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

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



Soo Grabbit & Runne

Handler Diary

Carol Nolan

Data Date : 09/11/2014 : 15:43
From Date:02/03/2001 ToDate:09/11/2014
Status: Outstanding
Action Type: All

Matter Action Id	Date Time	Client Name Description	From Status	Diary Code Item Type	Diary Description
High Priority					
FIT002/0001 1903 Not Applicable	19/12/2013 14:53:57	Melinda FitzGerald Sale of lands in wicklow	CN NA	G16 Action	Review File
KEL002/0001 1865 Not Applicable	26/12/2013 12:04:37	Sarah Kelly Purchase of Property	CN NA	G16 Action	Review File
KEL002/0001 1861 Not Applicable	07/05/2014 11:49:29	Sarah Kelly Purchase of Property	CN NA	G16 Action	Review File
BLA001/0001 1817 Not Applicable	28/05/2014 08:36:03	Gordon T. Black RTA Walkinstown Crossroads, G. Black	CN NA	G16 Action	Review all contracts
BLA001/0001 1837 Not Applicable	04/06/2014 17:12:35	Gordon T. Black RTA Walkinstown Crossroads, G. Black	CN NA	G16 Action	incoming copies doc
AAA001/0001 1932 Not Applicable	27/10/2014 16:08:00	AAA Securities Ltd Landlord Dispute	CN NA	ADMSD Statute Date	Statute of Limitations Date =06 Nov 2014
BIL001/0001 1931 Not Applicable	01/11/2014 11:49:41	Noel Billing RTA Brennanstown Valley Roundabout	CN NA	ADMUD Undertaking	Undertaking Created: Date: 01 Nov 2014 Type: Financial Given Authorised By: AM Anne Mellon
BLA001/0002 1961 Not Applicable	04/11/2014 18:15:00	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Dublin 6	CN NA	G16 Action	Review File
BLA001/0002 1962 Not Applicable	04/11/2014 18:16:39	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Dublin 6	CN NA	G16 Action	Review File

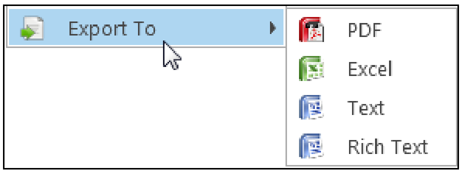
- 

Word;


- Adobe; or
- 

Excel.

How to Export a copy of your task list

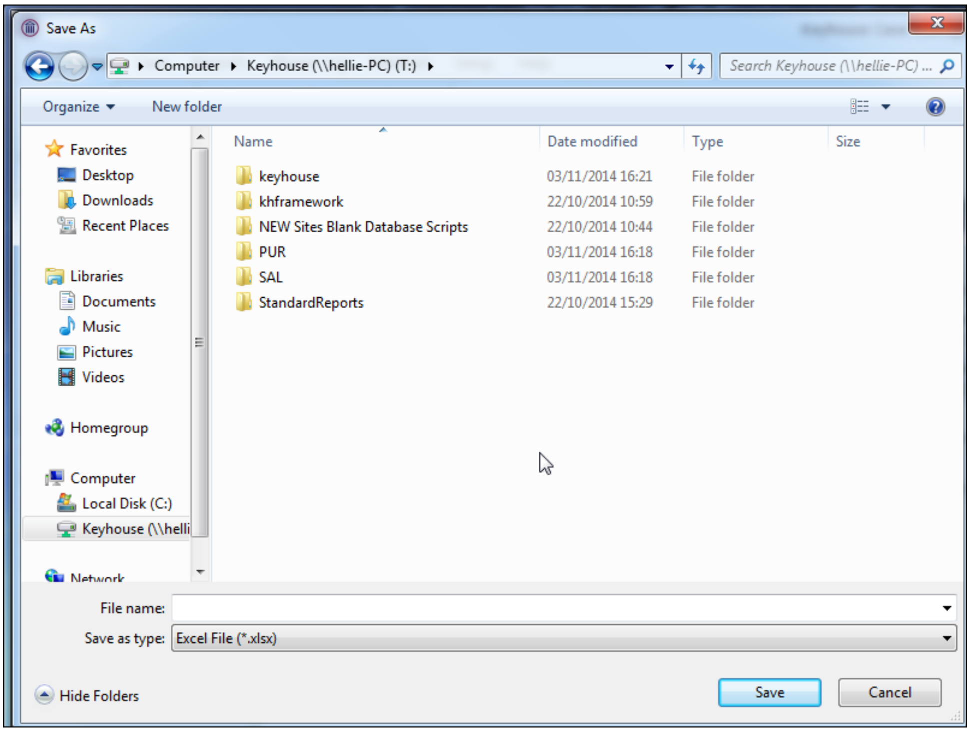


1. **Right click** in your task list and select **Export To** from the pop-up menu.

2. Select the desired option:.

   - **PDF**: Adobe Portable Document Format.
   - **Excel**: An Excel spreadsheet.
   - **Text**: A plain text file.
   - **Rich Text**: A Rich Text Format (**RTF**) document. RTF documents can be read by most 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.



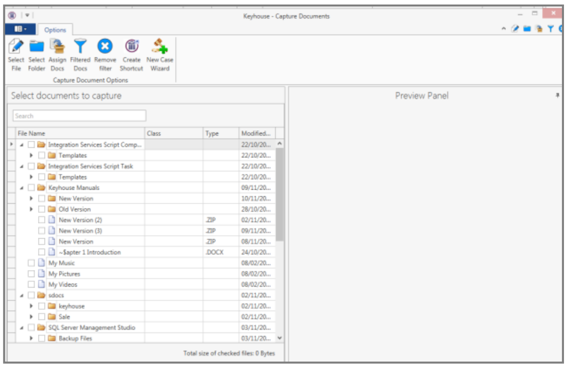
4. Click **Save**.

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

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

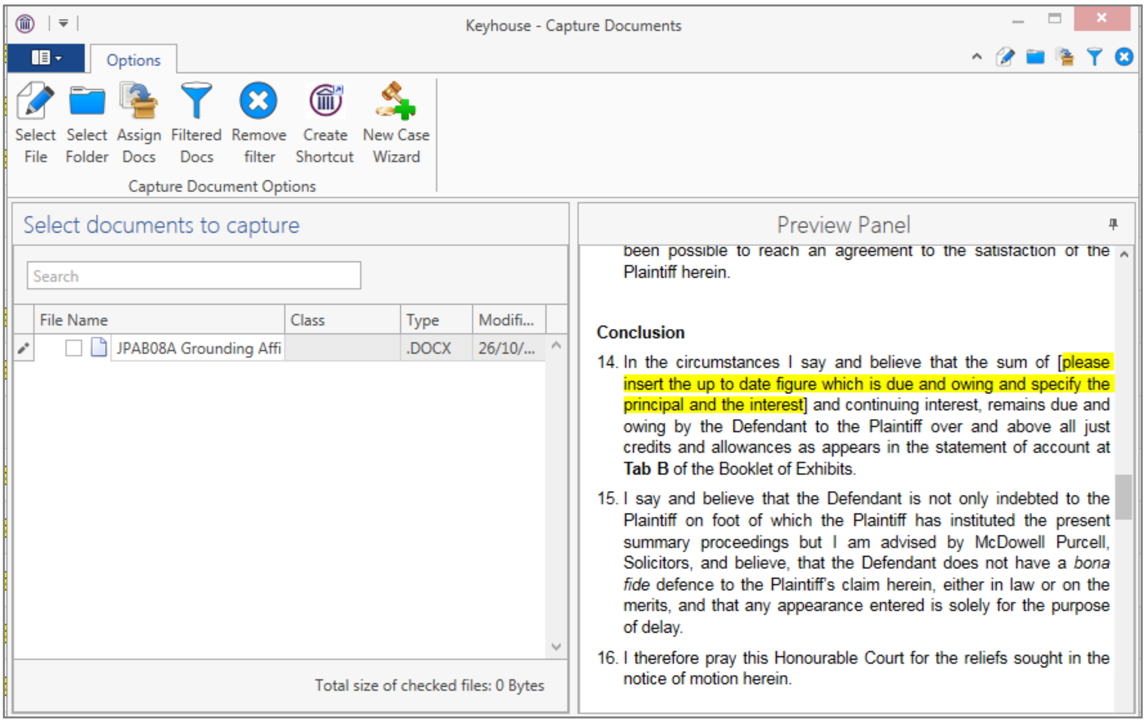


2. Click **Select File**.

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

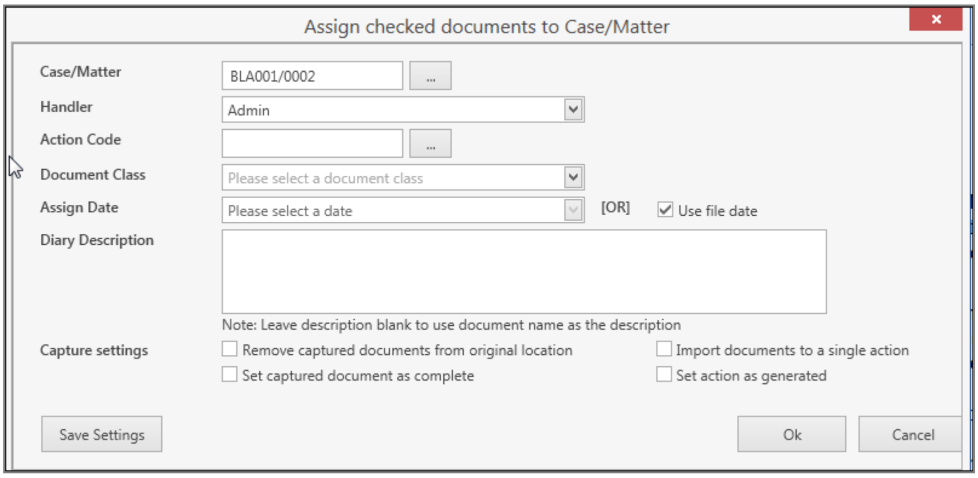
4. Click on the file and click on the Open button. The chosen document will be listed on the left-hand side of the **Capture Documents** window.

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



6. 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.



Provide the following information:

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

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

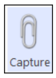
Tip: Click **Save Settings** to keep these settings for future documents captured.

8. When finished click **OK**.

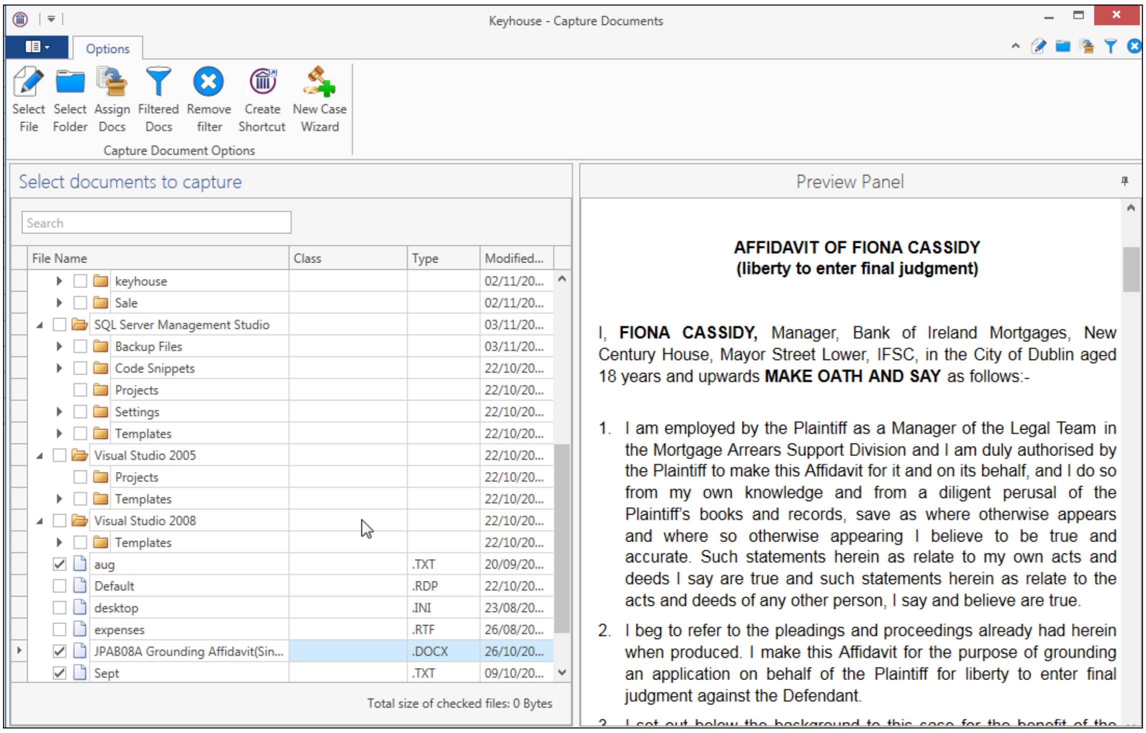
9. The files will appear in the case diary as a single action or multiple actions, depending on the options chosen.

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.



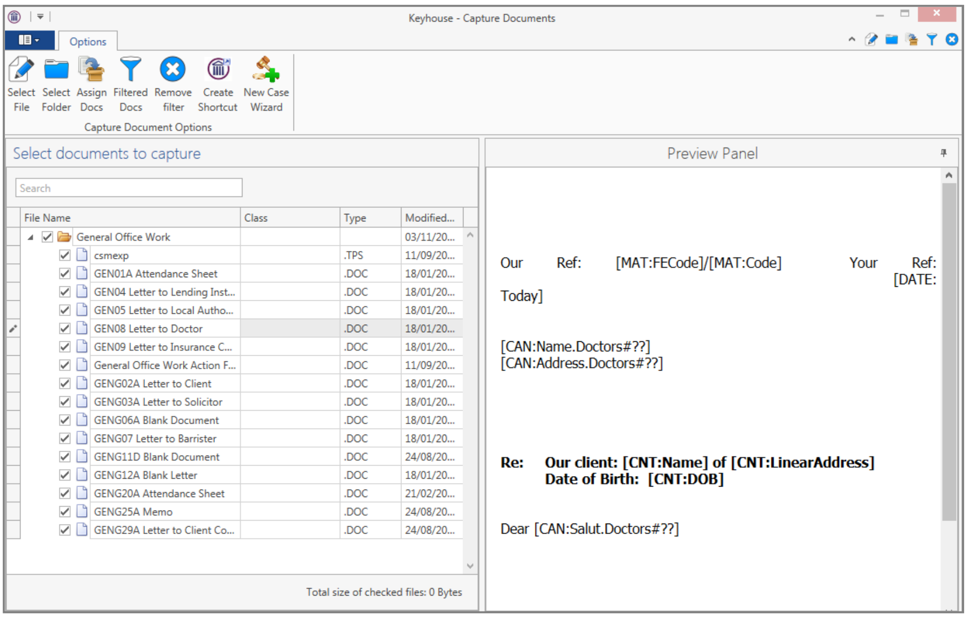
1. Click **Select Folder**. The **Capture Documents** screen will appear.



2. Browse and locate the folder.

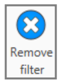
3. Select the folder to be imported and click OK.

4. The following screen will appear listing the folder contents.



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

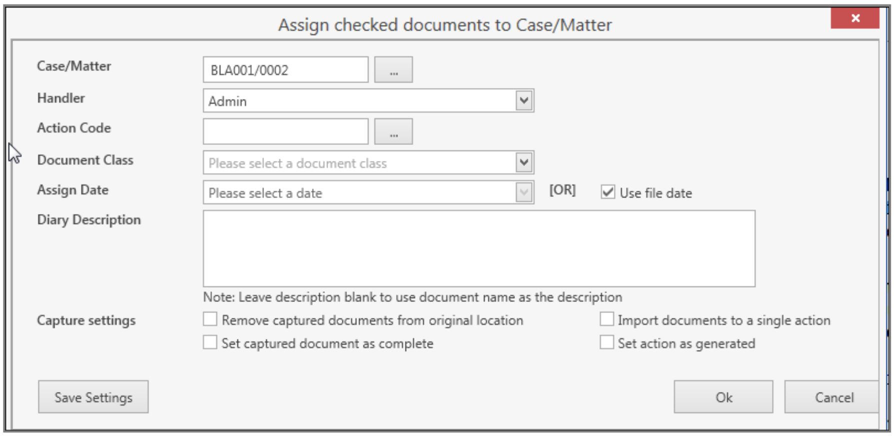
- Move your cursor over the column heading a pin will appear.
- Click on the **Pin** for a list of filters available.
- Select the required filter.
- Click **Remove filter** on the Options tab to display all documents.



Tip: To exclude a file remove the tick.

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

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

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

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

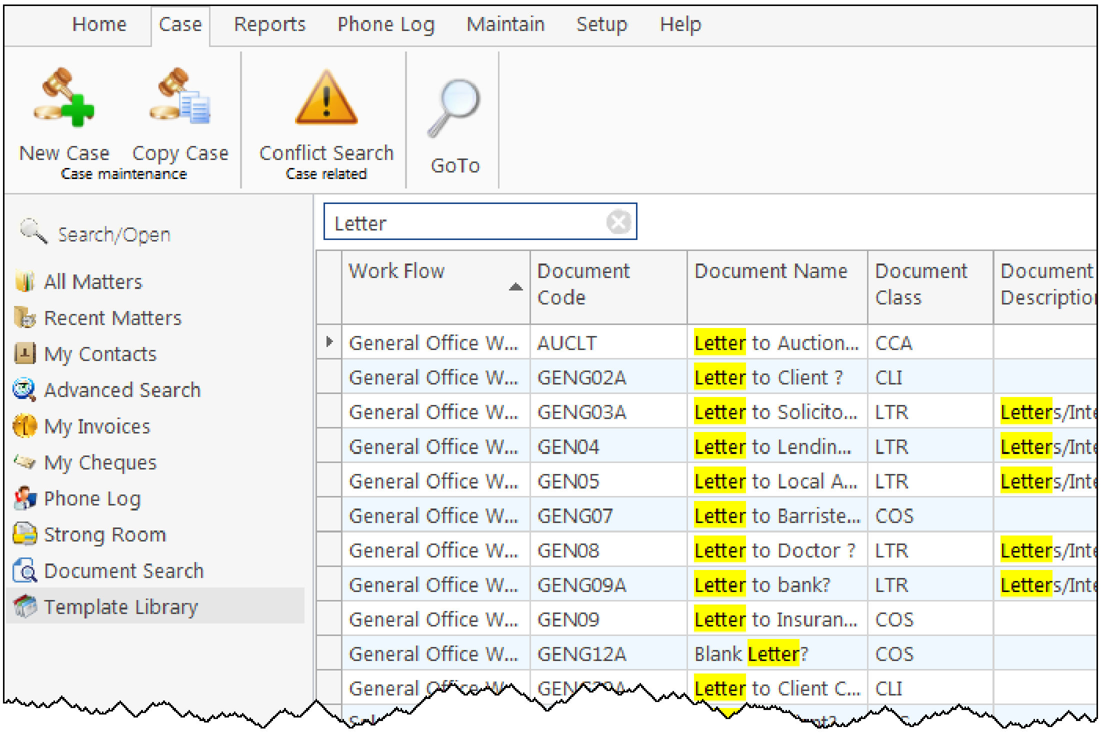
Chapter 7: The Template Library

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.

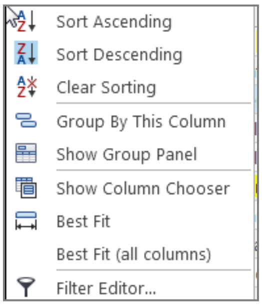


3. **Input** a key search word/s in the **Search Box.** The search results will update as you type.

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

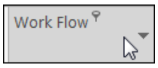
1. Click on a **column heading** to sort by that heading eg. Work Flow

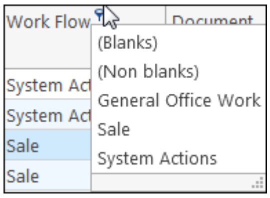


2. To return to the previous listing order, right-click in the column heading and select **Clear Sorting** from the pop-up menu.

How to apply a filter

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





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

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

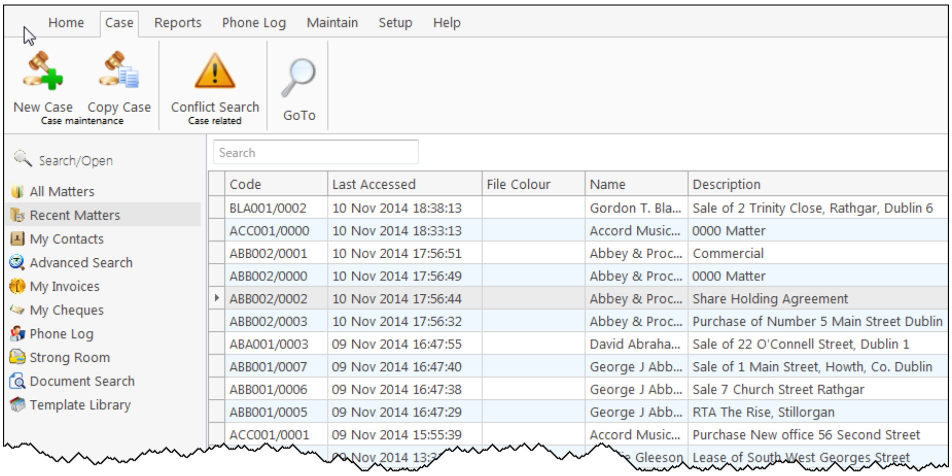
Chapter 8: Conflict Search

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.

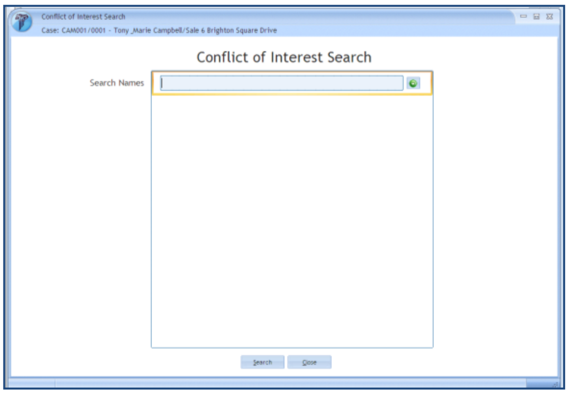
How to do a Conflict Search

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.



2. Click on **Conflict Search** icon on the Case tab.

3. A Conflict of Interest Search window will appear.

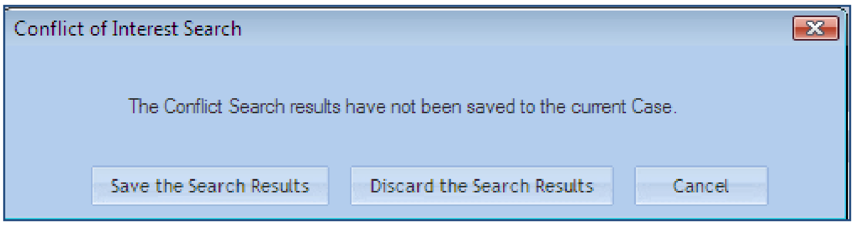


4. The types of information you can search for are the Name, PPS number, telephone number or address.

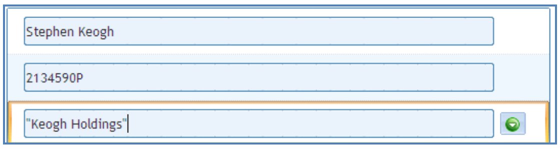
   a. Click in the search box, **input** the first search criteria e.g. Stephen Keogh

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

   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

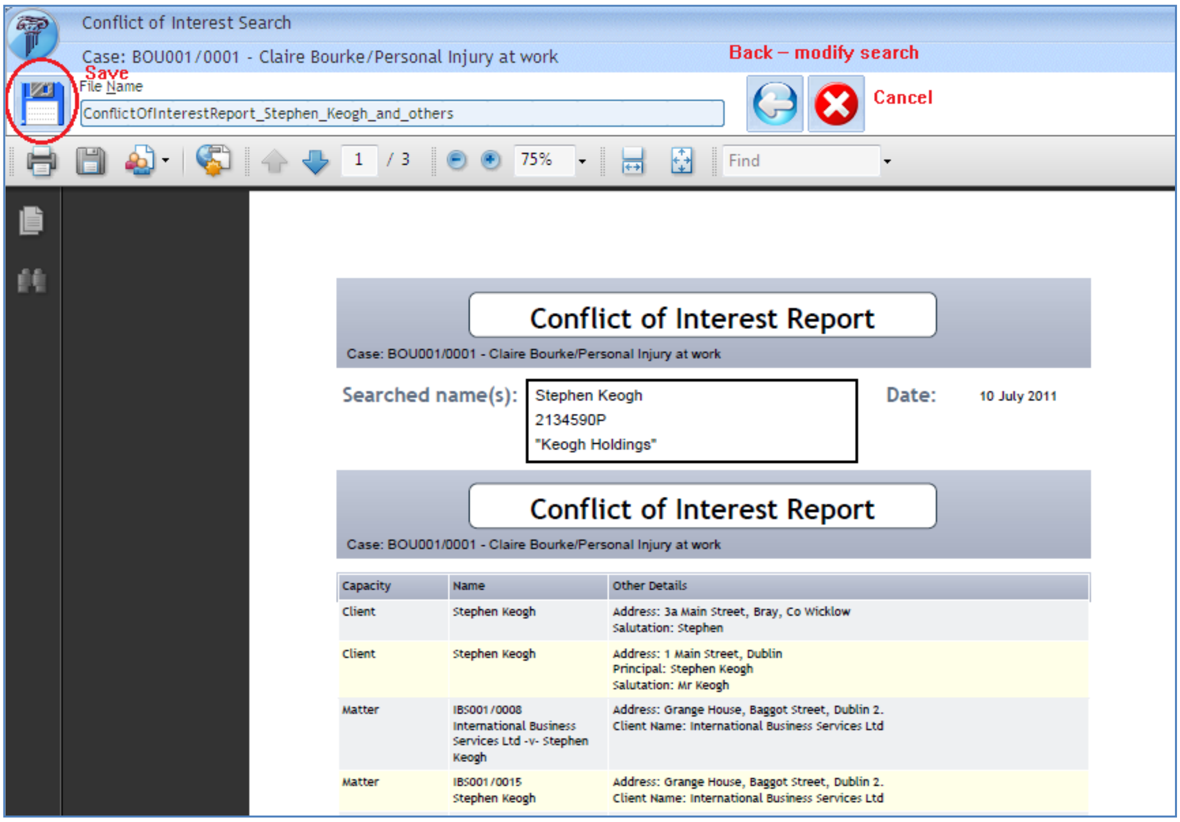


This will search for Stephen or Keogh anywhere **and**
2134590P anywhere **and**
The exact phrase "Keogh Holdings" anywhere.

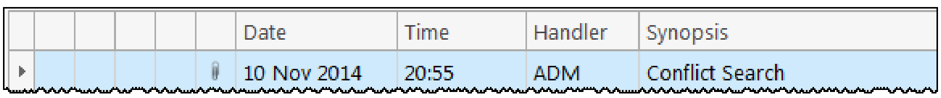
5. Click on the **Search button** at the bottom of the window.

6. A report will be generated listing any matches.

7. To save the results as an action in the case diary, click on **Save**.



See the following example.



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

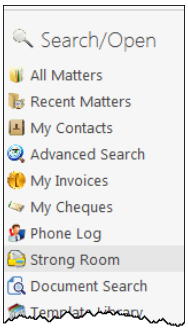
What is the Strong Room used for?

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.

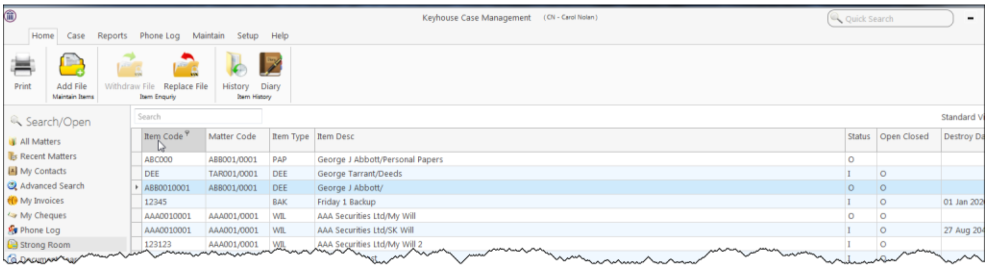
The Strong Room also keeps a record of the date the item has been withdrawn and when it has been returned and by whom. The history of the item is recorded for tracking purposes.

How to Search for an Item

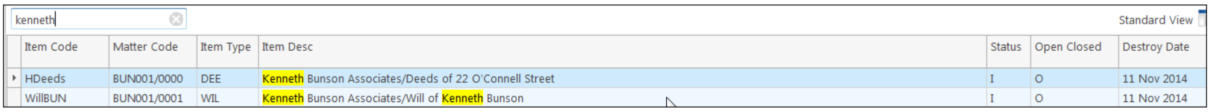
1. **Click** on **Search/Open** on the Navigation panel. (The Strong Room for the current case may be accessed via the Navigation panel in Client/Case.)



2. Click on **Strong Room** on the Navigation panel. The following screen will appear listing all items in your strong room.



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



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

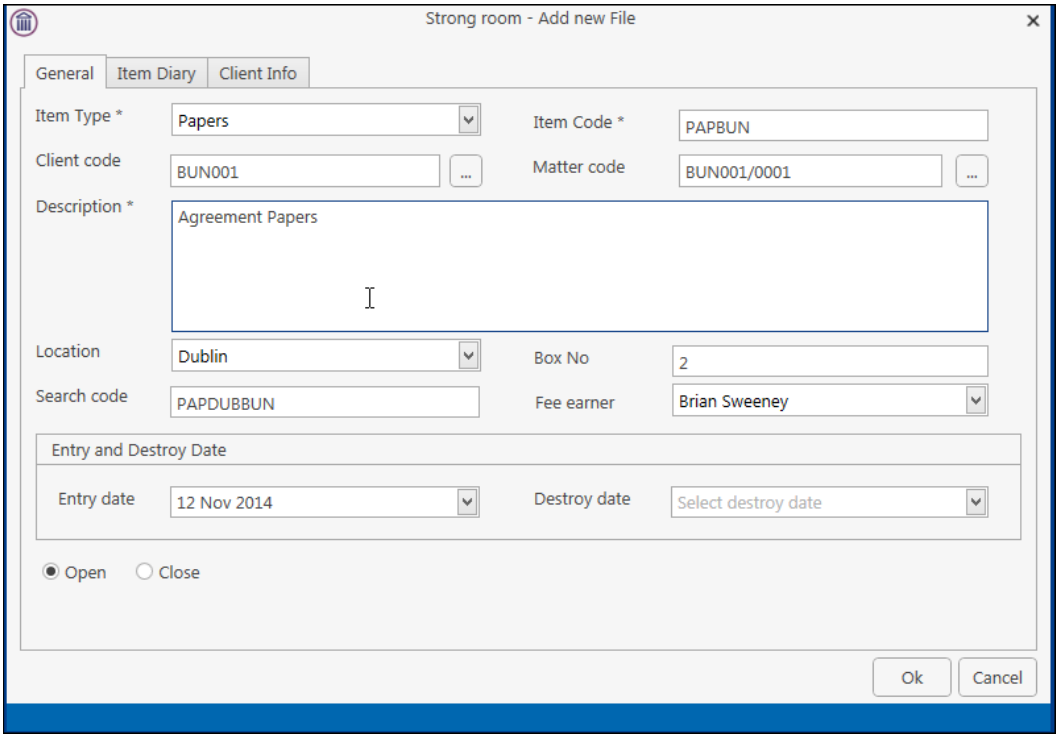
Tip: You can sort column headings by click on the heading.

How to Add a File/Item to the Strong Room

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

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

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



Fields marked with an asterisk are required.

Item Type	Select the Item Type from the drop-down list.
Item Code	**Input** an item Code.
Client Code	See also Matter Code below.
Matter Code	If the code of the current matter is not displayed, or you wish to select a different matter, use the browse button to browse the matter list.
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

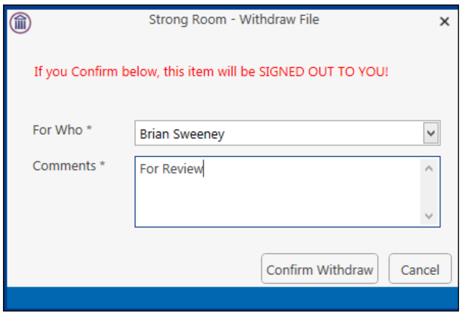
1. Open the **Strong Room** screen, search for and select the item you want to withdraw.

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.

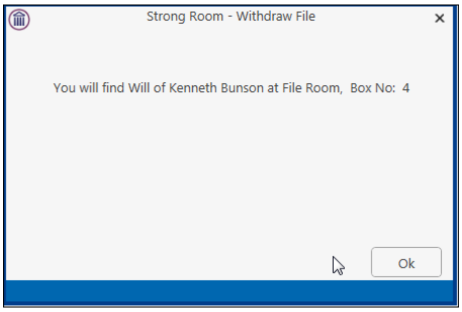


   Provide the following information:

   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.



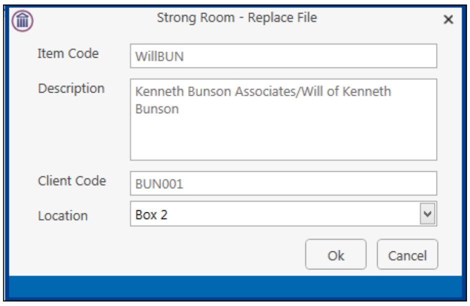
5. Click **Confirm Withdrawal**. The following screen will appear telling you where to find the item.

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.

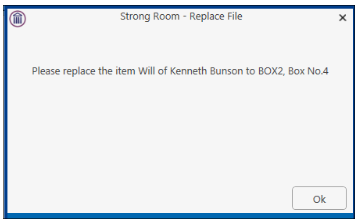
2. Click on the **Replace File** icon on the Home tab.



   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.



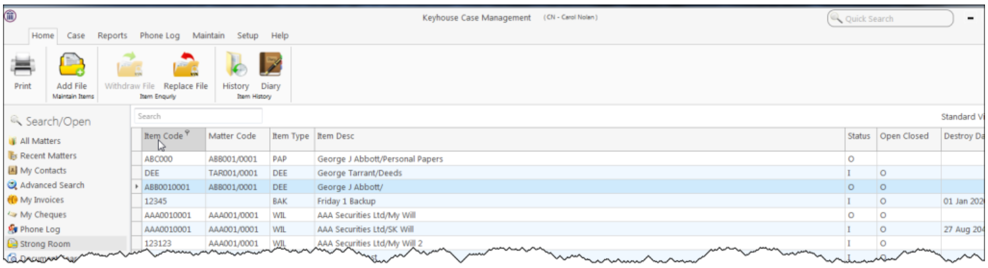
5. Click **OK**. You will see a message asking you to place the item in the selected location.

6. Click **OK**.

How to view the History on a file/item

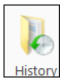
1. If the **Strong Room** is not shown on the Navigation panel, click on **Search/Open.**

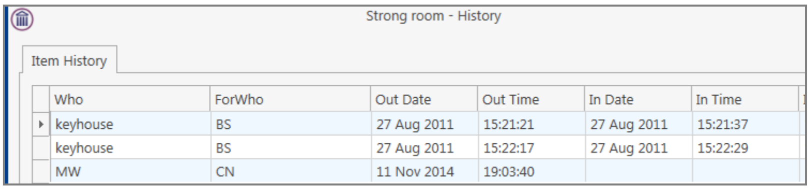
2. Then click on **Strong Room** on the Navigation panel to show the following screen listing all items in your strong room.



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

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





5. Click Cancel to exit this screen.

Chapter 10: Time Recording

Time Recording in the Case Diary

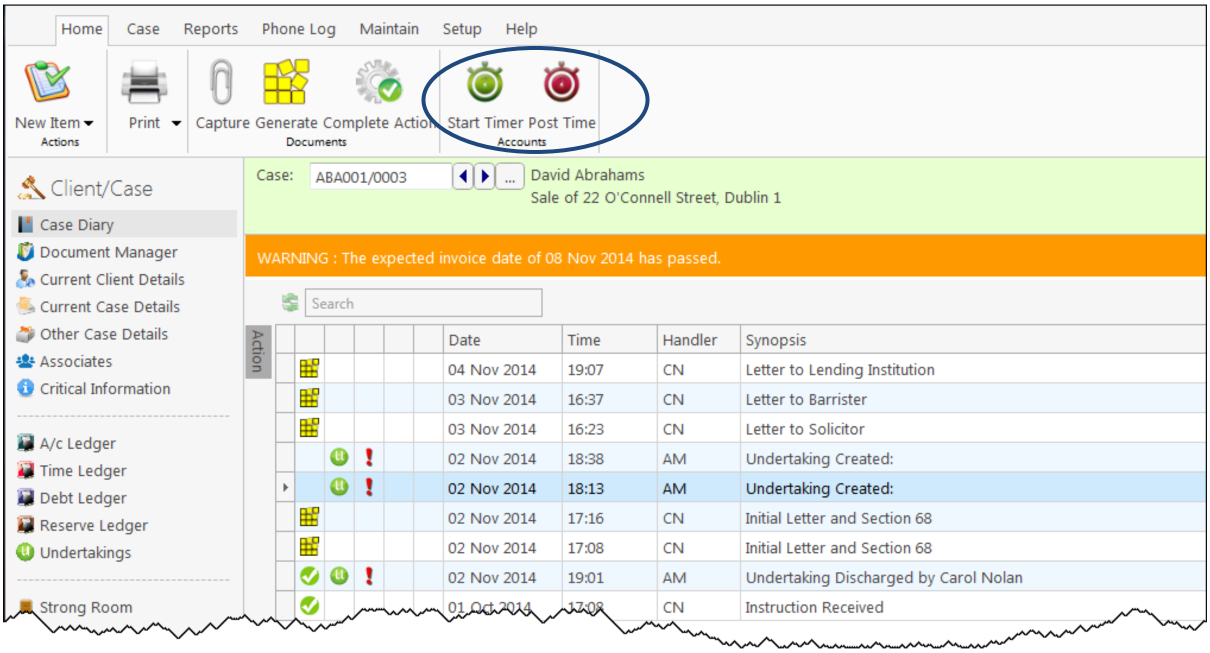
Time can be recorded in the case diary in two ways: automatically using a timer or manually using a time slip. Once time is recorded it is then posted to the Day Book and from there it is posted to the time ledger of the case. Recorded time can be used for billing, reporting and productivity tracking.

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

The Timer

Manual time slips

Both tools can be found on the Home tab.

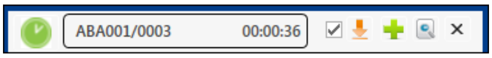


How to Record Time Using the Timer

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.

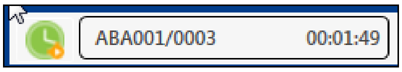
1. **Open** a Case in the Case Diary

2. Click **Start Timer** on the Home tab. A timer will appear displaying the current case reference.



3. The clock will automatically start recording.

4. To pause the timer click on the **clock** at the left of the timer. The clock will stop and an orange symbol will appear next to it.

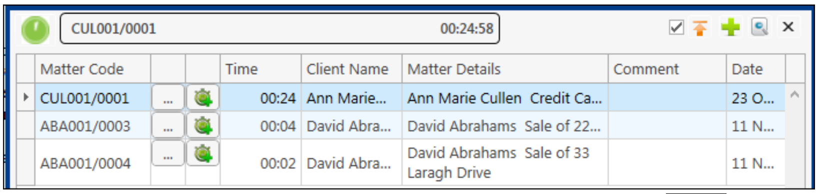


5. To **resume** recording, click on the **clock** the clock will continue recording.

6. To 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.

7. To expand the timer click on **Maximise**. 

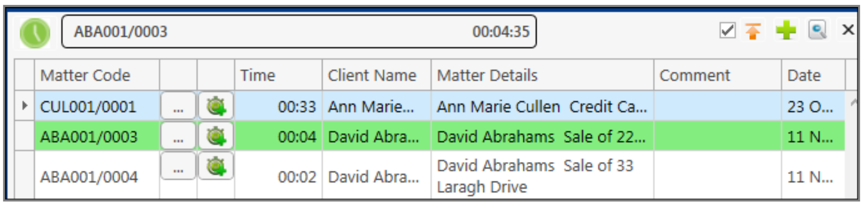


8. To recommence a time recording for an entry already listed in your timer click on  next to case code.

Note if open the case in the case diary the timer will automatically recommence the active time recording for this case.

Note the entry highlighted in **Green** is the active time recording.

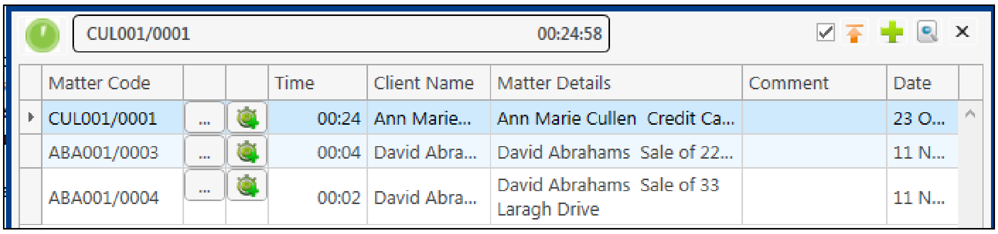
9. You can amend the details and post this time now or later.



10. The time recording will remain in the Timer until you post it or **delete** it.

How to Post Time from the Timer

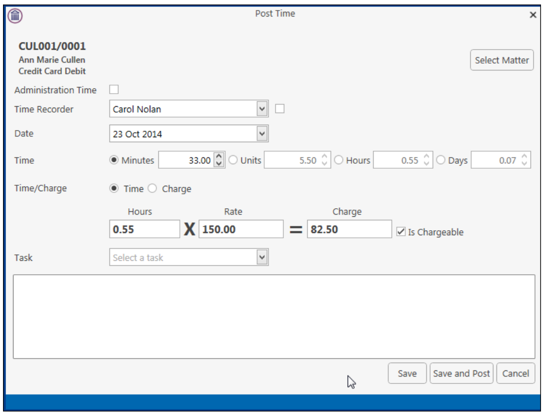
1. **Maximise** the Timer screen. The following screen will appear.



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

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

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



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

Minutes/Hours/Days: This will show the time recorded and 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.

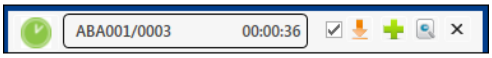
Comment Input a narrative to describe the time entry

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.

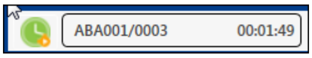
Note: All entries in the Timer are automatically displayed in the Daybook ready for posting.

How to Record and Post Admin Time Using the Timer

1. **Open** a Case in the Case Diary
2. Click **Start Timer** on the Home tab. The following timer will appear displaying the current case reference.



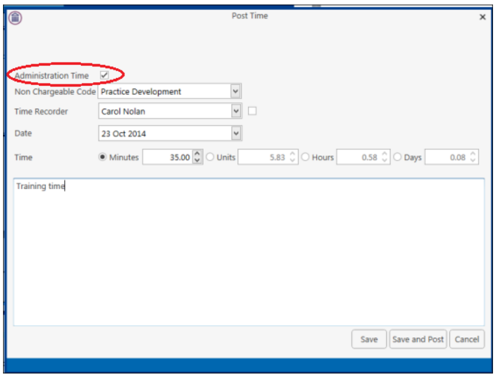
3. The clock will automatically start recording.



4. 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 non-chargeable code from the drop-down list; e.g. Training, Illness, Holidays etc.

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.

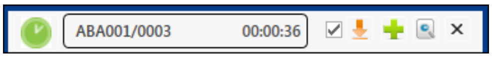
Date	Today's date will be shown by default; amend if required.
Minutes/Hours/Days:	This will show the time recorded and may be amended if required.
Non- Chargeable Code	Select from the drop-down list to change the non-chargeable code.
Comment	**Input** a narrative to describe the time entry

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. 

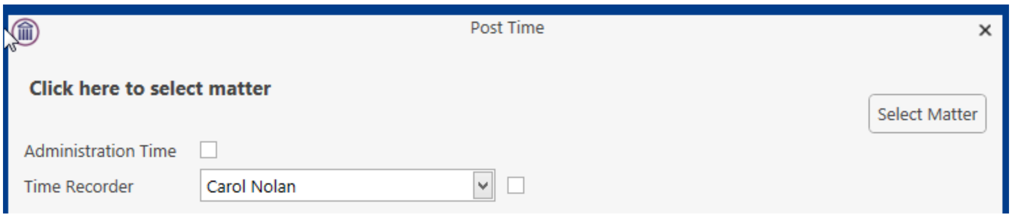
The current case will automatically be selected.

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.



6. Input/Amend the following details as required:

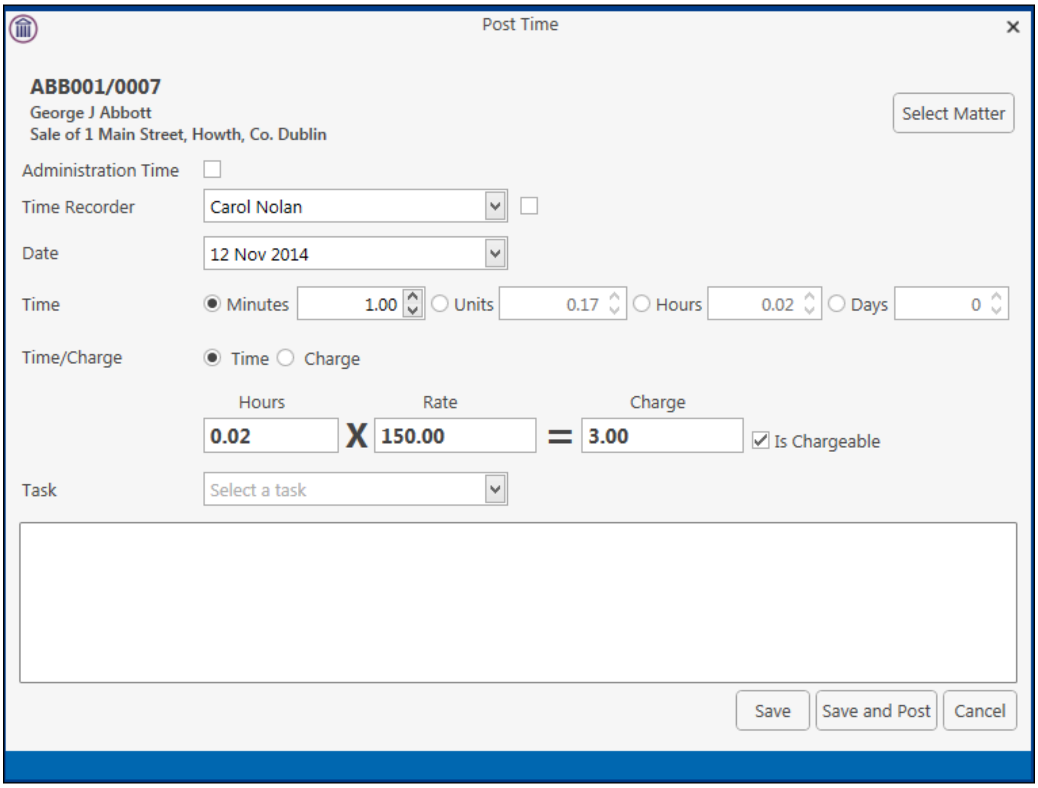
Matter:	No case code will be displayed. Click the **Select Matter** button to bring up the matter list and select the case to which the time is to be posted.
Date:	By default, the date of the time recording will be shown. Amend if required.
Minutes/Hours/Days:	This will reflect the timings recorded but 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.



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

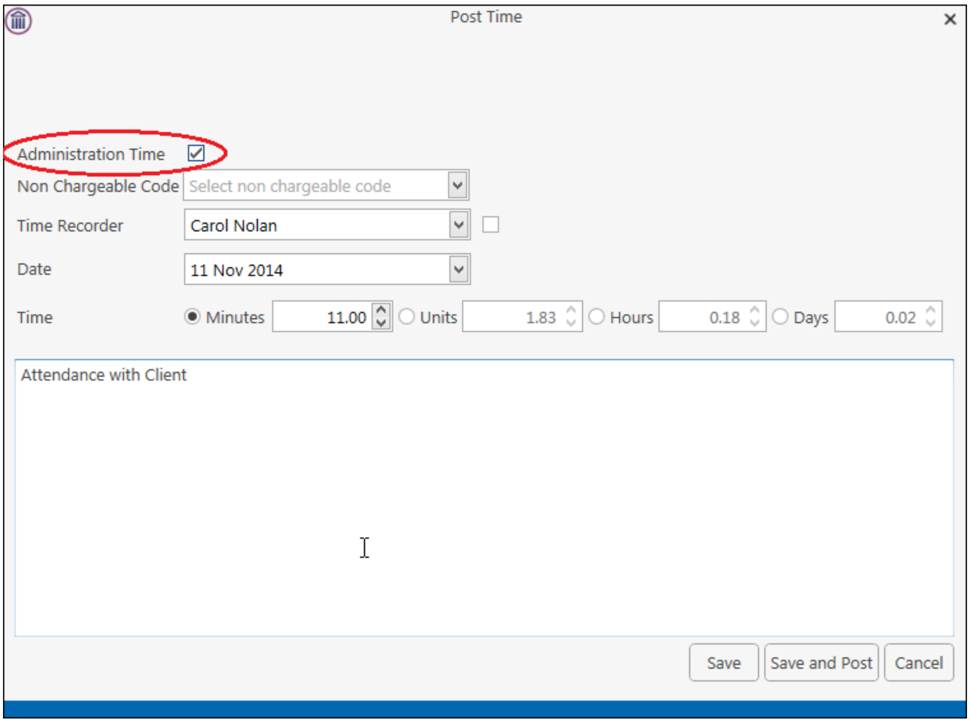
4. When all details have been entered click **OK**. The time slip will appear in the Daybook ready for posting.

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:



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.

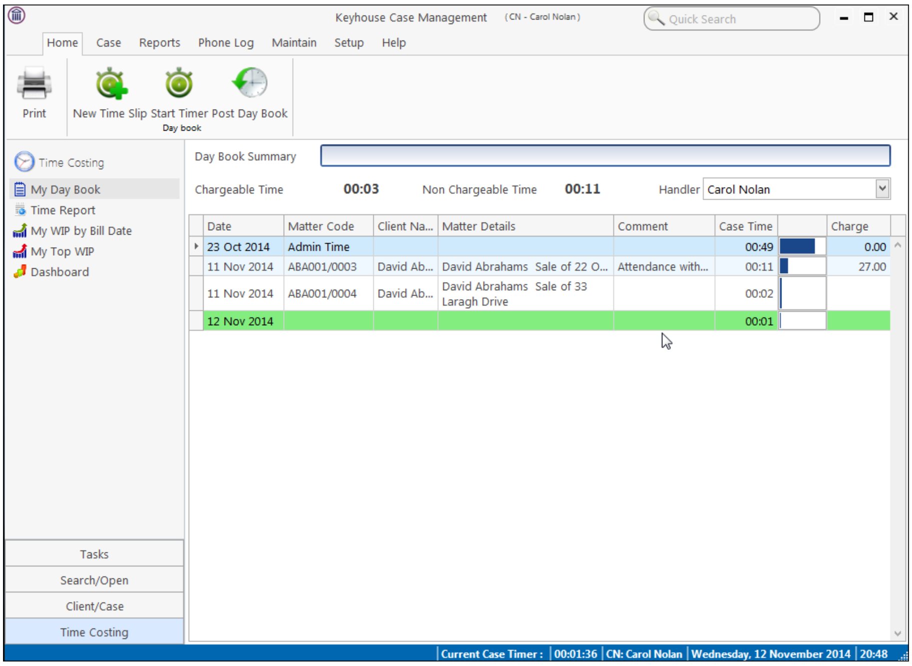
Note: It is possible to record more than one non-chargeable entry in your timer at a time.

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.



My Day Book

Viewing the Day Book

1. Click on **Time Costing** on the navigation Bar the day book will appear listing all your unposted time.

2. Click on the required item.

Tip: Click on a column headings to sort by that heading, e.g. Matter Code

How create a Time slip in the Day Book

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

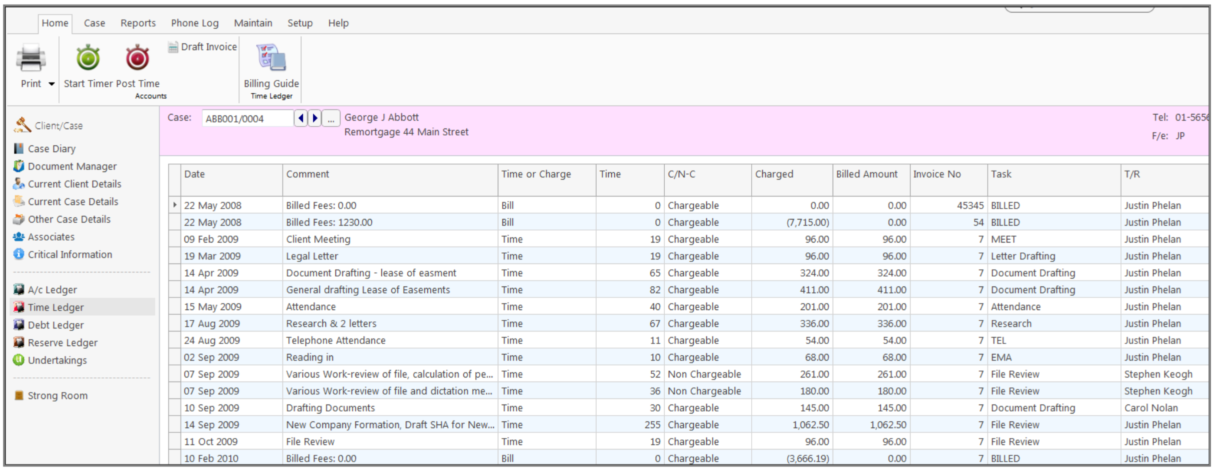
Accessing the Time Ledger Screen

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.



Date	Comment	Time or Charge	Time	C/N-C	Charged	Billed Amount	Invoice No	Task	T/R
22 May 2008	Billed Fees: 0.00	Bill	0	Chargeable	0.00	0.00	45345	BILLED	Justin Phelan
22 May 2008	Billed Fees: 1230.00	Bill	0	Chargeable	(7,715.00)	0.00	54	BILLED	Justin Phelan
09 Feb 2009	Client Meeting	Time	19	Chargeable	96.00	96.00	7	MEET	Justin Phelan
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
14 Apr 2009	General drafting Lease of Easements	Time	82	Chargeable	411.00	411.00	7	Document Drafting	Justin Phelan
15 May 2009	Attendance	Time	40	Chargeable	201.00	201.00	7	Attendance	Justin Phelan
17 Aug 2009	Research & 2 letters	Time	67	Chargeable	336.00	336.00	7	Research	Justin Phelan
24 Aug 2009	Telephone Attendance	Time	11	Chargeable	54.00	54.00	7	TEL	Justin Phelan
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
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

Tip: Click on a column headings to sort by that heading e.g. T/R (Time Recorder).

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

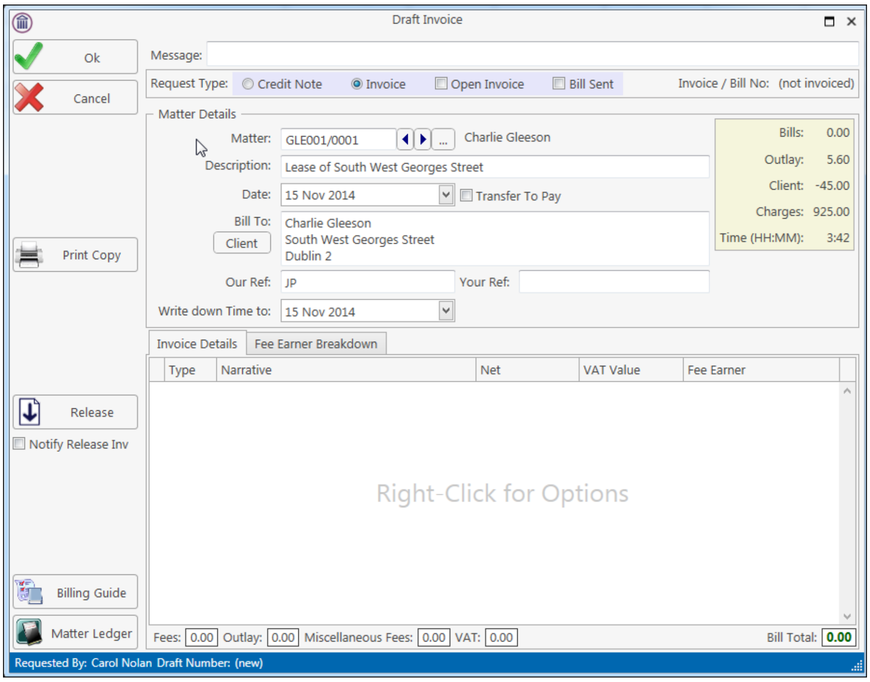
How to Create a Draft Invoice from the Time Ledger Screen

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

2. Click on **Time Ledger** on the **Case Diary** Navigation panel.

3. Click on **Draft Invoice** on the Home tab. The following Draft Invoice will appear.

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



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

revert to the client details.

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

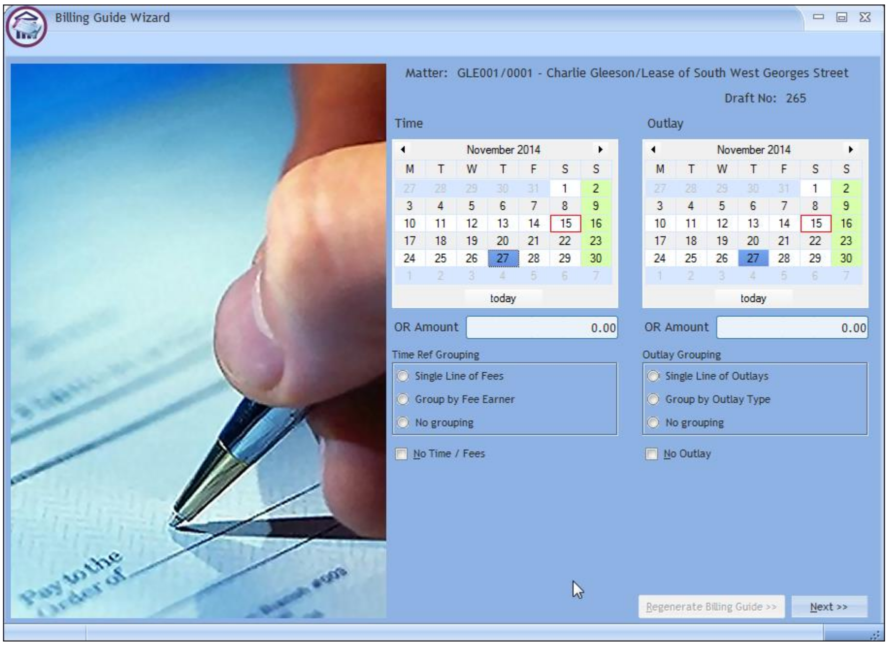
Your Ref — **Input** a reference if applicable.

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

4. The time and outlay to be included in the bill may be input using the **Billing Guide Wizard** or manually.

   a. Using the **Bill Guide Wizard**

      i) Click on **Billing Guide** at the bottom left corner to start the Billing Guide Wizard.



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

The options for grouping time are:

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

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

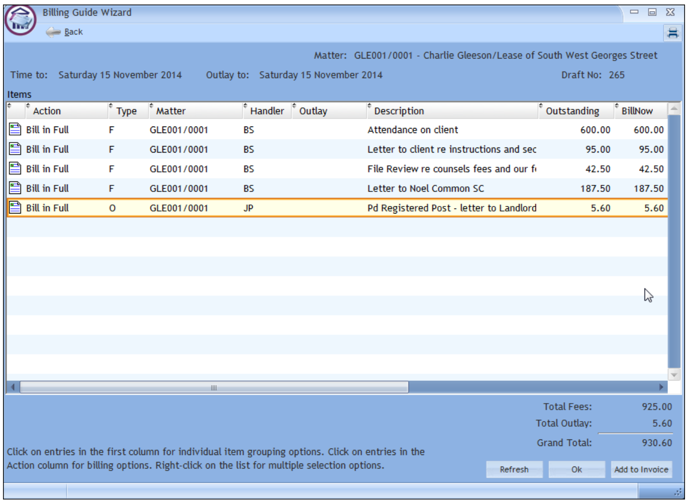
The options for grouping outlay are similar:

- Single Line of Outlays — a total figure for outlay will be given without listing items separately

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

ii) Click **Regenerate Billing Guide** to continue to the next screen.

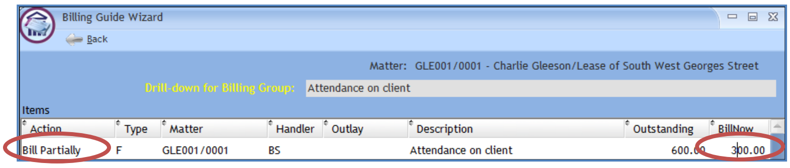
This example shows no Grouping on either fees or outlays



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

How to Partially Bill an Item

- Double-click the item to be changed:



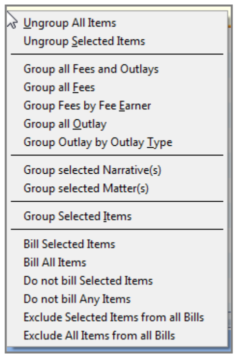
- Click the figure in the ***Bill Now*** column and change the amount. The ***Action*** will change to ***Partially Billed***.
- Click **OK** to save the change.

How to exclude an action item from a bill

- Click the item to be excluded.

Tip to exclude more than one item hold down the CTRL key on your keyboard and click on each of the items.

- **Right-click** the the selection and choose one of the following commands from the pop-up menu:



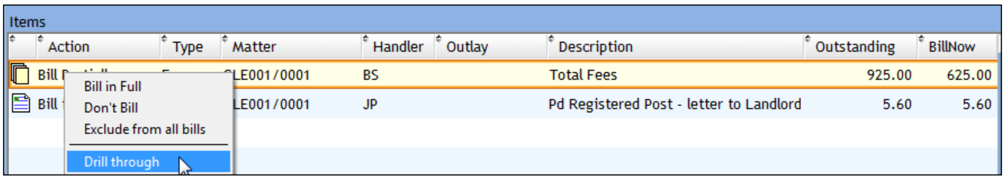
- **Do not bill Selected Items** — the items will be excluded from the current bill only;
- **Exclude Selected Items from all Bills** — the items will not be included in any future bill.

To Add Grouping Levels

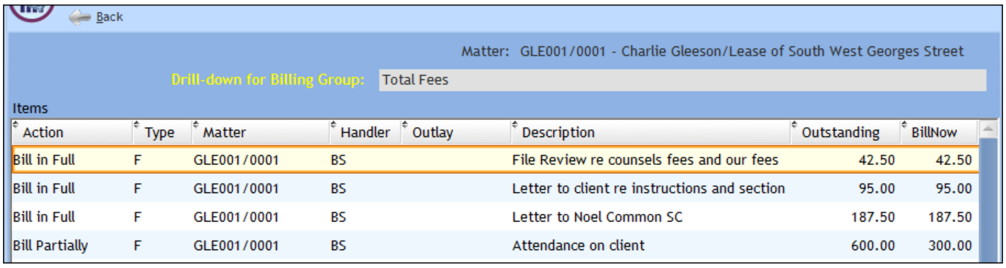
Right click on an item and select the required Grouping option from the pop-up menu

How to Drill down to view all items in a group

- Click on a grouped item and select **Drill Through** from the pop-up menu.



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



- Click the **Back** button to return to the previous screen.

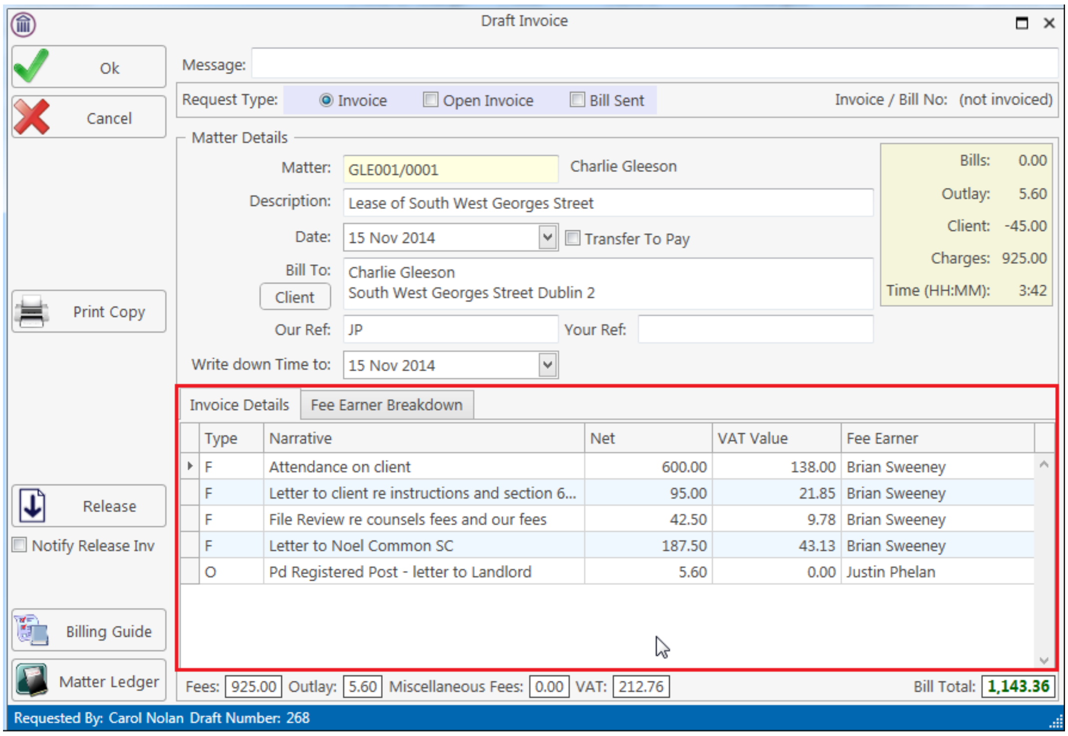
iv) When complete:

- Click **OK** to update the draft. A message will ask whether you want to recalculate the ***Fee Earner Breakdown*** based on the changes to the Billing Guide. Click **Yes** to recalculate or **No** if you do not wish to recalculate.

  OR

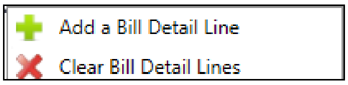
- Click the **Add to Invoice** button when you are ready to update the invoice. A message will ask whether you want to recalculate the ***Fee Earner Breakdown*** based on the changes to the Billing Guide. Click **Yes** to recalculate or **No** if you do not wish to recalculate.

b. Adding a Line to the bill manually

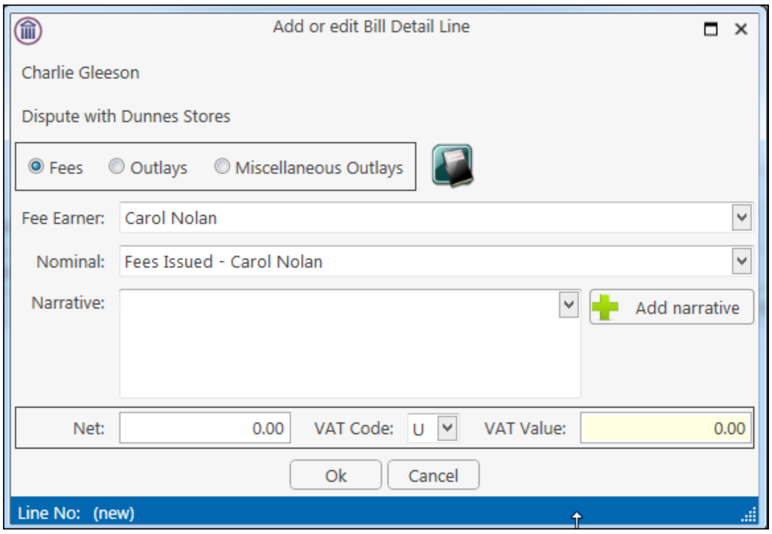


i) Right-click in the ***Invoice Details*** screen to see the pop-up menu.

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



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



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

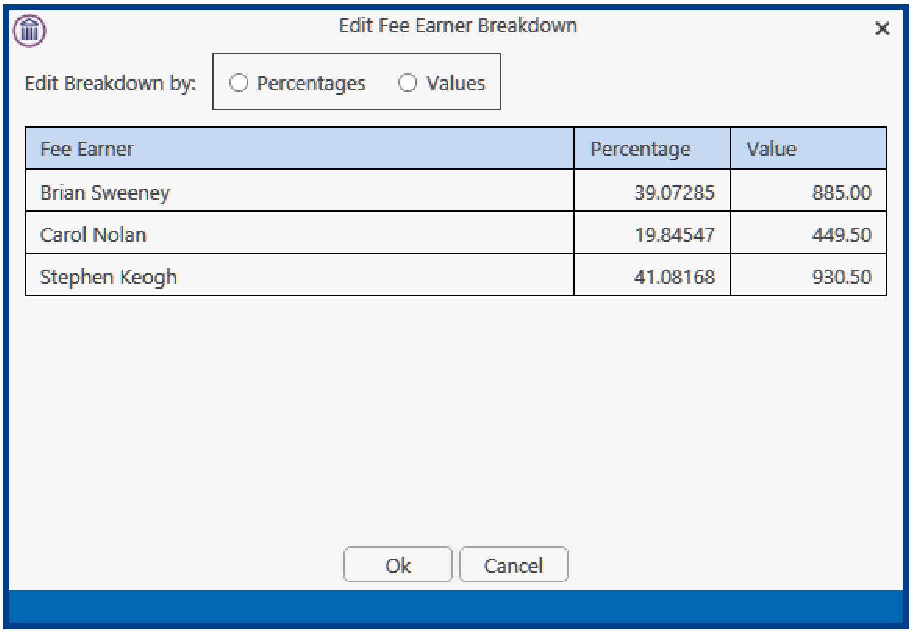
c. How to amend the Fee Earner Breakdown

i) **Click** the **Fee Earner Breakdown** Tab.

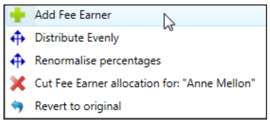
The breakdown will have been calculated automatically, based on time charged in the invoice in respect of each fee earner.

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

iii) In the Edit Fee Earner Breakdown window, you may choose to edit the breakdown either by percentages or values. Choose one or the other, then click in the relevant column to change the percentages or values.



iv) Alernatively, you may right-click on any of the fee earners and select the required command from the pop-up menu.



v) If you select **Add Fee Earner**, you will be able to choose from a list of fee earners by double-clicking.

vi) If you select **Cut Fee Earner allocation for [Fee Earner Name]**, that fee earner's allocation will be removed from the breakdown

vii).In either case, you will be returned to the ***Edit Fee Earner Breakdown*** screen, where you can alter the percentages or values as described in iii) above.

viii) Click **OK** to save the changes and be returned to the ***Draft Invoice*** screen.

5. Click **OK** on the left-hand column of the ***Draft Invoice*** screen to save the draft bill or **Release** to send to accounts for approval.

6. The Draft Bill will appear as an entry in the case diary for future review.

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

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

Create a Billing Guide Report

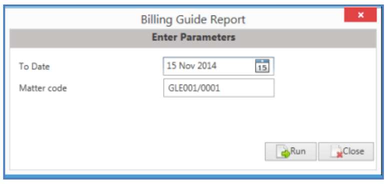
1. **Open** a case in the Case Diary.

2. Click on **Time Ledger** on the **Case Diary** Navigation panel.

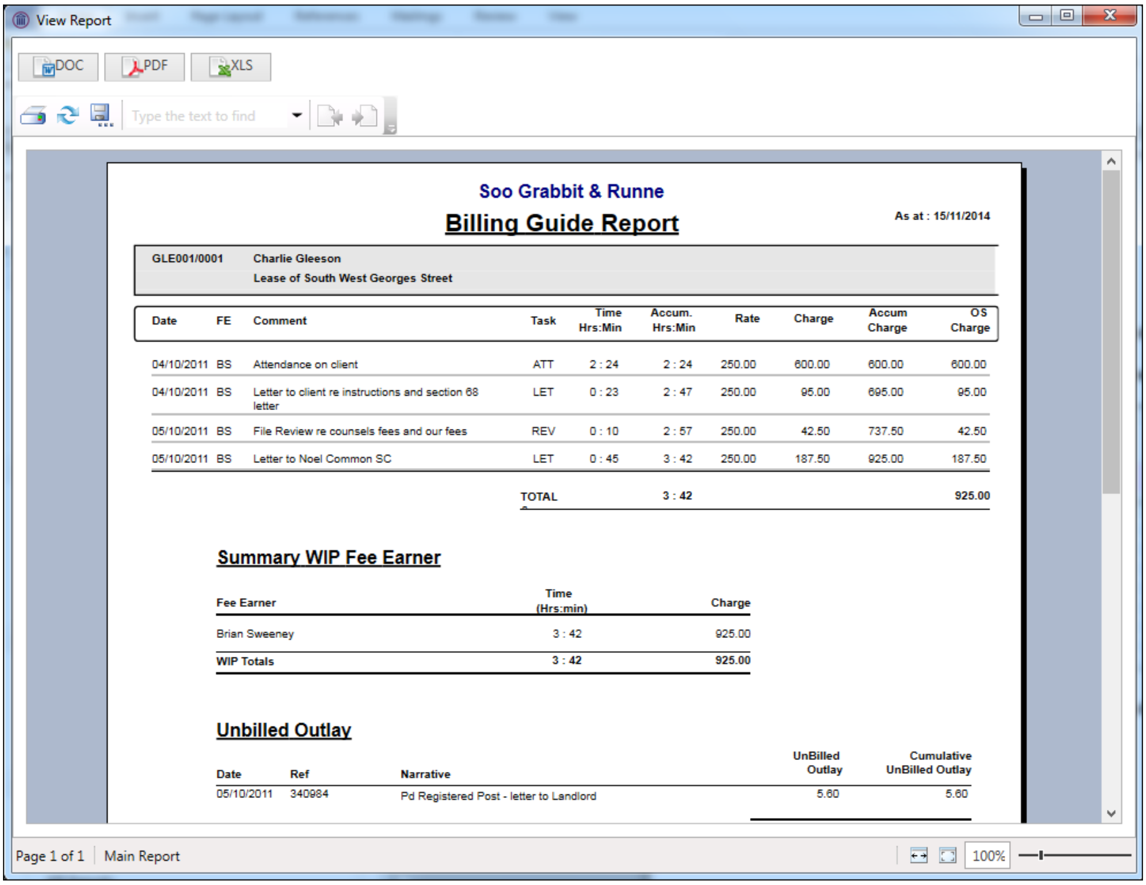
3. Select **Billing Guide** on the Home tab to bring up a screen asking for parameters for the Billing Guide report.

    a. Specify the date down to which the report is to be prepared

    b. Enter the matter code. The current case will be shown by default



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

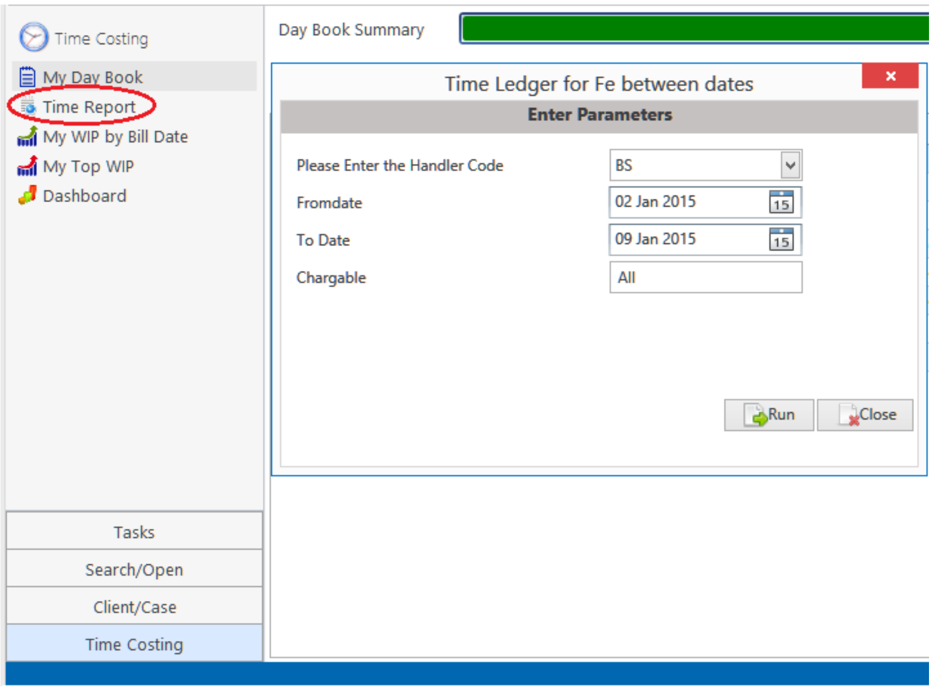


The Report may be exported to a Word document (DOC), PDF or an Excel spreadsheet (XLS)

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

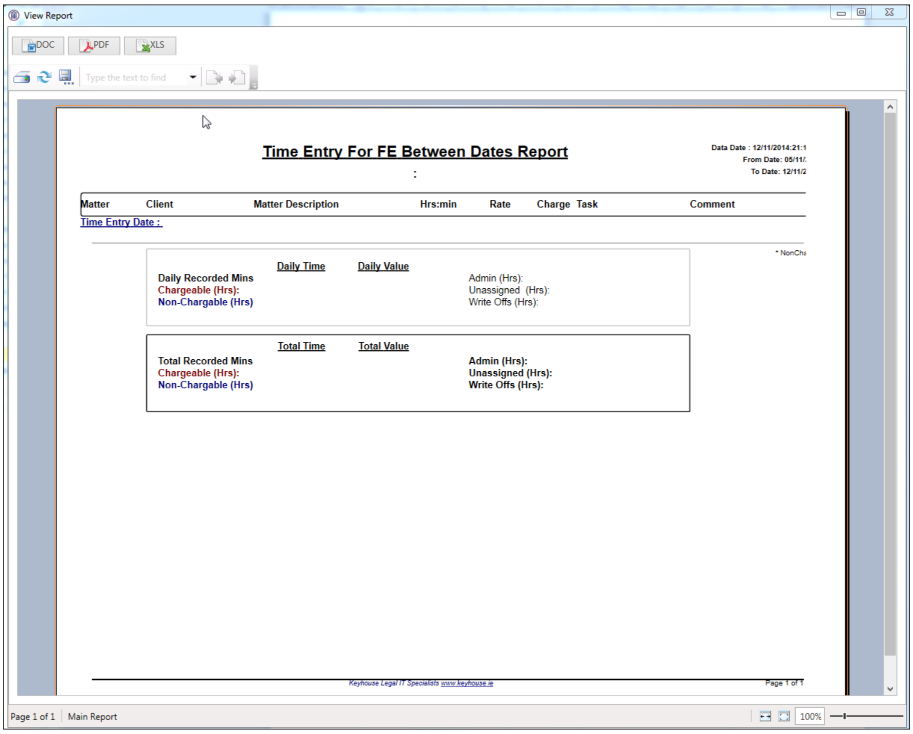
The Time Report

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



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

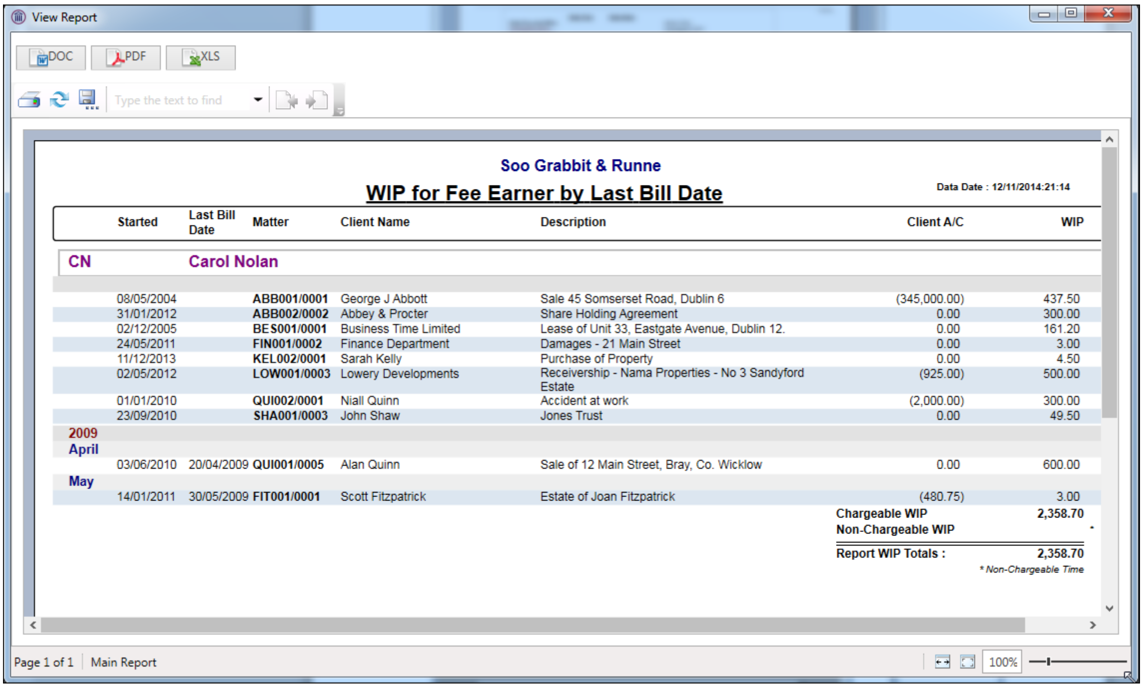
2. Click **Run**. The report may be exported, printed or searched in the same way as the ***Billing Guide*** report above.



My WIP by Bill Date

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

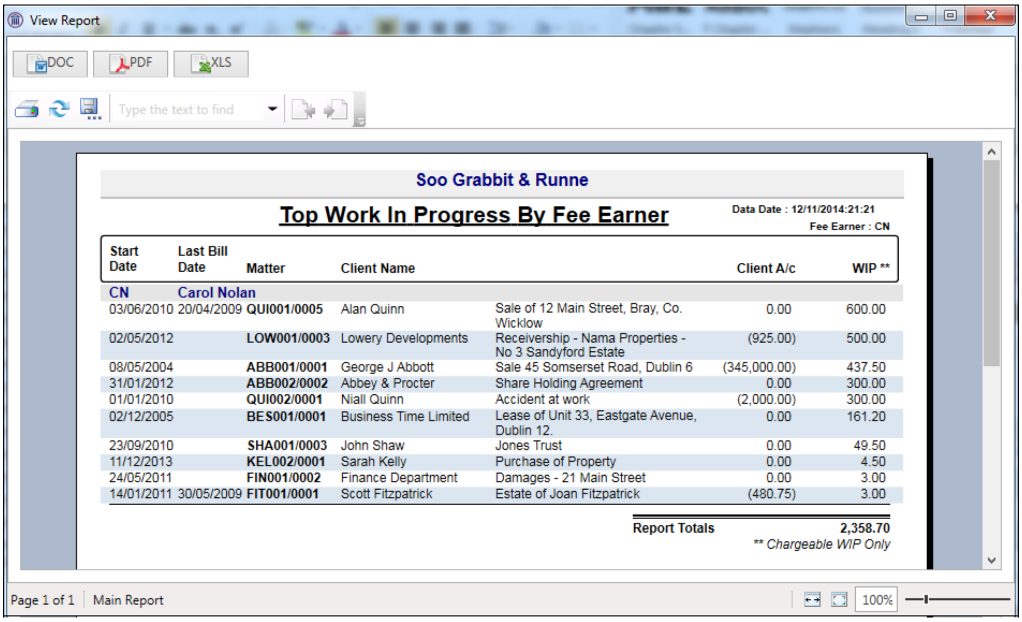
   WIP is Work in Progress i.e. unbilled time



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***.



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Top Work In Progress By Fee Earner

Data Date : 12/11/2014:21:21

Fee Earner : CN

Start Date	Last Bill Date	Matter	Client Name		Client A/c	WIP **
CN	Carol Nolan					
03/06/2010	20/04/2009	QUI001/0005	Alan Quinn	Sale of 12 Main Street, Bray, Co. Wicklow	0.00	600.00
02/05/2012		LOW001/0003	Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Estate	(925.00)	500.00
08/05/2004		ABB001/0001	George J Abbott	Sale 45 Somserset Road, Dublin 6	(345,000.00)	437.50
31/01/2012		ABB002/0002	Abbey & Procter	Share Holding Agreement	0.00	300.00
01/01/2010		QUI002/0001	Niall Quinn	Accident at work	(2,000.00)	300.00
02/12/2005		BES001/0001	Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12.	0.00	161.20
23/09/2010		SHA001/0003	John Shaw	Jones Trust	0.00	49.50
11/12/2013		KEL002/0001	Sarah Kelly	Purchase of Property	0.00	4.50
24/05/2011		FIN001/0002	Finance Department	Damages - 21 Main Street	0.00	3.00
14/01/2011	30/05/2009	FIT001/0001	Scott Fitzpatrick	Estate of Joan Fitzpatrick	(480.75)	3.00
					Report Totals	2,358.70

** Chargeable WIP Only

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

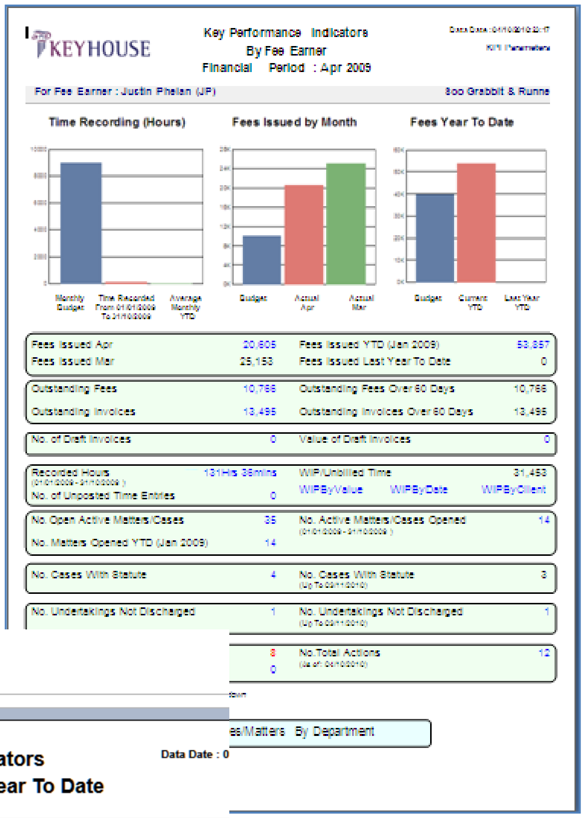
KPI Reports

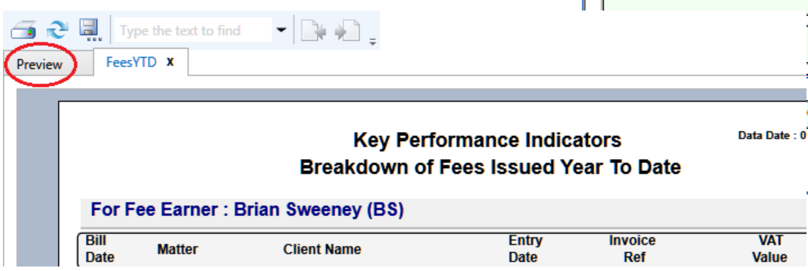
1. Click **Dashboard** on the Navigation panel in ***Time Costing*** to see the Key Performance Indicators report for the fee earner who is logged in.

2. Click on the figures in **blue** or **red** to view a 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.

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

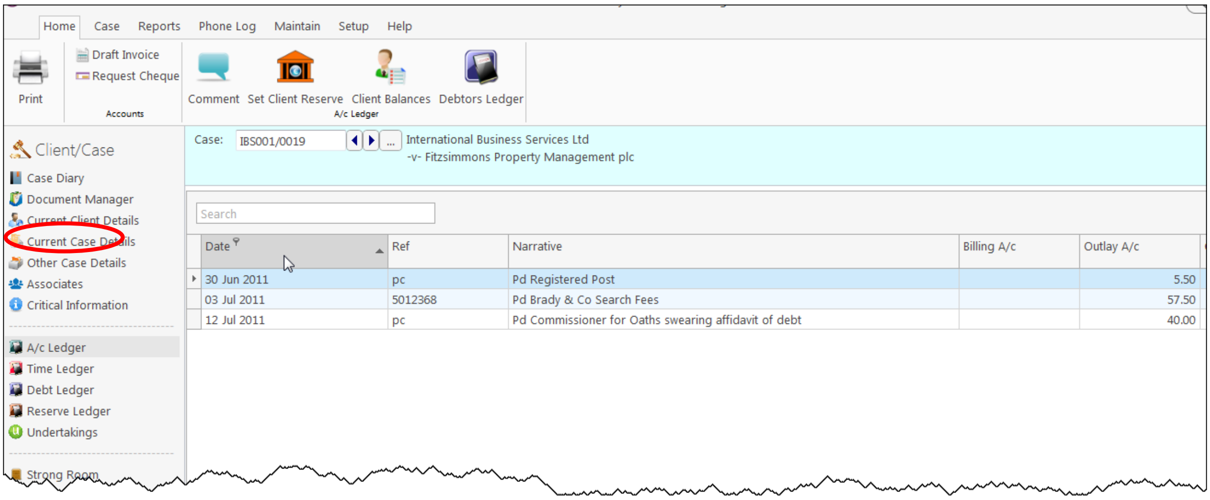
Account Functions in the Case Diary

View the Matter Ledger

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

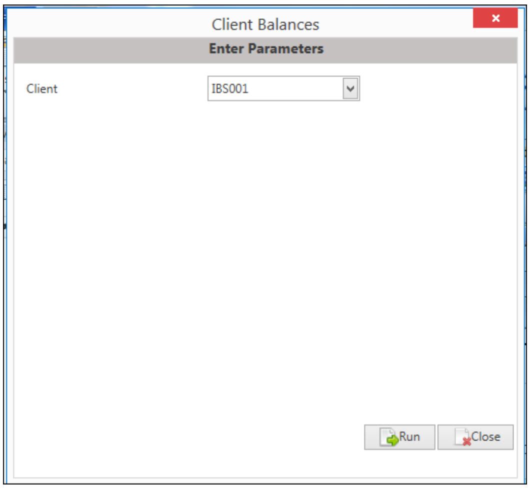
2. Click on **A/C Ledger** on the Case Diary Navigation panel.

3. The following screen will appear.



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

Run a Report on client balances

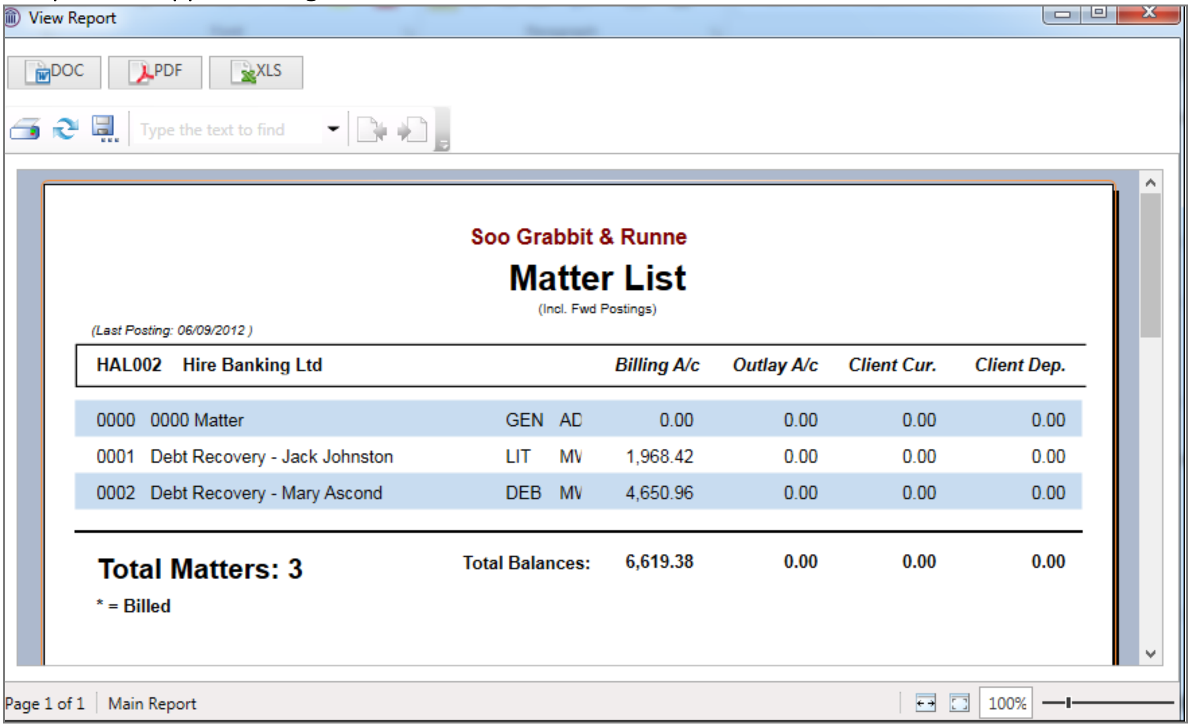


1. **Open** a case in the Case Diary.

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.



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Matter List

(Incl. Fwd Postings)

(Last Posting: 06/09/2012)

HAL002	Hire Banking Ltd			Billing A/c	Outlay A/c	Client Cur.	Client Dep.
0000	0000 Matter	GEN	AD	0.00	0.00	0.00	0.00
0001	Debt Recovery - Jack Johnston	LIT	MV	1,968.42	0.00	0.00	0.00
0002	Debt Recovery - Mary Ascond	DEB	MV	4,650.96	0.00	0.00	0.00

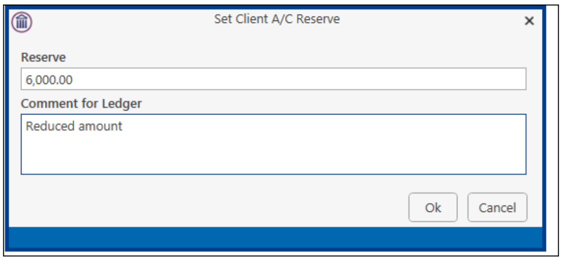
Total Matters: 3 Total Balances: 6,619.38 0.00 0.00 0.00

* = Billed

How to set a reserve amount

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

2. Click on **A/C Ledger** on the Case Diary Navigation panel.



3. Click on **Set Client Reserve** on the Home tab, and the following screen will appear.

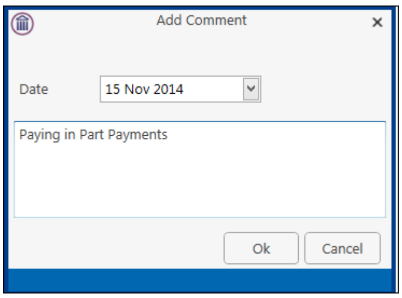
4. **Input** an amount and a comment.

5. Click **OK**; the reserve amount will then appear on the matter ledger.

How to add a comment

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

2. Click on **A/C Ledger** on the Case Diary Navigation panel.



3. Click on the **Comment** icon on the Home tab.

4. Input a comment.

5. Click **OK**; the comment will then appear on the matter ledger.

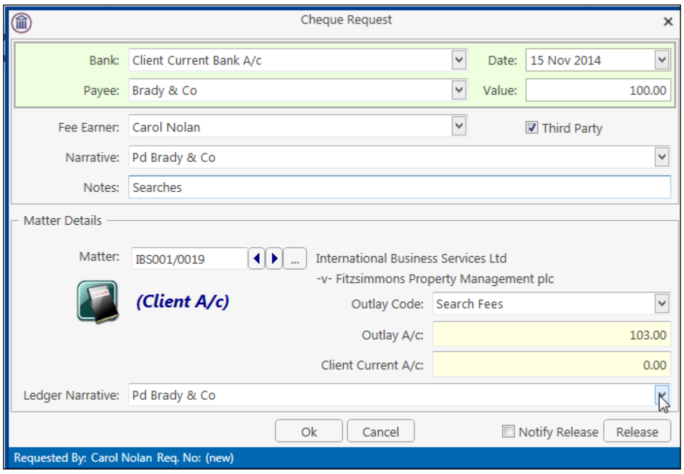
How to Create a Cheque Request

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

2. Click on **A/C Ledger** on the Case Diary Navigation panel.

3. Click on **Request Cheque** on the Home tab.

4. Input the following information:



Bank — Select the required bank account from the drop-down list.

Date — Today's date will be shown by default. Change as necessary.

Payee — Input the Payee's name or select from the supplier drop-down list.

Value — **Input** the amount of the cheque.

Fee Earner — This will default to the current fee earner. Select a different fee earner from the drop-down list if required.

Third Party — Check the box if this is a third party cheque.

Narrative — **Input** a cheque narrative or click on the down arrow to pick from a list of narratives.

Notes — **Input** a note to the Accounts Department if required.

Matter — This will show the current case. To select a different case, click on the browse button for the matter list and **double-click** the required case.

Notify Release — Check this box if you want an email to be sent to the Accounts Department when the cheque has been released.

Ledger Narrative — By default to the cheque narrative will be shown but it can be amended either manually or by selecting from the drop-down list.

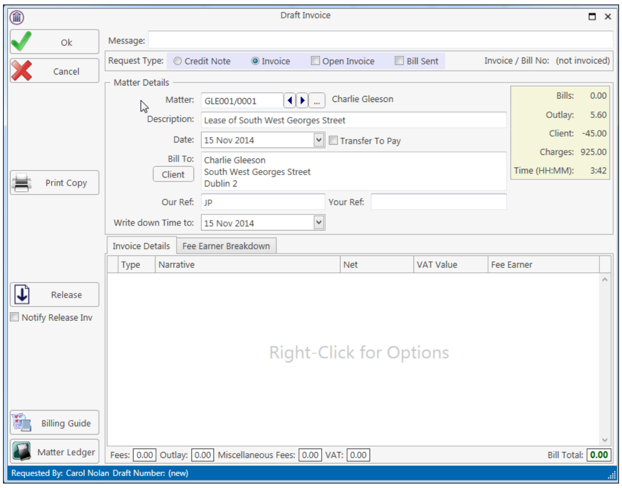
5. To release the cheque to accounts click **Release**. Alternatively to hold the cheque in your cheque list click OK.

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.

10. Click on **Draft Invoice** on the Home tab while in **A/c Ledger**. A Draft Invoice screen will appear.



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

Message	**Input** a message for the Accounts Department (optional)
Type	**Invoice** will be checked by default; select **Credit Note** if required.
Open Invoice	Check the box to create an open invoice.
Bill Sent	This box is to be checked when the bill is actually sent.
Matter	This will default to the current case; to change the case click on the browse button to bring up a matter list and double-click the required case.
Description	This will default to the matter description to amend click in the input box provided and amend.
Date	The date will default to today's date but may be changed.
Transfer to Pay	If this is checked, funds will be transferred from the client account to pay the bill.
Bill to	The client details will be shown by default, but the name and/or address may be changed. Click the **Client button** to revert to the client details. 
Our Ref	This will default to the Fee Earner's initials, but may be amended if required.
Your Ref	**Input** a reference if applicable.
Write down time to	Today's date will be shown by default. You may choose a different date for the time to be written down to.

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.

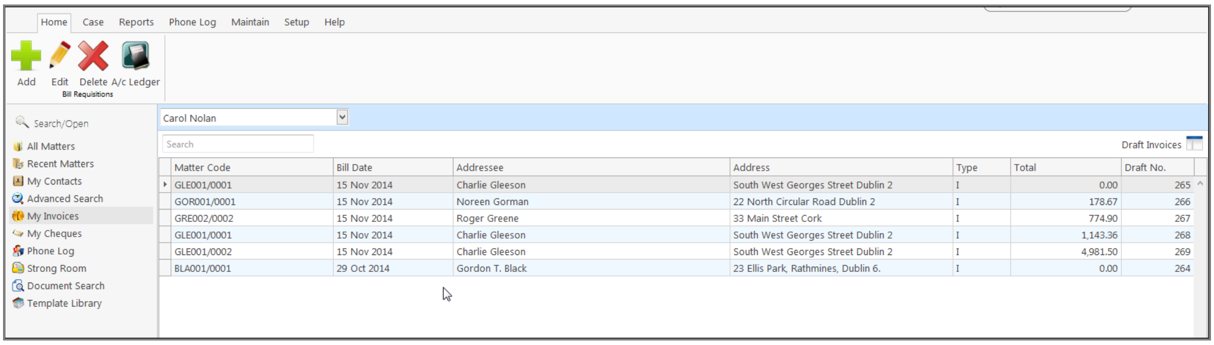
2.

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.



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.

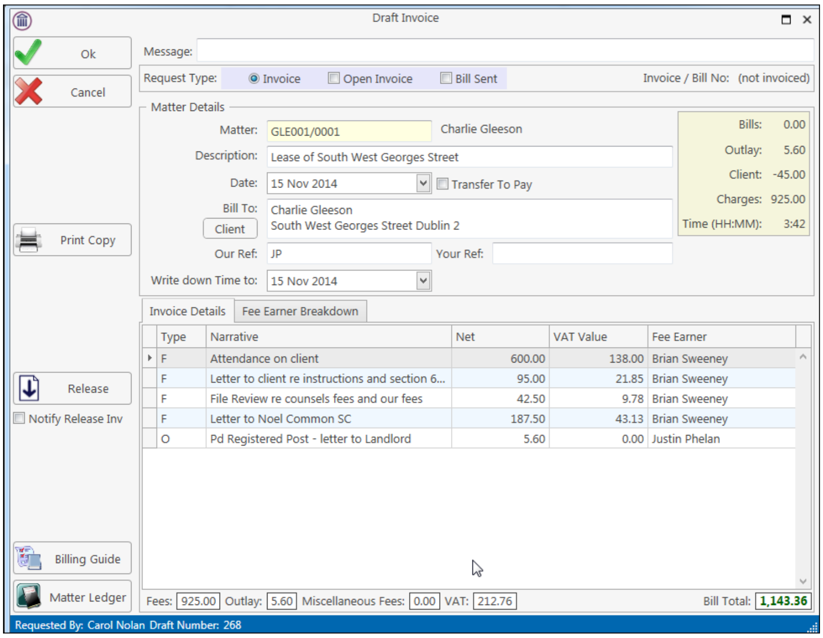
How to Edit a Draft Invoice

1. Go to **My Invoices** as described above.

2. Either select the invoice to be edited and click the **Edit** icon on the Home tab or **double-click** the invoice in the list.

3. **Edit** the invoice as required.

4. Click **OK** to save the changes or click **Release** to save the change and send to Accounts for approval.

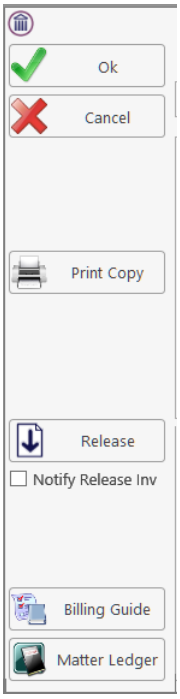


How to Delete a Draft Bill

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

2. Click on **Delete** on the Home tab or press **Delete** on your keyboard; you will be asked to confirm the deletion.

3. Click **OK** to delete.



How to Release a Draft Bill to Accounts

1. Go to **My Invoices**.
2. **Double click** on the invoice to be released; the draft bill will appear.

3. Click on the **Release** button on the left-hand panel to send to Accounts for approval.

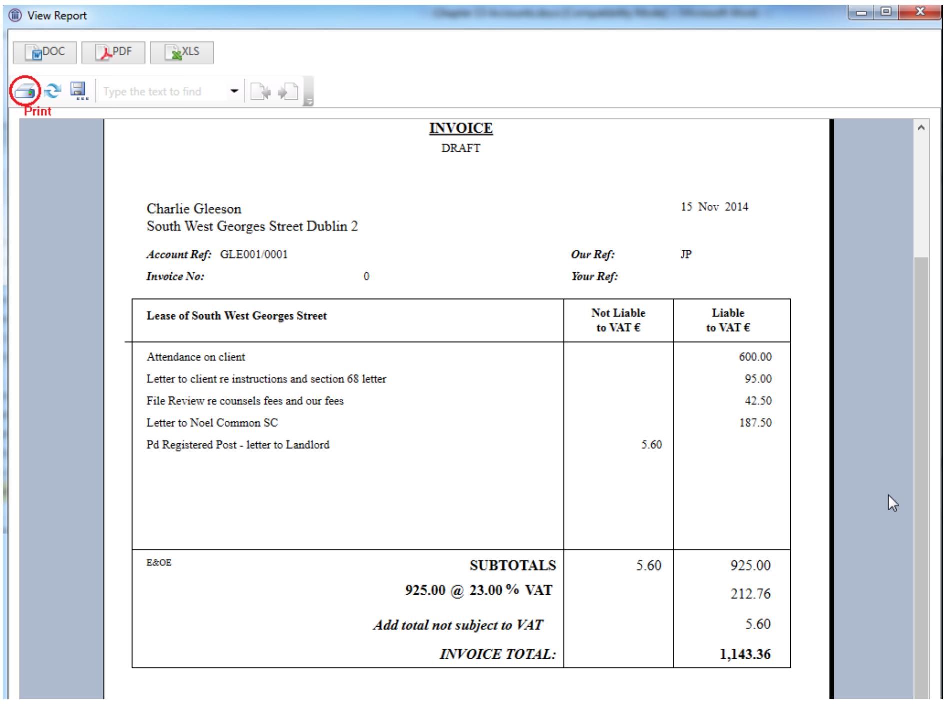
How to Print a Draft Bill

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.

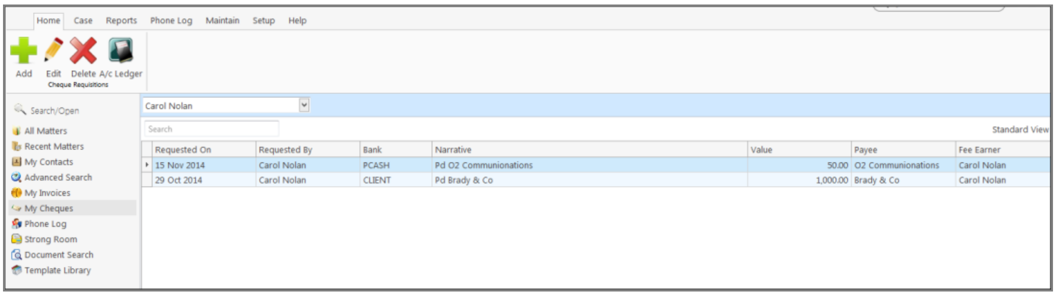


My Cheques

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.

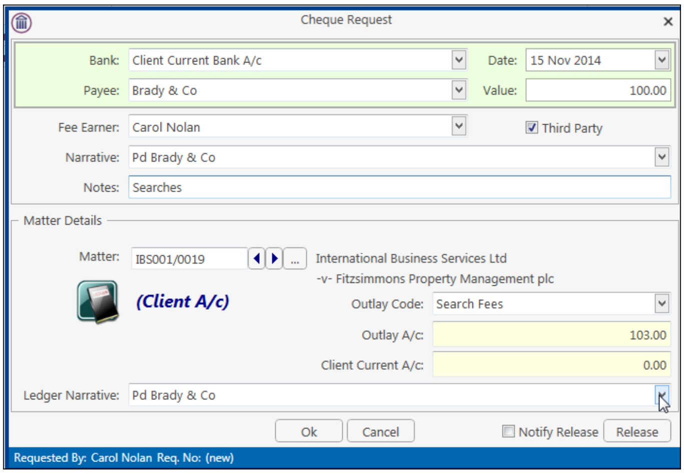


How to Create a Cheque Request

1. View **My Cheques** as described above.

2. Click **Add** on the Home tab.

3. Input the following information:



Bank	Select from the drop-down list.
Date	Today's date will be shown by default; change as required.
Payee	Input the Payee's name or select a supplier from the drop-down list.
Value	**Input** the amount of the cheque.
Fee Earner	This will default to the current fee earner. Select a different fee earner from the drop-down list if required.
Third Party	Check the box if this is a third party cheque.
Narrative	**Input** a cheque narrative or click on the down arrow to pick from a list of narratives.
Notes	**Input** a note to the Accounts Department if required.

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

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

How to 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.

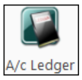
2. **Double click on** the cheque you want to release.

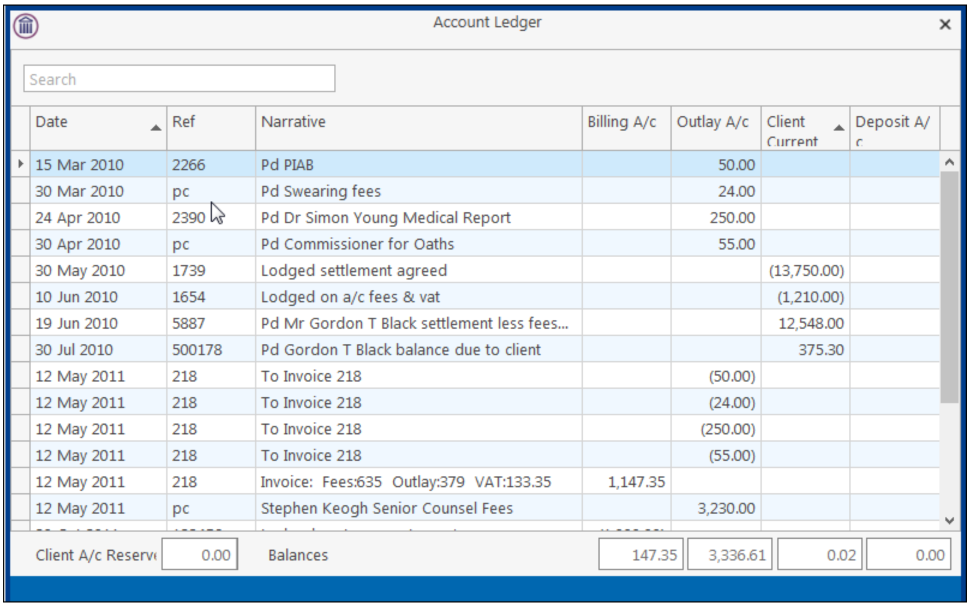
3. Click on the **Release** button at the bottom right of the Cheque Request dialogue box.

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.





Date	Ref	Narrative	Billing A/c	Outlay A/c	Client Current	Deposit A/c
15 Mar 2010	2266	Pd PIAB		50.00		
30 Mar 2010	pc	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

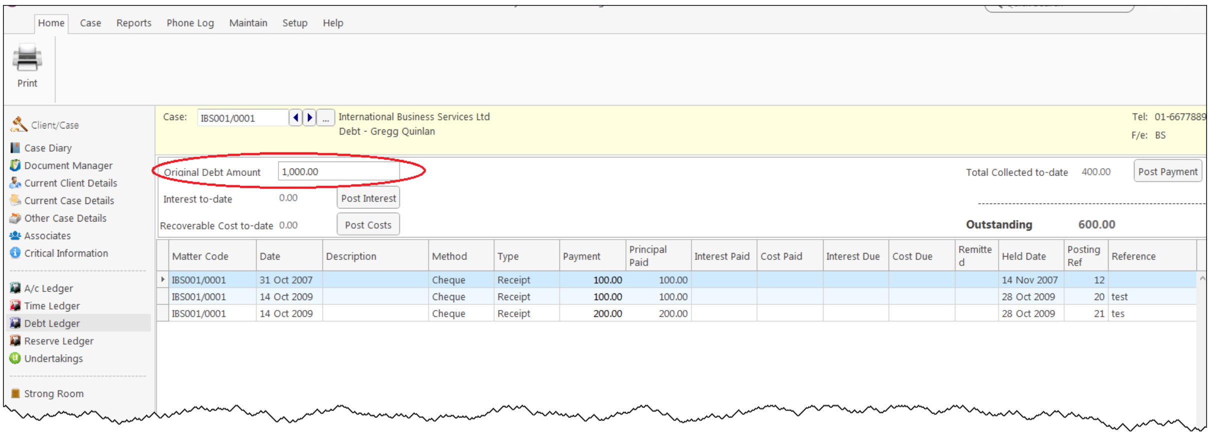
1. **Open** a case in the **Case Diary**.

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.



3. **Input** the Original Debt amount.

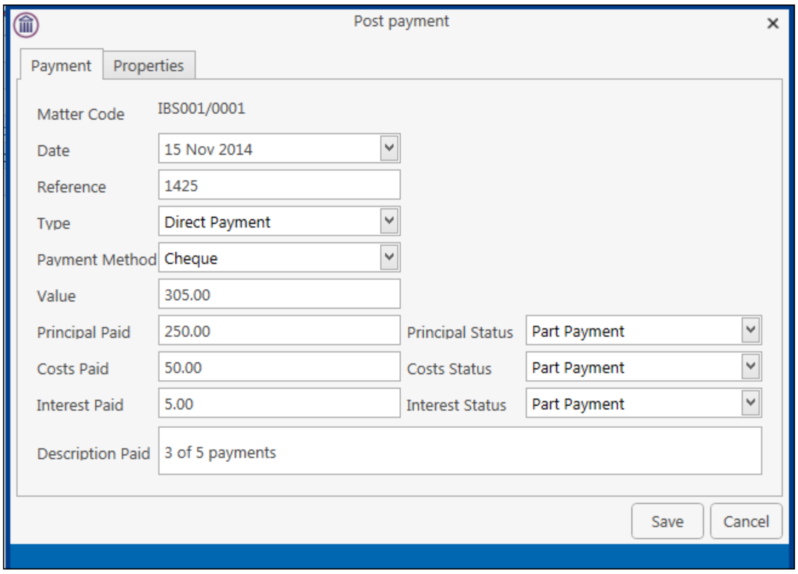
4. Click the check mark under the amount to  confirm.

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

How to Post a Payment

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

2. Click **Post Payment.**



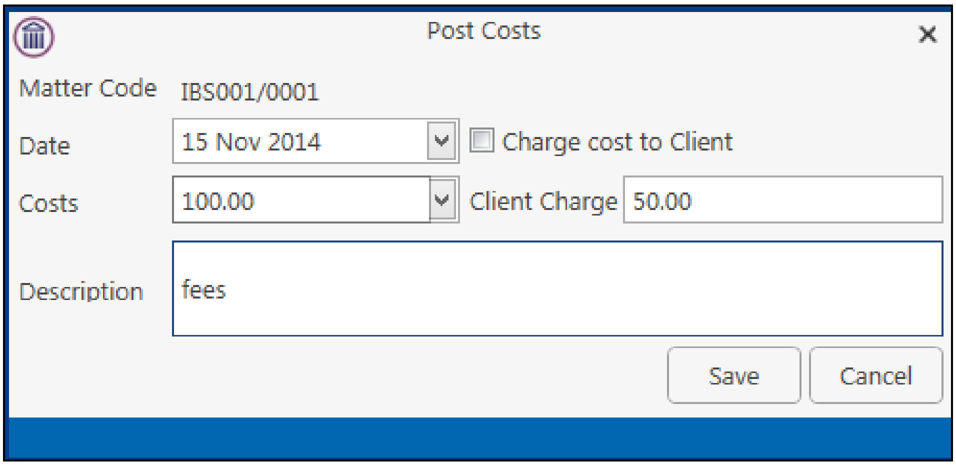
Input the following information on the **Post Payment** dialogue box:

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

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**.



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

Date — The date will default to today's date amend if required.

Costs — Input an amount for the cost or select from the drop-down list.

Description — **Input** a description of the cost.

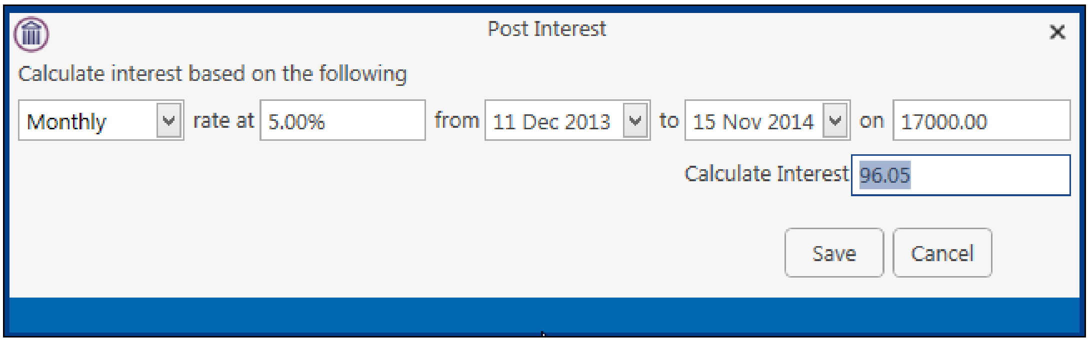
Charge cost to Client — Check the box if the cost is chargeable to the client

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

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

How to Post Interest

1. Click on **Post Interest**.



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

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

Rate at — **Input** the rate of interest

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

To	**Input** the end date or click the down arrow to select from the calendar.
On	**Input** the amount on which the interest is to be calculated.

Note: Once the information is provided the interest will calculate automatically and will then be displayed in the Calculated Interest box.

3. Click **Save** to post the interest and the balance will automatically update.

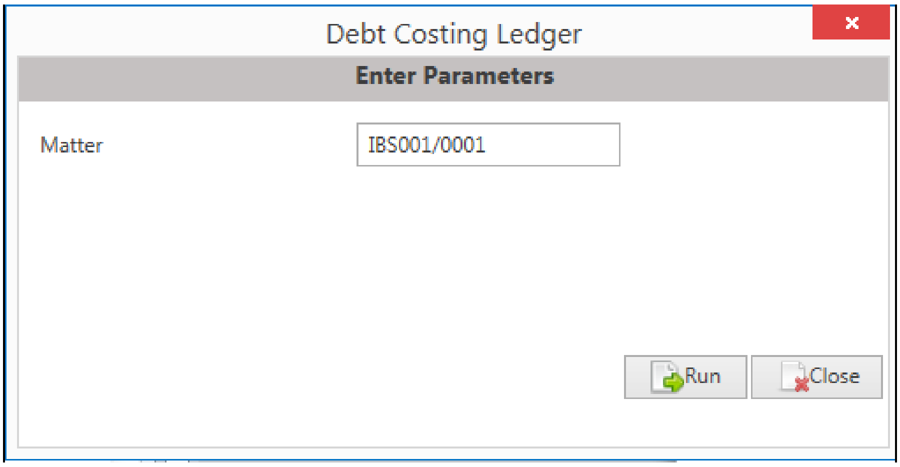
How to Amend a Entry

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.

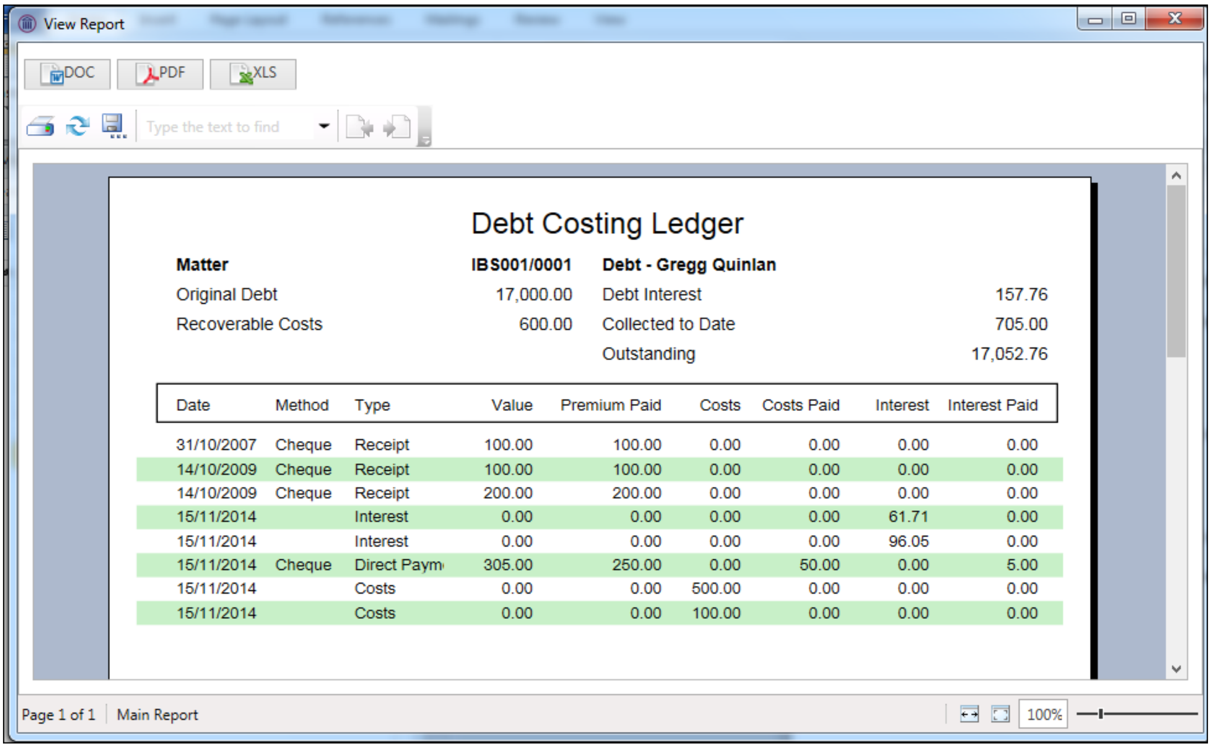
How to Print a Debt Ledger Report

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.



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	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	61.71	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	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.

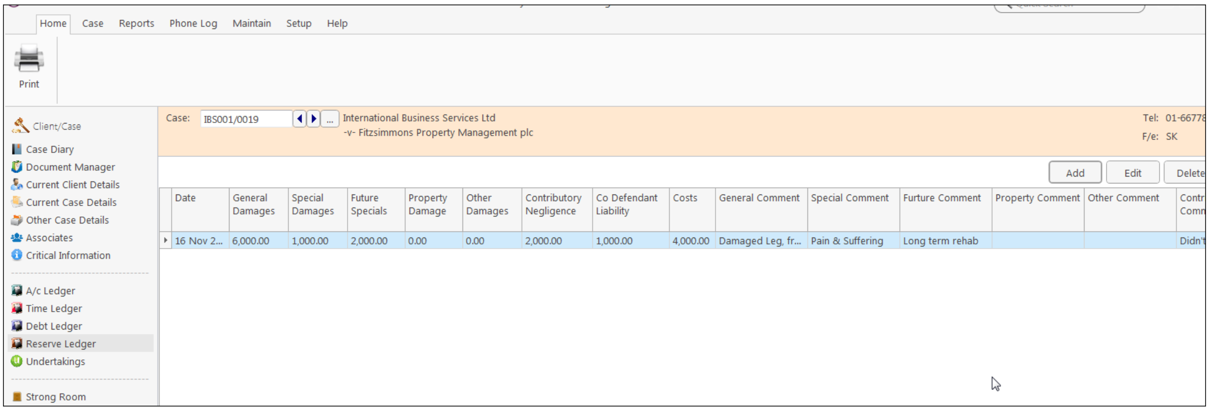
Chapter 13: The Reserve Ledger

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**.

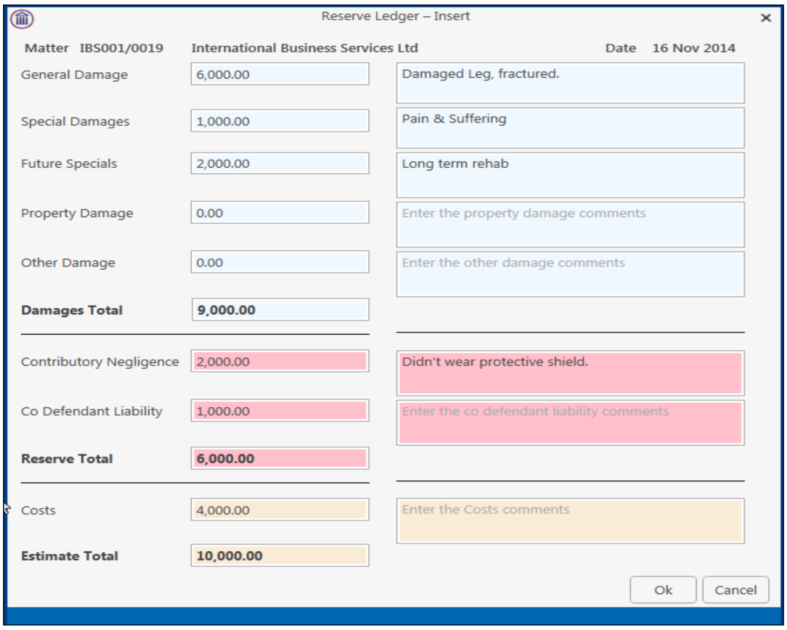
4. Click on **Reserve Ledger** on the **Case diary** Navigation panel. The Reserve Ledger will be displayed.



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.



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.

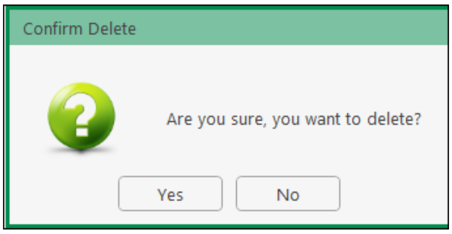
3. Click **OK** to Add the entry.

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.

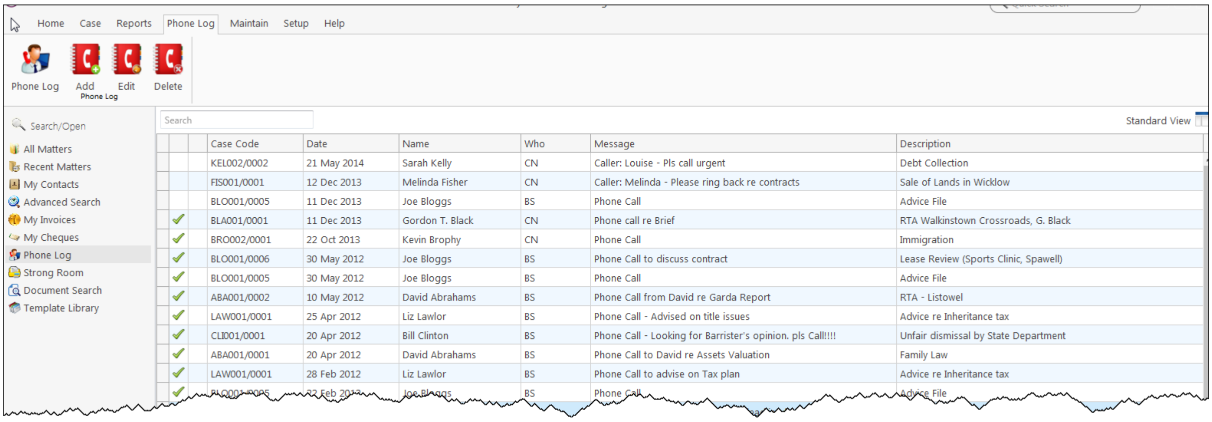
Chapter 14: Phone Log

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.



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

Tip to refresh the phone log click **Phone Log** on the Home tab.

Search the Phone Log

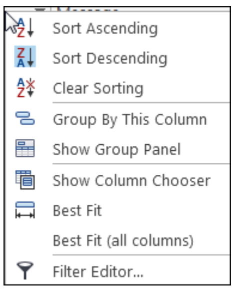
1. Open the Phone Log.

2. Click in the search box.

3. Input the search terms.

4. To clear the search, click the Clear button to the right of the search box. 

How to Sort the Phone Log



1. Open the Phone Log.

2. To Sort by column click on a column heading, e.g. Name.

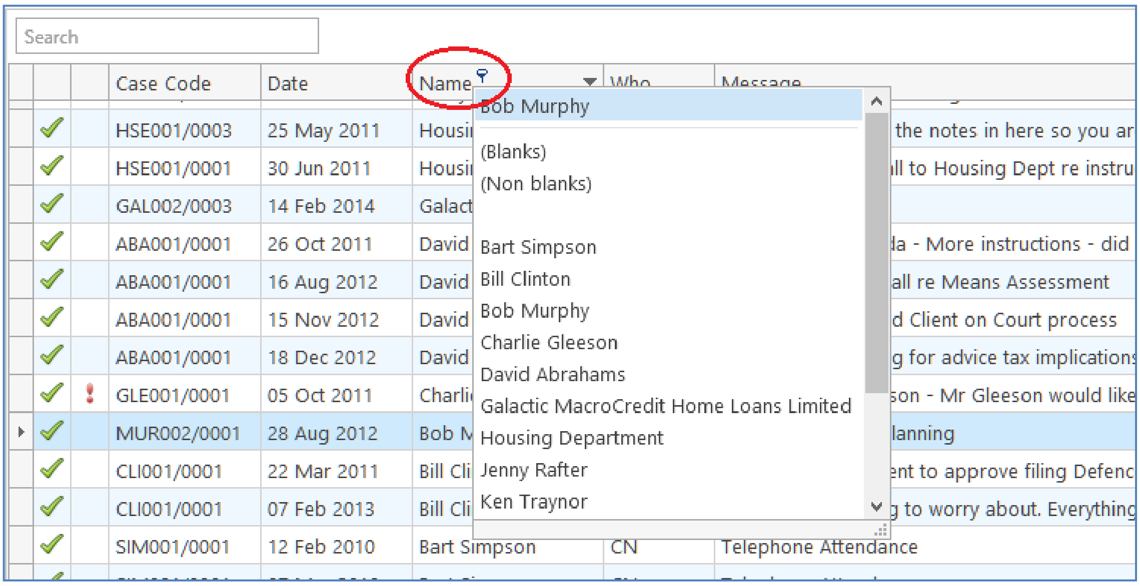
3. To clear the sort right, right-click on the column heading and select **Clear Sorting** from the pop-up menu.

How to 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.



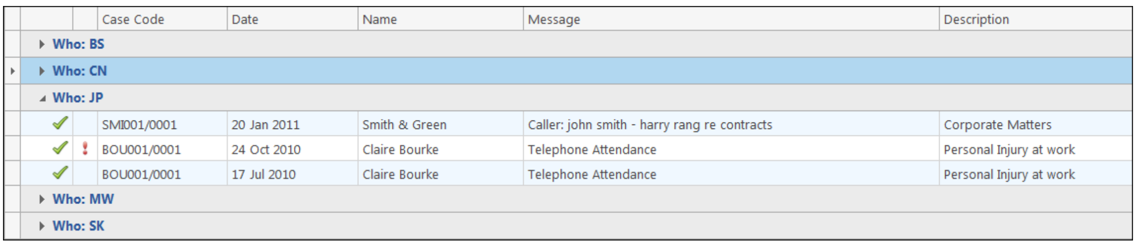
4. To clear the filter, select **(All)** from the filter drop-down menu (alternatively, right-click the column heading and select **Clear Filter** from the pop-up menu).

How to Group column headings in the Phone Log

1. Open the Phone Log.

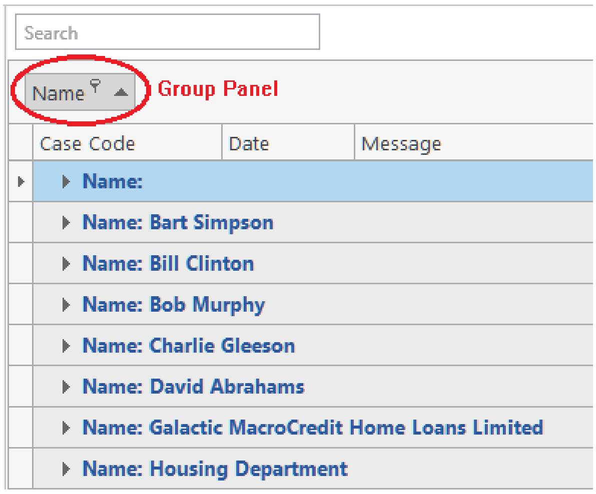
2. Right-click on a column heading to see the pop-up menu.

3. Select **Group By This Column** from the menu. The following example shows the results.



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.

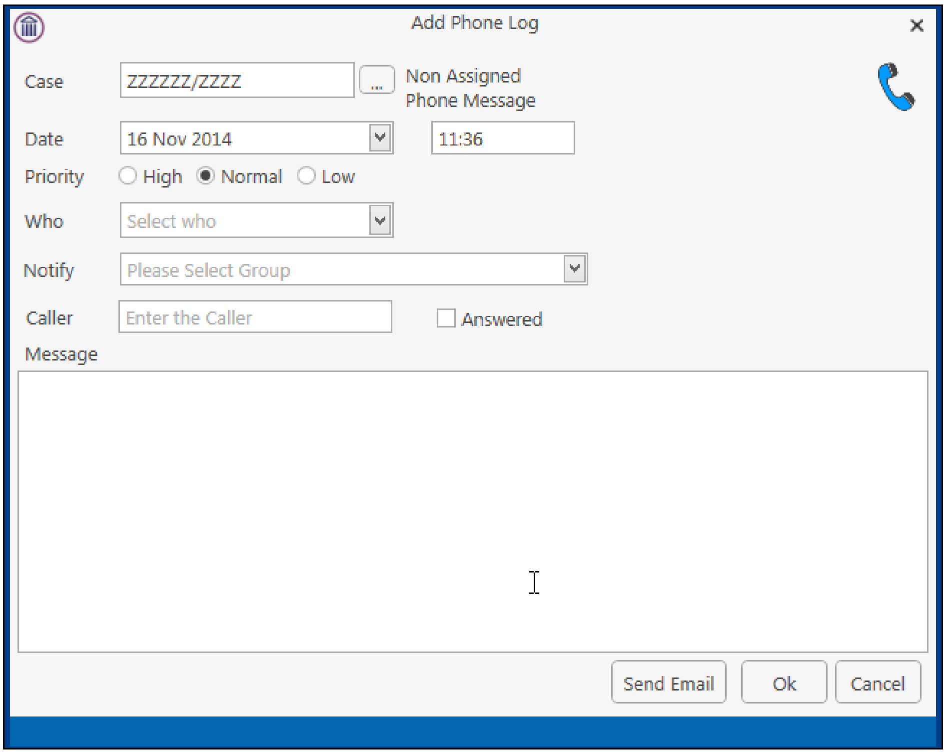


6. Select **Ungroup** from the pop-up menu.

How to add a phone message

1. **Open** the phone log.

2. Click **Add** on the Phone Log tab.



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

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

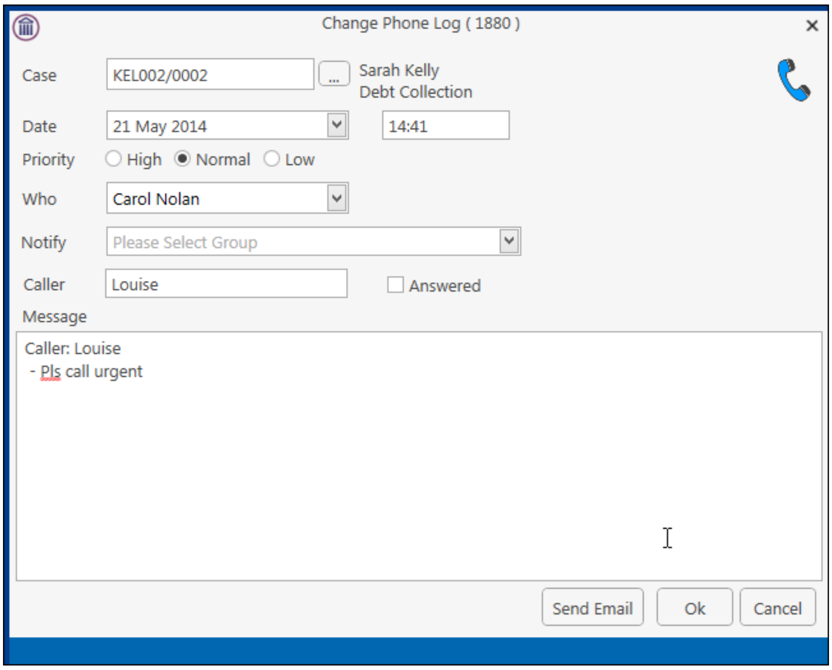
Priority	**Select** the priority of the message (HIgh, Normal or Low).
Who	Who is the message for. You may select from the drop-down list.
Notify	To notify somebody else, in addition to the addressee of the message, select from the drop-down list.
Caller	**Input** the caller's name.
Message	**Input**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

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

How to edit a phone message

1. In the phone log, select the message you want to amend.

2. Click **Edit** on the Phone Log tab.



3. Amend as required.

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

How to delete a phone message

1. **Open** the phone log.

2. Select the message you want to delete.

3. Click **Delete** on the Phone Log tab. You will be asked to confirm the deletion.

4. Click **Yes.**

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

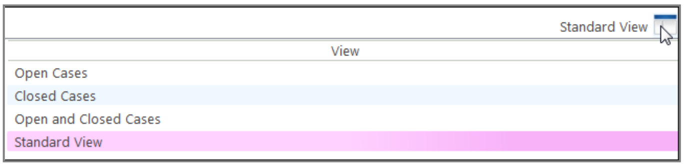
Chapter 15: Closed Cases

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.



4. Select the required View

   - **Closed Cases** to search only closed cases
   - **Open Cases** to search only open cases.
   - **Open and Closed Cases** to search both lists.

5. Input a search term in the search box; the search will update as you type.

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

1. Search for the closed case as described above.

2. Double click the required case to view the Case Diary.

3. Click on **A/C Ledger** on the Navigation panel to view the archived ledger.

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

How to Reopen a closed case

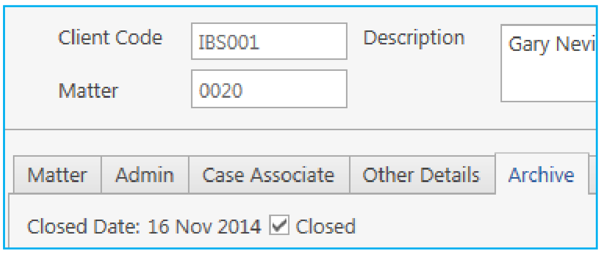
1. Search for the closed case as described above.

2. Double click to open in the case diary.

3. Click on **Current Case Details** on the Navigation panel, to see the Current Case Details screen.

4. Select the **Archive Tab** in Current Case Details.

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



How to close a Case

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

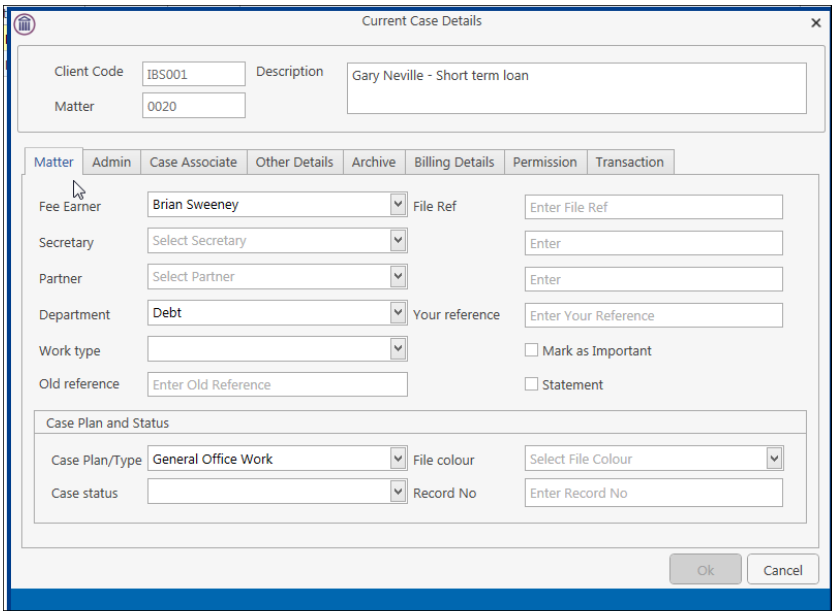
1. Click on **Search/Open** on the Navigation panel.

2. Select **All Matters** on the Navigation panel.

3. **Search** for the case in the normal way.

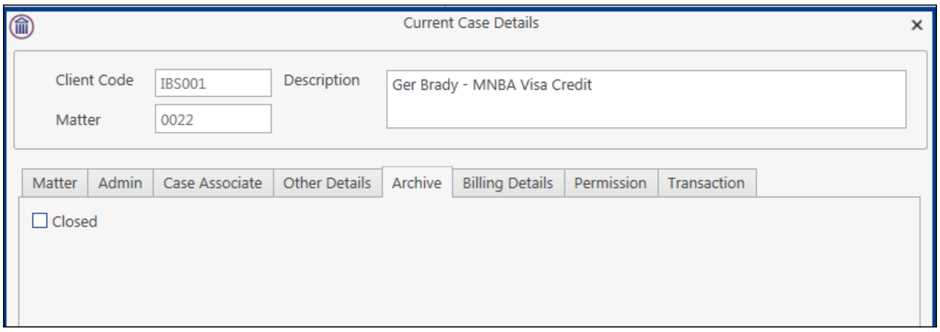
4. **Double click** to open in the Case Diary.

5. Click on **Current Case Details** on the Navigation panel, to view the Current Case Details screen.

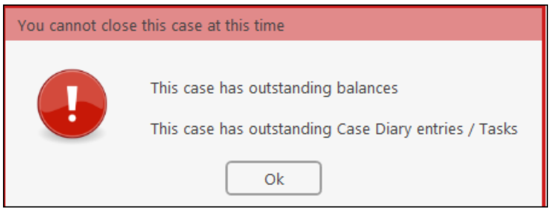


6. Select the **Archive Tab**.

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

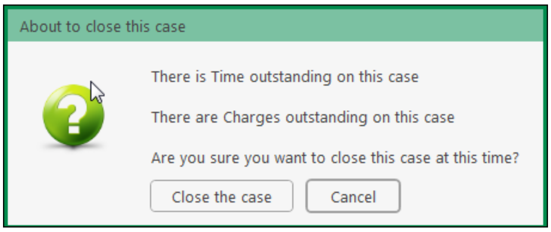


8. If the case cannot be closed because there are uncompleted tasks or there is an account balance, a warning message will be displayed, giving the reason why the case cannot be closed.



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.

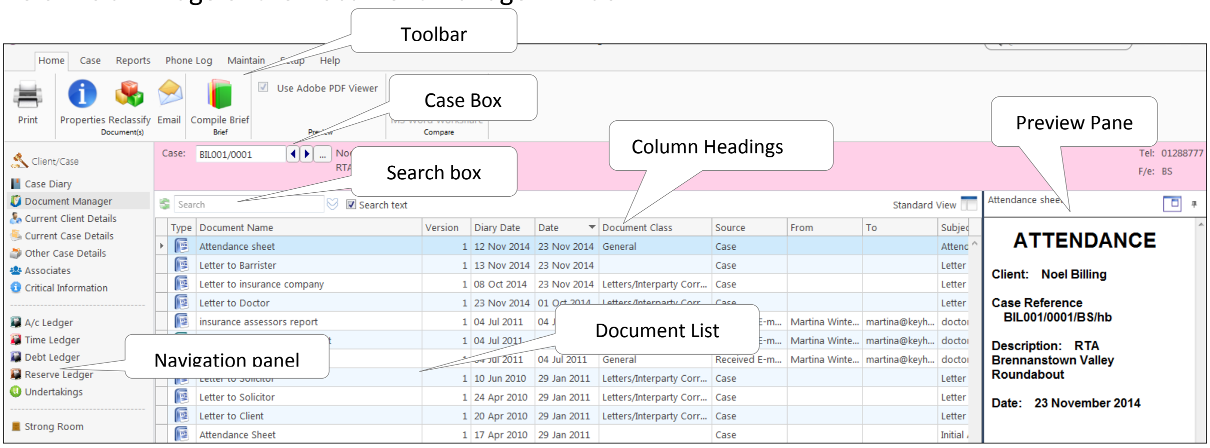


Chapter 16: Using the Document Manager and Brief Wizard

Document Manager

Getting around Document Manager

Below is an image of the Document manager window.



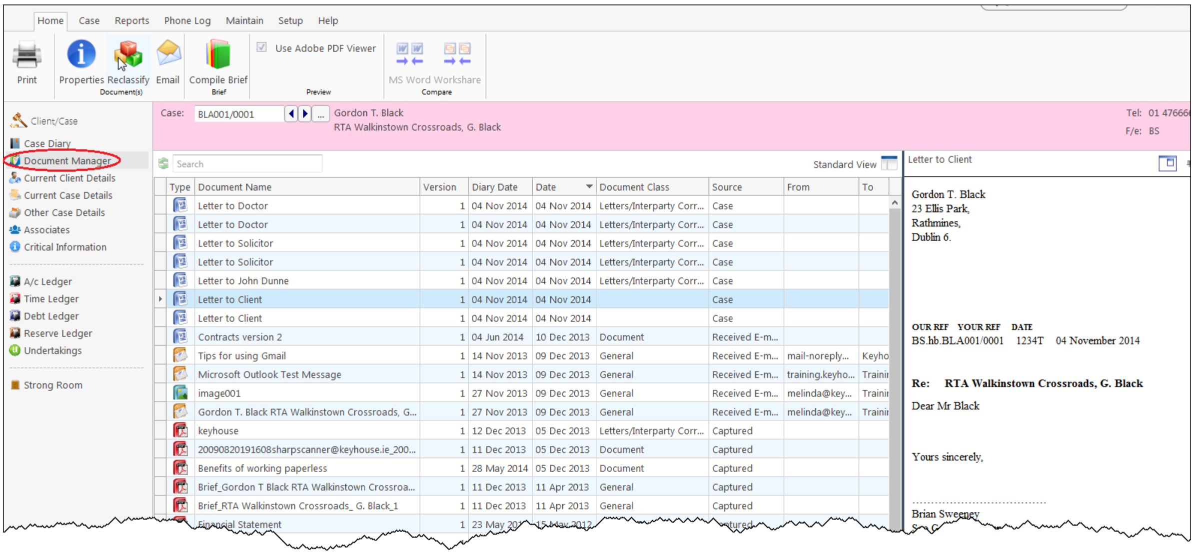
Window area	Description
Case Box	Input the case reference in this box or click the … browse button and search for the required case.
Column Headings	Click the column headings to sort the list of documents by name, version, diary date, document date, document class, Source, From, To, Subject.
Document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

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

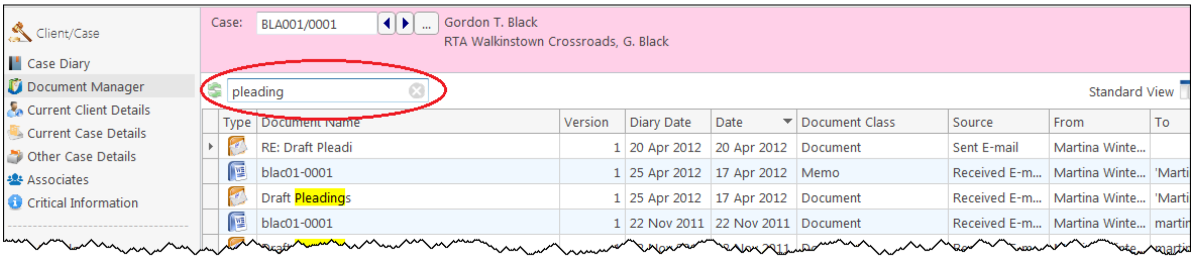
How to search the document manager

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.



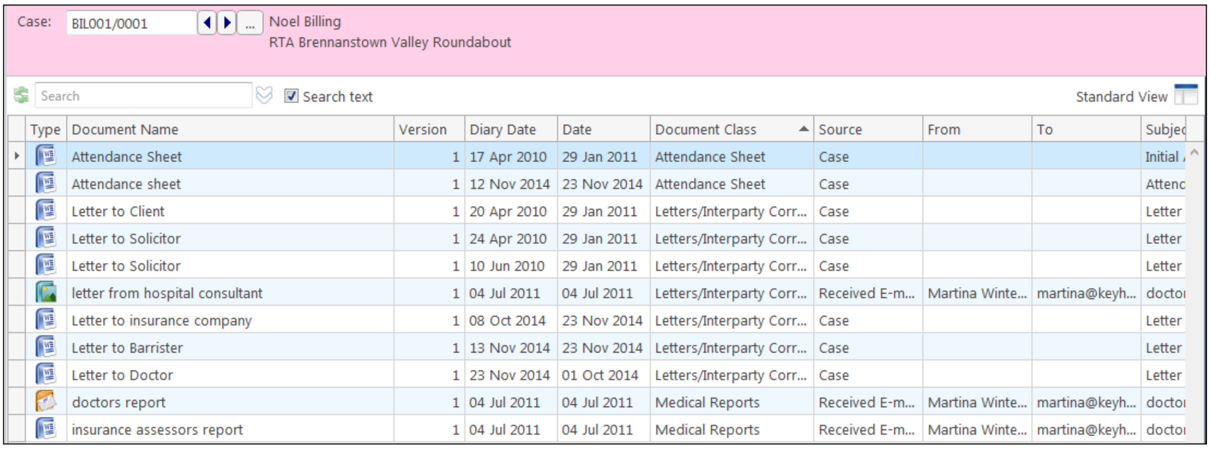
5. **Input** the search terms in the **Search box**. The search results will update in real time, showing all documents containing any of the search terms.



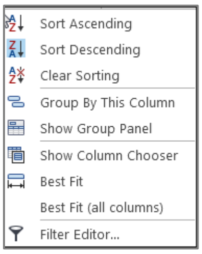
6. **Select** a document to see a preview. **Double click** to the open the document.

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**.

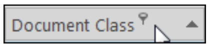


5. To remove the sort, **right-click** the column heading and choose **Clear Sorting** from the pop-up menu.

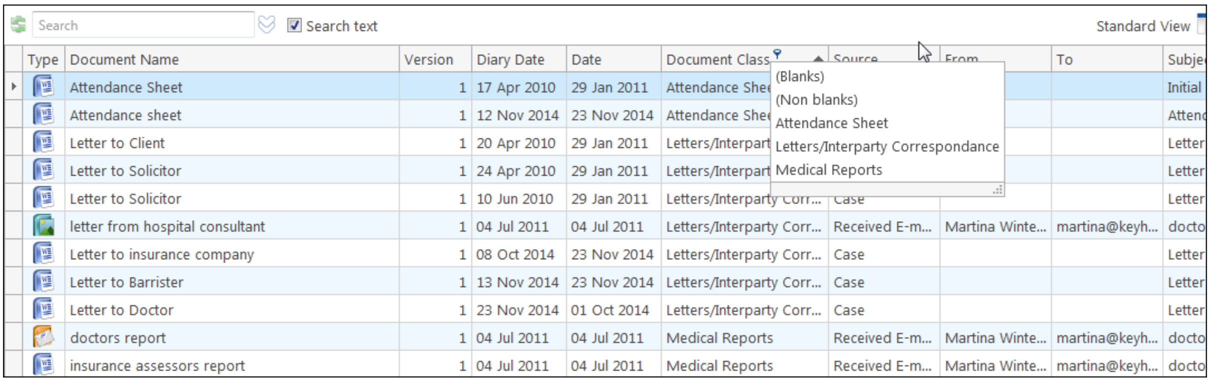


How to Filter Columns

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



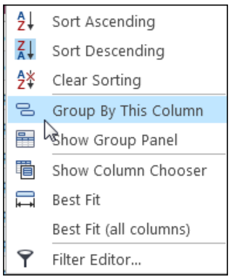
4. Click the filter pin and select the required filter from the drop-down menu.



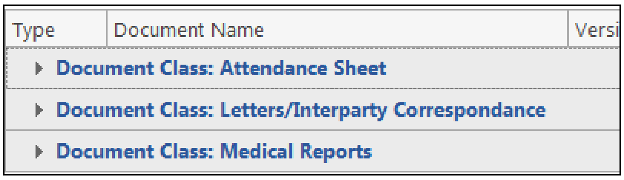
5. To remove the filter, select **(All)** from the filter pin drop-down menu (alternatively right-click the column heading and select **Clear Filter** from the pop-up menu).

How to Group by Column

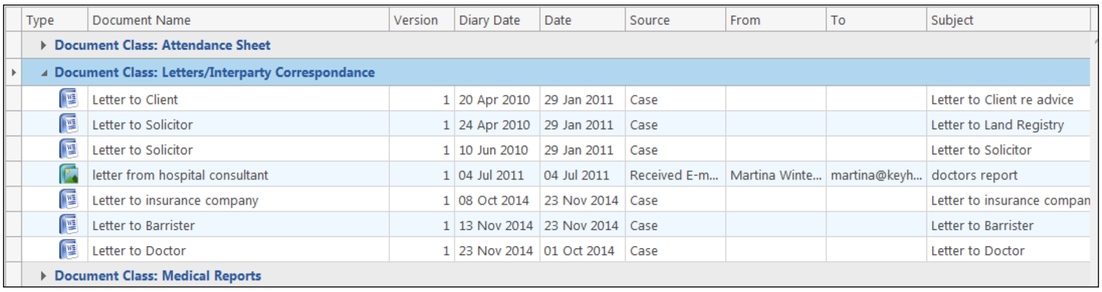
9. **Right-click** the column heading you want to group by, to show the pop-up menu.



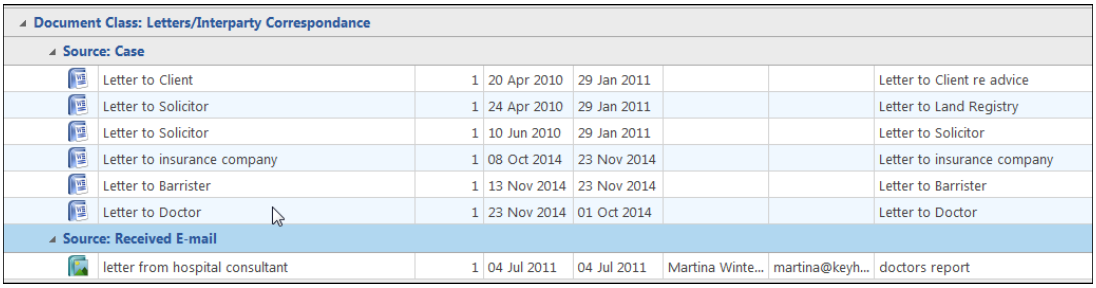
10. Select **Group By This Column**. In the following example, the documents are grouped by document class.



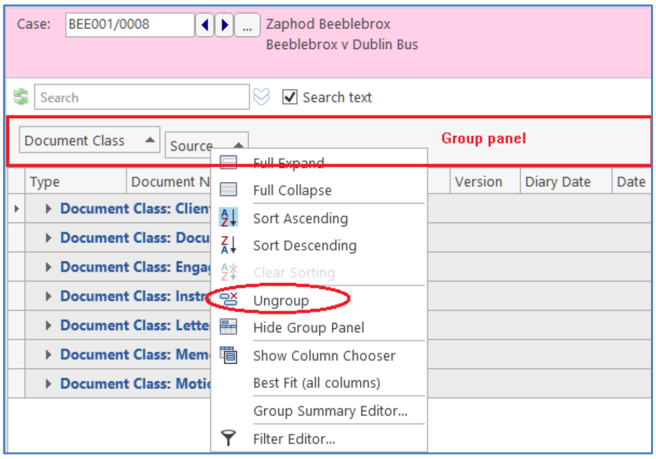
11. To **expand/collapse** a group click the **arrow** to the left.



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**.

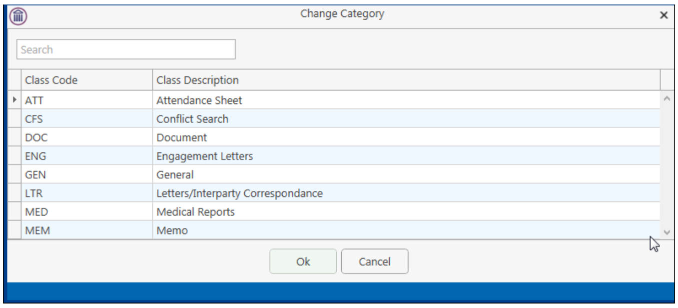


To remove the grouping, right-click in any column heading and select **Show Group Panel** from the pop-up menu. The group panel will contain each of the headings by which the documents are grouped (***Document Class*** and ***Source*** in this example). Right-click each of these in turn and select **Ungroup** from the pop-up menu.



How to reclassify documents

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



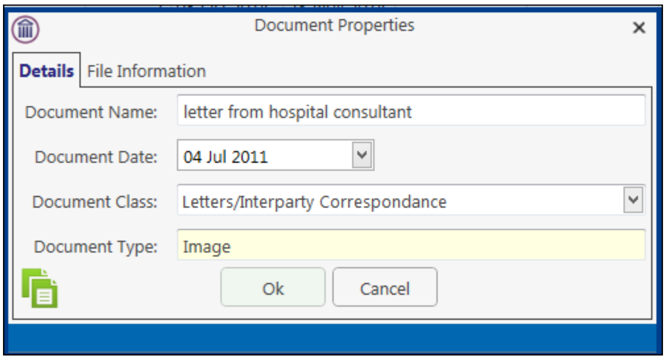
   TIP: To select multiple documents: Hold down **CTRL** on your keyboard and click each of the documents to be selected.

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

3. Click **OK**.

How to change the Document Properties

1. Select the document 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, 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.

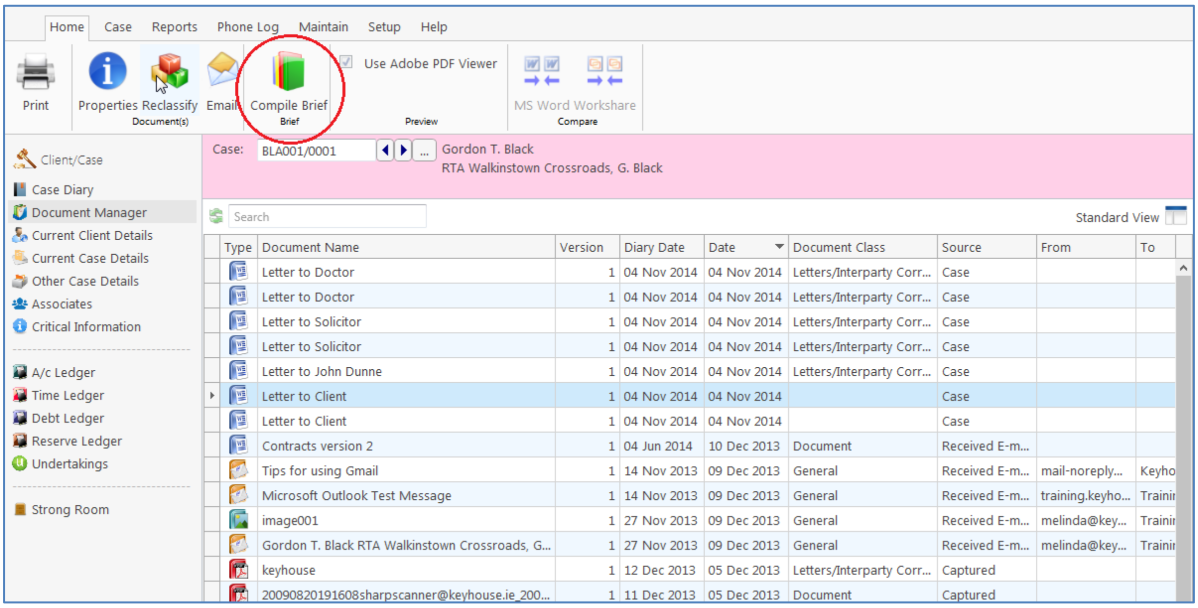
4. Please review the earlier part of this chapter (Document Manager, particularly p. 138 above) for details on how to rename and reclassify a document.

   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.

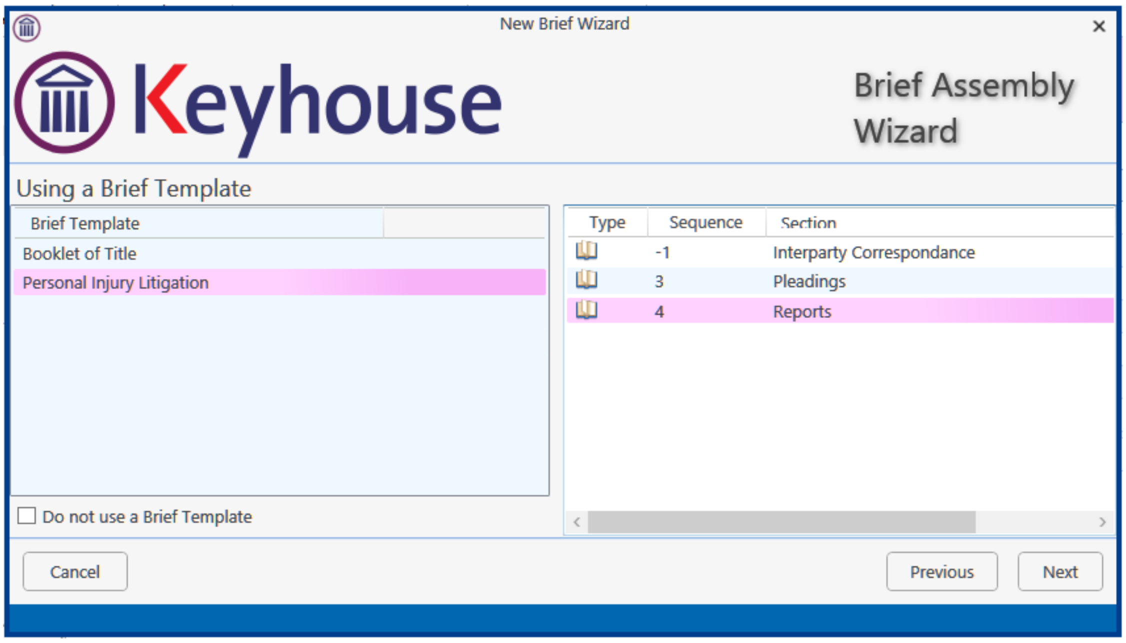
2. Click **Document Manager** on the Navigation panel.



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**.

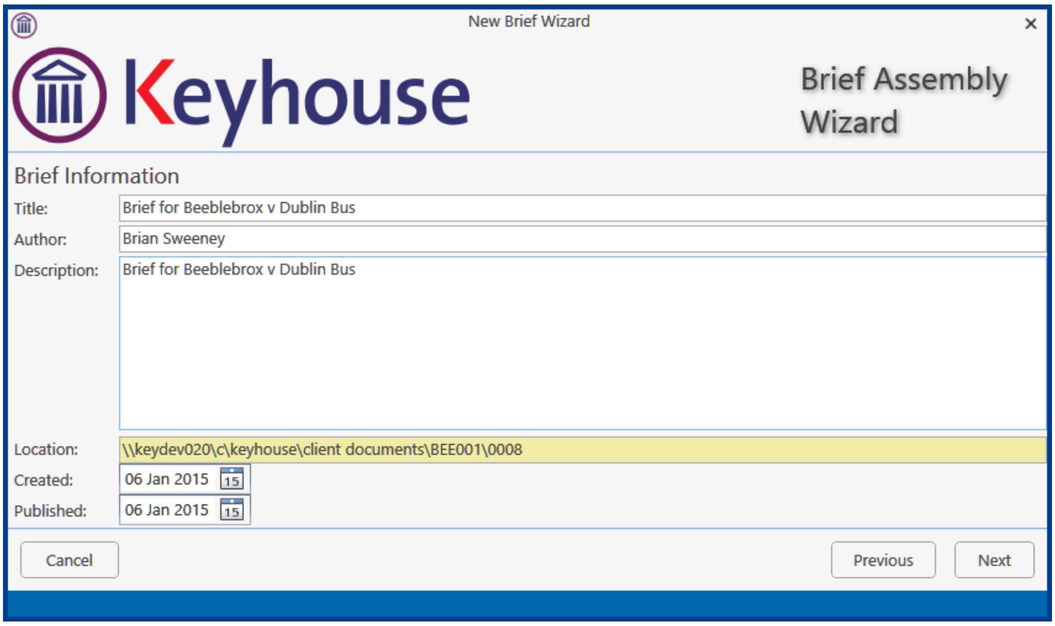


6. There are three options for populating the brief with documents:

- ***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.

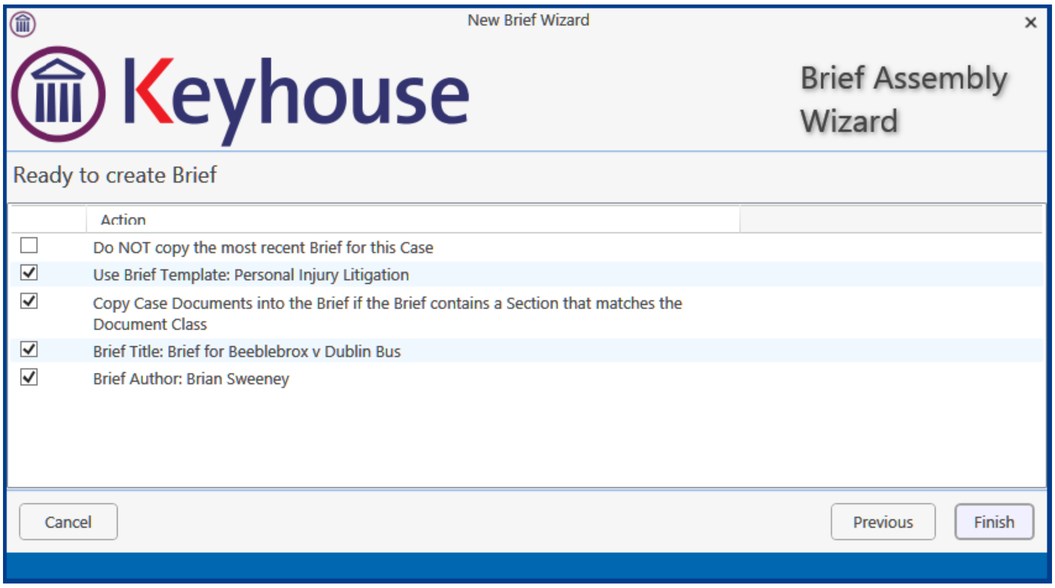
Tip: for further information on each option click the question mark icon beside it.

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



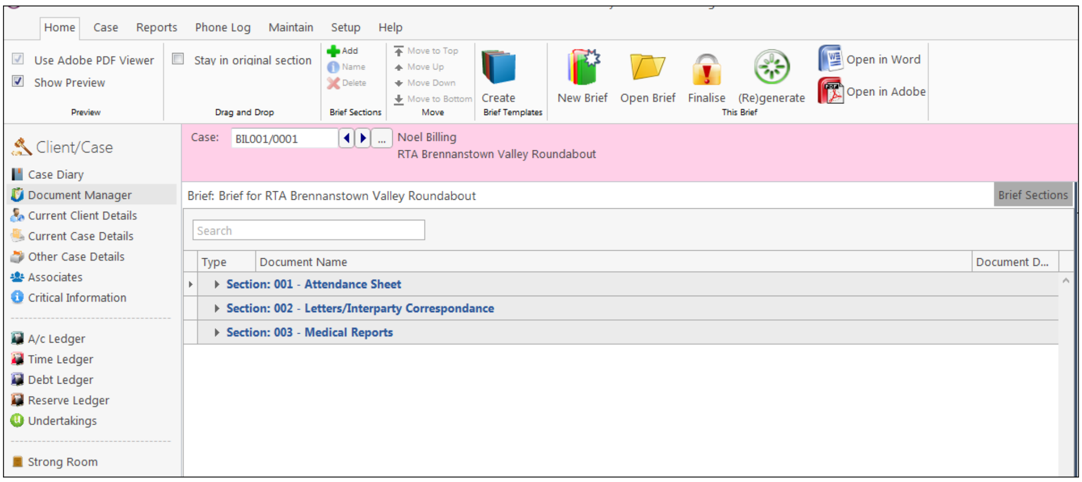
You may accept the default information or amend as required.

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



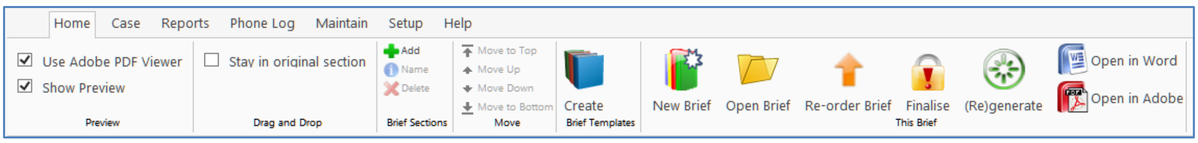
7. When you are satisfied, click **Finish**.

8. The sections in the brief will be displayed.



Brief Home tab

The Home tab in the Brief:



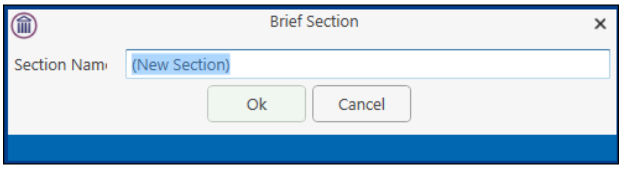
Brief Sections

How to Add a Section

1. Click **Add** on the Home tab.

2. Name the new section.

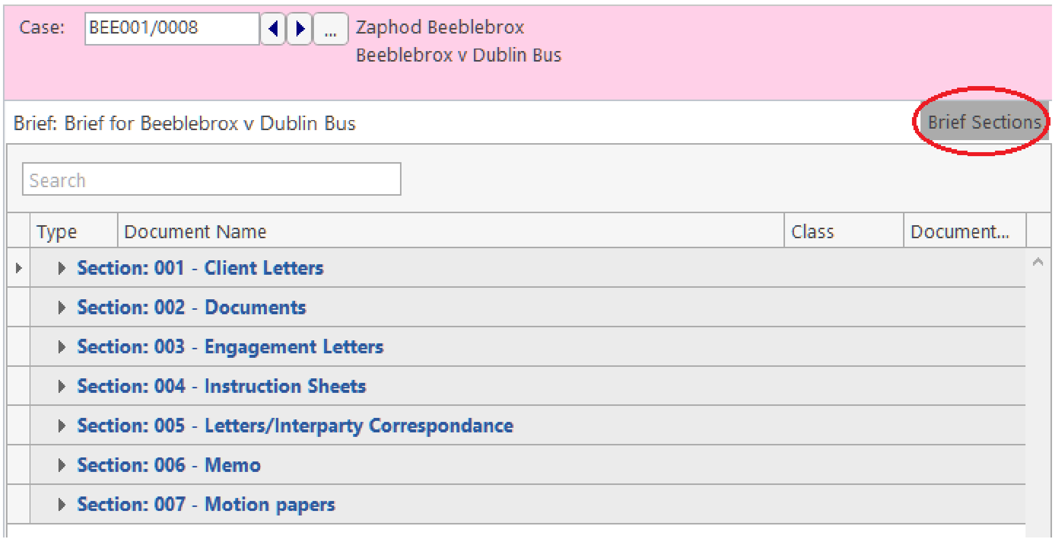
3. Click **OK**.



4. The new section will appear in the **Section** list.

How to amend a Section Name

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

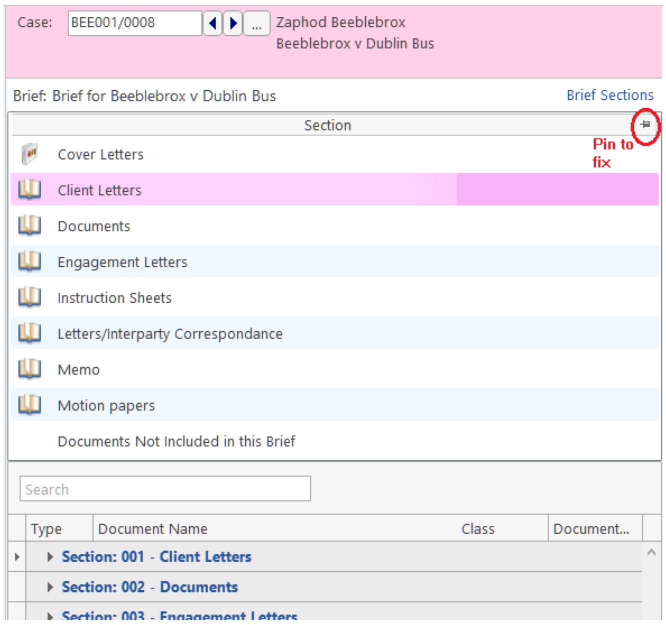


2. A list of sections will be expanded.
   Tip: To Show the list permanently click the pin.

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

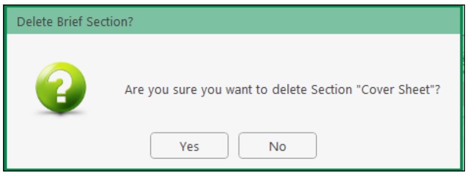
1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 143 above).

2. Select the **Section** you want to delete.

3. Click D**elete** on the Home tab. Alternatively, right-click the Section and choose **Delete Section** from the pop-up menu.

4. A message will ask you to confirm the deletion.

5. Click **Yes**.

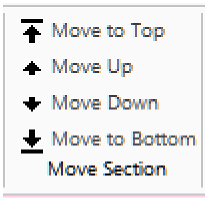


How to change the order of Sections

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



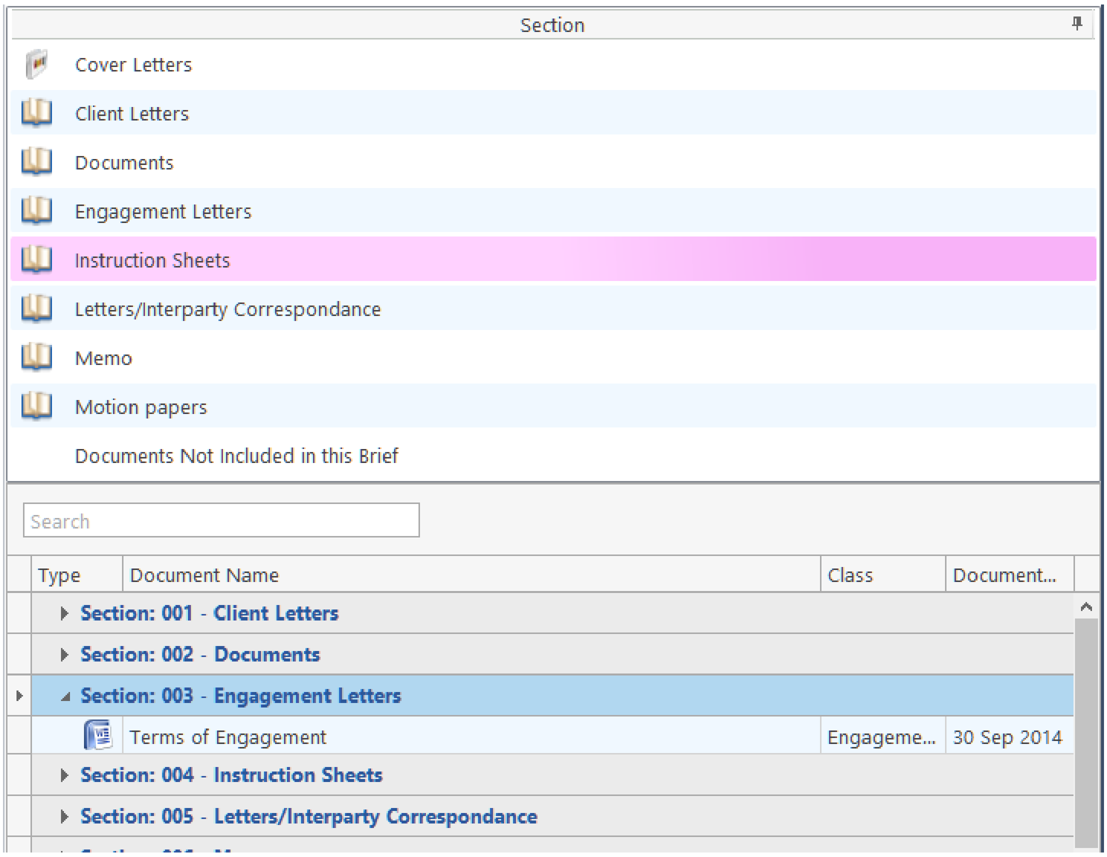
Move the selected section **to the top** of the list of sections.
Move the selected section **up one position**.
Move the selected section **down one position**.
Move the selected section **to the bottom** of the list.

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.



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.

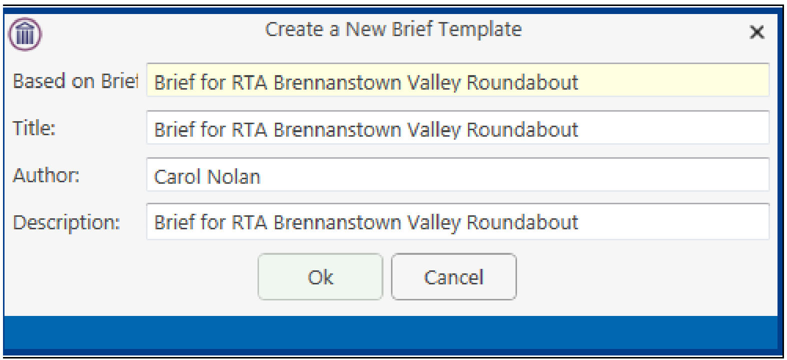
Main sections are included in the Table of Contents; ***Cover*** sections are intended to contain cover letters and similar preliminary material.

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**



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.

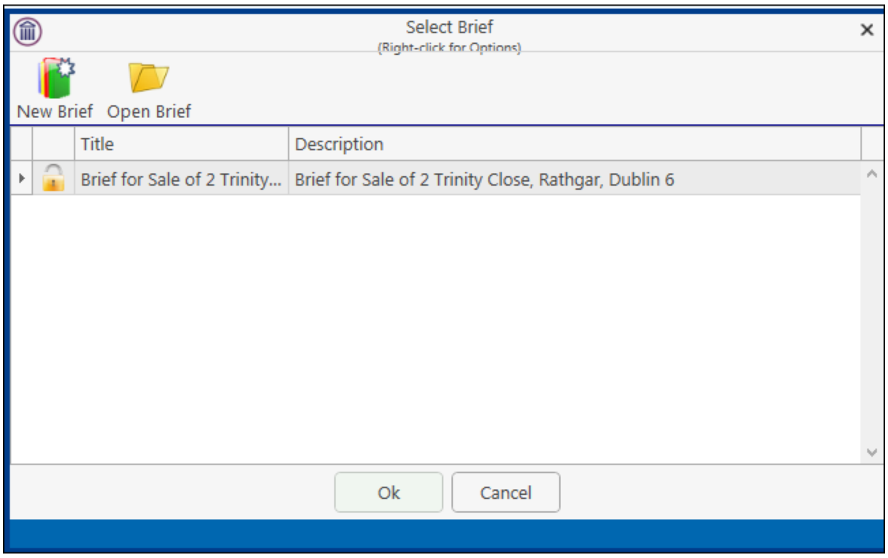
3. Click **OK**.

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.



4. Select the brief to open and click **Open Brief**.

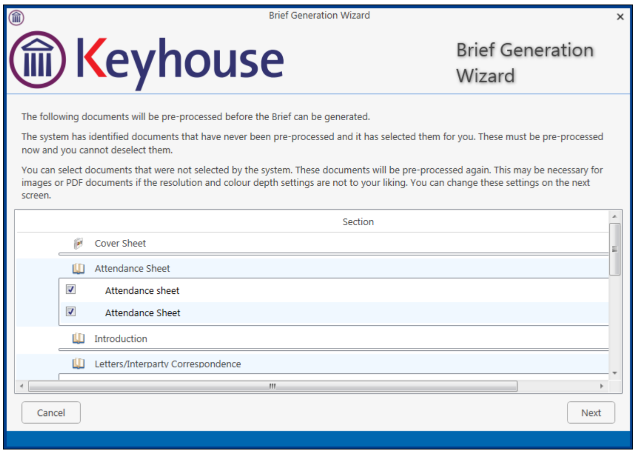
Note if you are already working in the brief screen, you may click **Open Brief** on the Home tab.

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



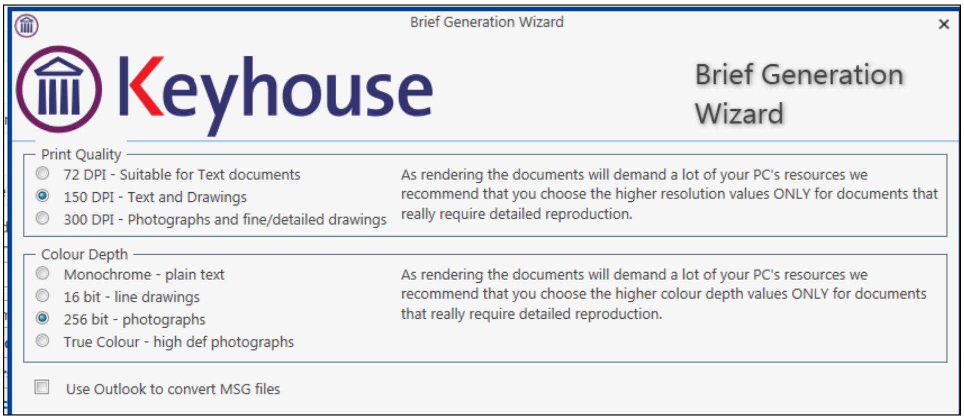
1. Click **(Re)Generate** on the Home tab.

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.

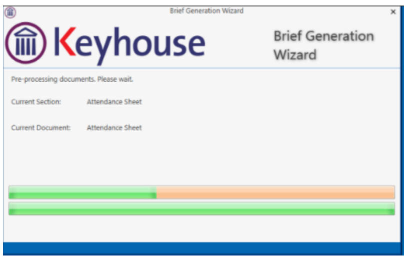
3. Click **Next**.

4. Select the ***print quality*** and ***colour depth*** required.

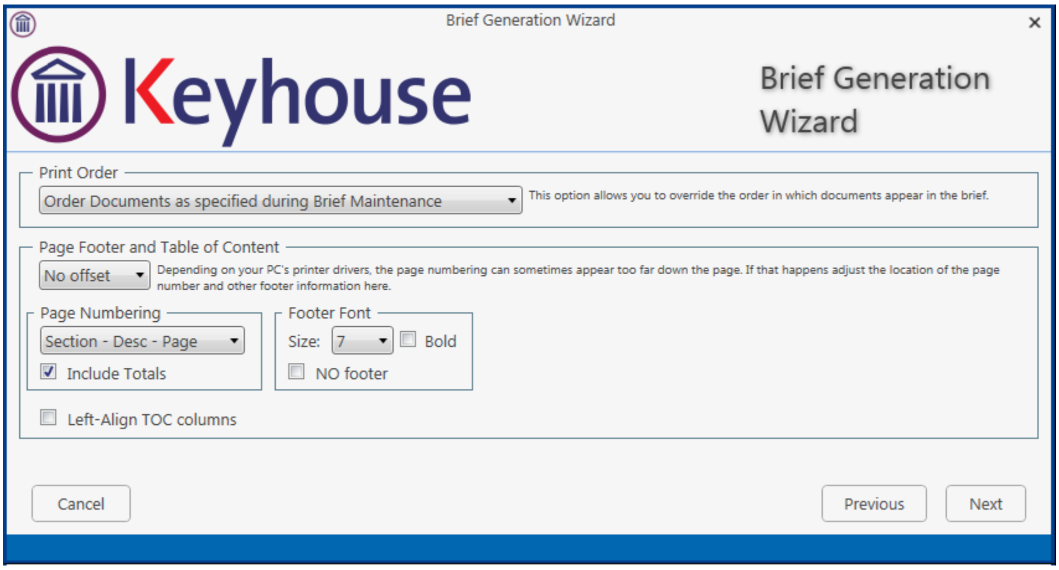


   Check the box to use Outlook to convert MSG files.

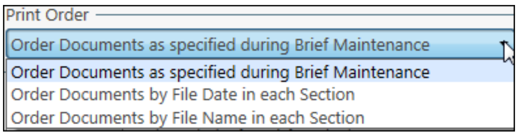
5. **Click Next.** A screen will show the progress of the document preprocessing.



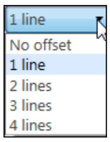
6. When preprocessing has been completed, you will have the opportunity to set the print order of the brief, the contents and position of the footer and the alignment of columns in the table of contents.



- The documents in each Section may be printed in ascending date order, in alphabetical order by filename or in the order in which they were added to the brief while it was being assembled or maintained.

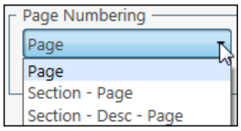


- The footer offset is the minimum number of lines that must be maintained between the footer and the physical end of the page.



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

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

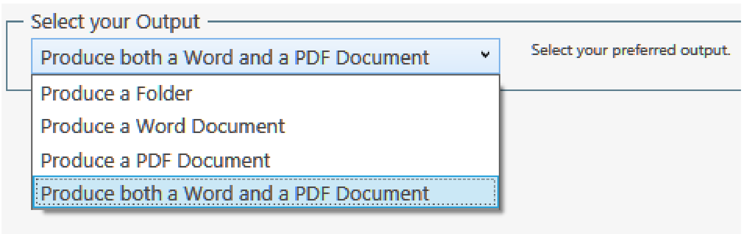


- You can set the footer font size and weight, or provide that there should be no footer.

- 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**.

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



instead of a single document.

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