

KEYHOUSE Administrator User Manual

VERSION 5.4.2.14

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PART 1: MAINTAIN

MAINTAIN DEPARTMENTS

Add A Department

- 1. Click Maintain from the list of Tabs
- 2. Click **Departments** from the ribbon. The following dialogue box appears.

	Maintain Departments	×
Add Edit Delete Ret		Retirec
Search		
Code	Description	
сом	Commercial	
CON	Conveyancing	
DEB	Debt	
FAM	Family Law	
FIN	Finance	
GEN	General	
HIG	High Court	
КН	Housing	
KPL	Planning	
KR	Rates	
LIT	Litigation	
LMU	Loans Management	
OMB	Ombudsman	
PC	Private Clients	
PRO	Probate	

3. Click the Add button to add a new department. The following dialogue box will appear.

		×
Add Departm	ient	
Code Description Retired		
		el

Input the following details:

A three letter department code e.g. CON for conveyancing. In the Department Code Box. Input a Description in the Description Box.

4. Click the **OK** Button. This department is now available for use.

Amend A Department

- 1. Open the **Department** Dialogue Box as before.
- 2. Select the department you want to amend. Click the **Edit** Button. The following dialogue box appears.

	D	×
	Change Depa	rtment
	Code	COM
	Description	Commercial
	Retired	
l		
		<u>O</u> K <u>C</u> ancel

Make any changes required.

3. Click the **OK** Button and the changes take place.

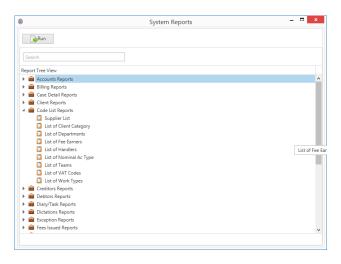
Retire A Department

- 1. Open the **Department** Dialogue Box as before.
- 2. Select the department you want to delete. Tick the **Retired** Box then click OK.

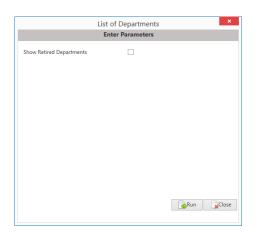
NOTE: If you have already assigned a department to a case matter you will not be able to remove that department record

Print A List Of Departments

- 1. Click on the Report Tab and select System Reports
- 2. Click on the arrow beside Code List Reports



3. Select List of Departments. The following dialogue box will appear.



4. Tick the Show Retired Departments if you need to see old departments otherwise just click on Run.

			View Report		
AFDF MALS 🧶 🦻					
🐘 🎭 Type the test to find 💿 💿 🕢 1 /1 🔹					
					_
ee X k Types List			Soo Grabbit & Runne		
Types Car				Data Date : 2008/2015 -	14.06
			Work Types List		
	Code	• •	Description		
			Unknown Worktype:		
	ACC		Accident		
	ACT		Action		
	ADV		Advice		
	CIR		Circuit Court		
	COM		Commerical		
	DEB	6	Debt Collection		
	DLC	t	Def Lit Circuit Court		
	DLD	t	Def Lit District Court		
	DLH	0	Def Lit High Court		
	DRC	t	Debt Receivery		
	GEN		General		
	HIG		High Court		
	LEA	l	Lease		
	LOAN	4 1	Loan		
	OMB		Ombudsman		

5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN WORK TYPES

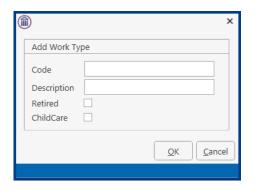
Work types are classification of work activities.

Add A Work Type

- 1. Click **Maintain** from the list of Tabs
- 2. Click Work Types from the ribbon. The following dialogue box appears

Maintain Work Types		×			
	Add	Edit Delete Retired		red	
	Search				
	Code	Description	Child Care		
⊧		Unknown Worktype:	N	^	
	ACC	Accident			
	ACT	Action			
	ADV	Advice			
	CIR	Circuit Court			
	COM	Commerical			
	DEB	Debt Collection	Debt Collection		
	DLC	Def Lit Circuit Court	Def Lit Circuit Court		
	DLD	Def Lit District Court			
	DLH	Def Lit High Court	Def Lit High Court		
	DRC	Debt Recovery			
	GEN	General			
	HIG	High Court			
	LEA	Lease			
	LOAN	Loan		\checkmark	

3. Click the **Add** button to add a work type. The following dialogue box appears.



Input a three letter work type code in the Code box. Input a description in the description box.

4. Click the **OK** Button to make this work type available for use.

Amend A Work Type

- 1. Open the **Work Type** Dialogue Box as before.
- 2. Select the **Work Type** you want to amend

3. Click the **Edit** Button. The following dialogue box will appear.

	2	×
Change Work	СТуре	
Code	PUR	
Description	Purchase	
Retired		
ChildCare		
L	<u>O</u> K <u>C</u> ancel	

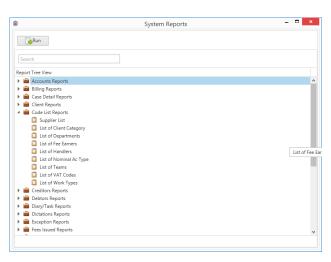
Retire A Work Type

- 1. Open the **Work Type** Dialogue Box as before.
- 2. Select the **Work Type** you no longer require and select **Edit**. Tick the **Retired** Box and click **OK**.

Note: If you have already assigned a work type to a case matter you will not be able to delete that work type.

Print A List of Work Types

- 1. Click on the Report Tab and select System Reports
- 2. Click on the arrow beside Code List Reports



3. Select List of Work Types. The following dialogue box will appear.



4. Tick the Show Retired Work Types if you need to see old work type otherwise just click on Run.

		View Report	
oc 💽 kol 🛞 🛞			
😌 🖳 🎭 Type the test to fiel 🔹 🕒 🏚 👔 71 🔹			
Nop Tree X Work Types List		Soo Grabbit & Runne	
with gas on			2010/2010 14:00
		Work Types List	
	Code Desc	cription	
	Unker	nown Worktype:	
	ACC Accid	dant	
	ACT Actor	n	
	ADV Advio	ce	
	CIR Circuit	ak Court	
	COM Comm	marical	
	DEB Dabi	Collection	
	DLC Defu	Lit Circuit Court	
	DLD Def LI	Lit District Court	
	DLH Def L	Lit High Court	
	DRC Debt	Receivery	
	GEN Gene	eral	
	HIG High I	Court	
	LEA Losse	e	
	LOAN Loan		
	OMB Ombs	udsman	

5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN FEE EARNER CODES

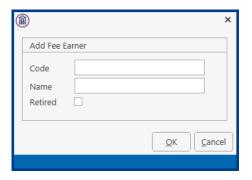
Fee Earners are the people within your firm who generate income.

Add A Fee Earner Code

- 1. Click **Maintain** from the Tabs
- 2. Click **Fee Earners** from the Ribbon and the following Dialogue Box appears.



3. Click the **Add** button. The following Dialogue Box appears.



Input their initials in the Code Box Input the Name in the Name Box

4. Click the **OK** Button and this Fee Earner is available for use.

Amend A Fee Earner Code

- 1. Open the Fee Earner Dialogue Box as before.
- 2. Select the **Fee Earner** you want to ament

3. Click the **Edit** button. The following Dialogue Box will appear.

	×
Add Fee	Earner
Code	
Name	
Retired	
	<u>O</u> K <u>C</u> ancel

Make any changes required

4. Click the **OK** button

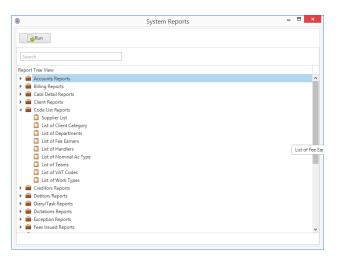
Retire A Fee Earner

- 1. Open the **Fee Earner** Dialogue Box
- 2. Select the Fee Earner you want to retire and select Edit. Tick the Retired box. Click OK

Note: If you have already assigned a Fee Earner to a case matter you will not be able to delete that Fee Earner.

Print A List of Fee Earners

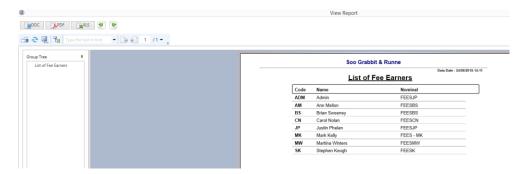
- 1. Click on the Report Tab and select System Reports
- 2. Click on the arrow beside Code List Reports



3. Select List of Fee Earners. The following dialogue box will appear



4. Tick the Show Retired Fee Earners if you need to see old fee earners otherwise just click on Run.



5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN HANDLERS

Handlers are people who carry out actions in the case diary and may record their time for billing purposes. Each Handler is a member of a team and must specify a Fee Earner Code.

Add A Handler

- 1. Select **Maintain** from Tabs.
- 2. Select **Handler** from the Ribbon and the following dialogue box appears.

<u>هم</u>	ld <u>E</u> dit	Maintain Han	dler Codes		× Retired
Searc	ch				
	Code	Name	Team	Rate	
F .	ADM	Admin	сом	150.00	1
	AM	Anne Mellon	CON	120.00	
	BS	Brian Sweeney	COM	250.00	
	CN	Carol Nolan	COM	150.00	
	COM	Commercial	COM	0.00	
	CON	Conveyancing	CON	0.00	
	JP	Justin Phelan	CON	180.00	
	LIT	Litigation	LIT	0.00	
	MK	Mark Kelly	COM	150.00	
	MW	Martina Winters	COM	180.00	
	SK	Stephen Keogh	COM	250.00	

3. Click the **Add** button, the following dialogue box appears.

		Add Han	dler			×
General	Target Hours	Period Start Dates	Billing Rates	Signature	Budgets	
Code			🗌 🗆 Team	Retired		
Name				Auto La	unch Timer	
Hourly Ra	te	0.00		Outlook	View	.
Team		Select team	~	Auto Lau	Inch KPI	- 1
Logon					By E-mail	
F/E Code		Select F/E code			Startup	
Default Task		Select task		O Send and Show		
Recent Us	ed Matter List			Туре		
Exchange	Alias			 Partner Solicitor 		
Default D	elegate Resource	Select delegate				
Departme	ent	Select department	•	O Suppo	ort Staff	
Branch		Select branch	*			
		Skip welcome sc	reen in new mat	ter wizard		
Employee	Reference No.					
				<u>о</u> к	Cance	

4. Input the following details:

Code:	Input two/three letter code e.g. HK for Helen Johnson
Name:	Input the name of the handler
Retired:	Leave this unchecked until the handler either retires or leaves the firm.
Team:	Click on the Down Arrow to reveal a list of teams. Select the applicable
	team and click the select button.
Outlook View:	Ensure that this is checked for the new view of case management.
Auto Launch Timer:	If you want the time recording timer to launch automatically pick a tick
	in this.
Hourly Rate:	Input this handler's default hourly rate.
Logon:	Input the handler's logon name.

A/cs F/E Code:	Click the Down Arrow to reveal a list of Fee Earners. Select the appropriate fee earner.
Default Task:	Click the Down Arrow to reveal a list of tasks. Select the appropriate task.
Recent Used	
Matter List:	Input the amount of recently used matters, you want to appear in the recent matter list of this handler.
Exchange Alias:	Input the Handlers Email account name.
Default Delegate	
Resource:	Click on the Down Arrow to reveal a list of handlers. Select the default delegate hander required.
Department:	Click on the Down Arrow to reveal a list of Departments. Select the appropriate department.
Туре:	Select the appropriate option button for this handler i.e. Solicitor etc.
Auto Launch KPI:	This is no longer in use.

See an example of a completed window below.

		Change Ha	andler			x
General	Target Hours	Period Start Dates	Billing Rates	Signature	Budgets	
Code Name Hourly Ra Team Logon F/E Code	ite	BS Brian Sweeney 250.00 COM BRIANS BS	Team	Outlook Auto Lau Send Send	inch KPI By E-mail	
F/E Code Default Task Recent Used Matter List Exchange Alias Default Delegate Resource Department Branch Employee Reference No.		GEN 30 keyhosuetest@gm CON Head Office Skip welcome sci		Type Partne Solicit Suppo	er	
				<u>O</u> K	Cancel	

5. Click on the **Target Hours** tab. The following window appears.

	Change Handler							
General	Target Hours	Period Sta	art Dates	Billin	g Rates	Signature	Budgets	
Month 1	400.00		Moi	nth 7	200.00			
Month 2	200.00		Mor	nth 8	200.00			
Month 3	200.00		Mo	nth 9	200.00			
Month 4	200.00		Mo	nth 10	200.00			
Month 5	200.00		Mor	nth 11	200.00			
Month 6	200.00		Mor	nth 12	200.00			
					4	ill from Mon		
						<u>о</u> к	<u>C</u> ance	1

Input the target hours for this time recorder for month 1. Use the **Fill from Month 1** button to fill in the remaining months with the same amount. Otherwise input individually.

6. Click on the **Period Start Dates** tab. The following window appears.

	Change Handler							
General	Target Hours	Period Start Dates	d Start Dates Billing Rates Signature					
1	01 Jan 2015	¥	7	01 Jul 2015 🗸				
2	01 Feb 2015	•	8	01 Aug 2015 🗸				
3	01 Mar 2015	•	9	01 Sep 2015 🗸				
4	01 Apr 2015	•	10	01 Oct 2015 🗸				
5	01 May 2015	¥	11	01 Nov 2015 🗸				
6	01 Jun 2015	¥	12	01 Dec 2015 🗸				
				Fill from 1	ncel			
				<u>O</u> K <u>C</u> ar	ncel			

Input the first period date and click on the **Fill from 1** button to fill in the remainder of the dates.

7. Click the **Billing Rate** tab. The following window appears.

	Change Handler 2						
General	Target Hours	Period Start Dates	Billing Rates	Signature	Budgets		
Rate L	evel Per Hour						
Rate 1	50.00						
Rate 2	150.00						
Rate 3	250.00						
Rate 4	350.00						
Rate 5	550.00						
Axle N	umber 0						
Charge (Select Ch	arge Group 🔽 Cle	ear				
				<u>о</u> к	<u>C</u> ance	1	

Input the rate levels per hour. Rate 1 is the lowest rate, Rate 5 the highest.

8. Click on the **Signature** tab. The following window appears.

			Change Ha	andler			×
General	Target	Hours	Period Start Dates	Billing Rates	Signature	Budgets	1
Signature	2						
Regards							
Brian Sw	reeney						
Phone nu	mber	12345					
E-Mail		keyhos	uetest@gmail.com				
					OK	Cance	4

Input a signature in the signature box. Input an email address in the email box.

9. Click on the **Budgets** tab.

General	Target Hours	1	Change Handler							
		Period Start Da	tes Billing R	ates	Signature	Budgets				
Year	Month	Fees	Chargable Tin	ne	Non-Charg	gable Ti				
							~			
Fill Bud	get Copy B	udget	Ad	d	Edit	Delete				
					<u>O</u> K	Cance	el			

10. Click the Add button and the following dialogue box will appear.

	Add Budget		
Handler	ADM		
Year			
Month			
Fees Budget			
Chargable Time Bud	lget		
Non-Chargeable Tin	ne		
	<u>о</u> к <u>С</u> а	incel	

- 11. On this screen the Handler's annual and monthly budgets can be entered.
- 12. When complete click the **OK** Button and click **OK** again. This time recorder is now available for use.

Amend A Handler

- 1. Open the **Hander** Dialogue Box as before.
- 2. Select the Hander you want to amend.
- 3. Click the **Edit** button. The following dialogue box will appear.

		Change Ha	ndler			×
General	Target Hours	Period Start Dates	Billing Rates	Signature	Budgets	
Code Name Hourly Ra Team Logon F/E Code	ite	BS Brian Sweeney 250.00 COM BRIANS BS	Team	Outlook Auto Lau Send Send	Inch KPI By E-mail Startup	
Default T		GEN	~		and Show	
Exchange	sed Matter List Alias elegate Resource	30 keyhosuetest@gm	ail.cc	Type Partne Solicit	tor	_
Departme Branch	ent	CON Head Office	~	O Suppo	ort Staff	
Employee Reference No.						
				<u>о</u> к	Cance	

4. Make any changes required and click the **OK** button.

Retire A Team

- 1. Open the **Handler** dialogue box
- 2. Select the Handler you want to retire and select **Edit**. Tick the **Retired** box and click OK.

Delete A Team

- 1. Open the **Handler** dialogue box
- 2. Select the **Handler** you want to delete.
- 3. Click the **Delete** button.

Note: If a Handler is already in use you will not be able to delete it.

Print A List of Handlers

- 1. Click on the Report Tab and select System Reports
- 2. Click on the arrow beside Code List Reports

)	System Reports	- = <mark>×</mark>
Run		
Search		
Report Tree View		
Accounts Reports		
Billing Reports		
Case Detail Reports		
Client Reports		
Code List Reports		
Supplier List		
List of Client Category		
List of Departments		
List of Fee Earners		
List of Handlers		List of Fee
List of Nominal Ac Type		List of Fee
List of Teams		
List of VAT Codes		
List of Work Types		
Creditors Reports		
Debtors Reports		
Diary/Task Reports		
Dictations Reports		
Exception Reports		
Fees Issued Reports		

3. Select List of Handlers. The following dialogue box will appear



4. Tick the Show Retired Handlers if you need to see old handlers otherwise just click on Run.



5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN TEAMS

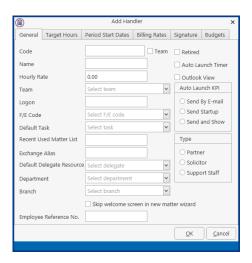
Teams can be based on groups of Handlers e.g. groups of Fee Earners and/or Support Staff. It is also possible to set default billing rates for the team.

Add A Team

1. Click **Maintain** from the Tabs. Click on **Handlers** and the following dialogue box will appear.

Î		Maintain Han	dler Codes		×
Ad	d <u>E</u> dit	Delete		[Retired
Searc	h				
	Code	Name	Team	Rate 📍	
۱.	ADM	Admin	сом	150.00	^
	AM	Anne Mellon	CON	120.00	
	BS	Brian Sweeney	COM	250.00	
	CN	Carol Nolan	COM	150.00	
	COM	Commercial	COM	0.00	
	CON	Conveyancing	CON	0.00	
	JP	Justin Phelan	CON	180.00	
	LIT	Litigation	LIT	0.00	
	MK	Mark Kelly	СОМ	150.00	
	MW	Martina Winters	СОМ	180.00	_
	SK	Stephen Keogh	COM	250.00	~

2. Click on the **Add** button, the following dialogue box appears.



Input the following details.

Code:Input a three letter code for the teamTeam:Check the team box. The following screen will appear

		Add Han	dler			×
General	Target Hours	Period Start Dates	Billing Rates	Signature	Budgets	
Code Name Hourly Ra	ate	0.00	₩ Team	Outlook Auto Lau Send Send Send	nch KPI By E-mail	
Exchange	Alias			Type O Partne		
Default D	elegate Resource	Select delegate	*	O Solicit		
Departme	ent	Select department	*	Support	ort Staff	
Branch		Select branch	~			
		Skip welcome sc	reen in new mat	tter wizard		
Employee	e Reference No.					
				<u>о</u> к	Cance	

Handler/TeamName Box:Input the team nameHourly Rate:Input a default hourly rate

3. Click the **OK** button and this Team is available for use.

Amend A Team

- 1. Open the **Handler** Dialogue Box as before.
- 2. Select the **Team** you want to amend. Click the **Edit** button. Make any changes required.
- 3. Click the **OK** button.

Retire A Team

- 1. Open the **Handler** dialogue box
- 2. Select the Team you want to retire and select **Edit**. Tick the **Retired** box and click OK.

Delete A Team

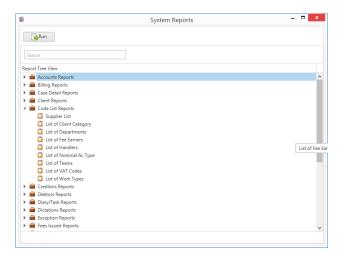
- 1. **Open** the **Handler** dialogue box
- 2. Select the **Team** you want to delete.
- 3. Click the **Delete** button.

Note: If you have already assigned a Team to a case matter you will not be able to delete that Team.

Print A List of Teams

1. Click on the Report Tab and select System Reports

2. Click on the arrow beside Code List Reports



3. Select List of Teams. The following dialogue box will appear.

	List of Teams	×
	Enter Parameter	rs
Show Retired Teams		
Show Fee Earners	\checkmark	
		Run

- 4. The Show Fee Earners is automatically ticked and will list the fee earners in each team.
- 5. Tick the Show Retired Teams if you need to see old teams otherwise just click on Run.

e X		Soo Grabbit &	Burner
Liet		SOU GIADDIT &	
OM ON		List of Handlers	Data Date : 2408/2015 14.4
T	Team	Name	Count Handlers
	сом	Commercial	
	ADM	Admin	
	BS CN	Brian Sweeney	
	CN	Carol Nolan	
	MK	Mark Kelly	
	MW SK	Martina Winters	
	SK	Stephen Keogh	
	CON	Conveyancing	
	AM	Anne Mellon	
	CON	Conveyancing	
	JP	Justin Phelan	

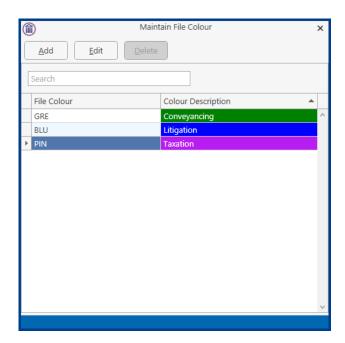
6. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN FILE COLOURS

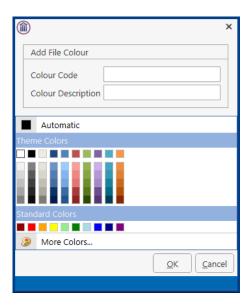
File Colours can be used to colour code file types e.g. all conveyancing files would be blue, all litigation red etc.

Add A File Colour

- 1. Click **Maintain** from the Tab list.
- 2. Select **Other Codes** from the Ribbon and then select **File Colour**.



3. Click the **Add** button to add a file colour. The following dialogue box appears.

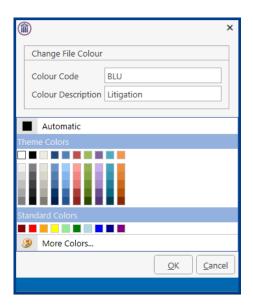


Input a three letter code in the Colour Code box e.g. BLU for Blue Input a Colour Description in the Colour Description box.

4. Click the OK button and this file colour is available for use.

Amend A File Colour

- 1. Open the File Colour dialogue box as before.
- 2. Select the File Colour you want to amend.
- 3. Click the Edit button and the following dialogue box will appear.



- 4. Make the necessary changes and then **select** the **colour** again.
- 5. Click on **OK** button.

Delete A File Colour

It is not possible to delete a file colour at this time.

MAINTAIN MARITAL STATUS CODES

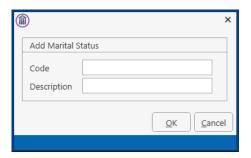
Marital status codes are used when classifying the marital status of a client.

Add A Marital Status Code

- 1. Click on **Maintain** from the Tabs.
- 2. Select **Other Codes** from the Ribbon and then select **Marital Codes**.

î	Maintain Marital Status	×
Add	<u>E</u> dit <u>D</u> elete	
Search		
Code	Description	Γ
DIV	Divorced	1
MAR	Married	
SEP	Separated	
SGL	Single	
WID	Widowed	

3. Click the **Add** button to add a Marital Status Code. The following dialogue box appears.



Input a three-letter Code in the Code box e.g. MAR for Married Input the Description in the Description box.

4. Click the **OK** button and this status code is available for use.

Amend A Marital Status Code

- 1. Open the **Marital Status** box as before.
- 2. Select the Marital Status code you want to amend.

Click the **Edit** button. The following dialogue box will appear. 3.

(×
	Change Mari	al Status	
	Code	DIV	
	Description	Divorced	
			OK Cancel

Make any changes required. Click the **OK** button.

4.

Delete A Marital Status Code

It is not possible to delete a marital code at this time.

MAINTAIN POPUP PARAGRAPH CODES

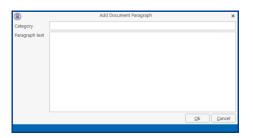
A PopUp paragraph can be used where the precedent may differ on language depending on the Matter details, e.g. special conditions. If you code for a PopUp paragraph you are giving the user the option to select the exact type of paragraph they require. It is possible to set up the PopUp paragraphs so the user can select one or multiple paragraphs in the letter\document.

Add A PopUp Paragraph Code

- 1. Click on **Maintain** from the Tabs.
- 2. Select **Other Codes** from the Ribbon and then select **PopUp Paragraph**.

Add	<u>E</u> dit <u>D</u> elete	Ý 4
Search		
Key Field	Category	Text Value
208	AccidentCircs	The Claimant slipped on a wet floor
209	AccidentCircs	The Claimant suffered injury when an unsecured object fell on
210	AccidentCircs	The Claimant tripped over a protruding object
108	AGRI	A first legal mortgage and charge on the [UDF:SzAcre] acre holding comprised in [CSM:CsPremises].
109	AGRI	A first legal mortgage and charge on the dwelling house located at [CSM:CsPremises].
110	AGRI	An Equitable Deposit over the lands comprised in [CSM:CsPremises].
111	AGRI	An Assignment of a Mortgage Protection on the life of [CNT:Name] for the amount and term of the loan.
112	AGRI	A charge over €[UDF:ChAmt] shares in [UDF:Shares].

3. Click the **Add** button to add a PopUp Code. The following dialogue box appears.



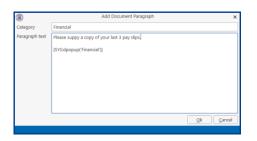
The system will generate a **Key Field** automatically Input a Category in the Category box e.g. Financial Type the required text in the Paragraph text box.

4. Click the **OK** button and this paragraph text is available for use.

Multiple Paragraph Option

- 1. Open the **Add Document Paragraph** dialogue box as before.
- 2. Add the **category** and type the **description**

3. Enter the code [SYS:dpopup('xxx')].



4. Click the **OK** button and the PopUp paragraph is now available for use.

Amend A PopUp Paragraph Code

- 1. Open the **PopUp Paragraph** box as before.
- 2. Select the **PopUp Paragraph code** you want to amend.
- 3. Click the **Edit** button. The following dialogue box will appear.



Make any changes required.

4. Click the **OK** button.

Delete A PopUp Paragraph Code

PopUp Paragraphs cannot be deleted at this time.

MAINTAIN DOCUMENT CLASS CODES

Add A Document Class Code

Document Class codes are used to classify document based on the type of document. This is important when using the Brief Builder Module to ensure all document appear in the correct section.

- 1. Click on **Maintain** from the Tabs.
- 2. Select **Other Codes** from the Ribbon and then select **Document Class Codes**.

🛉 🤌 🗶 👘 🖓						
	Search					
	Class Code	Class Description	Retired			
Þ		Unknown	N			
	Aff	UNKNOWN DOCUMENT CLASS: Aff	N			
	AGR	Agreements	N			
	ALL	All Documents	N			
	ATT	UNKNOWN DOCUMENT CLASS: ATT	N			
	BRF	Brief to Counsel	N			
	C11	UNKNOWN DOCUMENT CLASS: C11	N			
	C24	UNKNOWN DOCUMENT CLASS: C24	N			
	CA6	UNKNOWN DOCUMENT CLASS: CA6	N			
	CFS	Conflict Search	N			
	CLI	Client Letters	N			
	COR	Court Documents	N			
	COS	Correspondance	N			
	COV	Cover Letters	N			
	Dec	UNKNOWN DOCUMENT CLASS: Dec	N			
	DOC	Documents	N			
	ENG	Engagement Letters	N			
	FOR	UNKNOWN DOCUMENT CLASS: FOR	N			

3. Click the **Add** button to add a Marital Status Code. The following dialogue box appears.

	Add Document Class	×
Class code	Enter class code	Retired
Class description	Enter class description	
		<u>Ok</u> <u>C</u> ancel

Input a three-letter Code in the Code box e.g. CLI for Client Letters Input the Description in the Description box.

4. Click the **OK** button and this document code is available for use.

Amend A Document Class Code

- 1. Open the **Document Class** box as before.
- 2. Select the Marital Status code you want to amend.
- 3. Click the **Edit** button. The following dialogue box will appear.

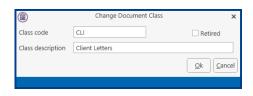
	Change Document Class	×
Class code	CLI	Retired
Class description	Client Letters	
		<u>O</u> k <u>C</u> ancel

Make any changes required.

4. Click the **OK** button.

Retire A Document Class Code

1. Double click on the code to be retired. The following dialogue box will appear.



2. Tick the Retired box and then click OK.

MAINTAIN STATUS CODES

Add A Document Class Code

Status Codes can be associated with work flow actions. They give you an updated case status when an action has been completed e.g. contract signed by purchaser.

- 1. Click on **Maintain** from the Tabs.
- 2. Select **Other Codes** from the Ribbon and then select **Status Codes**.

Add Edit Delete Image: mail of the system Search Search Code Description APP Application submitted ACP Assessment accepted ASS Assessment received/declined B24 BizGen24 Package B04 BizGen8 Package STL Case settled CRD Certificate Received CKL Checklist CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		D	Maintain Status Codes 🛛 🗙
Code Description APP Application submitted ACP Assessment accepted ASS Assessment received/declined B24 BizGen24 Package B04 BizGen4 Package B08 BizGen8 Package STL Case settled CRD Certificate Received CKL Checklist CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		<u>A</u> dd <u>E</u> dit	Delete 👻 🔶
APP Application submitted ACP Assessment accepted ASS Assessment received/declined B24 BizGen24 Package B04 BizGen8 Package STL Case settled CRD Certificate Received CKL Checklist CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed	[Search	
ACP Assessment accepted ASS Assessment received/declined B24 BizGen24 Package B04 BizGen4 Package B08 BizGen8 Package STL Case settled CRD Certificate Received CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		Code	Description
ASS Assessment received/declined B24 BizGen24 Package B04 BizGen4 Package B08 BizGen8 Package STL Case settled CRD Certificate Received CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed	Þ	APP	Application submitted
B24 BizGen24 Package B04 BizGen4 Package B08 BizGen8 Package STL Case settled CRD Certificate Received CKL Checklist CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		ACP	Assessment accepted
B04 BizGen4 Package B08 BizGen8 Package STL Case settled CRD Certificate Received CKL Checklist CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		ASS	Assessment received/declined
B08 BizGen8 Package STL Case settled CRD Certificate Received CKL Checklist CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		B24	BizGen24 Package
STL Case settled CRD Certificate Received CKL Checklist CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		B04	BizGen4 Package
CRD Certificate Received CKL Checklist CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		B08	BizGen8 Package
CKL Checklist CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		STL	Case settled
CLO Closed CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		CRD	Certificate Received
CTV Contract binding on both parties PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		CKL	Checklist
PUR Contract signed by Purchaser HEA Court Hearing DFF Defence filed		CLO	Closed
HEA Court Hearing DFF Defence filed		CTV	Contract binding on both parties
DFF Defence filed		PUR	Contract signed by Purchaser
		HEA	Court Hearing
Discussion and state in the		DFF	Defence filed
DSC Discovery complied with		DSC	Discovery complied with
DCF Documents filed with Court/Office		DCF	Documents filed with Court/Office

3. Click the **Add** button to add a Status Code. The following dialogue box appears.

(D		×
	Add StatusCo	des	
	Code		
	Description		
		QK Canc	el

Input a three-letter Code in the Code box e.g. STL for Case Settled. Input the Description in the Description box.

4. Click the **OK** button and this document code is available for use.

Amend A Status Code

- 1. Open the **Status Code** box as before.
- 2. Select the **Status code** you want to amend.

Click the **Edit** button. The following dialogue box will appear. 3.

(×
	Change Statu	isCodes	
	Code	STL	
	Description	Case settled	
ľ			QK Cancel

Make any changes required. Click the **OK** button.

4.

Delete A Status Code

It is not possible to delete a Status Code at this time.

MAINTAIN TASKS

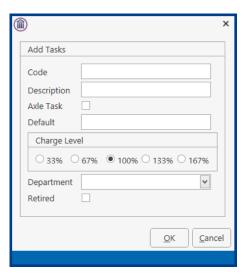
Tasks are general activities performed by handlers e.g. letter writing, file review etc.

Add A Task

- 1. Click **Maintain** from the Tabs.
- 2. Click Other Codes and then select Tasks. The following dialogue box appears.

	Maintain Tasks	:				
Add	<u>E</u> dit <u>D</u> elete	Retire				
Search						
Code	Description	Default				
ADV	Advice	0				
ATT	Attendance	0				
CLO	Close File	0				
COU	Court Attendance	0				
DEM	Demand & Draft Proceedings	40				
DIC	Dictation	0				
DRA	Document Drafting	0				
EMA	Email	0				
GEN	General Advice	0				
INS	Instructions received	0				
LET	Letter Drafting	0				
MEET	Client Meeting	0				
PC	Photocopying	25				
PHO	Phone Call	0				
PSX	Postage & Sundries	20				

3. Click the Add button to add a Task. The following dialogue box appears.



Input a three/four letter code in the Code Box e.g. Ltr for Letter. Input the Description in the Description box Input the default price in the default box if required. Use the Option Buttons provided to select the charge level applicable. Use the Drop down to select a specific department if required.

4. Click the **OK** button and this Task is available for use.

Amend A Task

- 1. Open the **Task** dialogue box as before.
- 2. Select the **Task** you want to amend.
- 3. Click the **Edit** button. The following dialogue box will appear.

D		×	
Change Tasks	5		
Code	LET		
Description	Letter Drafting		
Axle Task			
Default	0.00		
Charge Level			
○ 33% ○	67% • 100% • 133% • 167%		
Department	~		
Retired			
	<u>O</u> K <u>C</u> anc	el	

Make any changes required.

4. Click the **OK** button.

Retire A Task

- 1. Open the **Task** dialogue box as before.
- 2. Select the Task you want to retire and click on the Edit button.
- 3. Tick the **Retired** box and click **OK**.

Note: When you retire a task it will not affect any uncompleted items. However, it will stop it being selected again

Print A List Of Tasks

It is not possible to delete a task at his time.

MAINTAIN ADMIN CODES

Admin Codes are used to record administrative time; this is non-chargeable time e.g. sick leave, compassionate leave etc.

Add An Administration Code

- 1. Click **Maintain** from the Tabs.
- 2. Click **Other Codes** and then select **Admin Codes**. The following dialogue box appears.

	D		Maintain Admin Codes	×
	Add	<u>E</u> dit	Delete	
	Search			
	Code		Description	\square
Þ	ADM		Administration	^
	CPD		CPD Time	
	HOL		Holidays	
	ILL		Illness	
	NET		Networking	
	OFF		Office Work	
	PD		Practice Development	
				~

3. Click the **Add** button to add an Admin Code. The following dialogue box appears.

(×
	Add Admin Co	de	
	Code		
	Description		
		<u>O</u> K <u>C</u> ance	el

Input a three letter code in the Code box e.g. Hol for Holidays. Input the Description in the Description box.

4. Click the **OK** button and this code is available for use.

Amend An Administrative Code

- 1. Open the **Admin Code** dialogue box as before.
- 2. Select the Admin Code you want to amend

3. Click the **Edit** button. The following dialogue box will appear.

(×
	Change Adm	in Code	
	Code	ADM	
	Description	Administration	
			<u>O</u> K <u>C</u> ancel

Make any changes required.

4. Click the **OK** button.

Delete An Admin Code

It is not possible to delete an admin code at this time.

MAINTAIN STANDARD NARRATIVES

Standard narratives are used in conjunction with time recording; they are used to add further explanations to a time slip.

Add A Standard Narrative

- 1. Click **Maintain** from the Tabs.
- 2. Click **Other Codes** and then select **Standard Narratives**. The following dialogue box appears.

	Maintain Standard Narratives	x
Add Edit	Delete	
Search		
Code	Narrative	
ADV	Advice	^
CFI	CFI Seach	
CLI	Client Meeting	
DOC	Document Drafting	
GEN	General Work on advising client and updating file.	
LET	Letter Drafting for Client	
POS	Postage Petties & Sundry Outlays	
REG	Registry of deeds fees on Transfer	
REV	Review File	_
SFEE	Standby fee	_
		V

3. Click the **Add** button to add a standard narrative. The following dialogue box appears.

(D		×
	Add Standard	Narratives	
	Code		
	Description		
		<u>O</u> K <u>C</u> ance	1

Input a three letter Code in the Code box. Input the Narrative in the Description box.

4. Click the **OK** button and this narrative is available for use.

Amend a Standard Narrative

- 1. Open the **Standard Narrative** dialogue box as before.
- 2. Select the Standard Narrative you want to amend.

3. Click the **Edit** button. The following dialogue box will appear.

(x
	Change Stand	lard Narrative	5
	Code	ADV	
	Description	Advice	
			OK Cancel

Make any changes required. Click the **OK** button.

4.

Delete A Standard Narrative

It is not possible to delete a standard narrative at this time.

MAINTAIN BILLING NARRATIVES

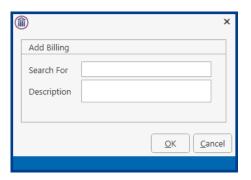
Billing narratives are used in conjunction with Draft Billing; they are used to add further explanation to a billing entry.

Add A Billing Narrative

- 1. Click **Maintain** from the Tabs.
- 2. Click **Other Codes** and then select **Billing Narratives**. The following dialogue box appears.



3. Click the **Add** button to add a billing narrative. The following dialogue box appears.



Input the Billing Description in the Description box Input a search code e.g. PROF for Professional Fees

4. Click the **OK** button and this billing narrative is available for use.

Amend A Billing Narrative

- 1. Open the **Billing Narrative** dialogue box as before.
- 2. Select the Billing Narrative you want to amend.

×
ng
DISCOUNT
Discount Applied
<u>O</u> K <u>C</u> ancel

- 3. Click the **Edit** button. The following dialogue box will appear. Make any changes required
- 4. Click the **OK** button.

Delete A Billing Narrative

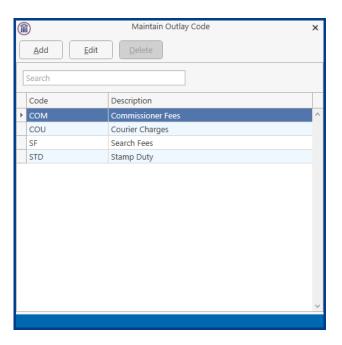
It is not possible to delete a billing narrative at this time.

MAINTAIN OUTLAY CODES

Outlay Codes are used in conjunction with Cheque Requisitions and allow the user to group Outlays if required. This in turn facilitates the grouping of Outlays in the Billing Guide.

Add An Outlay Code

- 1. Click **Maintain** from the Tabs.
- 2. Click **Other Codes** and then select **Outlay Code**. The following dialogue box appears.



- 3. Click the **Add** button to add an outlay code. The following dialogue box appears.
- 4.

			×
Add Outlay C	ode		
Code			
Description			
		<u>O</u> K	<u>C</u> ancel

Input the Outlay Code in the Description box

Input a search code e.g. MRPT for Medical Report

5. Click the OK button and this billing narrative is available for use.

Amend An Outlay Code

- 1. Open the **Outlay Codes** dialogue box as before.
- 2. Select the outlay code you want to amend.

		×
Change Out	ay Code	
Code	СОМ	
Description	Commissioner Fees	
	<u>Q</u> K <u>C</u> ance	el

- 3. Click the **Edit** button. The following dialogue box will appear. Make any changes required
- 4. Click the **OK** button.

Delete An Outlay Code

It is not possible to delete a billing narrative at this time.

MAINTAIN CATEGORY TYPES

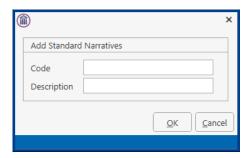
Category types enable the categorising of clients to enable specific types of contact with the client.

Add A Category Type

- 1. Click **Maintain** from the Tabs.
- 2. Click **Other Codes** and then select **Category Type**. The following dialogue box appears.

(Maintain Category Type	×
<u>A</u> dd <u>E</u> dit	Delete	
Search		
Category Type	Description	
BUD	Budget Seminar	
BUS	Business Source	
BUSTYP	Business Type	
EURO	Euro Campaign	
Mail	Mailing List	
XMAS	XMas Cards	

3. Click the **Add** button to add a category type. The following dialogue box appears.



Input a three letter Code in the Code box. Input the Narrative in the Description box.

4. Click the **OK** button and this narrative is available for use.

Amend a Category Type

- 1. Open the **Category Type** dialogue box as before.
- 2. Select the Category Type you want to amend.

3. Click the **Edit** button. The following dialogue box will appear.

		×
Change Cate	gory Type	
Code	MAIL	
Description	Mailing List	
		<u>Q</u> K <u>C</u> ancel

Make any changes required.

4. Click the **OK** button.

Delete A Category Type

It is not possible to delete a category type at this time.

MAINTAIN CONTACT CATEGORIES

It is possible to categorise your client and create different types of mailing lists. You may want to create a mailing list of clients to received information on changes in the Tax Code or a list of clients to receive a News Letter. It is also possible to add User Defined Fields to the Contact Category.

Create a Contact Category

- 1. Go to the Setup Tab and open the <u>Document Assist</u> Window (see Guide to The Document Assist) if required.
- 2. Click **Maintain** from the Tabs.
- 3. Select Contact Categories from the Ribbon and the following dialog box will appear.

()	Maintain Co	ntact Cate	gory	×
	<u>A</u> dd	<u>E</u> dit <u>D</u> elete			
	Search				
	Туре	Category Description	Code	Description	
Þ	BUS	Business Source	AD	Advertising	^
	Mail	Mailing List	BUD	Budget Update List	
	Mail	Mailing List	COR	Corporate	
	BUSTYP	Business Type	FIN	Financial Services	
	BUSTYP	Business Type	INS	Insurance	
	BUS	Business Source	NEWS	News Letter	
	BUSTYP	Business Type	PRI	Private Client	
	Mail	Mailing List	PRIM	Private Clients List	
	BUS	Business Source	REFER	Referral	
	BUS	Business Source	WEB	Web Site	
	Mail	Mailing List	XMAS	XMAS Cards	
_					~

4. Click Add button to add a new Contact Category and the following dialog box will appear.

	Add Contact Category	×
Category type	Please select a category type	Add category type
Code		
Description		
	User defined fields	
UDF1		
UDF2		
UDF3		
UDF4		
UDF5		
UDF6		
UDF7		
UDF8		
UDF9		
UDF10		
		<u>O</u> k <u>C</u> ancel

- 5. Select the Category Type or select Add category type to add a new category as detailed above.
- 6. Enter a Code and Description.
- 7. Using the Document Assist enter the <u>UDF fields</u> required. (See Creating User Defined Fields).

	Change Contact Category X
Category type	Mail Add category type
Code	NWS
Description	News
	User defined fields
UDF1	[CNT:Name]
UDF2	[CNT:Address]
UDF3	
UDF4	
UDF5	
UDF6	
UDF7	
UDF8	
UDF9	
UDF10	
	Qk Cancel

8. Click OK when finished.

Delete A Contact Category

It is not possible to delete a category type at this time.

PART 2: MAINTAIN USER SECURITY

User Access

User access levels can be restricted and controlled. This allows for greater system security.

Create New User

A new user can be set up for the User Setup Screen

1. Go to the Setup Tab and select User Setup

Admin Anne Mellon	Team Commercial	Active	Supervisor	Team Code	Ret
	Commercial				
		Yes	Yes	сом	N
	Conveyancing	No	No	CON	N
Brian Sweeney	Commercial	Yes	Yes	COM	N
Carol Nolan	Commercial	Yes	Yes	COM	N
Justin Phelan	Conveyancing	No	No	CON	N
Mark Kelly	Commercial	No	No	COM	N
Martina Winters	Commercial	No	No	COM	N
Stephen Keogh	Commercial	No	No	COM	N
	Mark Kelly Martina Winters	Mark Kelly Commercial Martina Winters Commercial	Mark Kelly Commercial No Martina Winters Commercial No	Mark Kelly Commercial No No Martina Winters Commercial No No	Mark Kelly Commercial No No COM Martina Winters Commercial No No COM

- 2. Select New User.
- 3. Enter the required information. The Handler code is usually their initials.

	New User 🗙	1
User name:	Jack Flynn	
Handler Code:	JF (This is also going to be their first password)	
Rate:		
Team:	Y	
Type of user:	O Partner	
	O Solicitor	
	Support Staff	
	○ Other	
E-mail address:	jack@keyhouse.ie	
	QK Cancel	
		ľ

- 4. Click OK.
- 5. As only limited information can be added at this point it may be necessary to use the Handler Option on the Maintain Ribbon to add the remaining details.

Search						
Code	Name	Team	Active	Supervisor	Team Code	Re
ADM	Admin	Commercial	Yes	Yes	COM	N
AM	Anne Mellon	Conveyancing	No	No	CON	N
BS	Brian Sweeney	Commercial	Yes	Yes	COM	N
CN	Carol Nolan	Commercial	Yes	Yes	COM	N
JF	Jack Flynn		Yes	No		N
JP	Justin Phelan	Conveyancing	No	No	CON	N
MK	Mark Kelly	Commercial	No	No	COM	N
MW	Martina Winters	Commercial	No	No	COM	N
SK	Stephen Keogh	Commercial	No	No	COM	N

Import User

When a user has been set up using the Handler Option on Maintain Tab, it will not visible in the list of users in the User Setup. Use the Import User option to add the name to the list.

- 1. Go to the Setup Tab and select User Setup.
- 2. Click on Import User and the User Name will appear in the list of Users.

Activate Handler

When a User has been set up using the Handler Option on the Maintain Tab, they need to be given access to the system and their password needs to be set. If a user is set up using the New User Option then they are automatically activated.

1. Go to the Setup Tab and select User Setup

	Code	Name	Team	Active	Supervisor	Team Code	Ret	ir
	ADM	Admin	Commercial	Yes	Yes	COM	N	1
•	AM	Anne Mellon	Conveyancing	No	No	CON	N	
	BS	Brian Sweeney	Commercial	Yes	Yes	COM	N	
	CN	Carol Nolan	Commercial	Yes	Yes	COM	N	
	JP	Justin Phelan	Conveyancing	No	No	CON	N	
	MK	Mark Kelly	Commercial	No	No	COM	N	
	MW	Martina Winters	Commercial	No	No	COM	N	
	SK	Stephen Keogh	Commercial	No	No	COM	N	

2. Right click on the User to be change.

	Code	Name	Team	Active	Supervisor	Team Code	Ret	ir
	ADM	Admin	Commercial	Yes	Yes	сом	N	
]	AM	Anne 🔥 Activate th	is handler		Yes	CON	N	
	BS		Password for this Handler		Yes	COM	N	
	CN	Caro 😝			Yes	COM	N	
	JP	Justin		Change	No	CON	N	
	MK	Mark 🌲 Remove S	pervisor role for this hand	dler	No	COM	N	
	MW	Mart 🔒 Set Handle	r's Group privileges		No	COM	N	
	SK	Stepl Set Report	Module Privileges		No	COM	N	

- 3. Click Deactivate this Handler and it will change to Activate this Handler
- 4. In the Change Password Box enter the User's password (usually their initials) and click Change.
- 5. Click Make this Handler a Supervisor if the user is to have Administration rights.

	Deactivate this handler	
	Reset the Password for this Handler	
•	••	hange
å	Remove Supervisor role for this handler	
0	Set Handler's Group privileges	
0	Set Report Module Privileges	

6. Click on the X in the top right of the Dialog Box to close the screen.

NOTE: The user will need to log on using the Login using your Handler Code and password option and then complete the log in procedure. This will only need to be done the first time the User logs in.

	Keyhouse
Please logir	to Reynouse
Handler:	an
Password:	**
	☑ Link this login to your Windows Login
	Login

Security Groups

Security Groups give the ability to limit access to Clients and Matters. This will help ensure confidentiality.

Set Up New Group

- 1. Go to the Setup Tab and select User Setup.
- 2. Select Record Security

î				Security Groups		×
	Group ID	Groupr Name	In Use	Applied To Matter	Applied To Handl	
(± 1	Family Law	True	True	False	^
(÷ 2	Conveyancing	True	True	False	
1	± 3	Litigation	True	True	False	
F I	∃ 4	Criminal	True	False	False	
1	∃ 5		True	False	False	
(± 6		False	False	False	
1	• 7		False	False	False	
1	± 8		False	False	False	
6	± 9		False	False	False	
1	± 10		False	False	False	
1	± 11		False	False	False	
1			False	False	False	
1	± 13		False	False	False	
E	± 14		False	False	False	
E	± 15		False	False	False	
(± 16		False	False	False	
(False	False	False	
6	± 18		False	False	False	
1	± 19		False	False	False	

3. Select the next line and enter the name of the Group

(D			Securit	ty Groups		×
		Group ID	Groupr Name	In Use	Applied To Matter	Applied To Handl	
	Ð	1	Family Law	True	True	False	1
	÷	2	Conveyancing	True	True	False	
	÷	3	Litigation	True	True	False	
	÷	4	Criminal	True	False	False	
I	Ð		Private Clients	True	False	False	
	Ŧ	6		False	False	False	
	÷	7		False	False	False	
	÷	8		False	False	False	
	÷	9		False	False	False	
	÷	10		False	False	False	
	÷	11		False	False	False	
	÷	12		False	False	False	
	÷	13		False	False	False	
	÷	14		False	False	False	
	÷	15		False	False	False	
	÷	16		False	False	False	
	÷	17		False	False	False	
	÷	18		False	False	False	
	÷	19		False	False	False	

- 4. Continue entering the groups and then close the screen.
- 5. Users will then need be assigned to the groups.

Add a User to a Group

Once the groups have been defined and added to the system, users can then be added to specific or all groups.

- 1. Go to the Setup Tab and select User Setup.
- 2. Right click on the required User and click Set Handler's Group privileges

		Mainta	in User Security				
New User Impo	ort Users Record Secur	ty Handler Control	Access Profile Cont	/	55		
Code	Name	Team	Active	Sup	ervisor	Team Code	Retir
ADM	Admin	Commercial	Yes	Yes		сом	N 1
AM	Anne Mellon	Conveyancing	No	Yes		CON	N
BS	Brian Sweeney	Commercial	Yes	Yes		сом	N
CN	Carol Nolan	Commercial	Yes	Yes		COM	N
▶ GC	Gera 也 Deactivati	e this handler		No		CON	N
JP		Password for this Handler		No		CON	N
MK	Mark		Change	No		COM	N
MW	Mart g	handler a Supervisor		No		COM	N
SK	Step	er's Group privileges			Family Law	2014	
	Set Repor	t Module Privileges			Conveyancing		
					Litigation		
<					Criminal		
					Private Clients		

- 3. Ticks the boxes to give access to the specific groups
- 4. Repeat the process for each user.
- 5. Close the Dialog Box once finished.

NOTE: Supervisor Access automatically gives full access to all Security Groups.

Handler Control Access

Users, by default, have access to the full Keyhouse system. Different people will require different levels of access e.g. a Fee Earner may need access to System Reports while a member of the Support Staff would not. It is possible to add and remove permission for individual Users.

- 1. Go to the Setup Tab and select User Setup.
- 2. Click on Handler Control Access.

۲							Keyhouse Con	trol Access Mair	ntenance					đ ×
Search														
Handler	OR All Handlers	Profile	Access Firm Phone Log	Access to Know Your Client	Accounts User	Action Flow Setup	Add Associate Types	AML Approval	Bank Details	Change Client Charge Out Rates	Change Day Book Handler	Change Matter Security Permissions	Discharge Undertaking	Document Assis
All Handlers	2		2		2	Z	2	Image: A start and a start	Image: A start and a start	Z		S	2	2 ^
Admin			2	✓	×	×	2	×	2	×	2	X	×	2
Anne Mellon			2	Image: A start and a start	 Image: A set of the set of the	×		×	Image: A start and a start	×		2	×	V
Brian Sweeney			2	✓	2	×	2	1	1		×	×	2	2
Carol Nolan			2	×	¥	2	2	2	V	×	×	×	2	2
Geraldine Curran			2	✓	2	×	✓	×	×		×	×	2	2
Justin Phelan			2	2	¥	2	2	¥	¥	×	2	×	2	2
Mark Kelly			×	✓	×	2	2	×	✓	×	×	×	2	2
Martina Winters			2	✓	×	2	2	2	2	2	2	×	2	2
Stephen Keogh			2	✓	×	2	2	×	Image: A start and a start	×		2	×	2

- 3. The **Or All Handlers** box is ticked for All Handlers to populate the information across all columns. This must remained ticked.
- 4. To remove access for a User, delete the tick in the appropriate column.

The Column Headings are:

Access Firm Phone Log:

Controls access to the Phone Log.

Account User:

Controls who can Draft an Invoice, Request a Cheque, see the Accounts Ledger on a matter and view My Invoices and My Cheques on the Search/Open Screen

Add Associate Types:

Controls who can create a new Associate Type

Bank Details:

Controls who can add or edit Bank Details for an Associate.

Change Client Charge Out Rates:

Controls who can add or edit Charge Out fees at both the Client and Matter level on the Billing Screens.

Change Matter Security Permissions:

Controls who can change the Matter Security Permission e.g. change a matter from one security group to another.

Access to Know Your Client:

Controls access to the Know Your Client Section on the Client/Case Screen

Access Flow Setup:

Controls who can access to the Case Workflow Setup on the Setup Tab

AML Approval:

Controls who can say that AML has been carried out (Tick the AML option on the Current Client Details General Tab or on the Critical Information Screen)

Can maintain Time Entries belonging to others:

Controls who edit entries on the Time Ledger for other people.

Change Day Book Hander:

Controls who can amend time recorded by others on the Time Costing Screen before it is posted.

Discharge Undertakings:

Controls who has access to Discharge an Undertaking on the system.

Document Assist:

Controls who has access to the coding structure for Precedent Documents

Maintain Ribbon Bar:

Controls who can see and maintain information contained on the Maintain Ribbon.

Matter Archiving:

Controls who can enter information on the Archive Tab on the Current Case Details e.g. close a matter or enter an Expected Destroy Date.

Partners:

Controls who has access the information on the Partners Ribbon

SAM4:

Controls who can Draft an Invoice, Request a Cheque, see the A/c Ledger on the Client/Case Screen, see My Invoices and My Cheques on the Search/Open Screen

Strong Room:

Controls who can see the Strong Room on the Client/Case Screen and on the Search/Open Screen

System Reports:

Controls who can access the System reports option. Note: Limited access can be given using the Reports Ribbon.

Time Recorders:

Controls who can use the Timer, Post Time, Access the Time Ledger and Time Costing Screen.

Undertakings:

Controls who can create an Undertaking on the Client/Case Screen

User Defined Reports:

Controls who can access reports specifically designed for the company.

Document Search:

Controls who can search for documents using the Document Search on the Search/Open screen

Maintain Undertakings:

Controls who can add, change and delete undertakings.

New Client:

Controls who can set up new Clients on the system.

Precedents:

Controls who can access the Precedents Documents using an Action.

Setup New Case:

Controls access to who can create a new case, copy a case and Disallow New Matters.

Strong Room Maintenance:

Controls who can add, change, remove, withdraw and replace items in the strong room

Time Ledger Maintenance:

Controls who can edit Post Time entries e.g. add comments, change the rate

Time Write Off:

Controls who can write off time on a matter using either the Time Ledger or the Maintain Tab.

User Administration:

Controls who can set up Users, create Handlers and Fee Earners.

Profile Control Access

When a number of people require the same level of access setting up User Profiles is a quicker and more efficient way of controlling access. The access is granted at the Profile level and people are assigned to the appropriate Profile.

- 1. Go to the Setup Tab and select User Setup.
- 2. Click on Profile Control Access.



- 3. In the Add Profile box enter the name of the Profile Group e.g. General User, Fee Earner etc.
- 4. Click Add Profile



5. Remove the tick from the area to be locked down from the Users

Profiles Handlers				Keyhouse Control Profile	Maintenance				đ :
Search									
Profile	Access Firm Phone Log	Access to Know Your Client	Accounts User	Action Flow Setup	Add Associate Types	AML Approval	Bank Details	Can maintain Time Entries belonging to others	Change Client Charge Out R
I Fee Earner	2	2	2			Sec.	2	2	2
General User	×	×	✓		×		2	×.	
	¢								
	¢								>
Fee Earner Add Profile									Delete Profile(s)

6. Click to the Handlers Tab

(iii)	Keyhouse Control Pro	ofile Maintenance	6" ×
Profiles Handlers			
Search			
Profile		Handler	
•		Admin	*
		Anne Mellon	
		Brian Sweeney	
		Carol Nolan	
		Justin Phelan	
		Mark Kelly	
		Martina Winters	
		Stephen Keogh	
Link & Replace Restrictions	Link & Apply Restrictions	Unlink & Remove Restrictions	Unlink & Do Nothing

- 7. Select the handlers to be add to the first group.
- 8. In the bottom right corner click on the down arrow and select the relevant group

Profiles Handlers	Keyhouse Control Profile Maintenance	đ :
Search		
Profile	Handler	
•	Admin	
	Anne Mellon	
	Brian Sweeney	
	Carol Nolan	
	Justin Phelan	
	Mark Kelly	
	Martina Winters	
	Stephen Keogh	
Fee Earners		
Secretaries		

9. Click Link & Apply Restrictions. Repeat until all users are in their correct groups. Users may be added to more than one group.

	Keyhouse Control Pro	ofile Maintenance	6 ×
Profiles Handlers			
Search			
Profile		Handler	
Fee Earners		Brian Sweeney	
Fee Earners		Carol Nolan	
Fee Earners		Justin Phelan	
Fee Earners		Stephen Keogh	
Secretaries		Admin	
Secretaries		Anne Mellon	
Secretaries		Mark Kelly	
Secretaries		Martina Winters	
Link & Replace Restrictions	Link & Apply Restrictions	Unlink & Remove Restrictions	Unlink & Do Nothing

- 10. If a user has been added to the wrong profile, select the name and click Unlink Handler. Then link them to the correct profile.
- 11. To remove a user from a group, select the user and click Unlink & Remove Restrictions to give the user full access or Unlink and Do Nothing which will remove the user from the group but keep their restrictions.
- 12. To move a User to a new group, select the required group and then click Link & Replace Restrictions.

User Report Access

Access to System Reports and User Defined Reports can be controlled in Keyhouse. Access can be removed or users can be given access to specific or all reports.

Access can be denied to individuals as outlined in Handler Control Access. It can also be denied to a group as outlined in Profile Control Access.

Denying access to specific reports

It is also possible to restrict access to system reports and give access only to selected reports. The procedure for denying access to specific report(s) has 3 steps:

- 1. Create a Report Group
- 2. Set which reports this group can access
- 3. Make users a member of this group

Step 1 – Creating a Report Group

- 1. Click Reports (1)
- 2. Click Create Report Group (2)
- 3. This will open the Maintain Permission Group screen (3) and click Add

Home Case Repor	ts 1 Log Ma	aintain Setup Help)		Keymouse case Management (Aus - andrew shnoot - 4000 / 4000)
tem Reports User Report	Billing Reports Cr	eate Report Group R	eports Setup Use	r Reports Permissio	on
. Search/Open	\$				
All Matters	Code	Last Accessed	File Colour	Name	Description Fee Code Fee Earner User1 User2
vy Matters	• 000005/0002			BDO	Sale of 14 Arcadia Hall, Lower Glanmire EH Elizabeth He
ecent Matters	000006/0001			John Lambert	CT CÓMHNALL
ontacts	000007/0001			Martin King	Gran Maintain Permission Group
ssociates	000007/0002			Martin King	
	000008/0001			KJ Carroll Far	The Add Change Delete
dvanced Search	2CO001/0001			2 Collaborate	Gene Course To Course Manage Description
ly Invoices	2CO001/0004			2 Collaborate	Med Group ID Group Name Description
ly Cheques	2CO001/0061			2 Collaborate	. Jona
hone Log	2CO001/0062			2 Collaborate	New
irm Undertakings	2CO001/0063			2 Collaborate	
trong Room	2CO001/0064			2 Collaborate	
ocument Search	A1S001/0001			A1 Skip Bags	Dean
emplate Library	A1S001/0002			A1 Skip Bags	Prem
	A1S001/0003			A1 Skip Bags	
	A1S001/0004			A1 Skip Bags	Ted I
	AAT001/0001			Laura Morris	Allied
	AAT001/0002			Laura Morris	AA T
	AAT001/0003			Laura Morris	Rate:
	AAT001/0004			Laura Morris	Sale
	AAT001/0005			Laura Morris	100 0
	AAT001/0006			Laura Morris	AA T
	AAT002/0001			AA Tyremaste	. Loan
	ABA001/0002			Abacus Prope	. Tran
	ABA001/0003			Abacus Prope	. Ridg
	[Closed] <> 'Y'				

4. You will be asked to enter a Code for the Report Group and a brief Description

		Maintain Permiss	ion Group		×
Add	Change	Delete			
Group	ID	Group Name	Description		
					^
				×	
	Add Grou	ıpModule			
	Code	OPERATOR			
	Descripti	on operator acce	ss		
			OK	ncel	
					~

5. Enter the details and click OK to proceed.

Step 2 - Set Reports available to this group

- 1. Click Reports (1)
- 2. Then User Reports Permission (2)
- 3. This will open the Maintain Set Module Permission screen (3)

s User Repo	rt Billing Reports Create Report Group	Reports Setup User Reports Permission							
/Open	Reports								
Open	Code Last Accessed	File Colour Name Descrip	tion	Ce.	e Code Fee Earner	User1	User2	User3	Started
	> 000005/0002				Module Permission	-	O ALLA	User5	× 10 Oct 2
	000006/0001			mannan set r		< 3			DS Aug
ers	000007/0001	Search							25 Aug
	000007/0002								25 Aug
	000008/0001	name	Report Type	All Handler	OPERATOR				10 Nov
arch	2CO001/0001	 Bill Layout 	Billing Report	2	Image: Second				Apr
	2CO001/0004	Action Report	System Report	R	2				BO Aug
	2CO001/0061	Activity List WIP	System Report		V				04 Jun
	2CO001/0062	Aged Creditors Report	System Report		2				L6 Jul 3
ikings	2CO001/0063	Aged Debt Breakdown	System Report	2	2				21 Jul 3
n	2CO001/0064	Aged Debt by Client	System Report	2	2				11 Aug
earch	A15001/0001	Aged Debt by Client (Show Dat	System Report						21 Jul 2
arary	A15001/0002	Aged Debt by Client (ShowDat	System Report	×	2				L2 Sep
	A1S001/0003	Aged Debt By Dept	System Report						12 Jan
	A15001/0004	Aged Debt by Fee Earner	System Report	2	2				08 Apr
	AAT001/0001	Aged Debt By Work Type	System Report	2	2				17 Jan
	AAT001/0002	Aged Debt Weekly	System Report	2	2				14 Jan
	AAT001/0003	All Cases	System Report						24 Oct
	AAT001/0004	Allocated Receipts	System Report	2	2				09 Feb
	AAT001/0005	Bill Breakdown	System Report	2	2				26 Feb
	AAT001/0006	Billed Time	System Report	2	2				06 May
	AAT002/0001	Billed Time By Client	System Report	2	2				22 Apr
	ABA001/0002	Billed Time for an Individual Ha	System Report		2				07 Nov
	A8A001/0003	Billing Guide	System Report	2	2				29 Nov
	✓ [Closed] <> 'Y'	Billing Guide Report	System Report	R	2				
	(e) Icrosed (e) L	BillingReport	System Report	2	2				

- 4. The Report Group just created is now visible
- 5. Untick the box for whichever reports you do not wish members of this group be able to see Note: To quickly remove the ticks from all boxes for a Group, right click and select Untick All.

NOTE: Do not untick the All Handler options as this will deny access to all users for all reports.

Step 3 – make users a member of the Report Group

- 1. Click Setup (1)
- 2. Then User Setup (2) and right click on the required user (3)

3. Click Set Report Module Privileges (4)

2 C	Case Work Flow S	etup UDF Form Deta	ls Client Other D System	etails Document A	ssists Personal setting:		Control Settings	Page/Dialog Co Isphouse	·			
n/Open	8											
1 - P	Code	Last Accessed	File Colour	Name	Description		Fee Code		Jser1	User2	User3	Started
'5	000005/0002			BDO	Sale of 14 Arcadia Hall	Lower Glanmire	EH	Elizabeth He				20 Oct 2015
itters	000006/0001			John Lambert			СТ	CÓMHNALL				05 Aug 2015
ACCET 5	000007/0001			(m)		Mair	tain User Securi	ity				25 Aug 2015
	000007/0002			W			nam over accun	.y				25 Aug 2015
, Search	000008/0001			.	8 🛋							10 Nov 2015
search	2CO001/0001			New User Impo	rt Users Record Security	Handler Contro	Access Profil	e Control Access				17 Apr 2012
	2CO001/0004		_									30 Aug 2012
es	2CO001/0061			Search								04 Jun 2015
rtakings	2CO001/0062		_	Code	Name	Team	Active	Supervi	sor T	eam Code	Retir	16 Jul 2015
-	20001/0063		_	AA	Test	General	No	No		EN	N ^	21 Jul 2015
om	2CO001/0064		_	ADM	Admin	General	Yes	Yes		EN	N	11 Aug 2015
Search	A15001/0001		_	AG	3 AINE GLEESON	General	No	No		EN	Y	21 Jul 2010
Library	A15001/0002		_	Deactivate this h	<u> </u>		Yes	Yes	G	EN	N	12 Sep 2011
	A15001/0003		_	-	ed for this Handler		No	No	G	EN	Y	12 Jan 2012
	A1S001/0004		_	•			No	No	G	EN	N	08 Apr 2014
	AAT001/0001		_	1		Change	No	No	G	EN	N	07 Jan 2011
	AAT001/0002		_		sor role for this handler		No	No	G	EN	N	14 Jan 2011
	AAT001/0003		-	Set Handler's Gr	up privileges		No	No	G	EN	N	24 Oct 2013
	AAT001/0004 AAT001/0005			Set Report Mode	ile Privleges		All Handler		G	EN	N	09 Feb 2015
	AAT001/0005 AAT001/0006			- UI	COMHINA DO.	. General	An Aslight		G	ΈN	N	26 Feb 2015 06 May 2015
	AAT001/0005			DH	DAMIAN HAND	General	OPERATOR		G	EN	N 🗸 –	22 Apr 2015
	ABA001/0002											07 Nov 2011
	ABA001/0002		-	<							>	29 Nov 2011
	Closed] <> "Y		_								ati	29 100 2011
	(M) [Closed] <> Y								_	_		
	UDF Field											

- 4. This will open a list of all Report Groups which have been set (5)
- 5. Tick the appropriate box to make this user a member of this Report group
- 6. The selected user now only has access to those reports which have been set as accessible by the Report Group

Search Code Nam AA Test ADM Adm	2	Team	Control	Access Profile Co				_
Code Nam AA Test ADM Adm	-			Activo				
AA Test ADM Adm	-			A ctive				
AA Test ADM Adm	-							-
ADM Adm				Active	Supervisor	Team Code	Re	
		General		No	No	GEN	N	
AG ÁINE	n	General		Yes	Yes	GEN	N	
AU AUNE	GLEESON	General		No	No	GEN	Y	
Deactivate this handler]					
Reset the Password for this Hand	Reset the Password for this Handler			No	No	GEN	Y	
•		Change		No	No	GEN	N	
		inange		No	No	GEN	N	
Remove Supervisor role for this h	andler			No	No	GEN	N	
Set Handler's Group privileges				No	No	GEN	N	
Set Report Module Privileges				All Handler	GEN	N		
CT COM	HNALL TUO	. General		, and the second second	5	GEN	N	
DH DAM	IAN HAND	General	1	OPERATOR	_	GEN	N	
			-					

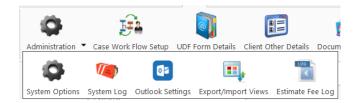
Note: you may set as many Report Groups as you wish, each with varying access. Users may be made members of multiple Report Groups but if they are denied access to a report in one Report Group then even if given access through another Report Group they <u>will not</u> be able to access the report.

ADMINISTRATION

Administration allows for the creation of system wide settings.

System Options

1. On the Setup Ribbon click on Administration



2. Select System Options

)			System C	Configuration				
Money Laundering	N	Aore	Keyhouse	Mail	Configuration	0	utlook Setting	s
General	Keyhouse Op	otions	Risk Managm	ient	System Options		Notify by Ema	ail
Precedent Folder	t:\keyho	ouse\Standrad	d Documents					
Storage Method								
Client Locat	ion t:\keyho	use\client do	cuments					
Document Nami	ng Method							
O Descriptio	n With Track F	eference	Track Reference	Only				
My Overview Set		8		Current WIF	• Limit	0		
Time DayBook Li	imit for a day	8		Current WIF				
OS Invoice Limit		0		Draft Invoio	e Limit	0		

The General Tab	Allows the user to change the storage locations for clients and precedents. It also allow the user to select how documents will be named. The Overview Settings are set here.
Keyhouse Options	Configured by Keyhouse at setup. Please do not adjust with prior consultation with Keyhouse
Risk Management	Allows the user to set warnings and limits
System Options	Allows the user to set Account Settings and Preferences
Notify by Email	Allow the user to set up email notification for Invoice and Cheque approval.
Money Laundering	Allows the user to set the Money Laundering Settings and Document Matter settings
More	Category types and Client Numbering system are set here. It is also possible to rename the

	Ref1-Ref3 fields. The Fee related fields can be made compulsory from this tab.
Keyhouse	From this tab you can set system wide
	permissions including marking documents as
	Read Only when an action is completed.
Mail Configuration	Please do not adjust with prior consultation
	with Keyhouse.
Outlook Settings	The settings required for the Outlook
	Integration are set here.

Other Administration Options

	Records errors which allows for faster resolutions.
System Log	
•	Holds the Outlook Integration settings – please do not adjust
Outlook Settings	
=,	Allows for the import and export of the standard Keyhouse views.
Export/Import Views	
LOG C	Records all changes made to estimated fees on matters.
Estimate Fee Log	

Personal Settings

Each individual user has the ability to change their own personal settings. This is done through the Personal Settings option on the Setup Tab.

- 1. Click on the Setup Tab and then select Personal Settings.
- 2. Select Preferences



3. From here the user can make changes need to set their own personal settings.

(Preference ×
User Setting	
Remember Sync Document Name With Subject Line	
My Briefcase	
	Do Not Show Briefcase Notification
Show Notification to Open Case Diary Attachment	
Show Start Up Page	
Show Case Associative Contact Details	
Use Enter in Search Boxes	
Retain Last Advanced Matter Search	
My Overview Settings	
Budget Daily Hours (HH:MM) 8:00	Current WIP Limit
OS Invoice Limit	Draft Invoice Limit
Choose which has to shown first on preview panel in	a case diary O Action Details
SDLT XML path	
Launch Alarm system at startup	
Allow focus to the top after completing an action	
	QK Cancel

4. It is also possible to set a label printer and changing user's passwords.

PART 3: SETTING UP CASE PLANS

INTRODUCTION

This document is designed to inform the reader how to complete the case setup section of the Keyhouse Console. Within this document you will learn how to customise the set-up specific to your firm's needs. This manual will begin with the set-up of the different case types required by your firm. Then a case action flow will be completed for each case type, complete with detailed actions, associated actions and associated documents. The aim of this document is to familiarise you, the user, with all these operations. Good luck! And we hope you enjoy the efficiency of the Keyhouse Console.

Objectives

- Background Overview
- Set-up of Case Types
- Set-up of Case Action Flow
- Set-up of Actions
- Set-up of Associated Actions
- Set-up of Associated Documentation

Preparation Needed

In order to successfully complete the set-up section of the Keyhouse Console, it would be beneficial if you gathered the following information.

- 1. A list of the types of cases your firm deals with e.g. Sale of Property, Wills etc.
- 2. Upon completion of Step 1, examine each case type individually and compile a list of the steps needed to complete each case type. Be as thorough as possible.
- 3. Then examine the order in which you complete each step.
- 4. Finally, examine the type of documents that need to be completed at each step in your case action flow.

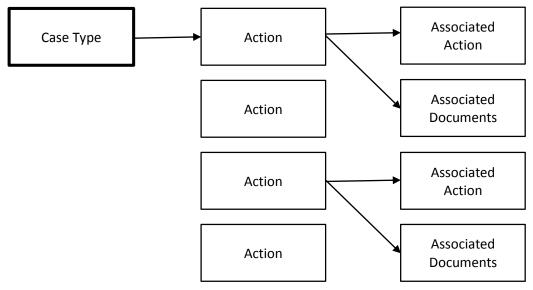
Remember that good preparation will ensure your maximise the benefits of your Keyhouse Console.

BACKGROUND OVERVIEW

Before we begin it might be useful to look how each step of the set-up interacts with each other, below is a graphical representation of this:-

Case Action Flow Setup:	This is the list of steps needed to complete a type of case. It is made up of Actions, Associated Actions and Associated Documents
Case Type:	This is the type of case in use e.g. Purchase of Property.
Action:	An Action is a step within the case action flow.
Associated Actions:	Associated Actions are actions associated or connected with that action.
Associated Documentation:	Associated Documents are documents associated with that step or action.

Case Action Flow/Plan

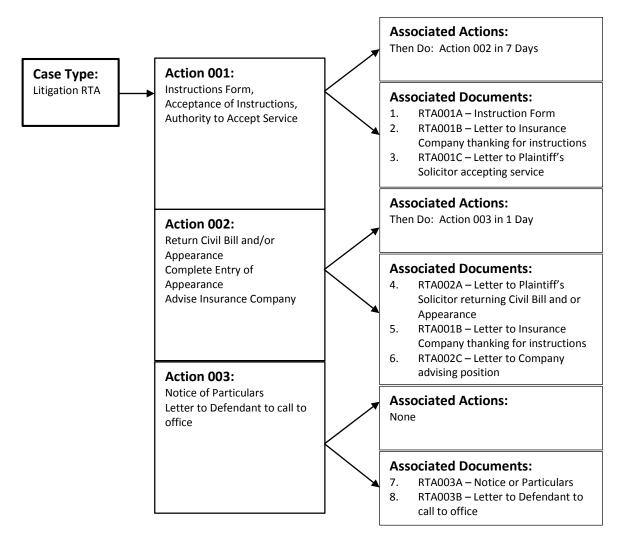


Explanation:

Illustrated in the above diagram we can see that each case type is made up of a case action flow, this is a list of steps that need to be completed. The case action flow is subsequently made up of a series of actions or steps. Each Action may then have associated actions and associated documents, connection with it. Please see the following simplified example of a case type and a case action flow.

Example

Case Flow Plan for a Litigation case type



For more examples see appendices to the rear of the manual.

Frequently used Icons

- Add an Existing Action
 - Create a New Action
- Edit an Action
- Delete An Action
- Print the Selected Case Plan

SET-UP OF CASE TYPES

Introduction

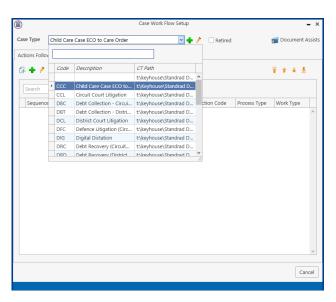
As previously mentioned the set-up of different case types will involve quite an amount of consideration but once the list of different case types is compiled the set-up of the different case types is reasonably straightforward. The set-up of the case type is the first step in case set-up section of the Keyhouse Console.

In this section we familiarise ourselves with the following tasks:

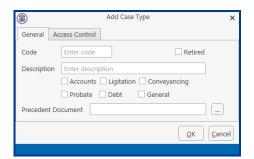
- Adding New Case Types
- Removing Case Types
- Amending Existing Case Types

Adding New Case Types

- 1. Select Setup from the list of Tabs
- 2. Select Case Work Flow Setup from the Ribbon. The following dialogue box will appear.



3. To add a Case Type click on the Green Plus beside the Case Type. The following dialogue box will appear.



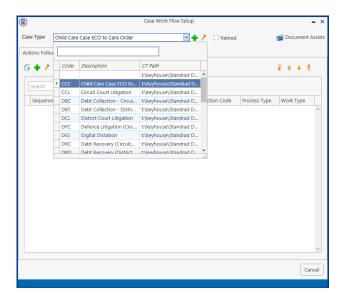
4. Type in an appropriate code in the Code box e.g. LIT for Litigation, this code must be unique and 3 characters in length.

Tip: It would be advantageous to compile a list of appropriate unique codes for each case type.

- 5. Type a description in the Description box e.g. Purchase Work Flow.
- 6. Below the Description Box you can see a series of tick boxes. Tick the most appropriate category for the case type.
- 7. Leave the Precedent Documents blank, it will create a storage location for the precedent documents.
- 8. When completed click the OK button and the case type just created will appear in the Case Type List.

Controlling Access To A Case Plan

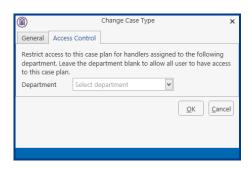
- 1. Select Setup from the list of Tabs
- 2. Select Case Work Flow Setup from the Ribbon. Click on the Down Arrow beside Case Type to get the list of all existing case plans. The following dialogue box will appear.



- 3. Select the case plan you want to restrict.
- 4. Click on the Edit button (Pencil) beside the Case Type Drop Down Arrow. The following dialogue box will appear.

		Change C	ase Type		×
General A	ccess Cont	rol			
Code	CCC			Retired	
Description	Child Ca	re Case ECO to	Care Order		
	Accour	nts 🗹 Ligitatio	on 🗌 Conveya	ancing	
	Probat	e 🗌 Debt	General		
Precedent D	ocument	t:\Keyhouse\	Standrad Docu	iments\Chile	
				<u>O</u> K	Cancel

5. Click on the Access Control tab. The following screen will appear.

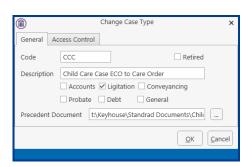


6. Click on the Down Arrow to get a list of departments, select the department to use this cae plan.

Note:	Only handlers assigned to this department will then have the option of choosing this case
	plan.

Amending An Existing Case Type

- 1. Select the required case plan as before.
- 2. Click on the Edit button (pencil) beside the Case Type Down Arrow.

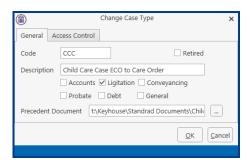


3. The following dialogue box will appear. Make any required changes and click the OK button and these changes will then take place.

Retire A Case Type/Plan

Once a case plan is no longer required it can only be retired. This will prevent it from be selected in error.

- 1. Select the required case plan as before.
- 2. Click on the Edit button (pencil) beside the Case Type Down Arrow.



- 3. Tick the Retired Button. This will remove it from the list of Case Plans.
- 4. Click OK.

SET-UP OF CASE ACTION FLOW

Introduction

After setting up the different case types it is essential to compile a list of steps involved in each case type, these steps are known as actions. The Case Action Flow as illustrated in the Introductory section is made up of a series of Actions, these actions in turn, have Associated Actions and Associated Documents. In this section we will familiarise ourselves with the following tasks:

- Set-up of a Case Action Flow
- Creating New Actions
- Amending Existing Actions
- Removing Actions
- Importing Zipped Case Plan Files
- Exporting Case Plans as Zipped Files

Setting Up A Case Action Flow

- 1. Select the case plan as before.
- 2. Click on the Green Cross under the Actions Followed



3. The following dialogue box will appear.

			Add Action				×
Case Plan Action code	Child Care Case ECO to Care O Enter action code	rder	V				
Action							
Properties	Follow Up Action Associated	documents	Auto charging	Commands	Email	Task Assignments	_
Priority No	ormal 🗸]	/lileStone Action	Billable	2		
Status No	ot Applicable]	now Your Client				
Flag	~						
Action Cat Action Fixed D Note Appoint Remind Email Phone I Dictatio Underta	bated Action Itment der Message on	Publish None WEB/TH Export o All	Only		● In ○ Ou	ss Type t her Process	
O Statute Critical Court D	Date Date d Post/Mail e Request D	Required					
						<u>Save</u>	ncel

4. Add a Unique Number Code for this action in the action code box. This code should be representative of the position the action/step is in the case plan e.g. RHP02 is the second step in the Residential House Purchase Case Plan.

5. Complete the following details in the Properties Tab.

Priority:	Set the priority of this action e.g. Normal, High, Low using the drop down list provided.
Milestone Actions:	Use the tick box provided to indicate if it is a Milestone Action i.e. a very important task. For example serving a summons would be a Milestone Action.
Billable:	Use the Tick box provided to indicate whether a bill is due to be issued at this stage of the Case Action Flow.
Status:	The Status of the action is the stage of completion of this action for example an action could be open, active, closed or billed.
Action Category:	Select the appropriate Action Category using the Option Buttons available.
Publish:	The Publish option is only available for those who have internet and export services available.
	Publishing an action will allow the action to be viewed or exported to an external source. Below is a list of options available.
	Web thin/client: Publish the action on the internet so that it can be viewed by clients who have this service.
	Export the action to external sources e.g. as an entry in a database.
	All will publish the action through the Internet and exports it to an external source.
	None will do none of the above.
Process Type:	This refers to whether the action is going out or coming in. For example a letter to a client would be going out therefore the process type would be "out". A Note/Internal Memo process type would be "other process" as it is neither going in or out. Select the Option button for the required process type.
Auto Populate:	This will automatically add the action to the Case Diary when the case is created.
Required Action: Auto Alarm Action: Hold Current Case Plan:	This will prevent the action being removed from the Case Diary Set a reminder on the action

6. Click to the Auto changing Tab.

î			Change Action					×
Case Plan	Shared Ownership	acquistions & disposals	~					
Action code	0020							
Action	Contract/Title rece	ived no instruction						
Properties	Follow Up Action	Associated documents	Auto charging	Commands	Email	Task Assignments		
Change matt	ter charge arrangen	nent to		on completio	n of this	action		
	cost to be charged of this action	on 0						
Post inter	est on complication	of this action						
							Save Cano	:el

- 7. From this screen the charging arrangements can be changed on the completion of the action.
- 8. Click to the Task Assignment Tab

			Change Action					×
Case Plan	General Office Work							
Action code	G01							
Action	Initial Attendance							
Properties	Follow Up Action	Associated documents	Auto charging	Commands	Email	Task Assignments		
	artner F/E	Assign Action To Tear Logged On Team Case Team Other				ompletion Required By		
Action C		ı			Time	e Frame		1
							~	_
						Sav	ve <u>C</u> ance	1

9. From this screen actions can be assigned to specific users and teams by selecting the required option.

Logged on Handler	If you would like the user of this case plan to receive the follow on actions leave the Assigned Action Handler option button as "Logged on Handler".
Case FE	If you would like the Case Fee Earner of this case plan to receive the follow on actions leave the Assigned Action Handler option button as "Case F/E"
Case Partner	If you would like the Case Partner of this case plan to receive the follow on actions leave the Assigned Action Handler option button as "Case Partner"
Other	If you wold like it to go to another specified handler choose the "Other" option button. Use the Down Arrow to locate the required user.

Logged on Team	If you would like the logged on team for this case plan to receive the follow on actions leave the Assigned Action to Team option button as "Logged on Team".
Case Team	If you would like the case team for this case plan to receive the follow on actions leave the Assigned Action to Team option button as "Case Team".
Other	If you wold like it to go to another specified team choose the "Other" option button. Use the Down Arrow to locate the required team.

- 10. Action Authorised/Completion Required by will allow you to control who completes the action if it is to be someone other than the assigned person.
- 11. When you have completed all the above steps click the OK button.
- 12. Repeat the procedure to add additional actions.

Amend An Existing Action

- 1. Select the Action you want to amend.
- 2. Click on the Edit button (Pencil) under the Actions Followed Tab.
- 3. Amend as required and click the OK button.

Remove An Existing Action

- 1. Select the Action you want to remove.
- 2. Click on the Red X under the Actions Followed Tab.
- 3. A message box will appear asking you "Are you sure you want to delete this item?".
- 4. Click the Yes button to remove.

Note: If the Action has associated actions or documents you will not be able to delete the action. Therefore in order to remove the action the associated actions and associated documents would have to be removed first.

Sequencing Actions

The sequencing tool allows you to alter the order or sequence of the actions in the case plan.

- 1. Select the Action you want to reposition.
- 2. Click on the sequence button required. As described below:



The first button will reposition an action to the top of the case plan. The second button will reposition an action up one level. The third button will reposition an action down one level. The fourth button will reposition an action to the bottom of the case plan.

Note: An action will still hold its original code therefore affecting associated actions.

SETTING UP ASSOCIATED ACTIONS

Introduction

Once the action has been inputted it is then possible to add an associated action to it. Associated actions are actions connected with the main action. In this section we will familiarise ourselves with the tasks.

- Creating Associated Actions
- Removing Associated Actions
- Amending Associated Actions

Creating An Associated Action

As described previously associated actions are connected to existing actions in our case action flow. Therefore, by adding associated actions to an action we are amending this action.

- 1. Select the required Case Plan as before.
- 2. All the actions in this case type are displayed.
- 3. Select the Action you want to add the associated action to.
- 4. Click on the Follow Up Action Tab

			Change Action					×
Case Plan	Residential House	Purchase	Y					
Action code	RHP01							
Action	Send initial letter t	o client.						
Properties	Follow Up Action	Associated documents	Auto charging	Commands	Email	Task Assignmen	ts	
+ / ×								
Decision	Next Action	Description			When	When Type	Action	
								<
								~
O Auto	omaticaly process as	ssociated actions	Ask the user to sel	ect the associ	ated actio	ns to process		
							Save	Cancel

5. Click on the Green Cross and the following dialogue box will appear.

	Add Asso	ciated Action	×
On Completion of :	RHP01	Send initial letter to client.	
Then :	Do	Response from Client	~
In :	7.00	Days	✓ Time
		<u>S</u> ave	<u>C</u> ancel

Starting On Completion of: RHP01 then you do Click on the down arrow and a list of actions will be displayed.

۲		Add Associ	ater	d Action	×	Action	
On Completion of :	RHP01		Se	nd initial letter	to client.	Action	ients Auto d
Then :	Do	~	R	esponse from C	lient 🗸		
In :		7.00 🗘		rh	0	2	
			1	DESC 🔺			
				Action Code	Description		
			Þ	✓ DESC: Re	sidential House Purchase		^
				RHP01	Send initial letter to client.		
				RHP02	Response from Client		
				RHP03	Contact the Land Registry		
				RHP04	Reply from Land Registry		

Enter the first letter of the action codes to show get to the required actions. Select the action required Click on the down arrow to the left of time and coloct the time frame required of

Click on the down arrow to the left of time and select the time frame required e.g days, weeks, now.

Click on the down arrow to the right of the In box and specify the period.

6. Click Save to link the actions. The Associated Action will then be visible in the Associated Action Window.

To Remove An Associated Action

- 1. Select the Associated Action you want to remove.
- 2. Click the Delete Button.
- 3. A message will appear asking you to confirm the deletion. Click the Yes Button.

To Amend An Associated Action

- 1. Select the Associated Action you want to amend.
- 2. Click the Edit button (Pencil)
- 3. The Change Associated Action dialogue box will appear.
- 4. Make the required changes and click the OK button. These changes should be visible in the Associated Actions tab.

SETTING UP ASSOCIATED DOCUMENTS

Introduction

Associated documents are documents connected with an action or step i.e. Documents that need to be completed at that stage of the Case Action Flow/Plan.

There may be times when you may need to customise an existing library document to meet your requirements. In order to do so you may need to insert extra fields into the document or maybe create your own fields.

In addition you may need to create a new document to add to your document library. To assist in the creation of these documents you can import an existing Word document into your document library and amend as required. Below is a list of tasks to be covered in this section:

- Creating a New Associated Document
- Import a document to create a New Associated Document
- Amending an Associated Document
- Removing an Associated Document
- Adding an existing Associated Document
- Coding a Precedent Document
- Creating User Defined Fields

Creating A New Associated Document

- 1. From the Setup Tab select Case Work Flow Setup from the Ribbon.
- 2. Select the Case Plan as before.
- 3. Double click on the Action you want to add the associated document to.
- 4. Select the Associated Documents Tab. The following options become available.

٦			Char	ige Action					×
Case Plan	Residential House	Purchase	~						
Action code	RHP01								
Action	Send initial letter t	o client.							
Properties	Follow Up Action	Associated documents	Auto	charging	Commands	Email	Task Assignmen	ts	
🕂 🖟 🧷	× = 🖲 📂 🛛	È.							
Code	Document Name	2		Optional	Action	Filepath	ı		
								Save	Cancel
					_			Sane	Saucei

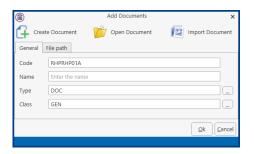
5. Below is an explanation of each tool used in creating associated documents.



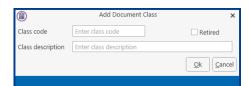
Add a new document

Select a new document

- Change/Amend document settings
- Contract Delete an associated document
- Select a document to import
- Open selected document
- Document Properties
- 6. To create a new document click on the Green Plus. The following dialogue box appears.



- 7. A code will be assigned automatically. It is made up of the Case Type Code and the Action Code plus a letter A, B C etc. in succession.
- 8. Enter the Document Name in the Name box e.g. Letter to Plaintiff's Solicitor Re: Notice for Particulars.
- 9. Type would be Word Document but this can be changed to match the type of document to be added by clicking the ... button.
- 10. Click on the 🗔 button to set the classification for the document. This is used in connection with the Brief Builder Module.
- 11. IF the code you want is not present, click on the Green Plus within the Document Class window. Enter a three letter code in the Class Code box and a description in the Description box and click OK.



- 12. The newly created Class will then be available in the Document Class window.
- 13. Click on the Create Document button, a blank Word document will open. Create the document as required.
- 14. The document will then be visible in the associated document window of the action.

Import A Document To Create A New Associated Document

There may be occasions when you already have the basic text of a document created that can be used as the foundation of a new document. Follow the instruction above from Step 1 to 11. Then follow the steps below.

1. Click on the Import Document button . The following dialogue box will appear.

						-
🕘 🕘 🕤 🕈 🏭 > This PC → Wind	iows (C:) »		v C	Search Windows (C		P
Organise • New folder				18	• 🔳	
This PC Desktop De	Name Name Name Name Name Name Name Name	Date modified 07/08/2015 1-18/3 24/06/2015 1-18/3 24/06/2015 1-18/3 24/06/2015 1-18/3 13/06/2015 1-18/3 25/06/2015 1-201 24/06/2015 1-201 23/06/2015 1-201 23/06/20	Type File folder File folder	Size		
File name	Marson Data	01/07/3016 15-80	Eile dalder	All files (*,*)		~
File Dame:			Ŷ			~
				Open	Cancel	

- 2. Browse for the document of your choice then click on the Open button.
- 3. The document will then be opened along with the Document Assist.
- 4. Close Microsoft Word.
- 5. Return to the Keyhouse Console Window. The document will then be visible in the Associated Document code at a later stage in the Section "Coding a Precedent Document".

To Remove An Associated Document

- 1. Select the Associated Document you want to remove.
- 2. Click on the Red X.
- 3. A message box will appear asking you " Are you sure you want to delete this Associated Document? Click the Yes button and the associated document is removed.

To Amend An Associated Document

- 1. Select the Associated Document you want to amend.
- 2. Click on the Open Selected Document 🖻 located on the Associated Documents screen.
- 3. Amend the document as required.
- 4. When complete save the changes and close the document.
- 5. Return to the Keyhouse Console.

Add An Existing Associated Document

- 1. Click on the Select a New Document button 🕒.
- 2. The following dialogue box will appear.

Dptional	Add Associated Action	×
Document :		
		Save Cancel

3. Click on the Browse Button to display a list of documents in your document library. The following Document Library dialogue box is displayed.

	Search							
	Code	Descrip	otion	File Path	Туре	Class	Plan	
J	AMCG10A	Dictati	on	t:\keyhouse\Standrad Documents\General Of	DOC	GEN		
	ATTR001A	Review	Attendance	t:\keyhouse\Standrad Documents\Pre-Court	DOC	ATT		
	CCBC101A	Memo	informing Client of adjourn	t:\keyhouse\Standrad Documents\Circuit Cou	DOC	GEN		
	CCBC101B	Letter i	nforming Appellant of adjo	t:\keyhouse\Standrad Documents\Circuit Cou	DOC	LTR		
	CCBC101C	Letter i	nforming Witness of adjou	t:\keyhouse\Standrad Documents\Circuit Cou	DOC	LTR		
	CCBC102A	Memo	informing client of result	t:\keyhouse\Standrad Documents\Circuit Cou	DOC	GEN		
	CCBC102AA	Agress	o Requisition Form for Cou	t:\keyhouse\Standrad Documents\Circuit Cou	DOC	GEN		
	CCBC102AB	Letter	o Counsel enclosing fees	t:\keyhouse\Standrad Documents\Circuit Cou	DOC	LTR		
	CCBC103A	Affiday	it of Debt	t:\keyhouse\Standrad Documents\Circuit Cou	DOC	GEN		
	CCBC103B	Certificate of No Appearance		t:\keyhouse\Standrad Dod	1 Docu	ments\Circuit	t Court Cis	ál I
	CCBC103C	Affiday	it of No Defence	t:\keyhouse\Standrad Documents\circuit cou	DOC	GEN	court en	
	CCBC103D	Deque	t far Judamant hu Dafault	th knukausal Clandrad Dacumantel Circuit Cau	000	CEN		
	Action Code		Description			Document		
G10						AMCG10A		

- 4. Search for the Document required using the search facility. To use the search:
 - a. Type part of the document name in the search box provided and click enter if needed.
 - b. A list of documents will be returned. Select the document required and click on the Select button.
- 5. You have the choice to open and view the document using the Open command 😕.
- 6. If this document is an optional document check the Optional check box.
- 7. Click the Save button to add the associated document.
- 8. The document will then be displayed in the Associated Documents window.

Coding A Precedent Document

When coding a document we are adding fields from our Keyhouse Console to a normal Word document to allow it to be generated through our Keyhouse Console diary. This will facilitate a normal document merge with data from our case management system to create individual client letter and documents.

- 1. From the Case Work Flow Setup window open Document Assist.
- 2.

	Case Work Flow Setup	- ×
Case Type	Residential Sale 🔍 🔶 🤌	🗊 Document Assists
Actions Follo	wed Information required	
G 🕈 🌶	🗙 🖴 🗷 👻 🔹	至今十五

- 3. Select the Associated Document you want to code.
- 4. Click on the Open Selected Document button 😕.
- 5. The Document Assist displays all field that may be added to a document. For more information on the Document Assist go to the Section: Guide to the Document Assist
- 6. Click on the document where the field is to be added
- 7. In the Search box enter a word related to the information required e.g. address.
- 8. All commonly used fields are visible however it may be necessary to tick the Show all fields box to see your required field.

8		Document Assist	×							
÷	1	K 🚐 🖡 👔 🗌 Show all fields 🛛 😽								
S	Select a associate type									
Fi	First									
	Include in Document Name									
	Search									
	Docu	ment Fields								
Þ	۰.	CAN: - Case Associates								
	۱.	CNT: - Client Details								
	۱.	CSM: - Other Case Details								
	۱.	DATE: - Important Dates & Times								
	۱.	DEA: - Debt Costin Ledger								
	۱.	DIA: - Case Diary								
	۱.	HAN: - Fee Earner/Handlers Details								
	۱.	LCL: - Other Client Details								
	۲.	LCN: - Client. Contact (Surnames Etc)								
	▶ 🗆	MAT: - Case/Matter Details								
	۱.	UDF: - User Defined/Other Information								

Select a suscisate type Inst Include in Document Name addres Document Fields CASI:- Case Associates Address Add	Show all fields	• / × ×
		Select a associ
	2	First
	lame	Include in D
Document Fields a C.M.N.: Case Associate: Address Unce 1- (Address 1) Address Unce 2- (Address 1) Address Unce 2- (Address 1) Address Unce 2- (Address 1) Address Unce 2- (Address 1) Address Unce 2- (Address 1) Address Unce 2- (Address 1) Address Unce 2- (Address 1) Address Unce 3- (Address 1) Address Unce 3- (Address 1) Address Unce 4- (Address 1) Address (Unce 3- (Address 1)) Address Unce 4- (Enval) E-Mail Address - (CaseAddress 1) E-Mail Address (Leve 4- (CaseAddress 1)) E-Mail Address (Leve 4- (CaseAddress 1))		
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Assigned Email Address - (AssignedEmail) E-Mail Address - (Enail) Legal Address - (Legal Address) Legal Address (Legal Address 1)	e 5- (<mark>Address</mark> 5)	
E-Mail Address- (Email) Legal Address- (LegalAddress) Legal Address Line 1- (LegalAddress)	gle Line- (<mark>Address</mark> Single)	
Legal Address- (LegalAddress) Legal Address Line 1- (LegalAddress1)		
Legal Address Line 1- (LegalAddress1)		
Legal Address Line 2- (LegalAddress2)		
Legal Address Line 3- (LegalAddress 3)		
Legal Address Line 4- (Legal Address 4)		
Legal Address Line 5- (LegalAddress5) Legal Address Single Line- (LegalAddressSingle)		

- 9. Click on the Chevron to collapse the categories.
- 10. Open the category your need



- 11. Double click on the required field to add it to the document.
- 12. Move to the next location on the document and continue until all required fields have been added.
- 13. Save the document when completed and close.

Note: The document will not show specific information until it is generated through the Console Diary.

ADDING A POPUP PARAGRAPH TO A PRECEDENT

The code below is how to code for a PopUp paragraph on your Precedent – write in the code where the paragraph itself will be placed:

E.g. [SYS:dpopup('XXX')] where XXX is the category name you assigned when setting up the Popup paragraph

You can have multiple paragraph options.

IMPORTING A DOCUMENT TO A PRECEDENT

This will allow you to import a document stored outside Keyhouse to a Precedent document stored in Keyhouse.

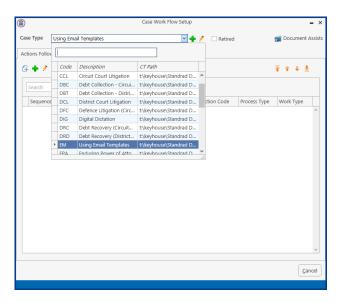
- 1. Go to the Setup Tab and open Case Work Flow Setup.
- 2. Open the Work Flow containing the Precedent.
- 3. Double click on the Action that contains the document.
- 4. Open the Associated Document Tab and double click on the Document.
- 5. Go to the location where the document is to be inserted.
- 6. Enter the following: [IMP:filepath]

	[MAT:Code]/[MAT:FeCode]/[UDF:SecRef] [DATE:Today]
Re:	[MAT:Description]
Dear	
[IMP]	N:\Approved Doctor.docx]
Yours	faithfully
[DIA:	CompanyName]

7. Save and close the document.

CREATING AN EMAIL TEMPLATE WITHOUT AN ATTACHMENT

- 1. Choose the required Workflow.
- 2. Open Document Assist.



3. Create a new action.

			Add Action				×
Case Plan Action code	Using Email Templates		~				
Action	Create an email without an attachment						
Properties	Follow Up Action Associated	documents A	uto charging	Commands	Email	Task Assignments	
Status No	ormal V ot Applicable V	9	Stone Action w Your Client	🗌 Billable	2		
Note Appoint Remind Email Phone I Dictatio	ated Action tment fer Message m	Publish None WEB/Thin Export Onl All			● In ○ Out	s Type : er Process	
O Underta Statute Critical Court D	aking Date Date d Post/Mail Request D	Auto Popula Required Act Auto Alarm Hold Current	tion Action				
						Save Ca	ncel

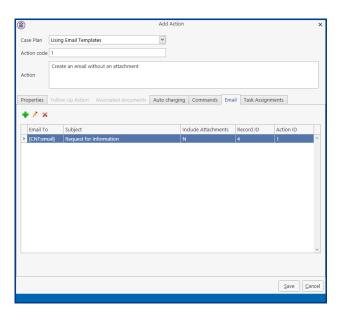
- 4. Set the properties to Email and save.
- 5. Open the Action and click on the Email Tab.

١			Add Action	n				×
Case Plan	Using Email Temp	lates	~					
Action code	1							
Action	Create an email w	vithout an attachment						
Properties	Follow Up Action	Associated documents	Auto chargin	g Commands	Email	Task Assig	nments	
+ / ×								
Email To	Subject			Include Attachme	nts	Record ID	Action I	D
								^
								~
							Save	e <u>C</u> ancel

6. Click on the green plus sign to create a new email.

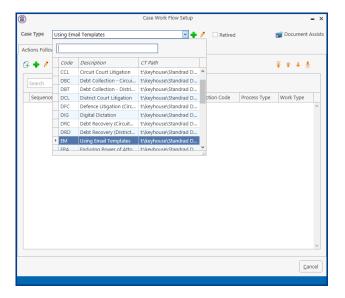
۲	Add Email Template	• ×
To:	[CNT:email]	
CC:	Enter CC addresses	
BCC:	Enter BCC addresses	
Subject:	Request for information	
	Include Attachments Mail Priority: Normal * Include PDF Versions of Attachments Request Read Receipt	
1 H 🖌	📰 x 📾 📾 x 🗄 🕵 x 🛯 🗮 🖉 🖉 x 🛤 x 🛛 😡 x	
6 E	1 * * * * * * * * * * * * * * * * * * *	. ^
	Dear [CNTISalut] I would be grateful if you could	
	Save	ancel

- 7. Using Document Assist to Code the Email with the relevant information and type the text required.
- 8. Save the changes.



CREATING AN EMAIL TEMPLATE WITH AN ATTACHMENT

- 1. Choose the required Workflow.
- 2. Open Document Assist.



3. Create a new action.

			Add Action				×
Case Plan	Using Email Templates		~				
Action code	2						
Action	Create an email with an attaching	nent					
Properties	Follow Up Action Associated	documents	Auto charging	Commands	Email	Task Assignments	
Priority No	ormal	□ N	lileStone Action	🗌 Billable	2		
Status No	ot Applicable	<u></u> к	now Your Client				
Flag	V						
Action Cat	egory	Publish —			Proces	ss Type	
Action Fixed D Note Appoint Remind Email Phone I Dictatio	ler Message	None WEB/Th Export C All			● In ○ Out ○ Oth	t her Process	
O Underta O Statute O Critical O Court D	aking Date Date d Post/Mail Request D	Auto Popi Required Auto Alan Hold Curr	Action				
						Save	ancel

- 4. Set the properties to Action and save.
- 5. Open the Action and click on the Email tab.

			Change Ac	tion				×
Case Plan	Using Email Templ	ates	Y					
Action code	2							
Action	Create an email wi	th an attachment						
Properties	Follow Up Action	Associated documents	Auto chargi	ng Commands	Email	Task Assign	ments	
+ / ×								
Email To	Subject			Include Attachmen	rts F	Record ID	Action ID	
								^
								~
							Save	Cancel

6. Click on the green plus sign to create a new email.

	Add Email Template	>
0:	[CNT:email]	
C:	Enter CC addresses	
:C:	Enter BCC addresses	
bject:	Medical Report	
	Ør lodde Attachments Mail Proving: [Mommal ¥] Indude POF Versions of Attachments Request Read Receipt Image: I 0 + 1 0 1 0 1 0 1 0 1 0 0 0 0 0 0 0 0 0 0 0 0	
	Dear [salut] Attached please find your medical report. I trust that this is satisfactory.]	
	Save Q	ncel

- 7. Using Document Assist to Code the Email with the relevant information and type the text required.
- 8. Tick the Include Attachments button. It is also possible change the priority of the mail and to send a PDF Version of the attachment.
- 9. Click to the Associated Documents Tab and create the required document as detailed in section "Setting Up Associated Documents".
- 10. Click save and then save again.
- 11. Click Cancel to close the Workflow.

GUIDE TO THE DOCUMENT ASSIST

- 1. Case Associates are everyone connected to the case other than the client and the fee earner. For example the other side's solicitor, the doctor, the land registry, the lending institution, the court, the defendant, the witness etc.
 - a) First pick the appropriate case associate type from the drop down list provided. For example Solicitor, Doctor, Witness etc. This will determine which category of case associate the user will be prompted for on this document.

You may want your document to cater for one/more solicitors on a file:

- First Solicitor on a file use the following code for his/her name [CAN:Name.Solicitor#01]. This will allow the user only to add the first solicitor's name to the document.
- Second Solicitor on a file use the following code for his/her name [CAN:Name.Solicitor#02]. This will allow the user to add the second solicitor's name to the document.
- iii) If you want to cater for multiple solicitors on a file then the code would be the following code for his/her name [CAN:Name.Solicitor#??]. This will pause and ask the user which solicitor's name they want added to the document.
- b) Example of Advanced Codes:
 - i) [CAN:Name.Solicitors#??] produces a separate letter for each solicitor selected.
 - ii) [CAN:Name.Defendant#@,] lists multiple defendants in a document with a "comma" between them.
 - iii) [Can:Name.Defendant#@&] list multiple defendants in a document with an "and" between them.
 - iv) [CAN:Name.Defendant#@R] lists multiple defendants in a document with a "line" between them.

Note: If it is a single defendant then it doesn't enter the comma etc.

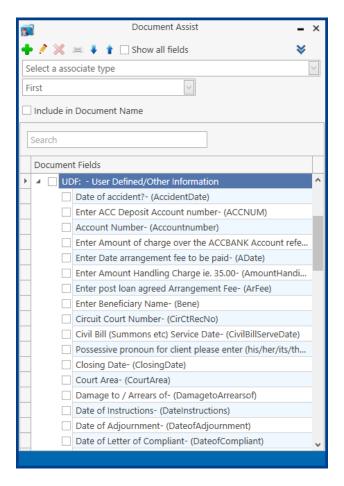
- 2. Case Diary this is a list of items from the case diary window. For example the date of the action, the action number.
- 3. Case/Matter details this is the information input in the matter record. For example the matter code, the matter description, the fee earner name and code connected to this case etc.
- 4. Client Details this is the information inputted in the client record. For example the client's name, address, date of birth, marriage, telephone number etc.
- 5. Client Contacts this is the information inputted in the client contacts section of the client record. For example the client spouse could be setup as a contact Name, Address, PPS number, date of birth etc.
- 6. Fee Earner/Handler this information inputted in the handler/fee earner record. For example it could be the current handler logged in details or the details of the fee earner assigned to this matter Fee Earner Name, Fee Earner Code, Current Handler's code etc.
- 7. Important Dates & times this contains fields that contain the date of a particular action or today's date Today's Date, Action Date etc.
- 8. Other Case Details this is additional information inputted in the other details section of the matter record. For example the "case premises" would be a field displayed in the "Other Details" tab of a conveyancing field or "Balance of Debt" field would appear in the "Other Details" tab of a debt recovery file.
- 9. Other Client Details this is additional information for the client.
- 10. User Defined/Other Information these are fields you create yourself to deal with anything that is not catered for in the above lists.

Note: To view additional fields in each category put a tick in the **All Fields** Check Box Show all fields at the top of the Document Assist dialogue box.

Creating User Defined Fields

On occasion you may want to insert information that is not available from the existing field lists in this case you can create your own fields this will allow you the flexibility to customise your own documents. The information behind these fields will be requested at the point the User generates the document through their Console Diary.

- 1. In the Document Assist window.
- 2. Click on Black Arrow to expand the User Defined/Other Information. The following Window is displayed.



3. Click on the Green Plus. The following dialogue box is displayed.

9	Add User Defined Field	×
General Va	dation SQL Statement	
Field Prefix	UDF:	
Field Name	Enter the field name	
Туре	Text Common Lock	
Screen Promp	Enter the scrren prompt	
Length	0	
Decimal	0 \$	
Format		
Default Value		
Category	V	
		QK <u>C</u> ancel

4. Fill in the following information:

File/Table: Field Name: Type: The File/Table Name is UDF for User Defined Fields Type in a Field Name in the box provided, this must not contain spaces. Select the **Type** from the drop down list provided i.e. the type of information that will be inputted i.e. Text, Dates or Numbers.

1			A	User Defined Field		×
General	Validat	tion	SQL Statement			
Field Pref	īx	UDF:		~		
Field Nan	ne	Benef	ficiaryName			
Туре		Text		🖌 🗌 Common 🗌 L	ock	
Screen Pr	ompt	Enter	Beneficiary Name			
Length						
Decimal				0.0		
Format	[@\$60)			
Default V	alue					
Category				~		
						QK <u>C</u> ancel

When creating a Text Field enter @sxx where xx representing the number of characters set in the length.

1	Add User Defined Field	×
General Val	idation SQL Statement	
Field Prefix	UDF:	
Field Name	FixturesSalePrice	
Туре	Numeric Common Lock	
Screen Promp	Please enter Bank Account No	
Length	10 🗘	
Decimal	2 🗘	
Format	@n10.2	
Default Value		
Category	×	
		OK Cancel

When creating a Numeric Field enter @nxx.x where xx.x represents the length and decimal values.

			Ac	ld User Defin	ed Field			×
General	Valida	ition	SQL Statement					
Field Pret	fix	UDF:		v				
Field Nar	ne	Date	OfCompletion					
Туре		Date		Y 00	ommon 🗌 Lo	ock		
Screen Pr	rompt	Enter	Completion Date					
Length				0 🗘				
Decimal				0 0				
Format		@d6						
Default V	/alue							
Category				~				
							<u>0</u> K	Cancel

When creating a Date Field enter @d6 to get a date in the format of dd/mm/yyyy or @d18 to get a date in the format of dd/mmmm/yyyy.

Common:	If you want this field always visible in the User Defined list tick this box.
Screen Prompt:	The Screen Prompt is the description displayed to the User at the point the document is generated e.g. "Please enter court date?"
Length:	Is the Amount of characters that can be inputted in this field. Adjust using
	the Up And Down Arrows as required.
Decimal:	Decimal will only be applicable to numbers: this is the amount of decimal
	places you want visible. Adjust using the Up And Down arrows as required.
Format:	If the data type is Date click on the browse button to select the preferred
	date format. Otherwise the data type and length will determine the
	format.
Default Value:	This is the value you would like to default to. If applicable, type the default value in the box provided.
Validations can be a	added for stricter control of the information inputted. A useful option is the

- 5. Validations can be added for stricter control of the information inputted. A useful option is the "always prompt" command which can be used for fields where the information changes frequently for example the Secretary's Reference.
- 6. Click the OK Button.
- 7. To insert this field as before, insert your cursor where you want the information to appear. Then double click the Field of your choice. It should then appear in the document displaying its field name.
- 8. Save the document as normal.

UDF Forms

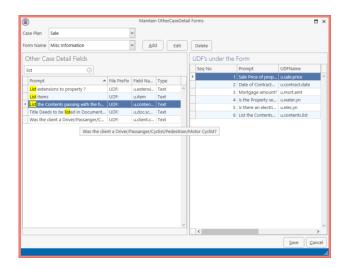
Certain cases/matters may need you to capture specific information that will require you to create UDF fields in Keyhouse. These fields can be gathered together using UDF Forms.

Create a UDF Form

1. Select the Setup Tab and then select UDF Form Details

۲			Mai	ntain OtherCaseD	etali Porms				•
Case Plan	Please select ca	se plan	~						
Form Name	Please select fo	m	~	Add					
Other C	ase Detail Fiel	ds			UDF	's under	the Form		
Search					Sec	No	Prompt	UDFName	
Prompt		File PreFix ⁹	Field Name	Туре					· · · · · ·
How the	accident occur	UDF:	AccidentCircs	Text	^				
Date of a	occident?	UDF:	AccidentDate	Date					
Enter AC	C Deposit Acco	UDF:	ACCNUM	Text					
Account	Number	UDF:	Accountnum	Text					
Enter An	ount of charge	UDF:	AChAmt	Text					
Enter Da	te arrangemen	UDF:	ADate	Text					
Enter Arr	angement Fee	UDF:	AFee	Text					
Claim Ty	pe	UDF:	AlGClaimType	Text					
Date Dat	nages Agreed	UDF:	AIGDamages	Text					
Date Co:	ts Settled	UDF:	AIGDateCost	Text					
Injury Ty	pe	UDF:	AlGInjuryType	Text					
Ambular	ce attended sc	UDF:	Ambulance	Text					
Enter An	ount Handling	UDF:	AmountHan	Numeric					
	Endorsement	UDF:	AnPostEndor	Text					
	st loan agreed	UDF:	ArFee	Text					
	elationship to	UDF:	Attorney1Rel						
	elationship to	UDF:	Attorney2Rel						
	elationship to	UDF:	Attorney3Rel						
Client's r	elationship to	UDF:	Attornev4Rel	Text	v				>
					<				,
								Save	Cancel

- 2. Select the Case Plan to be used.
- 3. Then click on Add to add a Form Name, enter the Name to be used and click OK.
- 4. Use the search box under the Other Case Details Fields to find the UDF's required.



5. The order the items appear in the form can be changed by dragging the item to the new location in the list.

			Maintair	n OtherCas	eDetai	Forms			• •
ase Plan	Sale		~						
orm Name	Misc Information		✓ Ad	d E	dit	Delete			
Other Ca	ase Detail Fields					UDF's unde	r the	Form	
list						Seq No		Prompt	UDFName
Prompt		File PreFix	Field Na	Type		•		Sale Price of prop	
	nsions to property ?	UDF:	u.extensi		-			Date of Contract	
List exten		UDF:	u.extensi	Text				List the Contents	
		UDF:	u.tem						
	ds to be listed in Document		u.conten u.doc.sc					Is there an electri	
	client a Driver/Passanger/C		u.doc.sc u.client.c				6	Mortgage amount?	u.mort.amt
					<	K			

- 6. To remove a UDF field from the report, right click on the field and select delete.
- 7. When all items are in place click Save and then OK.
- 8. If the same UDF Form is required for more than one workflow then it will need to be created again in the second workflow.

Edit a UDF Form

- 1. Go to the Setup Tab and select the UDF Form Details.
- 2. Enter the Case Plan associated with the UDF Form to be changed
- 3. Select the UFD Form to be changed

			Mai	ntain OtherCaseDe	etail Fi	orms				
ase Plan Sa	le		~							
orm Name M	isc Informatic	in	~	<u>A</u> dd Edit		Delete				
Other Case	Detail Fiel	ds			1	JDF's under	r the	Form		
Search						Seq No		Prompt	UDFName	
Prompt		File PreFix	Field Name	Type	•			Sale Price of prop	u.sale.price	^
How the acc	ident occur	UDF:	AccidentCircs					Date of Contract	u.contract.date	
Date of accid		UDE:	AccidentDate	Date				List the Contents	u.contents.list	
	eposit Acco		ACCNUM	Text					u.water.yn	
Account Nur		UDF:	Accountnum	Text				Is there an electri	u.elec.yn	
	nt of charge		ACCOUNTINUM	Text			6	Mortgage amount?	u.mort.amt	
Enter Amour		UDF:	ADate	Text						
Enter Date a		UDF:	ADate	Text						
Claim Type	ement ree	UDF:	Aree	Text						
Date Damag	or Annod	UDF:	AlGDamages	Text						
Date Costs S		UDF:	AlGDateCost	Text						
Injury Type	ettied	UDF:	AlGInjuryType	Text						
	ttended sc		Ambulance	Text						
	t Handling		AmountHan	Numeric						
An Post Ende		UDF:	AnPostEndor	Text						
Enter post lo		UDF:	ArFee	Text						
Client's relati		UDF:	Attorney1Rel	T GOIL						
Client's relati		UDF:	Attorney2Rel							
Client's relati		UDF:	Attorney3Rel	Text						
Client's relati		UDF:	Attorney/Rel		~					~
Control S (Plat)	an a second III		Part of Part of Parts		-1-	<				>

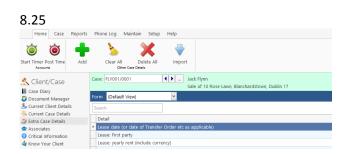
- 4. Make the required changes
- 5. Click Save and OK.

Delete a UDF Form

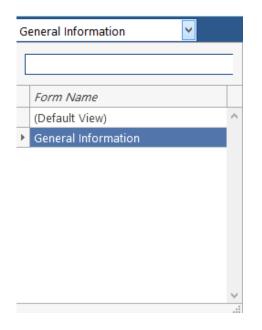
- 1. Go to the Setup Tab and select the UDF Form Details.
- 2. Enter the Case Plan associated with the UDF Form to be changed
- 3. Select the UDF Form to be changed
- 4. Click the Delete Button to remove the form.

Apply the Form to a Matter

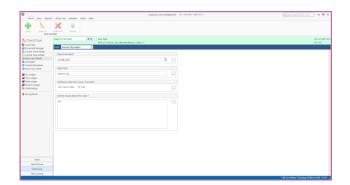
- 1. Open the required matter and check the correct Case Plan has been selected on the Current Case Details screen
- 2. Go to the Other Case Details Screen.



3. Click on the down arrow beside Default View and select the required form.



- 4. The UDF Fields will appear on the screen.
- 5. Complete the fields as normal.



6. The information is now available to use in correspondence if it is included in Case Plan Precedents.

CLIENT OTHER DETAILS

Forms can be created for individual clients. This will enable UDF information to be held at the client level and be visible on all matters for that client.

Create a Client Other Details Form

1. Select the Setup Tab and then select Client Other Details

٢			M	aintain Client	Other [Details		•
Client Code	select client coo	le(Optional)	~					
Form Name	Please select fo	rm	•	Add				
Other Cli	ient Detail Fie	elds				UDF's under t	he Form	
Search						Seq No	Prompt	UDFName
Prompt		File PreFix	Field Name	Туре				
How the	accident occur	UDF:	AccidentCircs	Text	^			
Date of a	ccident?	UDF:	AccidentDate	Date	_			
Enter ACC	Deposit Acco	UDF:	ACCNUM	Text				
Account I	Number	UDF:	Accountnum	Text				
Enter Am	ount of charge	UDF:	AChAmt	Text				
Enter Dat	e arrangemen	UDF:	ADate	Text				
Enter Arra	angement Fee	UDF:	AFee	Text				
Claim Typ	e .	UDF:	AIGClaimType	Text				
Date Dan	nages Agreed	UDF:	AIGDamages	Text				
Date Cos	ts Settled	UDF:	AIGDateCost	Text				
Injury Typ		UDF:	AlGInjuryType	Text				
	ce attended sc		Ambulance	Text				
	ount Handling		AmountHan	Numeric	_			
	ndorsement	UDF:	AnPostEndor	Text				
	t loan agreed	UDF:	ArFee	Text				
	alationship to	UDF:	Attorney1Rel	Text				
	elationship to	UDF:	Attorney2Rel	Text	- 1			
	elationship to	UDF:	Attorney3Rel					
Client's re	elationship to	UDF:	Attornev4Rel	Text	~	<		>

- 2. Select the Client Code.
- 3. Click Add and then enter a Form Name in the box and click OK.

ADDING INFORMATION REQUIRED TO A CASE ACTION FLOW

Introduction

It may be essential before a specific case type can be processed that particular information is required. This information can be facilitated through the use of User Defined Fields (UDF's). The Information Required Tab is where the User Defined Fields specific to this case type are selected. Below are the instructions on its use.

- 1. From the Setup Tab select Case Work Flow Setup.
- 2. Select the required Case Work Flow as before.
- 3. Select the Information Required Tab. The following dialogue box will appear.

١			Case Work Flow Setup	- ×
Case Type	Residential Sale		v 🔶 🤌	🗊 Document Assists
Actions Follo	wed Information re	equired		
🕂 🖉 New Edit	Delete Top Up	Down Bottom		
Search				
Sequen	. Description			
				~
				Gancel

4. Click on the Green Plus and the following dialogue box will appear.

) System Fields			
Add Edit Delete			
Search			
Prompt	Field Name		
How the accident occurred	AccidentCircs		
Date of accident?	AccidentDate		
Enter ACC Deposit Account number	ACCNUM		
Account Number	Accountnumber		
Enter Amount of charge over the ACCBANK Account r	AChAmt		
Enter Date arrangement fee to be paid	ADate		
Enter Arrangement Fee	AFee		
Claim Type	AIGClaimType		
Date Damages Agreed	AIGDamagesAgreed		
Date Costs Settled	AIGDateCostsSettl		
Injury Type	AlGInjuryType		
Ambulance attended scene of accident	Ambulance		
Enter Amount Handling Charge ie. 35.00	AmountHandingC		
	Select Cance		

- 5. Use the search box to locate the UDF required.
- 6. Click Select
- 7. Repeat Step 5-6 until all UDF's have been entered.
- 8. Once all fields have been entered you can the order of the fields sing the reorder buttons.



9. To remove any UDF's no longer required, click on the Red X.

APPENDIX

Appendix 1: Sample Case Action Flow

This is a sample of a Case Action Flow/Plan which you could create using the techniques described in the following section:

- Set-up of Case Action Flow
- Setting up Associated Actions
- Setting up Associated Documents

CIRCUIT COURT ROAD TRAFFIC					
DEFENCE ACTION FLOW					
Action	Description of Action	Documents required	Code	Act - days	
No					
001	Complete Instruction Form Acceptance of Instruction Authority to accept service	Instruction Form Letter to Ins Co thanking for instructions Letter to PI's Solr accepting service	RTA001A RTA001B RTA001C	002 in 4 days	
002	Return of Civil Bill and/or Entry of Appearance Send Civil Bill/Advise to Ins Co	Letter to PI's Solr returning Civil Bill and/or Appearance Appearance Ltr in Ins Co advising position	RTA002A RTA002B RTA002C	003 in 7 days	
003	Notice for Further Particulars Letter to Defendant to call to office	Notice for Particulars Letter to Defendant	RTA003A RTA003B RTA003C		

Appendix 2: Sample of a Blank Precedent Document

This document is a sample of a document that could be imported and then used to produce a precedent document. To produce this document use the techniques described in the Section: **Setting up Associated Documents**.

VENDOR INSTRUCTION SHEET RESIDENTIAL HOUSE

Offfice/Fax

Email:

Fax:

1. **INSTRUCTION DETAILS**:

a. Date of Instruction:b. Fee EarnerHandler

2. <u>CLIENT/VENDOR INFORMATION</u>

- a. Name:
- b. Address:
- c. Phone No. Home:
 - Mobile:
- d. Occupation:
- e. Date of Birth:
- f. Marital Status:
- g. Date of Marriage:
- h. Name of Spouse:
- i. Client's SSI No:
- j. Spouse's SSI No:

3. ASSOCIATED PARTIES:

- a. Name of 1st Purchase: Address of 1st Purchaser:
- b. Name of 1st Purchase: Address of 1st Purchaser:
- c. Purchaser's Solicitors: Address:
- d. Phone No: Office: Email:
- e. Auctioneer:
- f. Local Authority/County Council:
- g. Lending Institute:

4. **PROPERTY DETAILS**:

- a. Sales:
- b. Deposit to be paid:

- c. Closing Date:
- d. Interest Rate:
- e. Sale Price includes the following:
- f. Sale Price excludes the following:
- g. Description of Property: ALL THAT AND THOSE
- h. Is the Property Mortgaged? Yes/No
- i. Are there any extensions carried out in the Property? Yes/No
- j. Where are the Title Deeds?
- k. Title Deeds to be listed in Documents Schedule:

Outstanding Information for File no:

Appendix 3: A Sample of a Coded Precedent Document

This is a sample of a coded precedent document. To produce this document use the techniques described in the following Sub Sections of Setting Up Associated Documents:

- Coding a Precedent Document
- Creating User Defined Fields

INSTRUCTION FOR VENDOR – RESIDENTIAL HOUSE

DATE OF INSTRUCTIONS: [UDF: DateInstructions] Lawyer: [HAN:Name]

CLIENT INFORMATION

Client Name:	[CNT:Name]
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Address: [CLNT:Address1] [CLNT:Address2] [CLNT:Address3] [CLNT:Address4] [CLNT:Address5]

Home:	[CNT:Tel]	Office/Fax:	[CNT:Fax]
Mobile:	[LCL:CIMobNo]	Email:	[CNT:email]
-		Job Type:	[CNT:Occupation]
	Mobile: [LCL:CIMa	Home: [CNT:Tel] Mobile: [LCL:CIMobNo] [LCL:CIMartialCde] [CNT:DOB]	Mobile:[LCL:CIMobNo]Email:[LCL:CIMartialCde]Job Type:

CASE SCREEN DETAILS:

Name of Auctioneer: [CAN:Company.Auctioneers#01]

Name of Local Authority/County Council: [CAN:Company.LocalAuthori#01] Name of Bank/Building Society: [CAN:Company.Bank#01][CAN:Company.Build#01]

PROPERTY FOR SALE	[CSM:CsPremisis]
Name of 1 st Purchaser: Address (Home):	[CAN:Name.Purchaser#01] [CAN:LinearAddress.Purchase#01]
Name of 2 nd Purchaser: Address (Home):	[CAN:Name.Purchaser#02] [CAN:LinearAddress.Purchase#02]
Name of Other Solicitor:	[CAN: Company.Solicitors#01] [CAN:LinearAddress.Solicitors#01]
Telephone:	[CAN:Phone.Solicitors#01] Fax No: [CAN:Fax.Solicitor#01]

CLIENT DETAILS

RSI No: [LCN:CISSNumber#01] Spouse RSI No: [LCN:CISSNumber#02] Spouse's Name: [CNT:Spouse] Date of Marriage: [qCNT:DateofMarriage] Is the Property Mortgaged? YES/No Are there any extensions carried out to the Property? Yes/No Where are the Title Deeds? [CAN:Company.Bank#01] [CAN:Company.Build#01] CONTRACT FOR SALE

Sale Price: [UDF:SalePrice] Closing Date: [UDF:ClosingDate] Deposit to be paid: [UDF:Deposit] Interest Rate: Description of Property: ALL THAT AND THOSE [UDF:DescProp] Does the sale price include the following: [UDF:ContentsList] What fixtures does client wish to exclude from sale: [UDF:ContentsProp] Is there anything unusual about this sale that you wish to draw our attention to? Title Deeds to be listed in Documents Schedule: [UDF:DocSchedule]

Other Information for File No: [MAT:Code]