

# KEYHOUSE Administrator User Manual

VERSION 5.4.5.1

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# PART 1: MAINTAIN USER SECURITY

# **User Access**

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

# **Create New User**

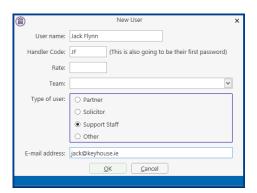
A new user can be set up from the User Setup Screen

1. Go to the Setup Tab and select User Setup

T	Code	Name	Team	Active	Supervisor	Team Code	Ret	
	ADM	Admin	Commercial	Yes	Yes	COM	N	
ļ	AM	Anne Mellon	Conveyancing	No	No	CON	N	
ĺ	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. Select New User.

3. Enter the required information. The Handler code is usually their initials.



- 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.

)							Maintain User Security 8
🝰 🔒 w User Import Use	ers Record Security	Handler Control A	ccess Profile Con				
arch							Standard View
Code	Name	Team	Active	Supervisor	TeamCode	Retired	
ADM	Admin	Commercial	Yes	Yes	COM	N	
AM	Anne Mellon	Conveyancing	Yes	No	CON	N	
BS	Brian Sweeney	Commercial	Yes	No	COM	N	
CN	Carol Nolan	Commercial	Yes	Yes	COM	N	
JP	Justin Phelan	Conveyancing	No	No	CON	Y	
мк	Mark Kelly	Commercial	Yes	No	COM	N	
MW	Martina Winters	Debt Recovery	Yes	No	DBT	N	
SK	Stephen Keogh	Commercial	No	No	COM	N	

**NOTE**: To ensure you only see active handlers on this screen filter the screen and create your own view.

#### Import User

When a user has been set up using the Handler Option on Maintain Tab, it will not be 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.

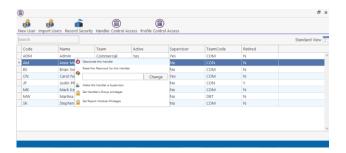
#### **Activate Handler**

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.

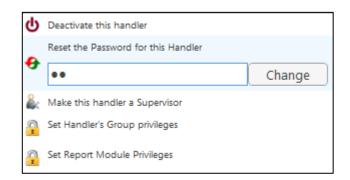
1. Go to the Setup Tab and select User Setup



2. Right click on the User to be change.



- 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.



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.

Please login	Keyhouse
Handler:	an
Password:	**
	Link this login to your Windows 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

×		Security Groups	S			٦
	Applied To Handl	Applied To Matter	In Use	Groupr Name	Group ID	
-	False	True	True	Family Law	1	Œ
	False	True	True	Conveyancing	2	Ð
	False	True	True	Litigation	3	Œ
	False	False	True	Criminal	1 4	F E
	False	False	True		1 5	Œ
	False	False	False		) 6	Œ
	False	False	False		) 7	Đ
	False	False	False		1 8	Œ
	False	False	False		9	Œ
	False	False	False		10	Œ
	False	False	False		11	Œ
	False	False	False		12	Đ
	False	False	False		13	Œ
	False	False	False		14	Œ
	False	False	False		1 15	Œ
	False	False	False		16	Œ
	False	False	False		17	Œ
	False	False	False		18	Œ
	False	False	False		19	Œ

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

1	)			Security Groups							
	Group ID		Groupr Name	In Use	Applied To Matter	Applied To Handl					
	æ	1	Family Law	True	True	False					
	±	2	Conveyancing	True	True	False					
	+	3	Litigation	True	True	False					
	÷	4	Criminal	True	False	False					
x			Private Clients	True	False	False					
	æ	6		False	False	False					
	æ	7		False	False	False					
	±	8		False	False	False					
	+	9		False	False	False					
	•	10		False	False	False					
	æ	11		False	False	False					
	æ	12		False	False	False					
	æ	13		False	False	False					
	æ	14		False	False	False					
	+	15		False	False	False					
	•	16		False	False	False					
	æ	17		False	False	False					
	æ	18		False	False	False					
	æ	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

Code Name Team Active ADM Admin Commercial Yes				Supervisor	TeamCode	Retired	Family Law	Conveyancing	Litigation	Criminal	Private Clients		
					Yes	COM	N	Yes	Yes	Yes	Yes	Yes	
AM BS	Anne Mellon	Conveyancing	Yes		No No	CON COM	N	No	Yes	No No	No	No No	
es CN	Deactivate this handler     Reset the Password for this Handler				Yes	сом	N	No Yes	Yes	Yes	No Yes	Yes	
JP	<b>A</b>	ord for this Handler	,		No	COM	Y	No	No	No	No	No	
MK	••		Change		No	COM	N	No	No	No	No	No	
viik VIW	& Make this hand	ler a Supervisor			No	DBT	N	Yes	Yes	Yes	No	No	
SK	Set Handler's Gr	oup privileges			Family Law			Yes	Yes	Yes	No	No	
	Set Report Mod	ule 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 Control Access Maintenance								
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			<b>Z</b>	<b>Z</b>	Image: A start and a start	Image: A state of the state			<b>S</b>	2	2 ^	
Admin			2	✓	×	×	2	×	✓	×	2	X	×	2	
Anne Mellon			2	Image: A start and a start	<ul> <li>Image: A start of the start of</li></ul>	×	<b>V</b>	×	<ul> <li>Image: A set of the set of the</li></ul>	2		N	×	×	
Brian Sweeney			2	×	×	2	1	×	×	2		×	2	2	
Carol Nolan				Image: A start and a start	×		2	2	<b>v</b>	2	2	N	×	2	
Geraldine Curran			2	×	×	2	×	×	×	2		×	2	2	
Justin Phelan			2	2	~		2	2	2	2	2	×	2	2	
Mark Kelly			2				2	2	×	2		×	2		
Martina Winters			2	✓	×	2	2	2	2	2	2	X	2	2	
Stephen Keogh			2	✓	×	2	2	×	×	2		×	2	2	

- 3. The **Or All Handlers** box is ticked for All Handlers to populate the information across all columns. This must remain 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, My Cheques and My Overview on the Search/Open Screen

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

Access to Know Your Client:

\_\_\_\_

#### Access Flow Setup:

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

#### Add Associate Types:

**Bank Details:** 

for an Associate.

the Billing Screens.

Controls who can create a new Associate Type

Controls who can add or edit Bank Details

Controls who can add or edit Charge Out

fees at both the Client and Matter level on

#### **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.

# Change Matter Security Permissions:

**Change Client Charge Out Rates:** 

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

#### Document Assist:

Controls who has access to the coding structure for Precedent Documents

#### Maintain Client & Case Matter:

Controls who can amend Client and Matter details after they have been set up.

#### 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.

#### **Document Search:**

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

#### 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, My Cheques and My Overview 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.

# **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.

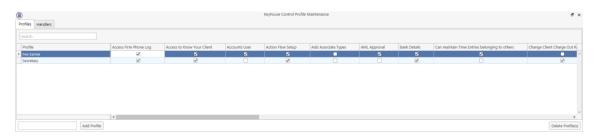


3. In the Add Profile box enter the name of the Profile Group e.g. Secretary, Fee Earner etc.

# 4. Click Add Profile



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



# 6. Click to the Handlers Tab

Profiles Handlers	Keyhouse Control P	rofile Maintenance	đ' ×
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 (Use <Ctrl> to select multiple Users).
- 8. In the bottom right corner click on the down arrow and select the relevant group.

California Keyhouse C	ontrol Profile Maintenance 🛷 🛪
Profiles Handlers	
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.

	Keyhouse Control P	rofile 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. Repeat until all users are in their correct groups.

**NOTE**: Users may be added to more than one group.

- 11. Click on the X to close the screen
- 12. Select Handler Control Access to view individual users' access.

0						Keyho	use Control Access Mai	intenance					e
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	Can maintain Time Entries belonging to others	Change Client Charge Out Rates	Change Day Book Handler	Change M
All Handlers	Z			2	2	Image:	Z	Z	2		S		
Brian Sweeney		Fee Earner	2	2	Y	×		2	2	V		×	
Carol Nolan		Fee Earner		×	Y	×		2	2	×			
Justin Phelan		Fee Earner	2	2	2	2		2	2	2		×	
Stephen Keogh		Fee Earner	×	×	Y	×		2	2	×		×	
Anne Mellon		Secretary		2		2					×	×	
Mark Kelly		Secretary	2	2		2			2		2	2	
Martina Winters		Secretary		<b>V</b>		×			2		×		
Admin			2	2	×	2	2	2	2	×	×	2	

# Changing a User's Profile

- 1. Select the user's name in the Profile Control Access
- 2. Select the correct profile and click Link & Replace Restrictions.

۱	Keyhouse Control Pr	ofile Maintenance	6 ×
Profiles Handlers			
Search			
Profile		Handler	
Fee Earner		Brian Sweeney	~
Fee Earner		Carol Nolan	
Fee Earner		Justin Phelan	
Fee Earner		Stephen Keogh	
Secretary		Anne Mellon	
Secretary		Mark Kelly	
Secretary		Martina Winters	
		Admin	
			v
Select Control Profile: Fee Earner			
Link & Replace Restrictions	Link & Apply Restrictions	Unlink & Remove Restrictions	Unlink & Do Nothing

Alternatively:

- 3. Select the name
- 4. Click Unlink Handler & Remove Restrictions.
- 5. Select the correct profile and select Link & Apply Restrictions.

# Change Profile Group Permissions

- 1. Open Keyhouse Control Profile Maintenance
- 2. Make the necessary changes to the profile concerned by ticking or unticking the appropriate boxes.

Profiles Handlers				Keyhouse Control Profile	Maintenance				đ x
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
Fee Earner	2	×	×	2			~	2	· · ·
Secretary	2	2		2	2				
									,
	<								>
Add Profile									Delete Profile(s)

- 3. Click to Handlers
- 4. Select all users within the profile concerned.
- 5. Set the Select Control Profile to the required profile e.g. Secretary
- 6. Click on Link and Replace Restrictions

	Keyhouse Control Pi	rofile Maintenance	6 ×
Profiles Handlers			
Search			
Profile		Handler	
Fee Earner		Brian Sweeney	^
Fee Earner		Carol Nolan	
Fee Earner		Justin Phelan	
Fee Earner		Stephen Keogh	
Secretary		Anne Mellon	
Secretary		Mark Kelly	
Secretary		Martina Winters	
		Admin	
Select Control Profile: Secretary			
Select Control Profile: Secretary			v
Link & Replace Restrictions	Link & Apply Restrictions	Unlink & Remove Restrictions	Unlink & Do Nothing

# Remove a User from a Profile

- 1. Select the user.
- 2. Click Unlink & Remove Restrictions to give the user full access

Or

3. Unlink and Do Nothing which will remove the user from the group but keep their restrictions.

# **USER REPORT ACCESS**

Reports hold large amounts of data in relation to client and the business. This information needs to be stored securely. To prevent users seeing confidential information, access to the reports must be controlled. This can be done by removing/limiting access to this function of Keyhouse. As detailed in the User Access section, access to reports can be blocked but it may be necessary to give access to specific reports. This can be done by creating Report Groups with access to specific reports and adding users to the groups.

# **Create a Report Group**

1. Click Reports Tab and select Create Report Group

	Maintain Permissi	on Group	×
Add Change	Delete		
Group ID	Group Name	Description	
			^
			~

- 2. This will open the Maintain Permission Group screen and click Add.
- 3. You will be asked to enter a Code for the Report Group and a brief Description.

	)		Maintain Permissi	on Group	×
	Add	Change	Delete		
	Group ID		Group Name	Description	
F	Ŧ	2	FEE	Fee Earner	^
	с	hange Gro	upModule FEE Fee Earner	OK Cancel	
					~

4. Enter the details and click OK.

# Set Reports Available To This Group

1. Click on the Report Tab and then select User Reports Permission.

	ing Reports Create Report Group Rep Reports	ports Setup User Reports Permission						
y Day Book Cl	ay Book Summary hargeable 00:00 Non-Chargeable 0	00:00 Total 00:00 Remaining 07:30					Handler Carol Nola	1
ne Report / WIP by Bill Date	Date Matter Code C	lient Nar		Maintain Set M	odule Permission	×	Case Tim	e Charg
Top WIP shboard	Date Matter Code C	Search					Case Im	e Charg
		name	Report Type	All Handler	FEE			
		<ul> <li>Bill Layout</li> </ul>	Billing Report	<b>Z</b>	✓	<u>^</u>		
		Activity List WIP	System Report	<b>V</b>	×			
		Activity Report	System Report	2	×			
		Aged Debt by Client	System Report	2				
		Aged Debt by Client (Show Dat. Aged Debt by Fee Earner	System Report System Report	×	× ×			
		AgedDebtbyClient(ShowDates)		×	×.			
		All Cases	System Report		2			
		Bill Breakdown	System Report	~	2			
		Billed Time	System Report					
		Billed Time By Client	System Report	V	×			
		Billed TTme for an Individual H.		2				
		Billing Guide Report	System Report	×	×			
		Billing Report Case Diary Report	System Report System Report	✓	×			
		Case Summary Report	System Report	Z	2			
		Client Category Report	System Report		2			
		Client Statments	System Report	×	2			
		Diary Time Report	System Report	<b>V</b>	×			
		Draft Bill Report	System Report	2	2			
		Estimated Fees By Est fees Date	System Report	✓	×	×		

- 2. The Report Group just created is now visible
- 3. Untick the box for the 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.

#### Make Users A Member Of The Report Group

1. Go to the Setup Tab and select User Setup.

earch										
Code	Name	Team	Active	Supervisor	TeamCode	Retired	Family Law	Management	Sensitive Files	
ADM	Admin	Commercial	Yes	Yes	COM	N	Yes	Yes	Yes	
AM	Anne Mellon	Conveyancing	No	No	CON	N	No	No	No	
BS	Brian Sweeney	Commercial	Yes	No	COM	N	Yes	Yes	Yes	
CN	Carol Nolan	Commercial	Yes	Yes	COM	N	Yes	Yes	Yes	
IP	Justin Phelan	Conveyancing	No	No	CON	N	No	No	No	
MK	Mark Kelly	Commercial	No	No	COM	N	No	No	No	
WW	Martina Winters	Commercial	No	No	COM	N	Yes	Yes	Yes	
5K	Stephen Keogh	Commercial	No	No	COM	N	Yes	Yes	Yes	

2. Select the required user and right click

3. Click Set Report Module Privileges and tick the appropriate box to make this user a member of this Report group.



4. The selected user now only has access to those reports which have been set as accessible by the Report Group.

**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.

# Partner Tab

A set of reports has been designed specifically for partners. Visibility of this tab is determined by how the User has been set up e.g. as a Partner, Solicitor or Support Staff. Access to the reports can also be controlled using Handler Control Access/Profile Control Access.

#### Set a User as a Partner

- 1. Go to the Maintain Ribbon and select Handler.
- 2. Select the User required and click Edit.

	)	Maintain Handle	er Codes		×
Ē	<u>A</u> dd <u>E</u> dit <u>D</u> elete	)		Include Retir	red
5	Search				
	Code	Name	Team	Rate	Γ
	ADM	Admin	СОМ	150.00	^
	AM	Anne Mellon	CON	120.00	
F	BS	Brian Sweeney	сом	250.00	
	CN	Carol Nolan	COM	150.00	
	COM	Commercial	COM	0.00	
	CON	Conveyancing	CON	0.00	
	DBT	Debt Recovery		0.00	
	GCU	Geraldine Curran	DBT	0.00	
	JP	Justin Phelan	CON	180.00	
	LIT	Litigation	LIT	0.00	
	MK	Mark Kelly	COM	0.00	$\checkmark$

#### 3. Set the Type to Partner.

٦		Change H	landler				×
General	Target Hours	Period Start Dates	Billing Rates	Sign	ature	Budgets	
Code *		BS		Feam	Re	tired	
Name *		Brian Sweeney			Au	to Launch Tim	her
Hourly Ra	ate	250.00			V Ou	tlook View	
Team *		СОМ		~	✓ Is (	Chargeable	
Logon		BRIANS			Тур	e	
F/E Code	*	BS		*		Partner	
Default T	ask	GEN	~	<b>X</b>	0	Solicitor	
Recent U	sed Matter List	30			0	Support Staff	
Exchange	Alias	keyhosuetest@gn	nail.com				
Default D	elegate Resource			~			
Departme	ent	CON		~			
Branch		Head Office		~			
		Skip welcome so	reen in new mat	ter wiz	zard		
Employee	e Reference No.						
Team Lea	ıder						
					<u> </u>	<u>2</u> K <u>C</u> ar	ncel

- 4. Click OK and then click on the X to close the window.
- 5. This will give the User access to the Partner Tab.

# **Restrict Access to Partner Tab**

It may be decided that not all partners should have access to the Partners Tab and their access must be restricted.

- 1. Go to the Setup Tab and select User Setup
- 2. Click on Handler Control Access
- 3. Select the User required
- 4. Scroll across to the Partner column and untick the box

					Keyhouse	Control Access Mainten	ance					đΧ
Search												
Handler	OR All Handlers	New Client	Partners	Precedents	SAM4	Setup New Case	Strong Room	Strong Room Maintenance	System Reports	Time Ledger Maintenance	Time Recorders	Time W
All Handlers	×	2	2	2	2	2	2	×	2	2	2	^
Mark Kelly		2			¥	×				×	×	
Erian Sweeney				2	Image:	2	2	2	2	2	2	
Justin Phelan		2			<b>V</b>	2	2	2	×	×	2	
Martina Winters		2		2	~	2	2	×	2	2	2	
Stephen Keogh		2			¥	2	2	2	2	×		
Anne Mellon		2		2	~	2	2	×	2	2	2	
Carol Nolan		2			1	2	2	2	2	×	2	
Geraldine Curran		2		2	~	2	2	×	2	2	2	
Admin		2	<b>N</b>	2	2		2	×	2	2	2	

5. Close the Window.

6. The Partner Tab will be visible but the reports will not be available on the ribbon.

Home Case Repo	rts Partners Phor	ne Log Maintain Setu	p Help		
Search/Open	3				
All Matters	Code	Last Accessed	File Colour	Name	Description
My Matters	FLY001/0001	08 Mar 2016 15:40:52		Jack Flynn	Sale of 10 Rose Lawn, Blanchardstown,
& Recent Matters	BLA001/0001	08 Mar 2016 15:31:13		Gordon T. Bla	RTA Walkinstown Crossroads, G. Black
Contacts	BLO001/0004	08 Mar 2016 15:09:19		Joe Bloggs	Commerical Work
🐍 Associates	AIG001/0002	01 Apr 2015 12:52:15		Allied Investm	Garry Barlow -v- Hired Talent Services
2 Advanced Search	AIG001/0001	01 Apr 2015 12:52:04		Allied Investm	Noel Brown -v- Jones Services Ltd
💔 My Invoices	BEC001/0001	30 Mar 2015 12:10:01		Angela Beck	Sale of 56 Church Street, Rathgar
My Cheques	AB8001/0001	30 Mar 2015 12:04:18		George J Abb	Sale 45 Somserset Road, Dublin 6
🗊 Phone Log	BES001/0002	12 Mar 2015 17:15:20		Business Time	Shareholding Agreement
Firm Undertakings	BES001/0001	09 Mar 2015 14:18:03		Business Time	Lease of Unit 33, Eastgate Avenue, Dubli
Strong Room	DUN002/0003	06 Mar 2015 10:31:35		Dunnes Store	Flesh Wound on Customers Hands
Cocument Search	AB8001/0004	04 Mar 2015 10:56:13		George J Abb	EPA - Mary James and David Jones
🗊 Template Library	BRO002/0001	04 Mar 2015 10:14:09		Thomas Brolin	Legal Advice re Repatriation
	000000000000000000000000000000000000000	00 k 444 000 0 00 40 40		There are provide	time studieters tak north

# **Restrict Access to Partner Tab using Profiles**

- 1. Go to the Setup Table and select User Setup
- 2. Select Profile Control Access
- 3. Go to the Partner column and remove the ticks from the required profiles

D Handlers						Keyhouse Cont	rol Profile Maintenanc	e					đ
Search				_									
Profile	ling	New Client	Partners	Precedents	SAM4	Setup New Case	Strong Room	Strong Room Maintenance	System Reports	Time Ledger Maintenance	Time Recorders	Time Write Off	Un
AML & Banking	i i	2	-	<b>Z</b>	2	2	2	2	2	2	2	2	
Equity Parners	1	×	×		×	×	×	2	×	2	2	2	
Fee Earners Full Access	1	2			2	2	2	×	2	2	2	2	
Secretarial Full Access	1	2			2	×	2	2	2	2	2	2	
Strong & Reports		2		×						2	2	2	

- 4. Go to the Hander Tab
- 5. Select all users within the amended profile
- 6. Select the Control Profile and click Link & Replace Restrictions

۲		Keyhouse Control Profile Maintenance	ල් ×
Profiles Handlers			
Search			
Profile		Handler	
Equity Parners		Brian Sweeney	A
Equity Parners		Stephen Keogh	
Fee Earners Full Access		Justin Phelan	
Fee Earners Full Access		Mark Kelly	
Fee Earners Full Access		Martina Winters	
Secretarial Full Access		Anne Mellon	
Secretarial Full Access		Carol Nolan	
Secretarial Full Access		Geraldine Curran	
		Admin	
			× .
Select Control Profile: Fee Earners Full Access			~
Link & Renlace Restrictions	Link & Annly Restrictions	Unlink	& Remove Restrictions

- 7. Repeat for all changed profiles
- 8. Click on the X to close the window.

# **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	Configu	ration			×	
More	Keyhouse	Mail Configu	ration	Outlook Setti	ngs	Revenue	Matter/Client Code Co	onfiguration	EFT	
General	heral Keyhouse Options Risk Managment System Options Notify by Email Money Laundering									
Precedent F	Precedent Folder t:\keyhouse\Standrad Documents									
Storage N	Storage Method									
	Client     Location t:\keyhouse\client documents									
Documer	nt Naming Meth	od								
) Desc	cription With Trad	ck Reference			01	Frack Reference C	Dnly			
Use Do	cument Folders	Defa	ult Root N	ame: Docume	nts					
Enable	Diary Date Shuf	ffling								
Show o	ption to open a	attachment or	n double c	lick of an actic	n					
🗹 Update	Document Fiel	ds when copy	ing Diary	items						
Leave d	locuments oper	n at the time (	of generat	ing						
My Overv	iew Settings									
Time Day	/Book Limit for a	day 0				Current WIP Lim	it 0			
OS Invoid	ce Limit	0				Draft Invoice Lim	nit 0			
Connec	Connect through Windows logon									
Show web p	Show web page on Logon screen:									
Show Ac	Show Add Associates Option									
								<u>o</u> k	<u>C</u> ancel	

The General Tab	The storage locations for clients and precedents documents
	can be change here.
	The use of the Document Folder function can be set from
	here.
	It also allow the user to select how documents will be named.
	It will also allow for the creation of a default Associate type.

	as additional work will be required before use.
	Please do not activate without consultation with Keyhouse
EFT	Allows the user to activate the EFT settings for the system.
	generated and the type of code generated.
Matter/Client Code Configuration	Allow the user to control how Client & Matter codes are
	Debt Recovery for the Revenue Commissioners.
Revenue	This screen will allow you to enter information related to
	here.
Outlook Settings	The settings required for the Outlook Integration are set
Mail Configuration	Please do not adjust with prior consultation with Keyhouse.
	completed.
-	marking documents as Read Only when an action is
Keyhouse	From this tab you can set system wide permissions including
	related fields can be made compulsory from this tab.
	is also possible to rename the Ref1-Ref3 fields. The Fee
More	Category types and Client Numbering system are set here. It
	Document Matter settings
Money Laundering	Allows the user to set the Money Laundering Settings and
	Cheque approval.
Notify by Email	Allow the user to set up email notification for Invoice and
System Options	Allows the user to set Account Settings and Preferences
Risk Management	Allows the user to set warnings and limits
, ,	prior consultation with Keyhouse
Keyhouse Options	Configured by Keyhouse at setup. Please do not adjust with
	The Overview Settings are set here.

# **Other Administration Options**



Records errors which allows for faster resolutions.



Holds the Outlook Integration settings – please do not adjust



Allows for the import and export of the standard Keyhouse views.

Export/Import Views



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 needed to set their own personal settings.

۱	Preference	×	Preference >
Main Application User Preferences	Other User Preferences Views		Main Application User Preferences Other User Preferences Views
Show start up page	$\sim$		Remember Sync Document Name With Subject Line
Show notification to open case dia	ary attachment 🗹		My Briefcase
Use enter in search boxes			Do Not Show Briefcase Notification
Launch alarm system at startup			
Allow spell check	$\checkmark$		Show Case Associative Contact Details
Show application closing prompt	$\checkmark$		Retain Last Matter Search
Disable animated images	(Spinning clocks, etc)		My Overview Settings
Scan capture rename the source fi	ile name		Budget Daily Hours (HH:MM) 7:30 Current WIP Limit
Run local version			OS Invoice Limit Draft Invoice Limit
			Choose which has to shown first on preview panel in case diary Action Details Document Preview SDLT XML path
			Allow focus to the top after completing an action $\checkmark$
Font size adjustment	< > (100%)		
		QK Cancel	QK Cancel

	Prefer	ence			×
Main Application User Preferences	Other User Preferences	Views			_
View Pinning					
Case Diary View	Pinned by default				
Case Documents View	Pinned by default				
			QK	Cancel	Ę

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

Print	Change Password (CN ) X
Printer Name: SHARP MX-2640N PCL6  Properties	Old Password Enter your old password
Status: Ready Type: SHARP MX-2640N PCL6	New Password Enter your password
Where: 20.0.0.217 Comment:	Confirm Password Confirm your password
Print range     Copies       Image: Copies     Image: Copies       Image: Copies     Image: Copies	<u>O</u> K <u>C</u> ancel
C Pages from: to: 123 123 Collate	
OK Cancel	

# PART 2: MAINTAIN

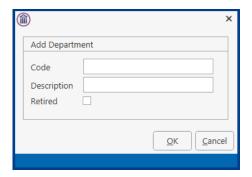
# **MAINTAIN DEPARTMENTS**

# Add A Department

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

(i			Maintain Departments	×
	<u>A</u> dd	Edit	Delete Include Retire	d
[	Search			
	Code		Description	
►	CIR		Circuit Court	^
	COM		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	۷

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



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** Dialog Box as before.
- 2. Select the department you want to amend. Click the **Edit** Button. The following dialog box appears.

(	D		×
	Change Depa	artment	
	Code	COM	
	Description	Commercial	
	Retired		
Ľ			
			<u>O</u> K <u>C</u> ancel

Make any changes required.

 $\textbf{NOTE:} \ \ \textbf{The Code cannot be amended}.$ 

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

# **Retire A Department**

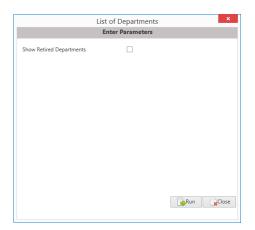
- 1. Open the **Department** Dialog Box as before.
- 2. Select the department you want to retire. Tick the **Retired** Box then click OK.

# **Print A List of Departments**

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

۱	System Reports	_ = <mark>×</mark>
Run		
Search		
Report Tree View		
Accounts Reports		^
<ul> <li>Billing Reports</li> </ul>		
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 Ea
📋 List of Nominal Ac Type		
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		

1. Select List of Departments. The following dialog box will appear.



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

				View Report	
C 2007 2015 (1) (1) (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	/1=				
Tree X					
Acrik Types List				Soo Grabbit & Runne	
				Work Types List	Data Data 12058/2015/12/06
			Code	Description	
				Unknown Worktype:	
			ACC	Accident	
		4	ACT	Action	
			ADV	Advice	
			CIR	Circuit Court	
			COM	Commerical	
		_	DEB	Debt Collection	
		_	DLC	Def Lit Circuit Court	
		1	DLD	Def Lit District Court	
		1	DLH	Def Lit High Court	
			DRC	Debt Recevery	
			GEN	General	
			HG	High Court	
			LEA	Lesse	
			LOAN	Loan	
		-	OMB	Onbudsman	

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

# MAINTAIN WORK TYPES

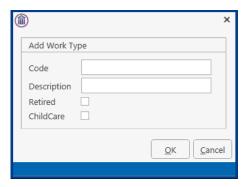
Work types are classification of work activities.

# Add A Work Type

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

	Maintain Work Typ	Des :	x
<u>A</u> dd	<u>E</u> dit <u>D</u> elete	Include Retired	ł
Search			
Code	Description	Child Care	
	Unknown Worktype:	N	1
ACC	Accident	N	
ACT	Action	N	
ADV	Advice	N	
CIR	Circuit Court	N	
COM	Commerical	N	
DEB	Debt Collection	N	
DLC	Def Lit Circuit Court	N	
DLD	Def Lit District Court	N	ľ
DLH	Def Lit High Court	N	
DRC	Debt Recovery	N	
GEN	General	N	
HIG	High Court	Ν	
LEA	Lease	Ν	
LOAN	Loan	N	•

3. Click the **Add** button to add a work type. The following dialog 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** Dialog Box as before.
- 2. Select the **Work Type** you want to amend
- 3. Click the **Edit** Button. The following dialog box will appear.

٦	×	
Change Work	Туре	
Code	PUR	
Description	Purchase	
Retired		
ChildCare		
	<u>O</u> K <u>C</u> ancel	]

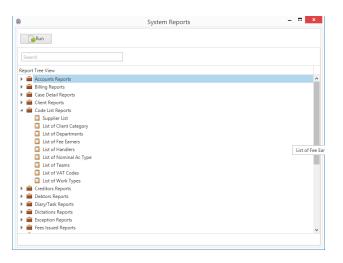
# **Retire A Work Type**

- 1. Open the **Work Type** Dialog 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 dialog box will appear.



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

<ul> <li>Q g type to be the total of the sector bad with the s</li></ul>	Soo Grabbit & Runne
	Soo Grabbil & Ruppe
	Ende Cade 2018/2015 12 M
	Work Types List
	Code Description
	Unknown Worktype:
	ACC Accident
	ACT Action
	ADV Advice
	CIR Circuit Court
	COM Commercial
	DEB Debt Collection
	DLC Def Lk Circuit Court
	DLD Def Lit District Court
	DLH Def Lit High Court
	DRC Debt Receivery
	GEN General
	HIG High Court
	LEA Lease LOAN Loan

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

# MAINTAIN FEE EARNER CODES

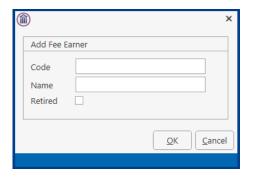
Fee Earners are the people within your firm who generate income.

# Add A Fee Earner Code

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



3. Click the **Add** button. The following Dialog 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** Dialog Box as before.
- 2. Select the **Fee Earner** you want to ament

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

e Farner	
e carrier	
AM	
Ann Mellon	
e	

Make any changes required

4. Click the **OK** button

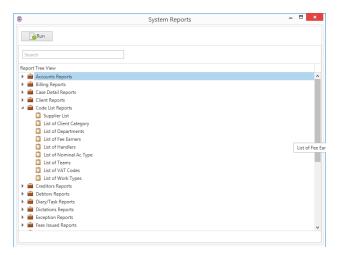
#### **Retire A Fee Earner**

- 1. Open the **Fee Earner** Dialog 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**

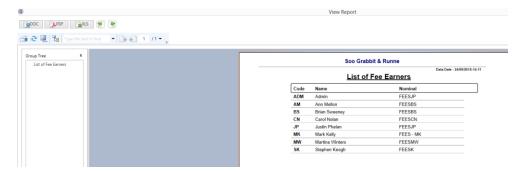
- 1. Click on the Report Tab and select System Reports
- 2. Click on the arrow beside Code List Reports



3. Select List of Fee Earners. The following dialog 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 dialog box appears.

		Maintain Han	dler Codes		×
Add	d <u>E</u> dit	Include F	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	COM	150.00	
	MW	Martina Winters	COM	180.00	
	SK	Stephen Keogh	COM	250.00	~

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

(	Ì		Add Har	ndler				×
J	General	Target Hours	Period Start Dates	Billing Rates	Sign	ature	Budgets	
	Code *			<b></b> 1	「eam	Ret	tired	
	Name *					Au	to Launch Tim	er
	Hourly Ra	ate	0.00			Ou	tlook View	
	Team *		Select team		*	🖌 İs (	Chargeable	
	Logon					Тур	e	
	F/E Code	*	Select F/E code		*	0	Partner	
	Default Ta	ask	Select task	*	] <u>x</u>		Solicitor	
	Recent U	sed Matter List				0.9	Support Staff	
	Exchange	Alias						
	Default D	elegate Resource	Select delegate		*			
	Departme	ent	Select department		~			
	Branch		Select branch		~			
			Skip welcome sc	reen in new mat	ter wiz	ard		
		e Reference No.			_			
	Team Lea	der						
L								
							<u>Car</u>	icel

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.
Auto Launch Timer:	If you want the time recording timer to launch automatically put a tick in this.
Outlook View:	Ensure that this is checked for the new view of case management.
Is Chargeable:	Allow for users to record time on a matter without it being charged to the matter.
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.
<b>Recent Used</b>	
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.
Branch:	Input the branch of the organisation where the hander will work
Team Leader:	Input the name of the team leader for the team associated with this handler
Туре:	${\tt Select the appropriate option button for this handler i.e. Solicitor etc.}$

See an example of a completed window below.

General     Target Hours     Period Start Dates     Billing Rates     Signature     Budgets       Code *     BS     Team     Retired       Name *     Brian Sweeney     Auto Launch Timer	
Name * Prian Sweeney	
Mane Bhan Sweeney	
Hourly Rate 250.00 🗹 Outlook View	
Team * COM 🔽 Is Chargeable	
Logon BRIANS Type	
F/E Code * BS   Partner  Partner	
Default Task GEN X O Solicitor	
Recent Used Matter List 30 Osupport Staff	
Exchange Alias keyhosuetest@gmail.com	
Default Delegate Resource Select delegate	
Department CON 🗸	
Branch Head Office	
Skip welcome screen in new matter wizard	
Employee Reference No.	
Team Leader	
	2

		Chan	ge Handler			×	)		Change	Handler			×
General	Target Hours	Period Start Da	ites Billing Ra	tes Signature	Budgets		General	Target Hours	Period Start Dates	Billing Ra	tes Signature	Budgets	
Month 1	0.00		Month 7	0.00			Month 1	200.00		Month 7	200.00		
Month 2	0.00		Month 8	0.00			Month 2	200.00		Month 8	200.00		
Month 3	0.00		Month 9	0.00			Month 3	200.00		Month 9	200.00		
Month 4	0.00		Month 10	0.00			Month 4	200.00		Month 10	200.00		
Month 5	0.00		Month 11	0.00			Month 5	200.00		Month 11	200.00		
Month 6	0.00		Month 12	0.00			Month 6	200.00		Month 12	200.00		
	Fill from N	<u>tonth 1</u>						Fill from M	tonth 1				
					<u>ок С</u> а	ncel						<u>0</u> K <u>C</u> ar	ncel

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

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 X					Change Handler 2								×
(	Gen	eral	Target Hours	Period Start Dates	В	illing Rates	Signature	Budgets	G	enera	al Target Hours	Period Start Dates	E	Billing Rates	Signature	Budgets	
		Please	select date	~	7	Please sele	ct date	~	1	01	Jan 2016	~	7	01 Jul 2016		[	~
2	2	Please	select date	~	8	Please sele	ct date	~	2	01	Feb 2016	~	8	01 Aug 201	6		~
3	3	Please	select date	~	9	Please sele	ct date	~	3	01	Mar 2016	~	9	01 Sep 2016	5	[	~
4	t [	Please	select date	~	10	Please sele	ct date	~	4	01	Apr 2016	~	10	01 Oct 2016	5		~
:	5	Please	select date	~	11	Please sele	ct date	~	5	01	May 2016	~	11	01 Nov 201	6	[	~
6	5	Please	select date	~	12			~	6	01	Jun 2016	~	12	01 Dec 201	5	[	~
								Fill from 1								Fill from	
								<u>D</u> K <u>C</u> ancel								<u>K</u>	ancel

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 H	andler			×				Change H	landler			×
General Targe	et Hours	Period Start Dates	Billing Rates	Signature	Budgets		General	Targe	t Hours	Period Start Dates	Billing Rates	Signature	Budgets	L_,
Rate Level Per	r Hour						Rate Le	evel Per	Hour					
Rate 1	0.00						Rate 1		50.00					
Rate 2	0.00						Rate 2		150.00					
Rate 3	0.00						Rate 3		250.00					
Rate 4	0.00						Rate 4		350.00					
Rate 5	0.00						Rate 5		550.00					
Axle Number	0						Axle N	umber	0					
Charge Group	Select Cha	irge Group			¥ ()		Charge C		Code PTR SAS JAS TNE	arge Group Charge Group Partner Senior Associate Junior Associate Trainee		) ^		X
				<u> </u>	<u>DK</u>	el							ок Са	ancel

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

Set the Charge Group Rates (See Maintain Handler Charge Groups p. 40 for information on setting up Handler Charge Groups). Axle Number is not required.

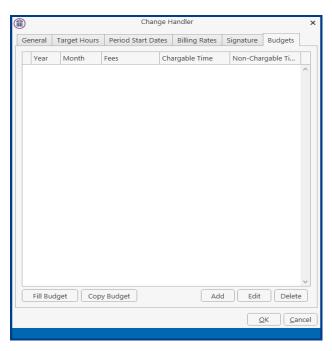
#### 8. Click on the **Signature** tab. The following window appears.

			Change H	andler			×		Change Handler						
Gene	eral Targ	et Hours	Period Start Dates	Billing Rates	Signature	Budgets		General	Target Hours	Period Start Dates	Billing Rates	Signature	Budgets		
Sign	ature							Signature	e de la compañía de l						
								Kind reg	ards						
								Brian Sw	eeney						
Phor	e number	Enter pho	one number					Phone nu	mber 01-290 2	222				-1	
E-Ma		Enter em						E-Mail		etest@gmail.com				-1	
	ing name	Litter em						Trading n		obit & Runne				-1	
		<u> </u>							ame Soo Glai						
					<u> </u>	<u>Cano</u>	el						<u>ок С</u> а	ncel	

Input a signature in the signature box. Input a phone number in the phone number box. Input an email address in the email box. Input a trading name in the trading name box.

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

(



10. Click the Add button and the following dialog box will appear and the Handler's monthly budgets can be entered.

**NOTE:** This will enter the same values for each month

Add I	Budget 🗙				Chang	ge Handler			×
	BS	G	ieneral	Target Hours	Period Start Dat	tes Billing Rates	Signature	Budgets	
			Year	Month	Fees	Chargable Time	Non-Char	gable Ti	
			2016	1	8,500.00	210.00	)	30.00	^
			2016	2	8,500.00	210.00	)	30.00	
			2016	3	8,500.00	210.00	)	30.00	
			2016	4	8,500.00	210.00	)	30.00	
et			2016	5	8,500.00	210.00	)	30.00	
			2016	6	8,500.00	210.00	)	30.00	
			2016	7	8,500.00	210.00	)	30.00	
			2016	8	8,500.00	210.00	)	30.00	
	<u>O</u> K <u>C</u> ancel		2016	9	8,500.00	210.00		30.00	
			2016		8,500.00	210.00		30.00	
			2016		8,500.00	210.00		30.00	
			2016	12	8,500.00	210.00	)	30.00	
									~
			Fill Bud	get Cop	y Budget	Add	Edit	Delete	
i	ick the <b>OK</b> Button and						C	K Can	icel

- 11. When complete click the **OK** Button and click **OK** again.
- 12. Use the Add button to add a unique value for each month.
- 13. Use Edit to change the values by exceptions.

- 14. Copy Budget will copy all the budget from a previous year into the current year.
- 15. Click on Copy Budget

Search			
Year	Month 01	Fees Budget 01	Chargeable Time Budg.
2015	1	8250.00	210.00
2014	1	7900.00	210.00
2013	1	7500.00	210.00
2012	1	6000.00	200.00
2011	1	35000.00	120.00
2010	1	30000.00	122.00
2009	1	17000.00	120.00
2008	1	16000.00	120.00
	<		

#### 16. Select the year to be copied and click Select

17. This will copy the budget information for each month

Gene	eral T	arget Hours	Period Start Dat	tes Billing Rates	Signature Budgets	
١	/ear	Month	Fees	Chargable Time	Non-Chargable Ti	
F	2016	1	8,250.00	210.00	30.00	^
	2016	2	8,250.00	210.00	30.00	
	2016	3	8,250.00	210.00	30.00	
	2016	4	8,250.00	210.00	30.00	
	2016	5	8,250.00	210.00	30.00	
	2016	6	8,250.00	210.00	30.00	
	2016	7	8,250.00	210.00	30.00	
	2016	8	8,250.00	210.00	30.00	
	2016	9	8,250.00	210.00	30.00	
	2016	10	8,250.00	210.00	30.00	
	2016	11	8,250.00	210.00	30.00	
	2016	12	8,250.00	210.00	30.00	
						v
F	ill Budg	et Cop	y Budget	Add	Edit Delete	2

- 18. Values can then be edited by exception
- 19. Click OK when finished to save the changes
- 20. This time recorder is now available for use.

## **Amend A Handler**

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

		Change Ha	andler		2	×
General	Target Hours	Period Start Dates	Billing Rates	Signature	Budgets	
Code Name Hourly Ra Team Logon F/E Code		BS Brian Sweeney 250.00 COM BRIANS BS	Team	Outlook Auto Lau Send Send	inch KPI By E-mail Startup	
Default T	ask	GEN	~	Send	and Show	
Recent U	sed Matter List	30		Type		
Exchange Default D	e Alias velegate Resource	keyhosuetest@gm	nail.cc	Partne     Solicit	tor	
Departme	ent	CON	*	O Suppo	ort Staff	
Branch		Head Office	~			
		Skip welcome sc	reen in new mat	tter wizard		
Employee	e Reference No.					
				<u>о</u> к	Cancel	]

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

## **Retire A Team**

- 1. Open the **Handler** dialog 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** dialog 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

0	System Reports	<b>-</b> ×
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 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 dialog 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 dialog box will appear.

		Maintain Han	dler Codes		×
Add	d <u>E</u> dit	Delete		Includ	e Retired
Searc	h				
	Code	Name	Team	Rate	
	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 dialog box appears.

(	ì		Add Har	ndler				×
	General	Target Hours	Period Start Dates	Billing Rates	Sign	ature	Budgets	
	Code *				Feam	Re	tired	
	Name *					Au	to Launch Tim	ner
	Hourly Ra	ate	0.00			Ou	tlook View	
	Team *		Select team		¥	🖌 İs (	Chargeable	
	Logon					Тур	e	
	F/E Code	*	Select F/E code		۷	0	Partner	
	Default T	ask	Select task	~	] <b>X</b>		Solicitor	
	Recent U	sed Matter List				0.9	Support Staff	
	Exchange	Alias						
	Default D	elegate Resource	Select delegate		*			
	Departme	ent	Select department		*			
	Branch		Select branch		*			
			Skip welcome sc	reen in new mat	tter wiz	ard		
		e Reference No.			_			
	Team Lea	ider						
l						_		
					_		<u>2K C</u> ar	ncel

Input the following details.

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

		Add Har	ndler				×
General	Target Hours	Period Start Dates	Billing Rates	Signa	ature	Budgets	
Code *			<b>I</b>	「eam	Ref	tired	
Name *					Au	to Launch Tim	er
Hourly Ra	ate	0.00			Ou	tlook View	
					✓ Is (	Ihargeable	
					Тур	e	ור
					0	Partner	
					0	Solicitor	
					0.9	Support Staff	
Exchange	Alias						
Default D	elegate Resource	Select delegate		~			
Departme	ent	Select department		~			
Branch		Select branch		~			
		Skip welcome sci	reen in new mat	ter wiz	ard		
Employee	e Reference No.						
Team Lea	der						
						<u>K</u>	icel

Name Box:	Input the team name
Hourly Rate:	Input a default hourly rate
Is Chargeable:	Tick the box if rate is chargeable
Department:	Input a department for the team
Branch:	Input a brand for the team (if relevant)
Team Leader:	Input a team leader for the team

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

#### Amend A Team

- 1. Open the **Handler** Dialog 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** dialog 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** dialog 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

0	System Reports	- <b>-</b> ×
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 Teams		
List of VAT Codes		
List of Work Types		
Creditors Reports		
Debtors Reports		
Diary/Task Reports		
Dictations Reports		
<ul> <li>Exception Reports</li> </ul>		
Fees Issued Reports		~

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

	List of Teams	×			
Enter Parameters					
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.

oup Tree X			19 22 20 20
4 Team List		Soo Grabbit &	
COM			Data Date : 24/08/2015 14 46
CON		List of Handlers	By Team
τυ	Team	Name	Count Handlers
	COM	Commercial	
	ADM	Admin	
	BS CN MK MW	Brian Sweeney	
	CN	Carol Nolan	
	MK	Mark Kelly	
	MW	Martina Winters	
	SK	Stephen Keogh	
	CON	Conveyancing	
	AM	Anne Mellon	
	CON	Conveyancing	
	<u>jp</u>	Justin Phelan	
	LIT	Litigation	
	JBL	Joe Blogs	
	LIT	Litigation	

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

# **O**THER **C**ODES

Other codes allows the user to maintain fields in Keyhouse. It facilitates the tailoring of Keyhouse to meet the needs of each company.

	File Colour Allow matters to be coded by colour e.g. Litigation – Red or Conveyancing -		Salutation Codes Use in Debt Recovery for Revenue
-	e.g. Litigation – Red or Conveyancing -		Use in Debt Recovery for Revenue
	<b>C</b> · · · · ·		Commissioners. Allow letters to be coded
	Green		with specific salutations
	Marital Status		Location
	Enables a client's/Contact's/	-	Allows for the addition of storage locations
<b>\$</b> \$	Associate's marital status to be added		for the Strong Room
	to the client details e.g. single,		
	divorced, using a drop down list		
	Nationality		Item Code
	Enables a client's nationality to be	10104	Allows for the creation of items for the
I	added to the Client Details using a		Strong Room e.g. Wills or Deeds
	drop down list		
	PPS Tax Types		Category Type
	Allow for the creation of a list of		Allow for the creation of customer category
	different tax types for use on the	AN	types. These codes are visible on the Current
	Current Client Details Screen		Client Details Screen and the Know Your
			ClientScreen
	Tasks		Flag Description
	Allows for the creation of Tasks to be	P	Allows for a description to be added to flags.
ō—	used in relation to Time Recording. It	P	
	also allow Charge Levels to be set.		
	Admin Codes		Popup Paragraphs
<u>(</u>	Allows for the creation of	P	PopUp paragraphs can be used where the
Calt	Administration Codes used in relation	"	precedent content may differ depending on
	to Time Recording		the Matter details, e.g. special conditions.
	Standard Narratives		Document Class
	Used in relation to Time Costing. It		Allow for documents to be grouped based on
1	enables the user to add more		the type of document e.g. Client
	information in the Comments section		Correspondence, Pleadings etc.
	of the Time Slip.		
	Billing Narratives		Occupation
i e	Allow for the creation of narratives in	2	Creates a dropdown list of occupation types
	relation to invoicing e.g. Professional	۵	that can be used on the Current Client Details
	Fees, Search Fees etc.		Screen.
	Undertaking Status		Contact Type
•	Allow for the classification of		Allows for the profiling of Contacts e.g.
	undertakings based on the		Business, Lead, Private.
	undertaking status		
	Tax Head		Charge Arrangements
	Use in Debt Recovery for Revenue		Allow for the creation of different charging
1	Commissioners. Allows for the	3	arrangements in relation to outstanding
	creation of Tax Types e.g. PAYE,		debts. This can be on a commission or flat
	Capital Gains Tax		fee basis
Q	Allow for the classification of undertakings based on the undertaking status		Allows for the profiling of Contacts e.g. Business, Lead, Private.

22	Handler Charge Groups Groups can be set up for different categories of fee earners e.g. Partner, Associates to allow rates to be set a	•	<b>Status Codes</b> Status codes can be set up indicate the current position of a matter. The Status Codes are added to actions in workflows
٩	group level. <b>Charge Types</b> Used in Debt Recovery for Revenue Commissioners. This relates to the nature of the tax debt e.g. Interest, penalties or surcharges. Tax Head must be set up in advance of the	Ŵ	<b>UDF Categories</b> Setting up UDF categories will allow for the grouping of UDF fields together
6	Charge Type. <b>SDLTForm Parameters</b> Stamp Duty Land Tax – For UK Clients Only.	<b>\$</b>	<b>Undertaking Category</b> Used to classify undertakings based on the reason they were given e.g. Redemption of Mortgage, Registration of Deeds etc.
4	Know Your Client Relates to the type of due diligence carried out in relation to Anti Money Laundering. Pre populated with Law Society Guidelines	8	<b>Client Type</b> Used in relation to Anti Money Laundering to record the type of client e.g. a charity, partnership or private individual. Pre Populated with Law Society Guidelines
¢	Introduction By Used in relation to Anti Money Laundering to record how client was introduced to the company. Pre populated with Law Society Guidelines	<b>@</b>	<b>ID Proofs</b> Used in relation to Anti Money Laundering to record the type of documentation received as proof for AML. Pre populated with Law Society Guidelines
¢	Outlay Codes Used for Cheque Requisitions to group outlay based on type.	۲	<b>KPI Parameters</b> Maintained Monthly. Used to roll forward the accounting month to enable Dashboard reports to be run correctly.

# MAINTAIN SIMPLE CODES

Simple codes only require basic information e.g. Code, description. The following use simple codes only:

Salutation	Location	Marital Code
ltem Types	PPS Tax Types	Category Types
Admin Codes	Standard Narrative	Document Class
Occupation	Undertaking Status	Contact Type
Client Group	Branch	Handler Charge Group
UDF Category	Undertaking Category	Know Your Client
Introduced By	ID Proof	Outlay Code

Nationality

Tax Head Status Codes Client Type

**Billing Narrative** 

Flags

## Add A Simple Code

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

		Maintain Marital Status	×
	<u>A</u> dd <u>E</u> dit	Delete	
[	Search		
	Code	Description	
Þ	DIV	Divorced	^
	MAR	Married	
	SEP	Separated	
	SGL	Single	
	WID	Widowed	
			~

3. Click the **Add** button. A dialog box appears.

		×
Add Marital	Status	
Code		
Description		
		4

Input a three-letter Code in the Code box e.g. CVL for Civil Partnership Input the Description in the Description box.

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

## Amend A Simple Code

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

<b>î</b>		×
Change Mar	ital Status	
Code	CVL	
Description	Civil Partnership	
Retired		
	<u>O</u> K <u>C</u> anc	el

Make any changes required.

4. Click the **OK** button.

#### **Delete/Retire A Simple Code**

It is not possible to delete some codes however they can be retired.

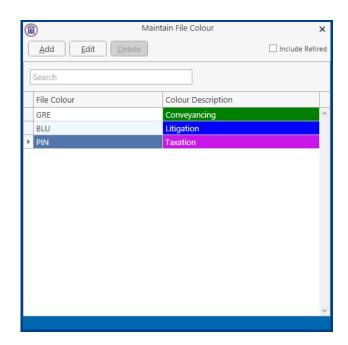
- 1. Open the **Code Type** box as before.
- 2. Select the **code** you want to amend.
- 3. Click the **Edit** button.
- 4. Tick the Retired box to retire the code
- 5. Click OK
- 6. If the code can be deleted, highlight the code and click Delete.

# MAINTAIN FILE COLOURS

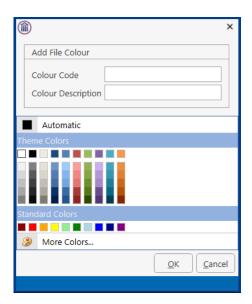
File Colours can be used to colour code file types e.g. all conveyancing files would be blue, all litigation red etc.

## 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 dialog 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. Select the colour to be added to the field

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

## Amend A File Colour

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



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

## **Delete/Retire A File Colour**

It is not possible to delete a file colour at this time however it can be retired.

- 1. Open the **Code Type** box as before.
- 2. Select the **code** you want to amend.
- 3. Click the **Edit** button.
- 4. Tick the Retired box to retire the code
- 5. Click OK

# 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.

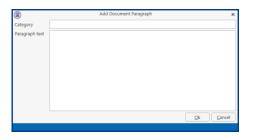
It is possible to set up the PopUp paragraphs so the user can select one or multiple paragraphs in the letter\document.

## 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	Edit Delete	÷ ÷
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 dialog box appears.



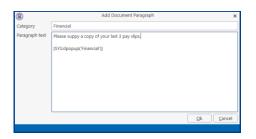
The system will generate a **Key Field** automatically Input a Category in the Category box e.g. Financial Type the required text in the Paragraph text box.

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

## **Multiple Paragraph Option**

- 1. Open the Add Document Paragraph dialog 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 dialog 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 TASKS

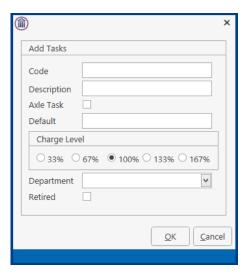
Tasks are general activities performed by handlers e.g. letter writing, file review etc.

## Add A Task

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

Ì	Maintain Tasks	2
Add	Include 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	200
MEET	Client Meeting	15
PC	Photocopying	25
PHO	Phone Call	0
PSX	Postage & Sundries	20
050	e de la companya de l	0

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



Input a three/four letter code in the Code Box e.g. Ltr for Letter. Input the Description in the Description box Axle Task should not be ticked. Set the Default Rate if the rate should be the same for all handlers. If the Task is to be billed at a level other than the normal charge rate for the handler, set a Charge Level.

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

)		
Change Tasks	5	
Code	LET	
Description	Letter Drafting	
Axle Task		
Default	0.00	
Charge Lev	el	]
O 33% O	67% • 100% • 133% • 167%	
Department	¥	
Retired		
	OK Cano	e

Make any changes required.

4. Click the **OK** button.

## **Retire A Task**

- 1. Open the **Task** dialog 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

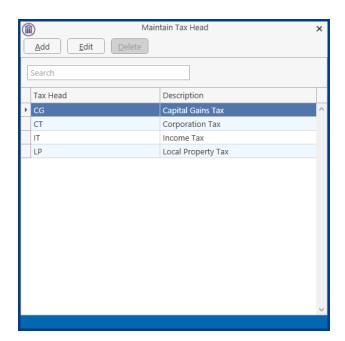
rep

# MAINTAIN TAX HEAD

Tax Heads detail all the different types of taxes payable by a company or an individual.

## **Create A Tax Head**

- 1. Click **Maintain** from the Tabs.
- 2. Click **Other Codes** and then select **Tax Head**. The following dialog box appears.



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

(	)		×
	Add Tax Hea	d	
	Tax Head		
	Description		
		<u>O</u> K <u>C</u> ance	

Input a two-letter Code in the Code box e.g. VT for VAT Input the Description in the Description box.

5. Click the **OK** button and this Tax Head is available for use.

## Amend A Tax Head

- 1. Open the **Tax Head** dialog box as before.
- 2. Select the **Tax Head** you want to amend.

3. Click the **Edit** button and the following dialog box will appear.

)		×
Change Tax	Head	
	LP Local Property Tax	
		el

- 4. Make the necessary changes.
- 5. Click on **OK** button.

## Delete A Tax Head

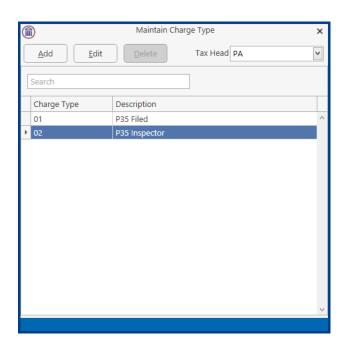
It is not possible to delete a Tax Head at this time.

# MAINTAIN A CHARGE TYPE

Charge Types all you to break down how the value of the debt was reached e.g. penalties and surcharges, assessment etc.

## **Create A Charge Type**

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



3. Click the **Add** button to add a Charge Type. The following dialog box appears.

Î	)		)	×
[	Add Charge 1	уре		
	Tax Head		~	
	Charge Type			
	Description			
			K Canad	h
		<u>_</u>	K <u>C</u> ancel	J

Input a two-letter Code in the Code box e.g. IL for Interest on Late Payment Input the Description in the Description box.

6. Click the **OK** button and this Charge Type is available for use.

## Amend A Charge Type

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

3. Click the **Edit** button and the following dialog box will appear.

٦	x
Change Ch	rge Туре
Tax Head	PA
Charge Ty	. 02
Description	P35 Inspector
L	
	<u>O</u> K <u>C</u> ancel

- 4. Make the necessary changes.
- 5. Click on **OK** button.

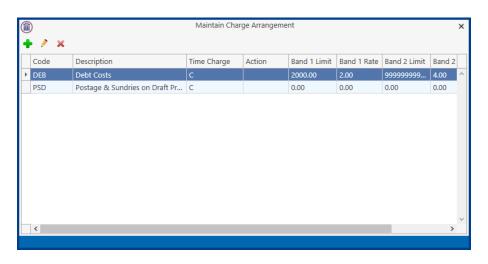
# Delete A Charge Type

It is not possible to delete a Tax Head at this time.

# MAINTAIN CHARGE ARRANGEMENTS

## **Create Charge Arrangements**

- 1. Click **Maintain** from the Tabs.
- 2. Click **Other Codes** and then select **Charge Arrangements**. The following dialog box appears.



3. Click the **Add** button to add a Charge Type. The following dialog box appears.

<b>(</b>		Add Charge Arrangement	×
General	Charge Matri	K	
Code			
Descripti	on		
On comp	letion of action	Select action Change charging method to      Time      Charge task	
Commi	ission Charges -		1
Band L	.imit 1	Band Rate 1	
Band L	.imit 2	Band Rate 2	
Band L	.imit 3	Band Rate 3	
Band L	.imit 4	Band Rate 4	
Band L	.imit 5	Band Rate 5	
			1
		Qk Cancel	]

Input a two-letter Code in the Code box e.g. DEB for Debt Input the Description in the Description box.

Input the next Action if required

Ensure Time is ticked if billing is based on the time spent on the matter. Ensure Charge task it ticked if billing is based on the action carried out. The Change Matrix will have to be created. If payment is on a commission bases, based on the values of the debt enter the commission rates to be charged e.g. Band Limit €2,000 with a Band Rate of 4%

Click on **Change Matrix** if required.

• / ×							
Charge Code	Description	Arrangement	Band 1 Limit	Band 1 Rate	Band 2 Limit	Band 2 Rate	
D01	Initial Deamand	DEB	999999999	30.00	0.00	0.00	
D02	District Court Issue Fee	DEB	99999999	120.00	0.00	0.00	
D03	Circuit Court Issue Fee	DEB	99999999	120.00	0.00	0.00	
D04	High Court Issue Fee	DEB	99999999	120.00	0.00	0.00	

#### Click the Add

Add Charge Code	×
DEB	
Band 1 Rate	
Band 2 Rate	
Band 3 Rate	
Band 4 Rate	
Band 5 Rate	
Band 6 Rate	
<u>Q</u> k <u>C</u> ar	icel
	DEB

Input a three character Charge Code Input the Description in the Description box. Input a Stage Code if required Input the Band Limits and a Band Rates as required

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

## Amend A Charge Type

- 1. Open the **Charge Arrangement** dialog box as before.
- 2. Select the **Charge Arrangement** you want to amend.

3. Click the **Edit** button and the following dialog box will appear.

General       Charge Matrix         Code       DEB         Description       Debt Costs         On completion of action       select action         Commission Charges       Band Limit 1         Band Limit 1       2,000.00         Band Limit 2       9,999,999,900         Band Rate 2       4,000	×
Description Debt Costs On completion of action Select action Commission Charges Band Limit 1 2,000.00 Band Rate 1 2.00	
On completion of action Select action Change Commission Charges Band Limit 1 2,000.00 Band Rate 1 2.00	
Commission Charges Band Limit 1 2,000.00 Band Rate 1 2.00	
Band Limit 1 2,000.00 Band Rate 1 2.00	charging method to 🛛 Time 💿 Charge task
Band Limit 2 9,999,999,999,00 Band Rate 2 4,00	0%
	0%
Band Limit 3 0.00 Band Rate 3 0.00	0%
Band Limit 4 0.00 Band Rate 4 0.00	0%
Band Limit 5 0.00 Band Rate 5 0.00	0%
	<u>O</u> k <u>Cancel</u>

- 4. Make the necessary changes.
- 5. Click to the Change Matrix Tab if a change is required here
- 6. Click on **OK** button.

## Delete A Charge Arrangement

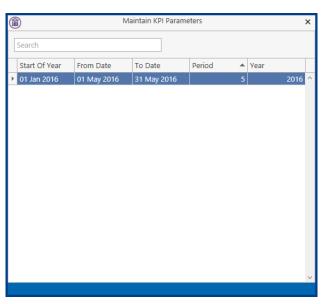
It is not possible to delete a Tax Head at this time.

# MAINTAIN KPIPARAMETERS

KPI Parameters should be maintained on a monthly basis. This information is used in relation to the Dashboard report on the Time Costing Screen.

#### **Maintain KPI Parameters**

- 1. Click **Maintain** from the Tabs.
- 2. Click Other Codes and then select KPI Parameters. The following dialog box appears.



3. Right click on the current entry and select Edit. The following dialog box appears.

	Update KPI Parameter	×
Start Of Year	01 Jan 2016	۷
From Date	01 May 2016	۷
To Date	31 May 2016	۷
Period	5	
Year	2016	
	<u>O</u> K <u>C</u> ancel	

- 4. Change the required information
- 5. Click OK and this information will be visible in the Dashboard Report.

# 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 receive 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 Document Assist (p. 83) 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.

\$	Search				
T	Туре	Category Description	Code	Description	
1	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 X
Category type	Please select a category type V Add category type
Code	
Description	
	User defined fields
UDF1	
UDF2	
UDF3	
UDF4	
UDF5	
UDF6	
UDF7	
UDF8	
UDF9	
UDF10	
	Ok Cancel

- 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 UDF fields (p. 84) required. (See Creating User Defined Fields).

	Change Contact Category	×
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		
		<u>O</u> k <u>C</u> ancel

8. Click OK when finished.

# Delete A Contact Category

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

# 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 custom ise 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.

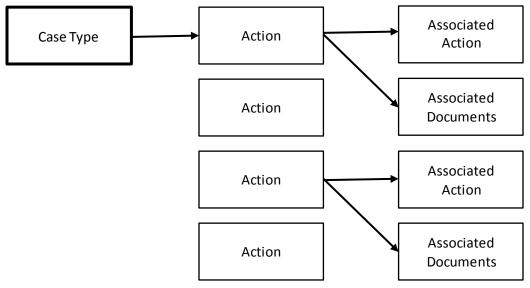
Remember that good preparation will ensure your maximise the benefits of your Keyhouse Console.

# BACKGROUND OVERVIEW

Before we begin it might be useful to look at 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

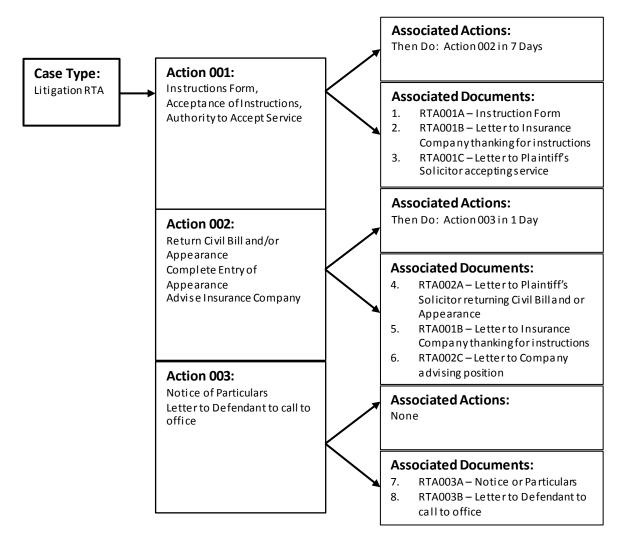


#### Explanation:

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, connected 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

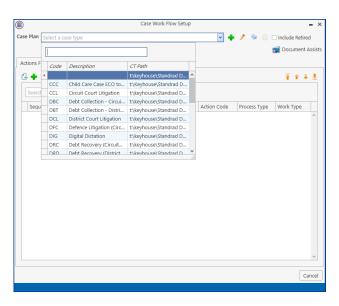
As previously mentioned the set-up of different case types will involve quite an amount of consideration but once the list of different case types is compiled the set-up of the different case types is reasonably straightforward. The set-up of the case type is the first step in case set-up section of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

In this section we familiarise ourselves with the following tasks:

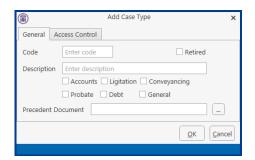
- Adding New Case Types
- Removing Case Types
- Amending Existing Case Types

#### Adding New Case Types

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



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



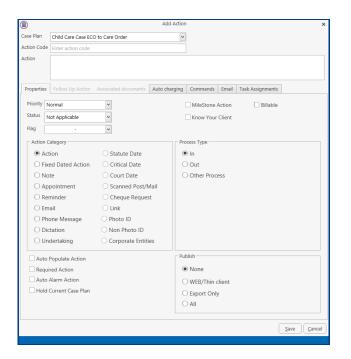
4. Type in an appropriate code in the Code box e.g. LIT for Litigation, this code must be unique and 3 characters in length.

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

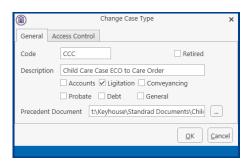
- 5. Type a description in the Description box e.g. Purchase Work Flow.
- 6. Below the Description Box you can see a series of tick boxes. Tick the most appropriate category for the case type.
- 7. Leave the Precedent Documents blank, it will create a storage location for the precedent documents.
- 8. 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**

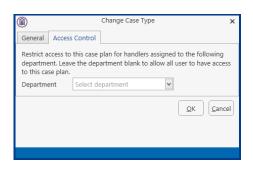
- 1. Select Setup from the list of Tabs
- 2. Select Case Work Flow Setup from the Ribbon. Click on the Down Arrow beside Case Type to get the list of all existing case plans. The following dialog box will appear.



- 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 dialog box will appear.



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

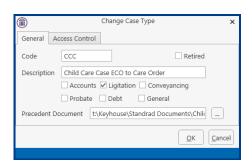


6. Click on the Down Arrow to get a list of departments, select the department to use this cae plan.

**NOTE**: <u>Only</u> 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.

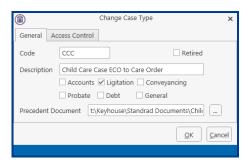


3. The following dialog box will appear. Make any required changes and click the OK button and these changes will then take place.

## **Retire A Case Type/Plan**

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

## Copy A Case Type/Plan

A Case Plan can now be copied and it creates a new set of coded documents.

- 1. Go to Setup and click on Case Work Flow Setup.
- 2. Locate the Case Plan to be copied

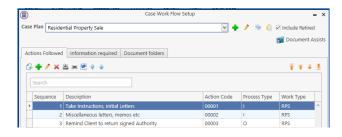
3. Click Copy Case plan/type button.

<b>(</b>	Case Work Flow Setup			- ×
Case Plan Proper	ty sale	V 🔶	/ 📑 👔	Include Retired
	,			ase plan/type Assists
			соруса	ASSISTS
Actions Followed	Information required Document folders			
(4 <b>+</b> / ×	9			<b>* * 1 1</b>
Search				
Sequence	Description	Action Code	Process Type	Work Type
▶ 1	Take Instructions, initial Letters	PSL01	1	PSL ^
2	Miscellaneous letters, memos etc	PSL19	I	PSL
3	Remind Client to return signed Authority	PSL02	0	PSL
4	Get Title from Lender and/or Land Reg	PSL03	0	PSL
5	Remind Lender to send Title	PSL04	0	PSL
6	Draft Contract	PSL05	0	PSL
8	Check whether Precontract Enquiries Received	PSL07	I	PSL
9	Reply to Precontract Enquiries	PSL08	0	PSL
10	Remind Purchaser Solicitors to return approved draft Cont	PSL09	0	PSL
11	Contract signed by Purchaser, get Redemption figure	PSL10	0	PSL
12	Remind Client to sign Contract	PSL11	I.	PSL
13	Send signed Contract to Purchaser Solicitor	PSL12	0	PSL
15	Approve draft Transfer	PSL13	0	PSL
16	Closing	PSL14	0	PSL
17	Post-Closing	PSL15	0	PSL
18	Remind Lender to furnish Vacate	PSL16	I	PSL
19	Send Vacate to Purchaser Solicitors	PSL17	0	PSL 🗸
				Cancel
				Cancer

4. Click Copy Case plan/type button.



5. A new case plan has been created.



6. The Follow Up Actions are still linked to the original Case Plan and will need to be changed to the new workflow. See Amend an Associated Action (p. 72)

# 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:

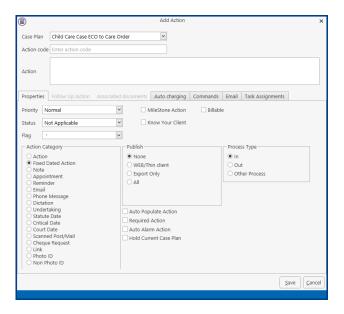
- Set-up of a Case Action Flow
- Creating New Actions
- Amending Existing Actions
- Removing Actions
- Importing Zipped Case Plan Files
- Exporting Case Plans as Zipped Files

## Setting Up A Case Action Flow

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

	Case Work Flow Setup				- 3		
Case Type	Residential House Purchase	¥ 🔶	v 🔶 🤌		Document Assists		
Actions Followed Information required							
G 🕂 /	× 8 × 8 + 4				Ŧ + + ±		
Search							
			Action Code	Process Type	Work Type		
Sequen	ce Description						

3. The following dialog box will appear.



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 an Initial Letter, Judgement Papers Filed, Summons Issued, Case Settled etc.
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.
	<b>All</b> 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
<b>Required Action</b> :	case is created. This will prevent the action being removed from the Case Diary
Auto Alarm Action:	Set a reminder on the action
Hold Current Case Plan	This will prevent the Case Plan from changing on completion of an action that was added to your Case Plan from an existing Case Plan and where a follow up action exists.

6. Click to the Auto charging Tab.

			Change Action				
Case Plan	Shared Ownership	acquistions & disposals	¥				
Action code	0020						
Action	Contract/Title rece	eived no instruction					
Properties	Follow Up Action	Associated documents	Auto charging	Commands	Email	Task Assignments	
Change mat	ter charge arrangen	nent to		on completio	n of this	action	
complication	cost to be charged n of this action rest on complication	0					
							Save Cance

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

Î			Change Action					×
Case Plan	General Office Wo	rk	~					
Action code	G01							
Action	Initial Attendance							
Properties	Follow Up Action	Associated documents	Auto charging	Commands	Email	Task Assignments		
	irtner /E	Assign Action To Team Logged On Team Case Team Other				ompletion Required B		
Action C		1			Time	Frame		
								< >
						S	ave C	ancel

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	<b>Y</b>					
Action code	RHP01							
Action	Send initial letter t	o client.						
Properties	Follow Up Action	Associated documents	Auto charging	Commands	Email	Task Assignmer	nts	
+ / ×								
Decision	Next Action	Description			When	When Type	Action	
								^
○ Auto	omaticaly process as	ssociated actions	Ask the user to sel	ect the assoc	ated actio	ns to process		
							Save	Cancel

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

	A	dd Associated	l Action	×
On Completion of :	RHP01	Se	nd initial letter to client.	
Then :	Do	✓ Re	esponse from Client	~
In :		7,00 🗘 Da	ays	♥ Time
			2	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	iater	d Action		×	Action			
On Completion of :	RHP01		Se	nd initial letter	to client.		Action	^	uments i da	<i>n</i> 0
Then :	Do	Y	R	esponse from C	lient	-				
In :		7.00 🗘	[	rh		Θ				
			[	DESC 🔺						
				Action Code	Description					
			Þ		sidential House Purcha	se				
				RHP01	Send initial letter to clie	nt.				
				RHP02	Response from Client					
				RHP03	Contact the Land Regist	ry				
				RHP04	Reply from Land Registr	У				

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 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 Amend An Associated Action

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

### 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.

# 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	nge 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 Assignments	5	
+ G 🧷	🗙 🗏 💌 📂 🛛	à							
Code	Document Name	!		Optional	Action	Filepath	ı		Π
									~
								Save	Cancel

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



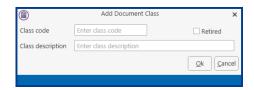
Add a new document

Select a new document

- Change/Amend document settings
- 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 dialog box appears.

	Add Documents		×
Crea	ate Document 📂 Open Document 📧 Import Document		
General	File path		
Code	GENG03B		
Name	Enter the name		
Туре	DOCX		
Class	GEN		
	Qk	<u>C</u> ance	<u>!</u>

- 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 dialog box will appear.

WindowsBT         07/04           P defini (Royte)         Juntalis         24/04           P defini (Royte)         Juntalis         24/04           P defini (Royte)         CK100-6fn         24/04           P defini (Royte)         Divines         01/04           D defini (Royte)         Divines         01/04           Minicit         Divines         01/04           Minicit         Horn         12/11           Minicit         Informed         24/04           Minicitories         Informed         24/04           Minicitories         Informed         24/04           Minicitories         Informed         24/04	Imodified         Type           6/2015 11:57         File folder           6/2015 14:35         File folder           6/2015 14:35         File folder           6/2015 14:36         File folder           7/2015 16:36         File folder           8/2015 14:36         File folder           7/2015 16:36         File folder           6/2015 12:43         File folder           6/2015 12:43         File folder	Size er er er er er	# • E	
No. C         Non. C         Data           IP Annin (Saythin)         SWindowsBT         07/07           IP Annin (Saythin)         Juntals         24/04           IP Connents         Drivers         07/07           IP Connents         Drivers         07/07           IP Marcic         IP One         10/07           IP Marcin         IP One         10/07           IP Marcin         IP One         10/07           IP Marcin         IP One         10/07           IP One         IP One	8/2015         File folder           6/2015         File folder	er er er er er		
CODE (P)     Code (Vished a) (P4)     Co	5/2015 13:13 File folder 7/2015 14:26 File folder 6/2015 12:08 File folder 6/2015 22:48 File folder 6/2015 12:27 File folder 6/2015 11:27 File folder 7/2015 08:38 File folder 7/2015 08:38 File folder	er Er Er Er Er		
File name:	Trails from Andread	✓ All files (*.*)		v

- 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 G.
- 2. The following dialog box will appear.

	Add Associated Action	×
📂 🗌 Optional		
Document :		
		Save Cancel
		gave Gancer

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

Search							
Code	Descrip	otion	File Path	Туре	Class	Plan	
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	Certific	ate of No Appearance	t:\keyhouse\Standrad Dod t:\keyhouse\Standrad	Docu	monte) Circui	t Court Ci	áI.
CCBC103C	Affiday	it of No Defence	t:\keyhouse\Standrad Documents\Circuit Cou	DOC	GEN	i court cr	m
CCDC103D	Doguo	t for Judamont by Dofault	th kouhoused Standered Decumenter Circuit Cou	DOC	CEN		
		- 10					
Action Code		Description			Document	·	L
					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.

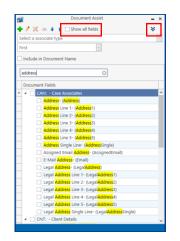
- 1. From the Case Work Flow Setup window open Document Assist.
- 2.

<b>(</b>	Case Work Flow	v Setup – X
Case Plan	General Office Work	💟 💠 🤌 🏦 🖺 🗆 Include Retired
Actions F	ollowed Information required	

- 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.

Select	a associate type	
First 🕑		
Incl	ude in Document Name	
Sear	ch	
Doc	ument Fields	
F F.	CAN: - Case Associates	
×.	CNT: - Client Details	
÷.	CSM: - Other Case Details	
×.	DATE: - Important Dates & Times	
F.	DEA: - Debt Costin Ledger	
•	DIA: - Case Diary	
×.	HAN: - Fee Earner/Handlers Details	
×.	LCL: - Other Client Details	
- F	LCN: - Client. Contact (Sumames Etc)	
•	MAT: - Case/Matter Details	
۱.	UDF: - User Defined/Other Information	

8. All commonly used fields are visible however it may be necessary to tick the Show all fields box to see your required field.



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.

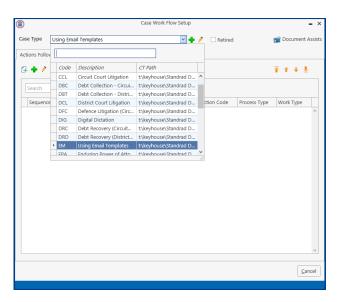
- 1. Go to the Setup Tab and open Case Work Flow Setup.
- 2. Open the Work Flow containing the Precedent.
- 3. Double click on the Action that contains the document.
- 4. Open the Associated Document Tab and double click on the Document.
- 5. Go to the location where the document is to be inserted.
- 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 att	achment					
Properties	Follow Up Action Associated	documents	Auto charging	Commands	Email	Task Assignments	
	ormal v ot Applicable v	Kr	lileStone Action now Your Client	Billable	2		
Action Cate Action Fixed D: Note Appoint Remind Email Phone N Dictatio	ated Action tment ler Message	Publish None WEB/Thi Export C All			● In ○ Out	s Type t her Process	
Dicitation     Undertaking     Statute Date     Critical Date     Critical Date     Critical Date     Critical Date     Critical Date     Critical Date     Critical Date     Critical Date     Critical Date     Nen Photo ID		Auto Popu Required J Auto Alarr Hold Curre	Action				
						Save	ancel

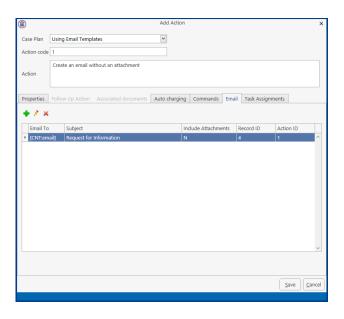
- 4.
- Set the properties to Email and save. Open the Action and click on the Email Tab. 5.

			Add Action					×
Case Plan	Using Email Temp	lates	*					
Action code	1							
Action	Create an email w	ithout an attachment						
Properties	Follow Up Action	Associated documents	Auto charging	Commands	Email	Task Assign	ments	
+ / ×								
Email To	Subject		li	nclude Attachme	nts R	ecord ID	Action ID	
								^
								_

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

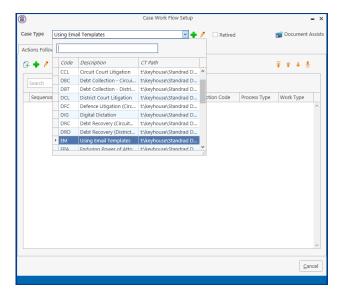
۲	Add Email Template	
To:	[CNT:email]	
CC:	Enter CC addresses	
BCC:	Enter BCC addresses	
Subject:	Request for Information	
	Include Attachments Mail Priority: Normal  Include PDF Versions of Attachments Request Read Receipt	
	□ →   ● ● →   □ ● →   □ ● □ = □ = ↓   → ↓ Ω → 1 + + + 1 + + + € + + + 1 + + + 1 + + + 2 + + + 1 + + + 3 + + + 1 + + + 4 + + + 1 + + + 5 + + + 1 + + + 8 + + + 1 +   +	
× · · · · · · · · · · · · · · · · · · ·	Dear [ONT:Selut] I would be grateful if you could	
	Save	Cancel

- 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**

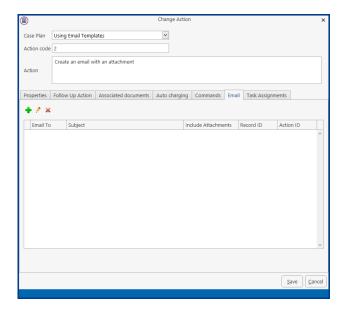
- 1. Choose the required Workflow.
- 2. Open Document Assist.



3. Create a new action.

			Add Action				×
Case Plan	Using Email Templates		~				
Action code	2						
Action	Create an email with an attach	ment					
Properties	Follow Up Action Associated	documents	Auto charging	Commands	Email	Task Assignments	
Priority No	ormal	- N	/ileStone Action	🗌 Billable	2		
Status No	ot Applicable	с К	now Your Client				
Flag •	×						
Action Cat	tegory	Publish —			Proces	s Type	_
Action     Fixed D	ated Action	None			In Out		
O Note		O WEB/Th				t ner Process	
O Appoin O Remind	der	O All	·				
<ul> <li>Email</li> <li>Phone I</li> </ul>	Message						
<ul> <li>Dictation</li> <li>Undertained</li> </ul>							
🔿 Statute	Date	Auto Pop					
<ul> <li>Critical</li> <li>Court D</li> </ul>		Auto Alar					
<ul> <li>Scanned Post/Mail</li> <li>Cheque Request</li> <li>Link</li> </ul>		Hold Curr	rent Case Plan				
O Photo I Non Ph							
1							
						Save	Cancel

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



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

00	[CNT:email]	
2	Enter CC addresses	
C:	Enter BCC addresses	
bject	Medical Report	
	Include Attachments         Mail Prototy: Normal *           Include PDF Versions of Attachments         Request Read Receipt           Include PDF Versions of Attachments         Request Read Receipt           Include PDF Versions of Attachments         Request Read Receipt	
	Dear [Salut] Attached please find your medical report. I trust that this is satisfactory.	

- 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:

- i) 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 dialog 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.

### In The Document Assist Window

1. Click on Black Arrow to expand the User Defined/Other Information. The following Window is displayed.

🗊 Document Assist 🗕 🖌	¢
🛉 🤌 💥 🚔 🛊 🗋 Show all fields 🛛 🛛 💝	
Select a associate type	1
First	1
Include in Document Name	
Search	
Document Fields	-
UDF: - User Defined/Other Information	^
Date of accident?- (AccidentDate)	
Enter ACC Deposit Account number- (ACCNUM)	
Account Number- (Accountnumber)	
Enter Amount of charge over the ACCBANK Account refe	
Enter Date arrangement fee to be paid- (ADate)	
Enter Amount Handling Charge ie. 35.00- (AmountHandi	
Enter post loan agreed Arrangement Fee- (ArFee)	
Enter Beneficiary Name- (Bene)	
Circuit Court Number- (CirCtRecNo)	
Civil Bill (Summons etc) Service Date- (CivilBillServeDate)	
Possessive pronoun for client please enter (his/her/its/th	
Closing Date- (ClosingDate)	
Court Area- (CourtArea)	
Damage to / Arrears of- (DamagetoArrearsof)	
Date of Instructions- (DateInstructions)	
Date of Adjournment- (DateofAdjournment)	
Date of Letter of Compliant- (DateofCompliant)	~

2. Click on the Green Plus. The following dialog box is displayed.

<b>1</b>	Add User Defined Field	×
General Valid	ation SQL Statement	
Field Prefix	UDF:	
Field Name	Enter the field name	
Туре	Text Common Lock	
Screen Prompt	Enter the scrren prompt	
Length	0 🕽	
Decimal	0 🗘	
Format		
Default Value		
Category		
		<u>O</u> K <u>C</u> ancel

3. Fill in the following information:

FILLINGTONOWI	
Field Prefix:	The Field Prefix Name is UDF for User Defined Fields
Field Name:	Type in a Field Name in the box provided, this must not contain spaces.
Туре:	Select the <b>Type</b> from the drop down list provided i.e. the type of information
	that will be inputted i.e. Text, Dates or Numbers.
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 <b>Up And Down</b> arrows as required.
Format:	If the data type is <b>Date</b> 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.

<b>F</b>			Change User	Defined Field		×
General Valio	lation	Other	SQL Statement			
Field Prefix	UDF:		$\vee$			
Field Name	Bene					
Туре	Text		~	Common 🗌 Lock		
Screen Prompt	Enter E	Beneficia	ary Name			
Length			50 🗘			
Decimal			0			
Format	@s50		[	Fix document format	Left Justify	
Default Value						
Category			~			
					<u>о</u> к	Cancel

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

<b>5</b>			A	dd Usei	r Defined Field		×
General	Valida	ation	SQL Statement	]			
Field Pref	īx	UDF:		~			
Field Nam	ne	Fixtu	resSale Price				
Туре		Num	eric	~	Common Lock		
Screen Pr	ompt	Pleas	e enter Fixtures S	ale Prio	e		
Length				10 🗘			
Decimal				2 🗘			
Format		@n1(	0.2		Fix document format	Left Justify	
Default V	alue						
Category				~			
						<u>о</u> к	<u>C</u> ancel

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

<b>F</b>				Change Use	r Defined Field		×
General	Valida	ation	Other	SQL Statement			
Field Pref	īx	UDF:		$\sim$			
Field Nan	ne	Com	pletionDa	ite			
Туре		Date		~	Common Lock		
Screen Pr	ompt	Com	pletion d	ate			
Length				10 🗘			
Decimal				0 🗘			
Format		@d1	8		Fix document format	Left Justify	
Default V	alue						
Category				~			
							_
						<u>O</u> K <u>C</u> anc	el

When creating a Date Field enter @d6to get a date in the format of dd/mm/yyyy or @d18 to get a date in the format of dd/mmmm/yyyy.

## **Create UDF Validation**

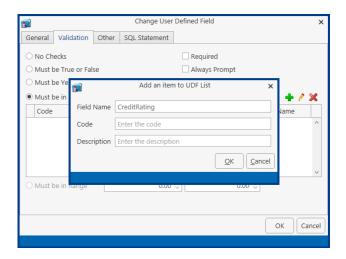
Validations can be added for stricter control of the information inputted. A useful option is the "always prompt" command which can be used for fields where the information changes frequently for example the Secretary's Reference.

<b>S</b>		Change User	Defined Field			×		
General Validation	Other	SQL Statement						
No Checks			Required					
O Must be True or False Always Prompt								
O Must be Yes or N	0							
O Must be in List					÷ +	/ X		
Code	Descriptio	n			Field Name			
O Must be in Range	·	0.00	0	0.00 🗘	]	~ >		
					<u>O</u> K	<u>C</u> ancel		

No Check:	Will give a blank field where the user enters required data
Must be True or False:	Will only allow True or False to be entered
Must be Yes or No:	Will only allow Yes or No to be entered
Must be in List:	Will only allow the user to enter a value from a list of values
Required:	Value must always be entered and cannot be left blank
Always Prompt:	Each time the field occurs the user will be prompted to confirm the data is correct.
Must be in Range:	Only used with numbers. The user must select a number from a specific range of numbers.

### Create a List

1. Click on the Green Plus.



- 2. Enter a Code and Description and click OK.
- 3. Continue until all items have been entered.

<b>S</b>			Change User	Defined Field		×
General	Validation	n Other	SQL Statement			
	hecks			Required		
O Must	be True or F					
<ul> <li>Must</li> </ul>	be Yes or N	0				
Must	be in List				+ 🥕	×
Cod	e 🔺	Description	n		Field Name	
🕨 Bad		Poor			CreditRating	^
Exe		Excellent			CreditRating	
Res		Reasonabl	e		CreditRating	
						~
O Must	be in Range		0.00	0.0	0 0	
						ancel

4. Click the OK Button.

## **Other & SQL Statement**

Used by Keyhouse for System Codes. Please do not amend without consultation with Keyhouse.

<b>S</b>			Change User	Defined Field		×
General	Validation	Other	SQL Statement			
Formul	a					
					<u>О</u> К	Cancel

**NOTE**: 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. Save the document as normal.

# **UDF Forms**

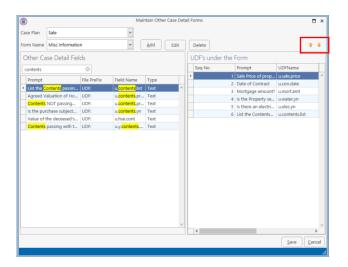
Certain cases/matters may need you to capture specific information that will require you to create UDF fields in Keyhouse. These fields can be gathered together using UDF Forms.

## Create a UDF Form

Case Plan	Please select ca	ro plan	~						
Case Plan		ise pian							
Form Name	Please select fo	rm	~	Add					† 4
Other Ca	ise Detail Fiel	lds				UDF's under	the 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 AC	Deposit Acco	UDF:	ACCNUM	Text					
Account	Number	UDF:	Accountnum	Text					
Enter Am	ount of charge	UDF:	AChAmt	Text					
Enter Dat	e arrangemen	UDF:	ADate	Text					
Enter Arr	angement Fee	UDF:	AFee	Text					
Claim Typ	xe	UDF:	AIGClaimType	Text					
Date Dan	nages Agreed	UDF:	AIGDamages	Text					
Date Cos	ts Settled	UDF:	AIGDateCost	Text					
Injury Typ	)e	UDF:	AlGInjuryType	Text					
	ce attended sc		Ambulance	Text					
Enter Am	ount Handling	UDF:	AmountHan	Numeric					
	indorsement	UDF:	AnPostEndor	Text					
	t loan agreed	UDF:	ArFee	Text	_				
	alationship to	UDF:		Text					
	elationship to	UDF:	Attorney2Rel	Text	_				
	alationship to	UDF:	Attorney3Rel	Text					
Client's n	elationship to	UDF:	Attornev4Rel	Text	~	<			>

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

- 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 using the orange Up and Down arrows.

			Maintair	n OtherCa	iseDetai	Forms				•
Case Plan	Sale		~							
Form Name	Misc Information		✓ Ad	a) [	Edit	Delete				
Other Ca	ase Detail Fields					UDF's under	r the	Form		
list						Seq No		Prompt	UDFName	
Prompt		File PreFix	Field Na	Type		Figure 1				
· ·	nsions to property ?	UDP:	u.extensi		-		2	Date of Contract	u.contract.date	
List exter		UDF:	u.extensi	Text			3	List the Contents	u.contents.list	
		UDF:	u.tem		- 11		- 4	Is the Property se	u.water.yn	
	ds to be listed in Document		u.doc.sc	_			5	Is there an electri	u.elec.yn	
	client a Driver/Passanger/C		u.doc.sc u.client.c				6	Mortgage amount?	u.mort.amt	
					~					
						<				>

- 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

			_							
ase Plan	Sale		~							
orm Name	Misc Informatio	n	¥	Add Edit		Delete				
Other Ca	ise Detail Fiel	ds				UDF's under	the	Form		
Search					1	Seq No		Prompt	UDFName	
Prompt		File PreFix	Field Name	Type	- 2				u.sale.price	^
	accident occur	UDF:	AccidentCircs	Text	-			Date of Contract	u.contract.date	
Date of a		UDF:	AccidentDate	Date				List the Contents	u.contents.list	
	C Deposit Acco		ACCNUM	Text					u.water.yn	
Account 1		UDF:	Accountnum	Text					u.elec.yn	
	ount of charge		AChAmt	Text			6	Mortgage amount?	u.mort.amt	
		UDF:	ADate	Text						
	angement Fee	UDF:	AFee	Text						
Claim Typ		UDF:	Aree	Text						
	nages Agreed	UDF:	AlGDamages							
Date Cost		UDF:	AlGDateCost	Text						
Injury Typ		UDF:	AlGInjuryType	Text						
	ce attended sc		Ambulance	Text						
	ount Handling		AmountHan	Numeric						
	indorsement	UDF:	AnPostEndor	Text						
	t loan agreed	UDE	ArFee	Text						
	ationship to	UDF:	Attorney1Rel							
	ationship to	UDF:	Attorney2Rel							
	elationship to	UDF:	Attorney3Rel							
Client's re	lationship to	UDE:	Attornev4Rel	Text	~					~
						<				>

- 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 Extra Case Details Screen.

Home Case Rep	orts Phone Log Maintain Setup Help			
ö ö •	F 🏂 🗙 🏺			
Start Timer Post Time Accounts	Add Clear All Delete All Import Other Case Details			
Client/Case	Case: FLY001/0001 Jack Flynn Sale of 10 Rose Lawn, Blanchardstown, Dublin 17			
Case Diary	Form (Default View)			
💑 Current Client Details	Search			
🌭 Current Case Details 🎒 Extra Case Details	Detail			
Associates Lease date (or date of Transfer Order etc as applicable)				
Oritical Information	Lease: First party			
🗳 Know Your Client	Lease: yearly rent (include currency)			

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.

Care Reports	Phone Log Maintain Selug Weig	Keyhouse Case Management (201-0407/081-0001/0721)	(4, 049 Start 101 - 0 ×
And District All District Card	Chara al and and and and and and and and and and		
	Case: PLVDT/0001		Tab 01-568 7412 File: (M
E Cese Dery Document Manager	form General Information		196.03
& Carrent Client Details & Carrent Case Details	Date of anident?		
💭 Estra Caue Estañs 🔿 Estra clase	22.548-3016	× -	
<ul> <li>Ditial Monution</li> <li>Envertient</li> </ul>	hjuy Tpx		
Aut Ledger	Bulantay		
Debt Ledger	Ambalance attended scarse of accident		
Cindertakings	Set True Or False 🗵 True		
<ul> <li>Strong Room</li> </ul>	Did the Garda attend the scene ?		
	Aas		
Terin			
Saud/Open			
Clert/Care			
Time Costing			In the table of the second sec

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**

٢								
Client Code	select client coo	le(Optional)	~					
Form Name	Please select fo	rm	<b>v</b>	Add				
Other Cli	ient Detail Fie	elds				UDF's under	the Form	
Search						Seq No	Prompt	UDFName
Prompt		File PreFix	Field Name	Type				
How the a	accident occur	UDF:	AccidentCircs	Text	^			
Date of a	ccident?	UDF:	AccidentDate	Date	_			
Enter ACC	C Deposit Acco	UDF:	ACCNUM	Text				
Account	Number	UDF:	Accountnum	Text				
Enter Am	ount of charge	UDF:	AChAmt	Text				
Enter Dat	te arrangemen	UDF:	ADate	Text				
Enter Arra	angement Fee	UDF:	AFee	Text				
Claim Typ	pe	UDF:	AIGClaimType	Text				
Date Dan	nages Agreed	UDF:	AIGDamages	Text				
Date Cos	ts Settled	UDF:	AIGDateCost	Text				
Injury Typ	pe	UDF:	AlGInjuryType	Text				
Ambulan	ce attended sc	UDF:	Ambulance	Text				
Enter Am	ount Handling	UDF:	AmountHan	Numeric				
An Post E	Indorsement	UDF:	AnPostEndor	Text				
Enter pos	t loan agreed	UDF:	ArFee	Text				
Client's re	elationship to	UDF:	Attorney1Rel	Text				
Client's re	elationship to	UDF:	Attorney2Rel	Text				
	elationship to	UDF:	Attorney3Rel					
Client's re	elationship to	UDF:	Attornev4Rel	Text	~			
						٢		>

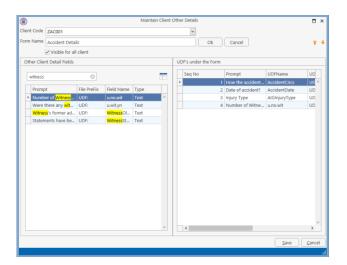
1. Select the Setup Tab and then select Client Other Details

- 2. Select the Client Code.
- 3. Click Add and then enter a Form Name in the box and click OK. If the form is to be available for all customers tick the **Visible for all client** box.

				Mainta	in Client	Other Details			
lient Code	ent Code ZAC001				~				
orm Name						0	Cancel		÷.
	Visible for all	client							
Other Clien	t Detail Fields					UDF's under the F	orm		
Search						Seq No	Prompt	UDFName	UD
Prompt	t	File PreFix	Field Name	Туре					
How the	e accident o	UDF:	AccidentCi	Text	^				
Date of	f accident?	UDF:	AccidentD	Date					
Enter A	CC Deposit	UDF:	ACCNUM	Text					
Accourt	nt Number	UDF:	Accountn	Text					
Enter A	mount of ch	UDF:	AChAmt	Text					
Enter D	ate arrange	UDF:	ADate	Text					
Enter A	urrangement	UDF:	AFee	Text					
Claim 1	lype	UDF:	AIGClaimT	Text					
Date D	amages Agr	UDF:	AIGDama	Text					
Date C	osts Settled	UDF:	AIGDateC	Text					
Injury 1	fype	UDF:	AlGInjuryT	Text					
Ambula	ance attende	UDF:	Ambulance	Text					
Enter A	mount Hand	UDF:	AmountH	Numeric					
An Pos	t Endorsement	UDF:	AnPostEn	Text					
Enter p	ost loan agr	UDF:	ArFee	Text					
Client's	relationship	UDF:	Attorney1	Text					
Client's	relationship	UDF:	Attorney2	Text					~
Client's	relationship	UDF:	Attorney3	Text	~	<			>

4. Drag the required fields to the panel on the right.

5. Once all required fields have been added, click Save



6. The system will advise that the form has been saved. Click Ok and then click Cancel to close the screen.



# 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 dialog box will appear.

	Case Work Flow Setup			- :	×
Case Plan Reside	ential Sale	¥ 🔶	/ 🗎 🛍	Include Retired	
				🗊 Document Assist	ts
Actions Followe	d Information required Document folders				
G 🛨 / 🗙	2 = 💌 👻 🔶				
Sequence	Description	Action Code	Process Type	Work Type	
				v	
				Cancel	J

4. Click on the Green Plus and the following dialog 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 using the reorder buttons.

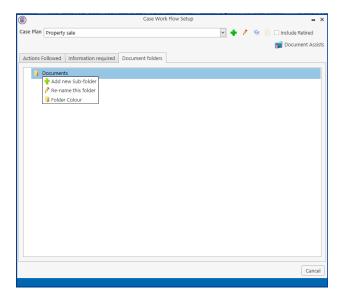


9. To remove any UDF's no longer required, click on the Red X.

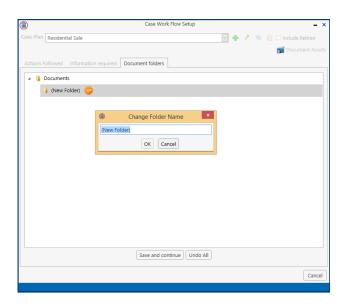
# Adding Document Folders To A Case Action Flow

When setting up a Workflow, a particular Document Folder structure may be applied. This can be created as part of the workflow and amended for specific matters at a later date, in that matter.

- 1. Ensure the Document Folder option has been activated on the General Tab of the System Options.
- 2. Click to the Document folders tab and right click on Documents

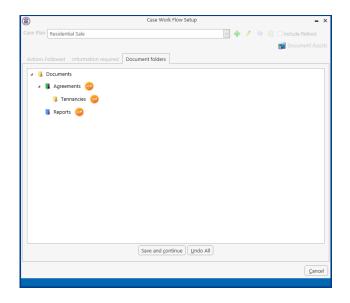


#### 3. Click Add new Sub-Folder



4. Enter the name of the Sub Folder and click OK.

5. Additional Sub Folders can be added to Sub Folders.



- 6. To delete a Sub Folder, right click and select Delete Folder and all its Sub Folders.
- 7. Click Save and Continue.

# 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 No	Description of Action	Documents required	Code	Act - days			
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 Billand/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

#### 1. INSTRUCTION DETAILS:

a. Date of Instruction:b. Fee EarnerHandler

#### 2. CLIENT/VENDOR INFORMATION

- 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 1<sup>st</sup> Purchase: Address of 1<sup>st</sup> Purchaser:
- b. Name of 1<sup>st</sup> Purchase: Address of 1<sup>st</sup> 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:

Offfice/Fax Email:

Fax:

- 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]
--------------	------------

Address: [CLNT:Address1] [CLNT:Address2] [CLNT:Address3] [CLNT:Address4] [CLNT:Address5]

Phone No:	Home:	[CNT:Tel]	Office/Fax:	[CNT:Fax]
	Mobile:	[LCL:CIMobNo]	Email:	[CNT:email]
Martial Status:	[LCL:CIMa	rtialCde]	Job Type:	[CNT:Occupation]
Date of Birth:	[CNT:DOB	]		

#### 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 <sup>st</sup> Purchaser: Address (Home):	[CAN:Name.Purchaser#01] [CAN:LinearAddress.Purchase#01]				
Name of 2 <sup>nd</sup> 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: ALLTHAT 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]