KEYHOUSE ADMINISTRATOR USER MANUAL

VERSION 5.2.2.70

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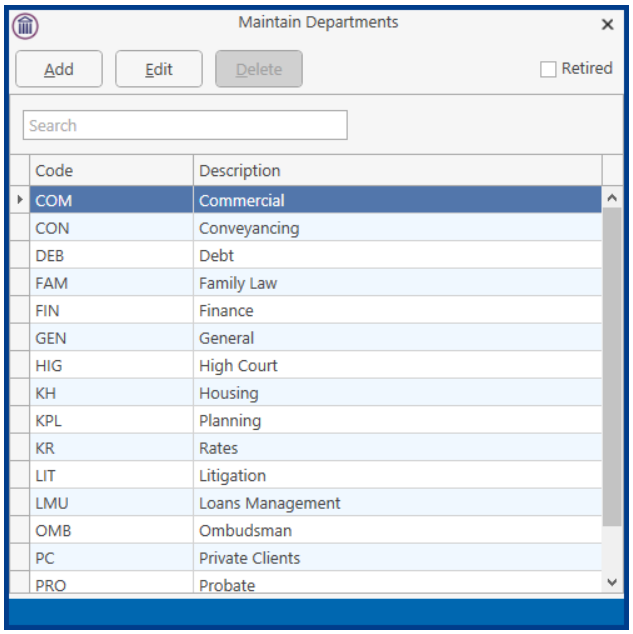
PART 1: MAINTAIN

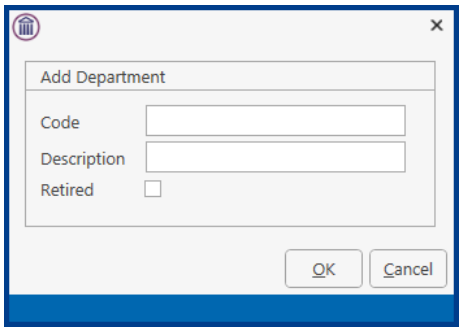
MAINTAIN DEPARTMENTS

ADD A DEPARTMENT

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



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

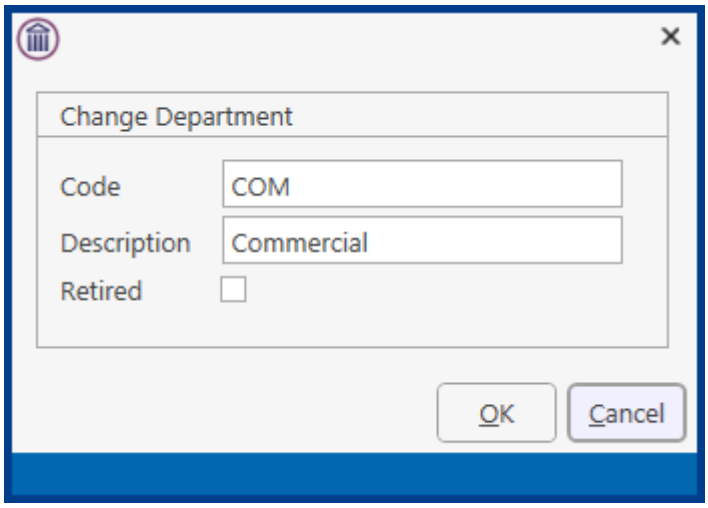


Input the following details:
A three letter department code e.g. CON for conveyancing. In the Department Code Box.
Input a Description in the Description Box.

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

AMEND A DEPARTMENT

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



Make any changes required.

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

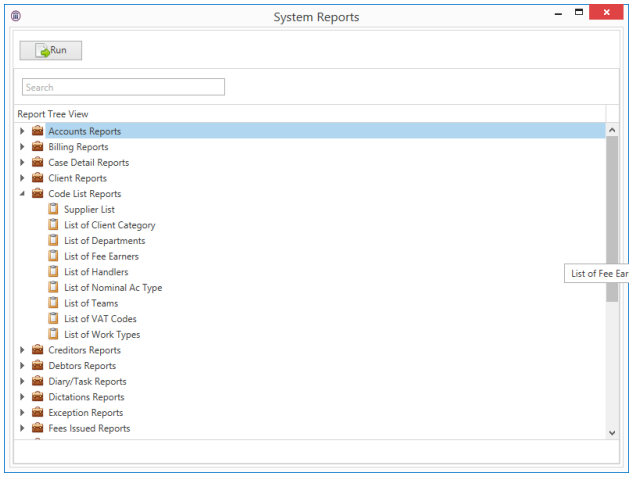
RETIRE A DEPARTMENT

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

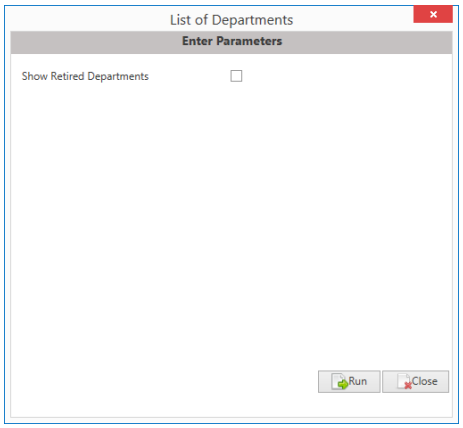
NOTE:	If you have already assigned a department to a case matter you will not be able to remove that department record

PRINT A LIST OF DEPARTMENTS

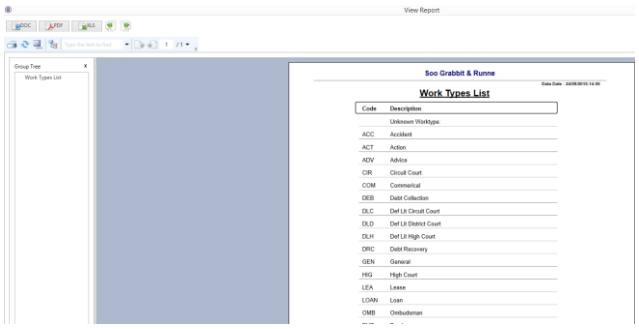
1. Click on the Report Tab and select System Reports
2. Click on the arrow beside Code List Reports



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



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



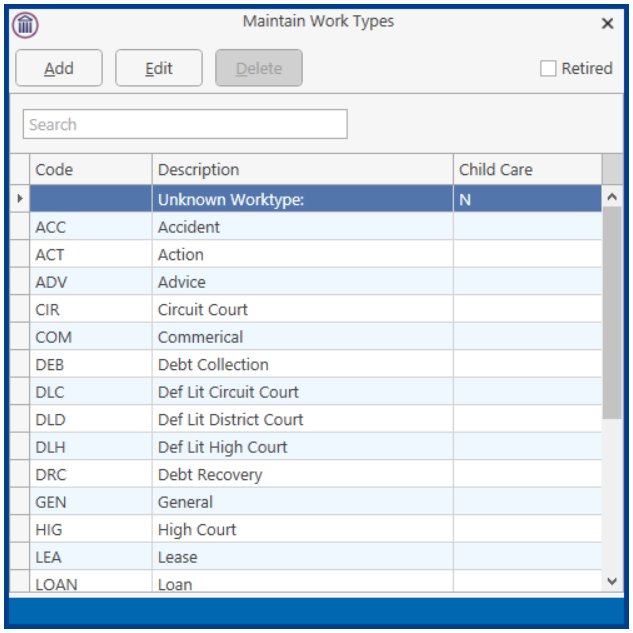
5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN WORK TYPES

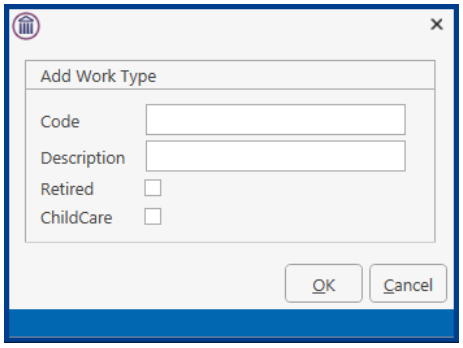
Work types are classification of work activities.

ADD A WORK TYPE

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



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



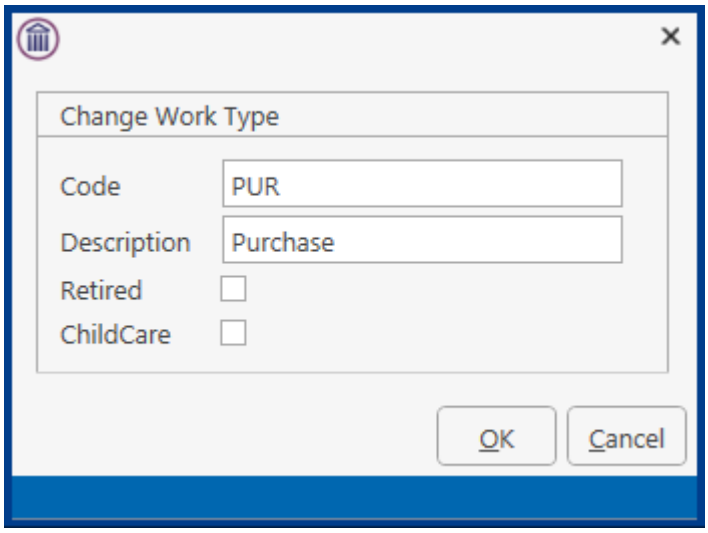
Input a three letter work type code in the Code box.
Input a description in the description box.

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

AMEND A WORK TYPE

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

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



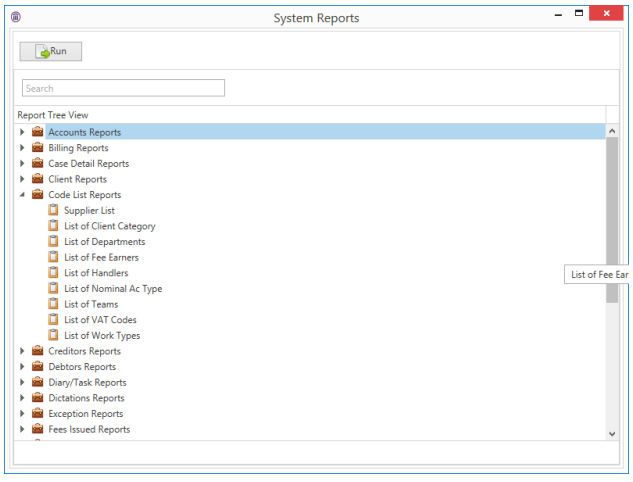
RETIRE A WORK TYPE

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

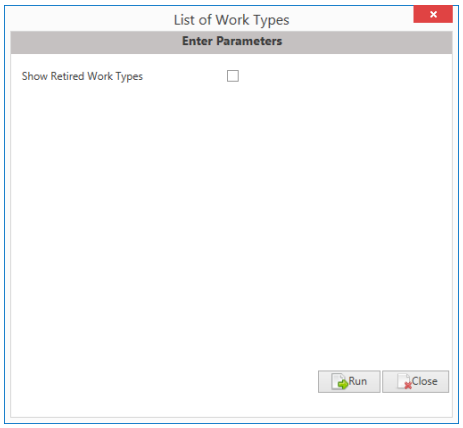
Note:	If you have already assigned a work type to a case matter you will not be able to delete that work type.

PRINT A LIST OF WORK TYPES

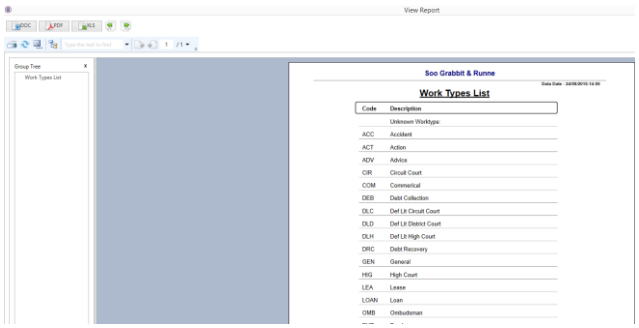
1. Click on the Report Tab and select System Reports
2. Click on the arrow beside Code List Reports



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



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



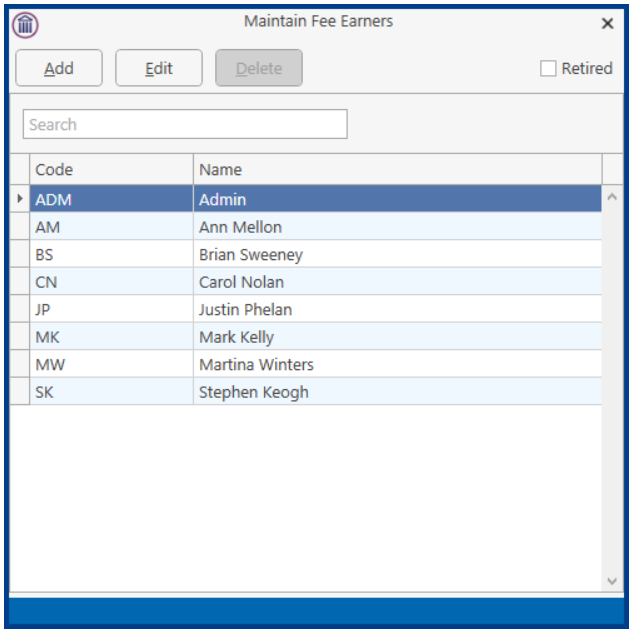
5. The report can be exported to Word, Excel or in a PDF format.

Maintain Fee Earner Codes

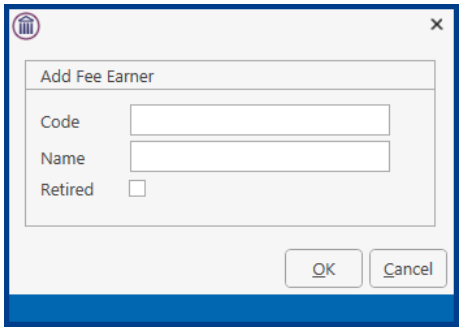
Fee Earners are the people within your firm who generate income.

Add A Fee Earner Code

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



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



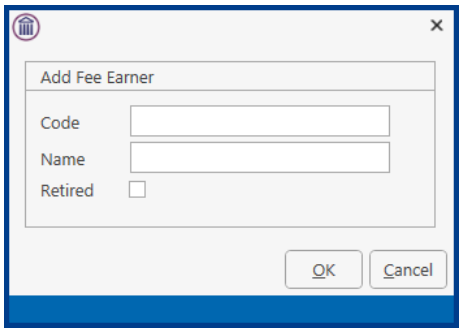
Input their initials in the Code Box
Input the Name in the Name Box

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

Amend A Fee Earner Code

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

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



Make any changes required

4. Click the **OK** button

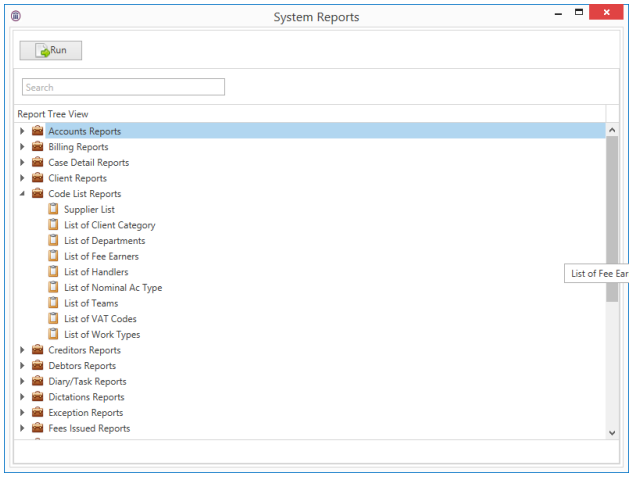
RETIRE A FEE EARNER

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

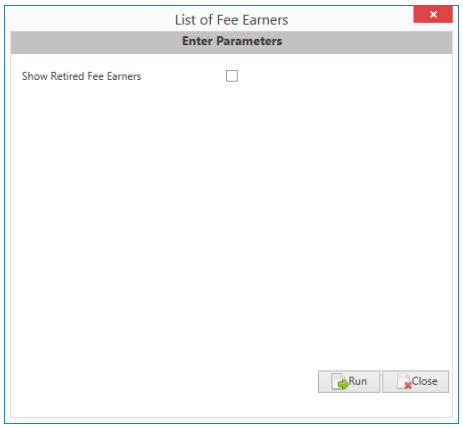
Note:	If you have already assigned a Fee Earner to a case matter you will not be able to delete that Fee Earner.

PRINT A LIST OF FEE EARNERS

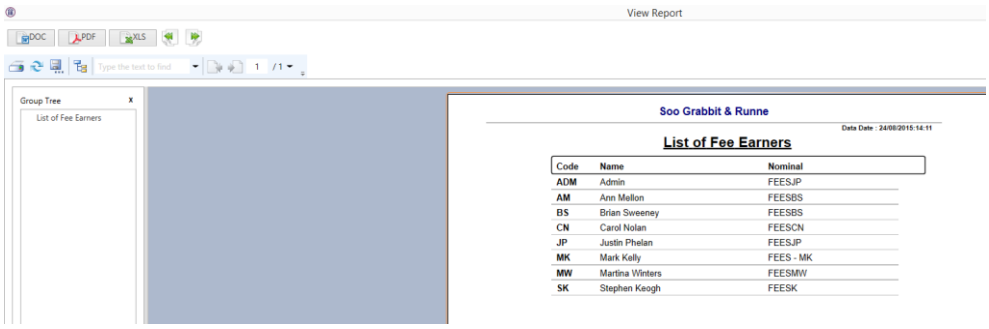
1. Click on the Report Tab and select System Reports
2. Click on the arrow beside Code List Reports



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



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



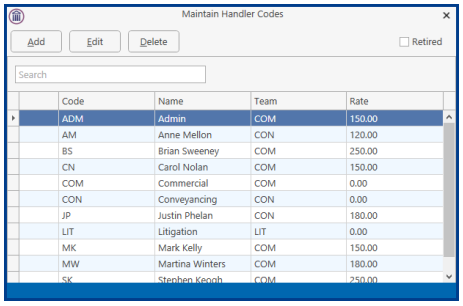
5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN HANDLERS

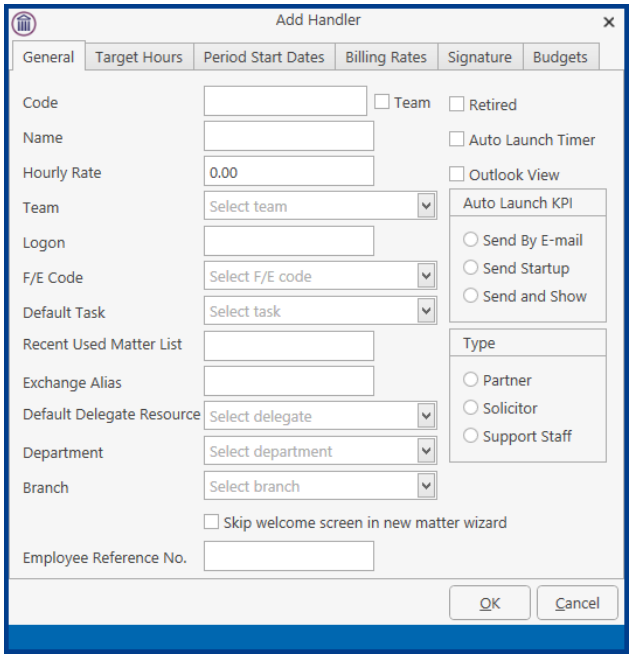
Handlers are people who carry out actions in the case diary and may record their time for billing purposes. Each Handler is a member of a team and must specify a Fee Earner Code.

ADD A HANDLER

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



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



4. Input the following details:

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

A/cs F/E Code: Click the Down Arrow to reveal a list of Fee Earners. Select the appropriate fee earner.

Default Task: Click the Down Arrow to reveal a list of tasks. Select the appropriate task.

Recent Used Matter List: Input the amount of recently used matters, you want to appear in the recent matter list of this handler.

Exchange Alias: Input the Handlers Email account name.

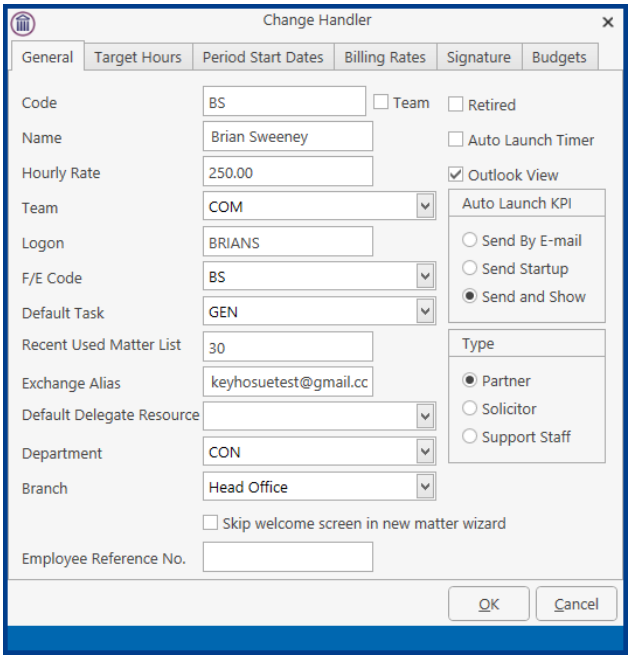
Default Delegate Resource: Click on the Down Arrow to reveal a list of handlers. Select the default delegate hander required.

Department: Click on the Down Arrow to reveal a list of Departments. Select the appropriate department.

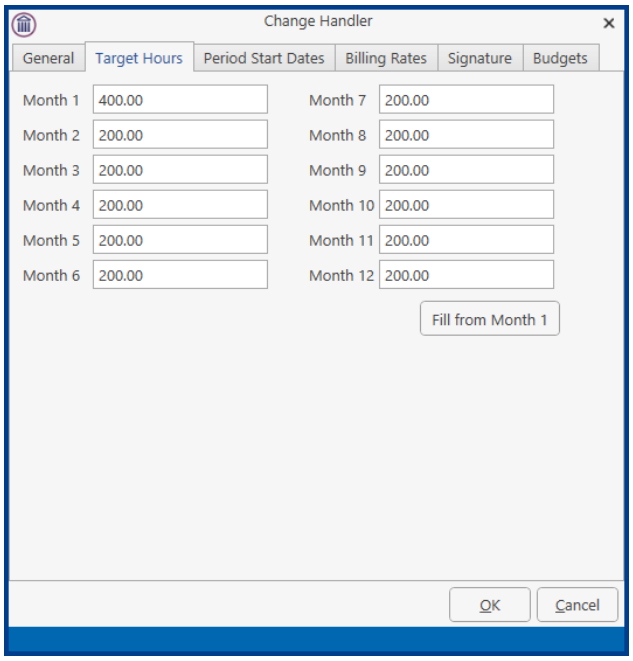
Type: Select the appropriate option button for this handler i.e. Solicitor etc.

Auto Launch KPI: This is no longer in use.

See an example of a completed window below.

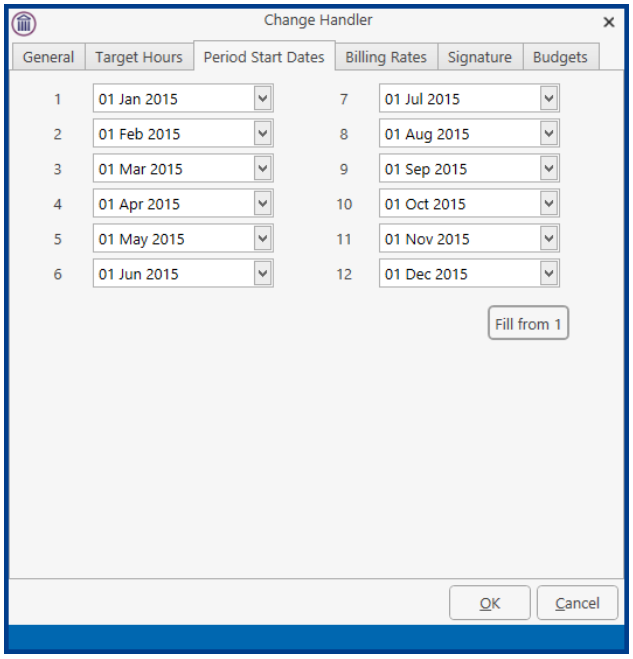


5. Click on the **Target Hours** tab. The following window appears.



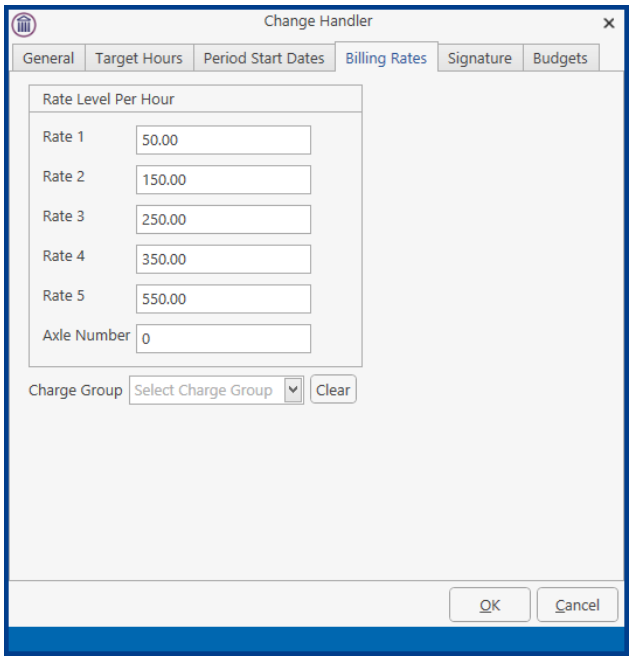
Input the target hours for this time recorder for month 1. Use the **Fill from Month 1** button to fill in the remaining months with the same amount. Otherwise input individually.

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



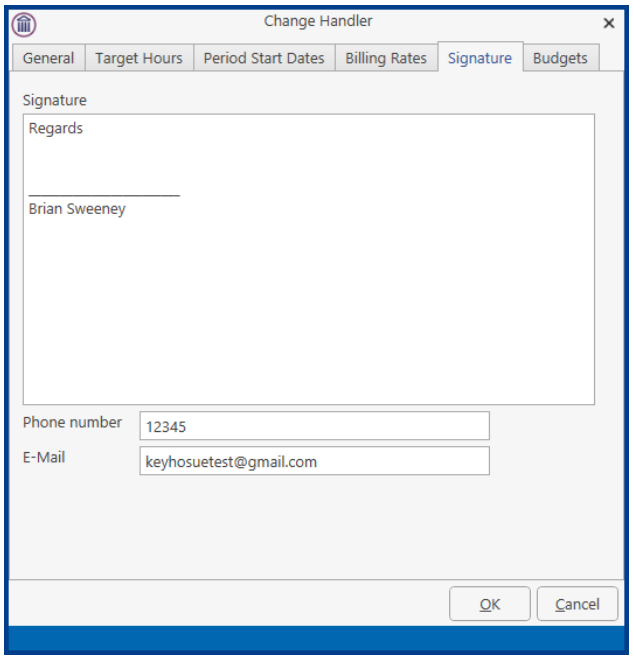
Input the first period date and click on the **Fill from 1** button to fill in the remainder of the dates.

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



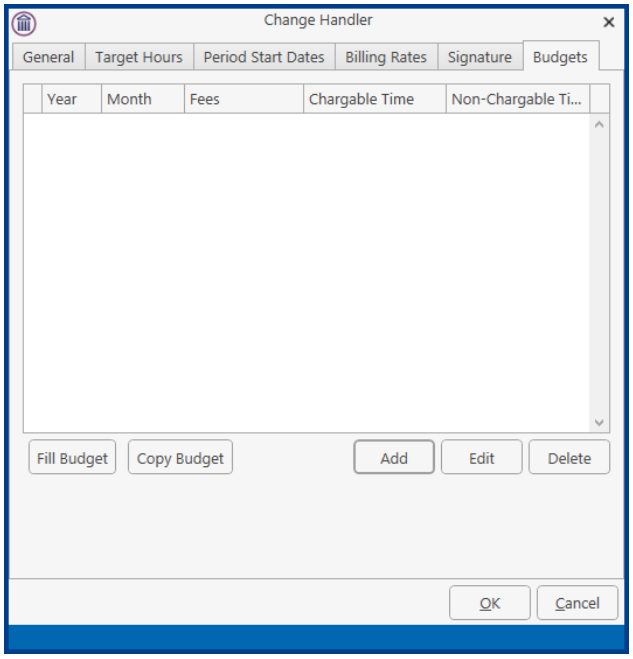
Input the rate levels per hour. Rate 1 is the lowest rate, Rate 5 the highest.

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

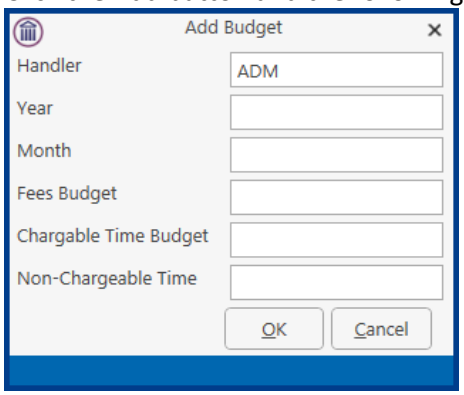


Input a signature in the signature box.
Input an email address in the email box.

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



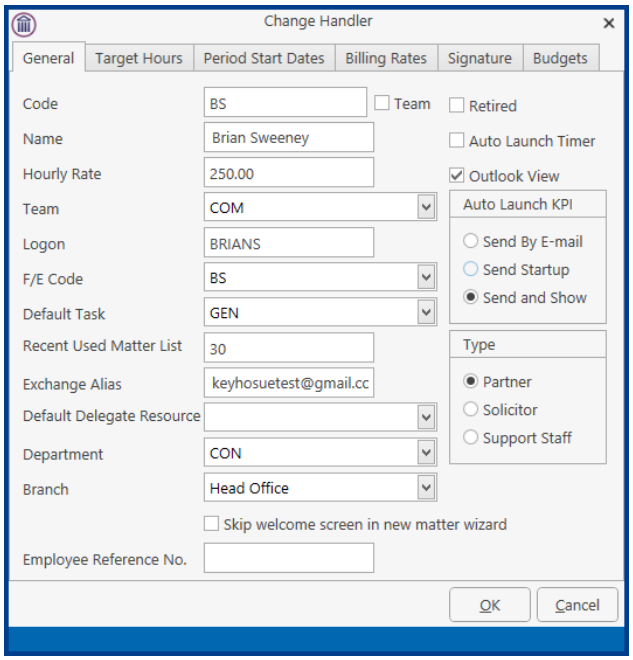
10. Click the Add button and the following dialogue box will appear.



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

AMEND A HANDLER

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



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

RETIRE A TEAM

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

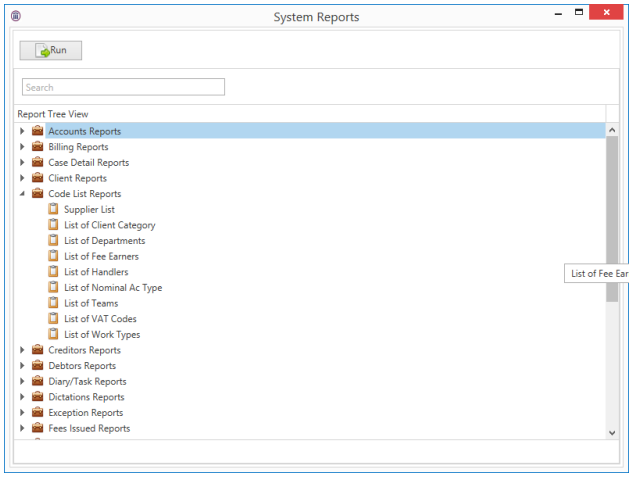
DELETE A TEAM

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

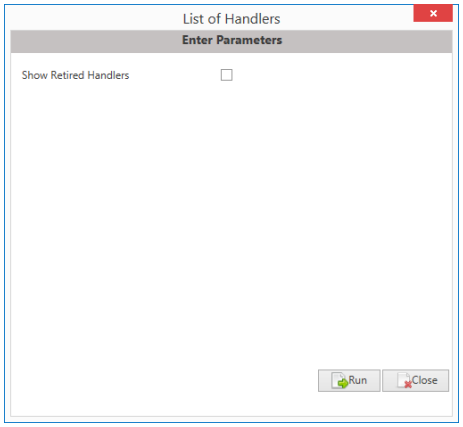
Note: If a Handler is already in use you will not be able to delete it.

PRINT A LIST OF HANDLERS

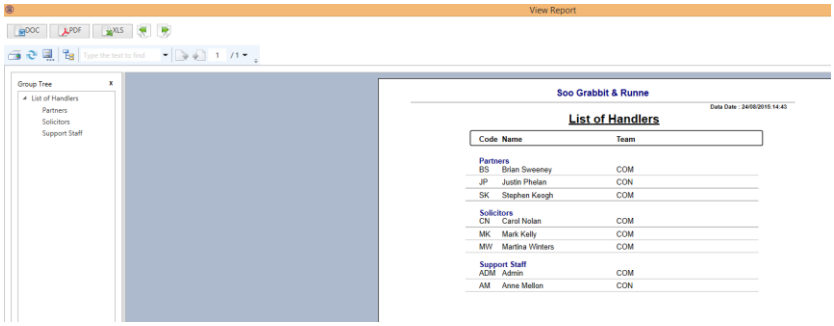
1. Click on the Report Tab and select System Reports
2. Click on the arrow beside Code List Reports



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



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



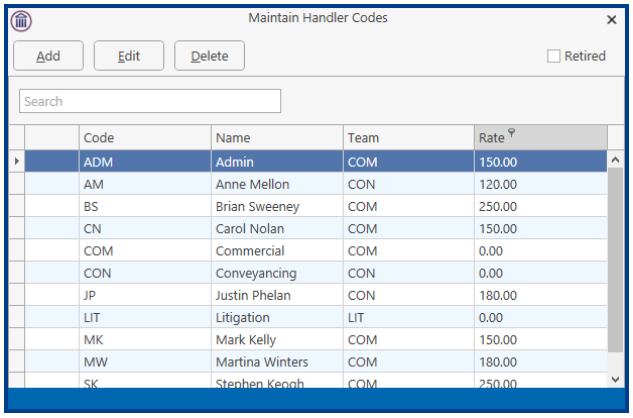
5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN TEAMS

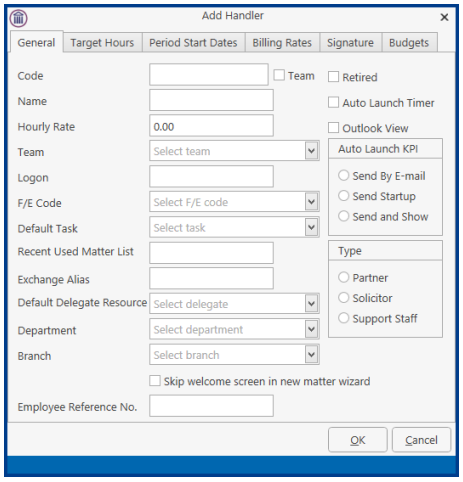
Teams can be based on groups of Handlers e.g. groups of Fee Earners and/or Support Staff. It is also possible to set default billing rates for the team.

ADD A TEAM

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



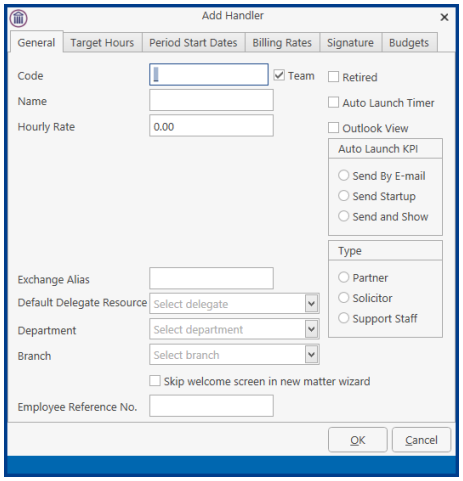
2. Click on the **Add** button, the following dialogue box appears.



Input the following details.

Code: Input a three letter code for the team

Team: Check the team box. The following screen will appear



Handler/Team

Name Box: Input the team name

Hourly Rate: Input a default hourly rate

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

AMEND A TEAM

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

RETIRE A TEAM

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

DELETE A TEAM

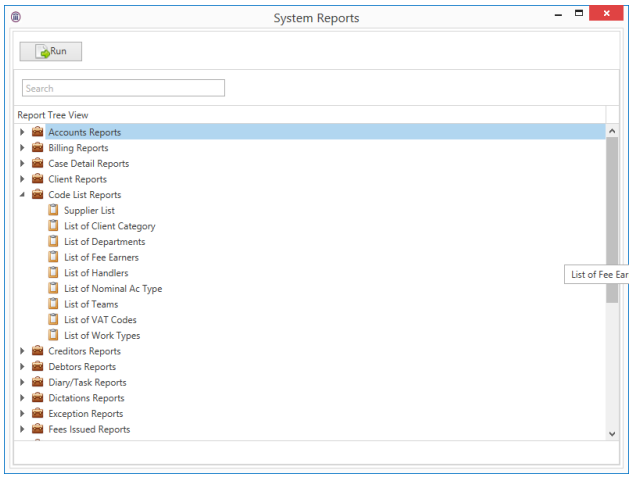
1. **Open** the **Handler** dialogue box
2. Select the **Team** you want to delete.
3. Click the **Delete** button.

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

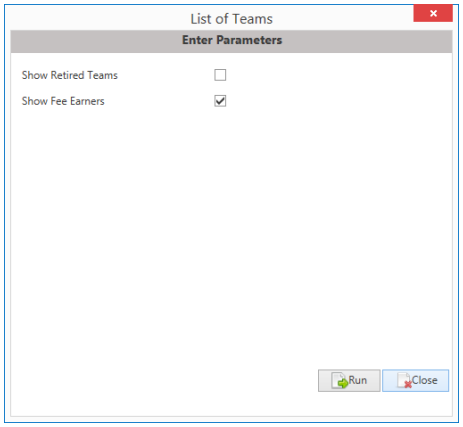
PRINT A LIST OF TEAMS

1. Click on the Report Tab and select System Reports

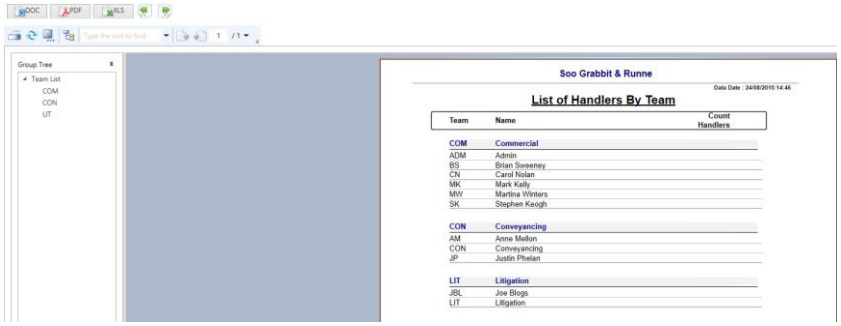
2. Click on the arrow beside Code List Reports



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



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.



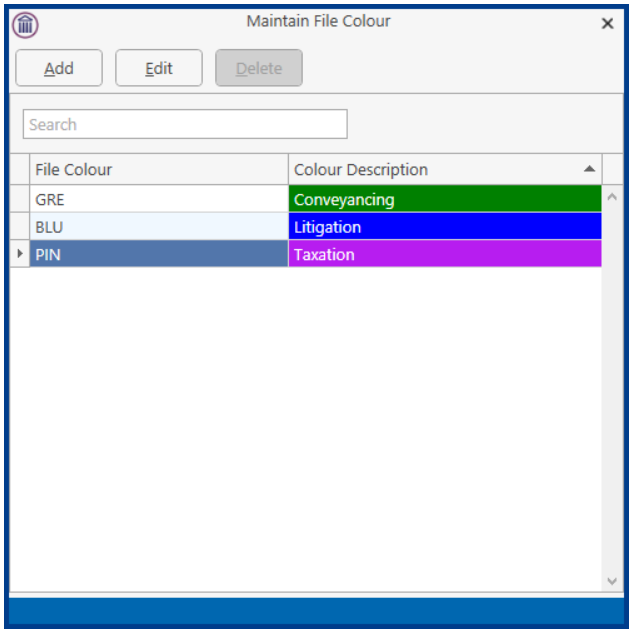
6. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN FILE COLOURS

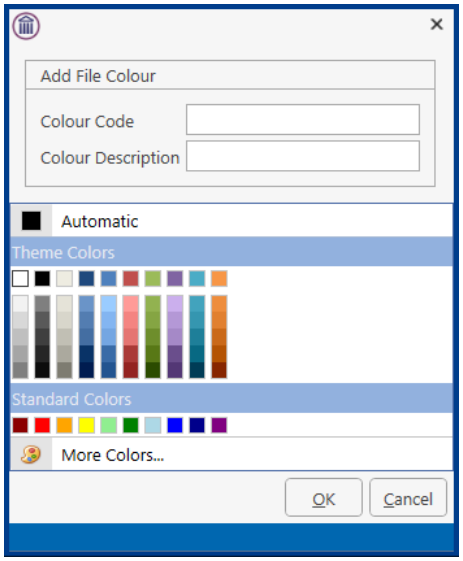
File Colours can be used to colour code file types e.g. all conveyancing files would be blue, all litigation red etc.

ADD A FILE COLOUR

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



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

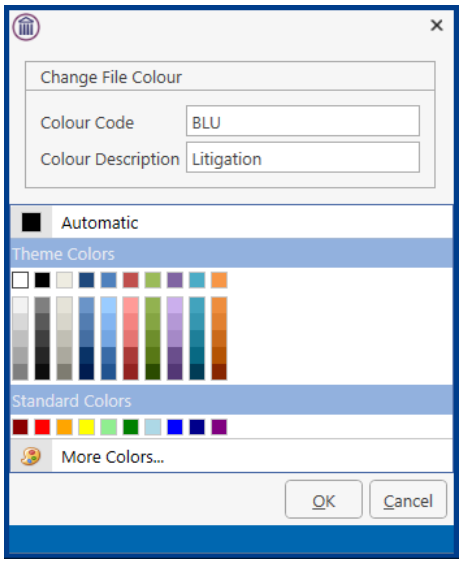


Input a three letter code in the Colour Code box e.g. BLU for Blue
Input a Colour Description in the Colour Description box.

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

AMEND A FILE COLOUR

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



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

DELETE A FILE COLOUR

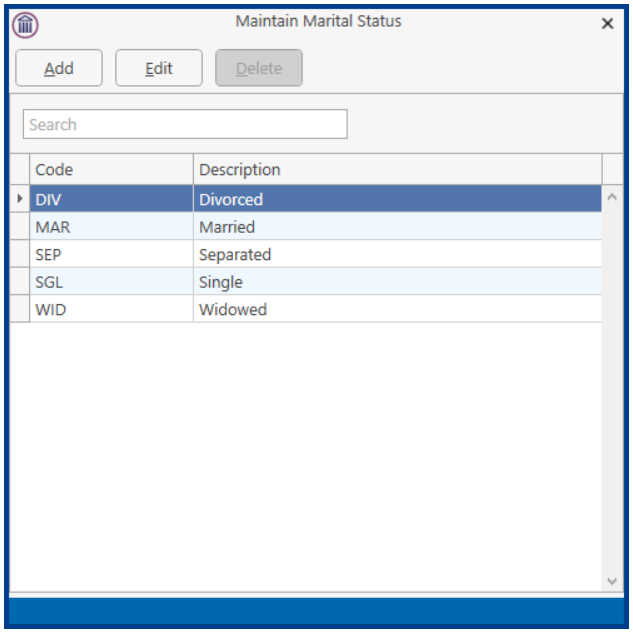
It is not possible to delete a file colour at this time.

Maintain Marital Status Codes

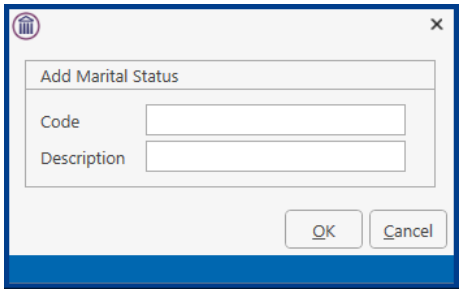
Marital status codes are used when classifying the marital status of a client.

Add A Marital Status Code

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



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



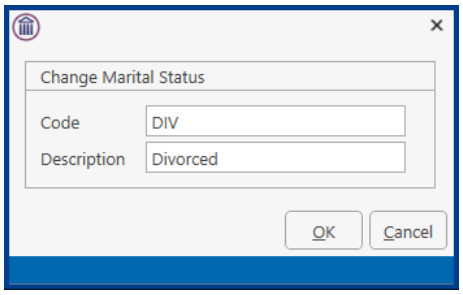
Input a three-letter Code in the Code box e.g. MAR for Married
Input the Description in the Description box.

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

Amend A Marital Status Code

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

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



Make any changes required.

4. Click the **OK** button.

DELETE A MARITAL STATUS CODE

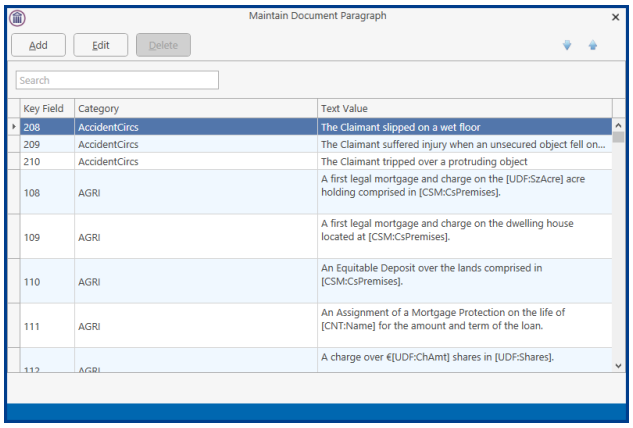
It is not possible to delete a marital code at this time.

MAINTAIN POPUP PARAGRAPH CODES

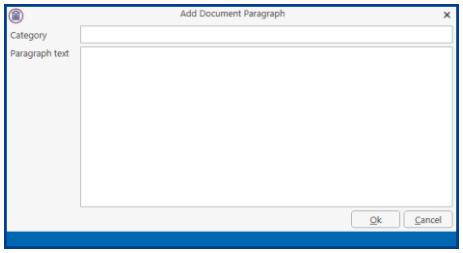
A PopUp paragraph can be used where the precedent may differ on language depending on the Matter details, e.g. special conditions. If you code for a PopUp paragraph you are giving the user the option to select the exact type of paragraph they require.
It is possible to set up the PopUp paragraphs so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

ADD A POPUP PARAGRAPH CODE

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



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



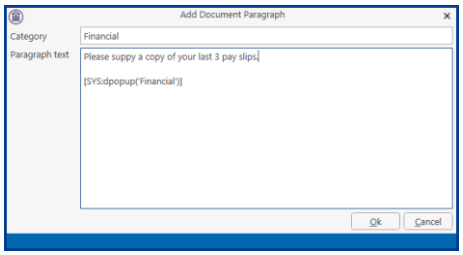
The system will generate a **Key Field** automatically
Input a Category in the Category box e.g. Financial
Type the required text in the Paragraph text box.

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

MULTIPLE PARAGRAPH OPTION

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

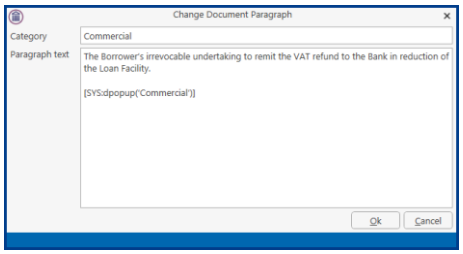
3. Enter the code **[SYS:dpopup('xxx')].**



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

AMEND A POPUP PARAGRAPH CODE

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



Make any changes required.

4. Click the **OK** button.

DELETE A POPUP PARAGRAPH CODE

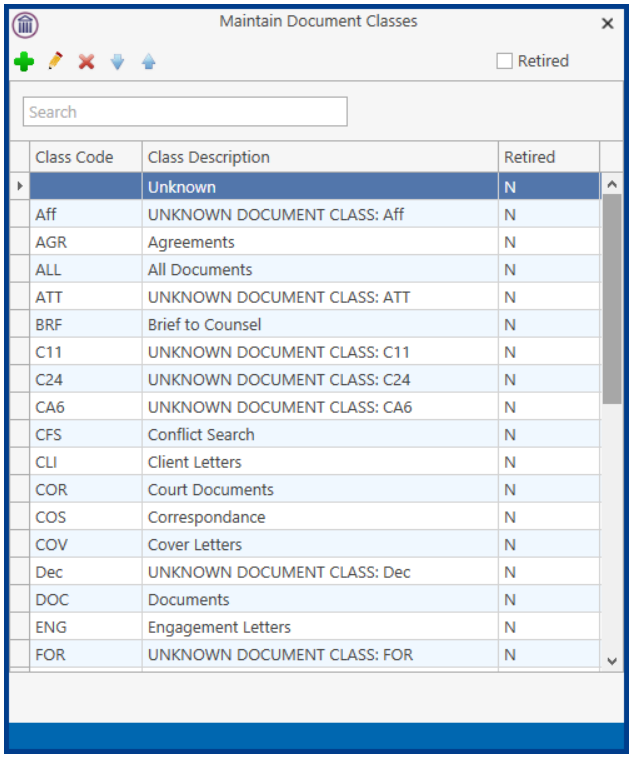
PopUp Paragraphs cannot be deleted at this time.

MAINTAIN DOCUMENT CLASS CODES

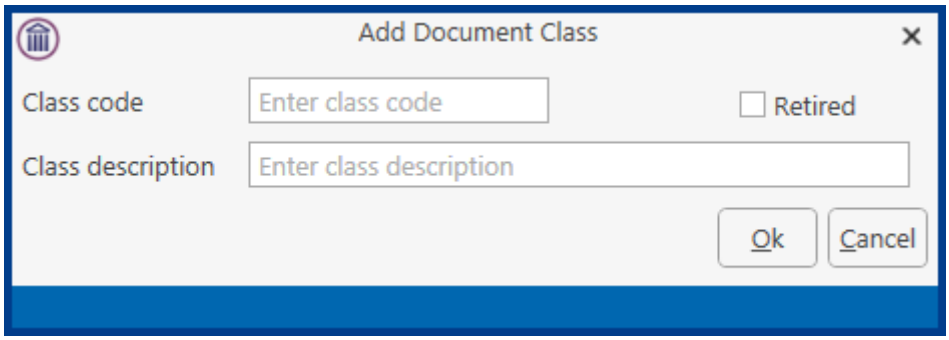
ADD A DOCUMENT CLASS CODE

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

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



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

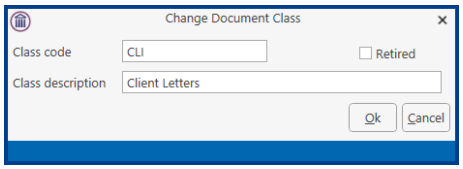


Input a three-letter Code in the Code box e.g. CLI for Client Letters
Input the Description in the Description box.

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

AMEND A DOCUMENT CLASS CODE

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

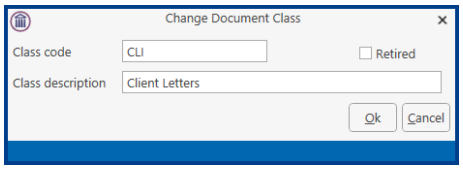


Make any changes required.

4. Click the **OK** button.

RETIRE A DOCUMENT CLASS CODE

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



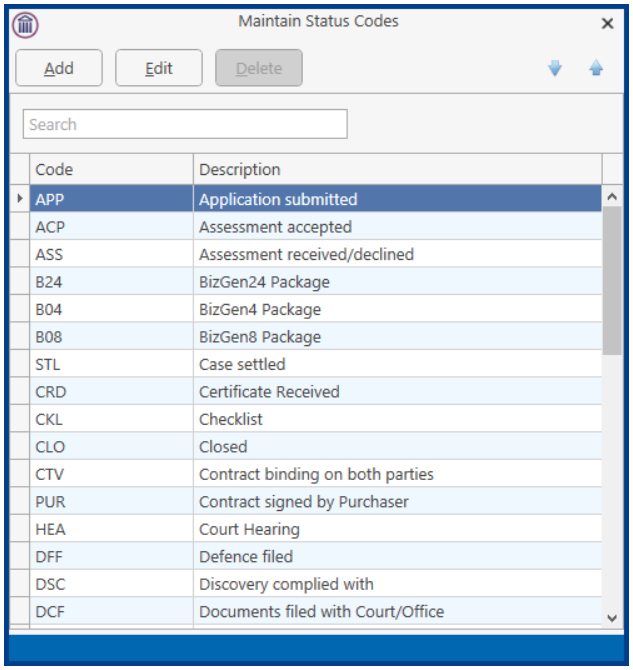
2. Tick the Retired box and then click OK.

MAINTAIN STATUS CODES

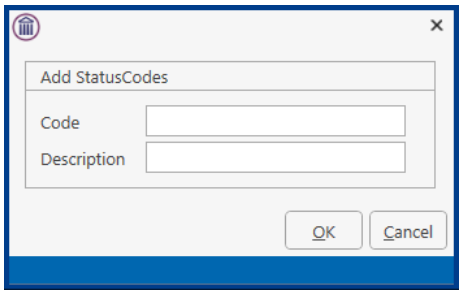
ADD A DOCUMENT CLASS CODE

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

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



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



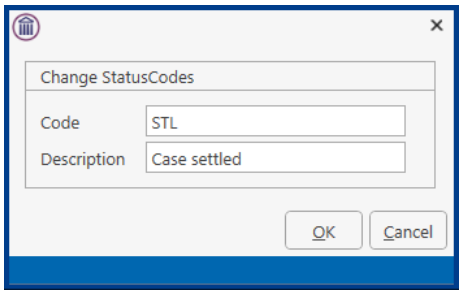
Input a three-letter Code in the Code box e.g. STL for Case Settled.
Input the Description in the Description box.

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

AMEND A STATUS CODE

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

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



Make any changes required.

4. Click the **OK** button.

DELETE A STATUS CODE

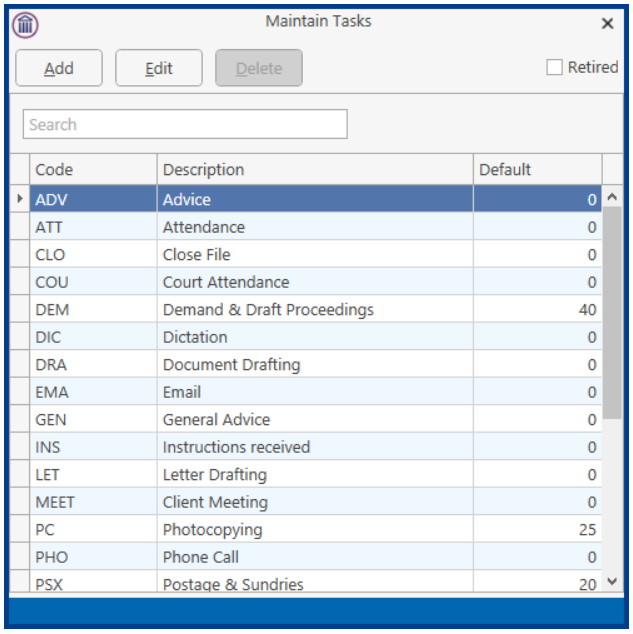
It is not possible to delete a Status Code at this time.

MAINTAIN TASKS

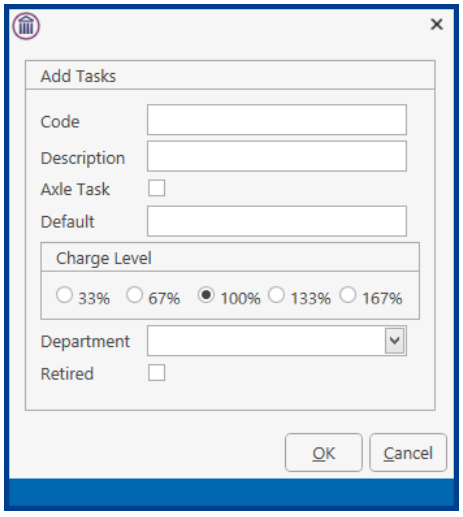
Tasks are general activities performed by handlers e.g. letter writing, file review etc.

ADD A TASK

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



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

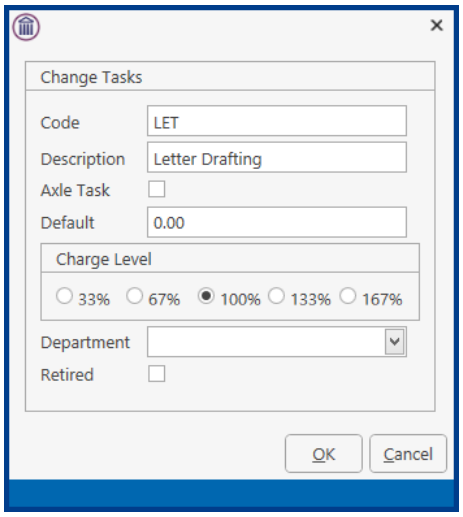


Input a three/four letter code in the Code Box e.g. Ltr for Letter.
Input the Description in the Description box
Input the default price in the default box if required.
Use the Option Buttons provided to select the charge level applicable.
Use the Drop down to select a specific department if required.

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

AMEND A TASK

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



Make any changes required.

4. Click the **OK** button.

RETIRE A TASK

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

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

PRINT A LIST OF TASKS

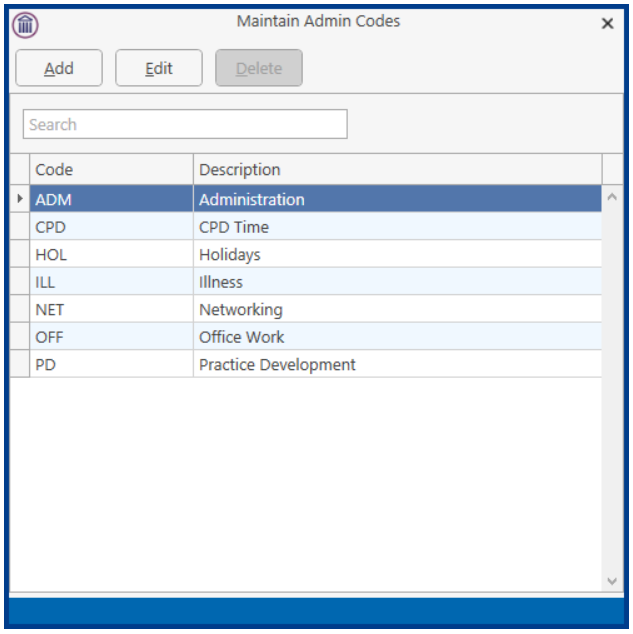
It is not possible to delete a task at his time.

MAINTAIN ADMIN CODES

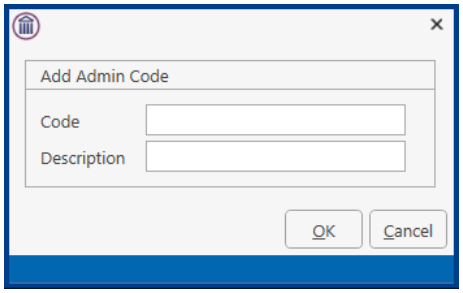
Admin Codes are used to record administrative time; this is non-chargeable time e.g. sick leave, compassionate leave etc.

ADD AN ADMINISTRATION CODE

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



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



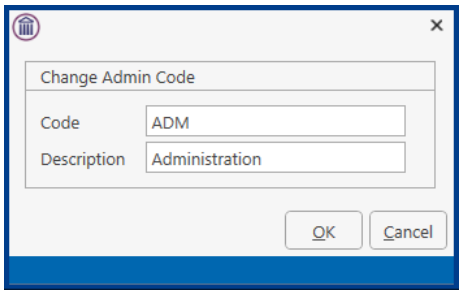
Input a three letter code in the Code box e.g. Hol for Holidays.
Input the Description in the Description box.

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

AMEND AN ADMINISTRATIVE CODE

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

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



Make any changes required.

4. Click the **OK** button.

DELETE AN ADMIN CODE.

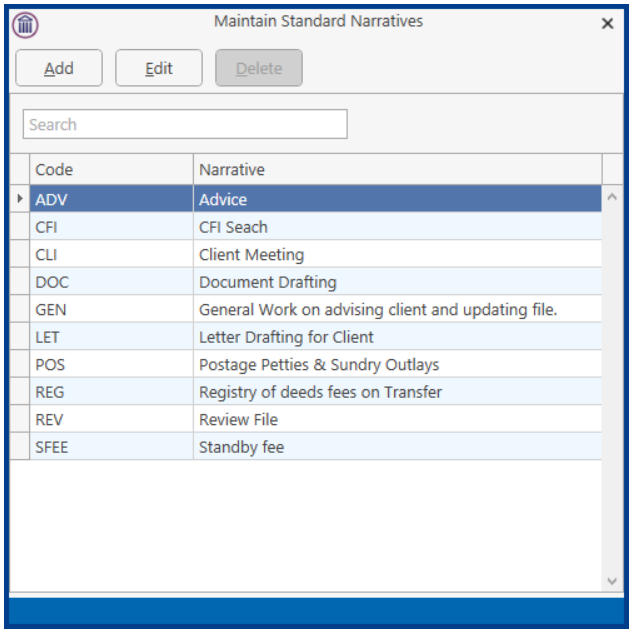
It is not possible to delete an admin code at this time.

MAINTAIN STANDARD NARRATIVES

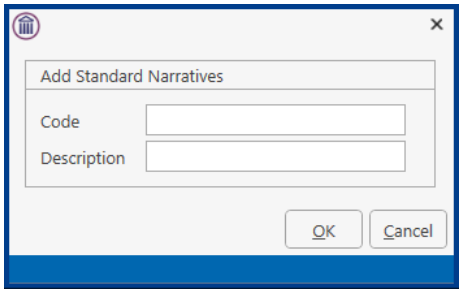
Standard narratives are used in conjunction with time recording; they are used to add further explanations to a time slip.

ADD A STANDARD NARRATIVE

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



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



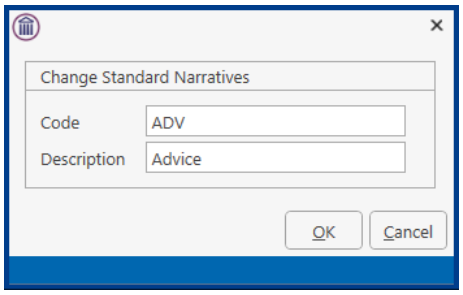
Input a three letter Code in the Code box.
Input the Narrative in the Description box.

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

AMEND A STANDARD NARRATIVE

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

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



Make any changes required.

4. Click the **OK** button.

DELETE A STANDARD NARRATIVE

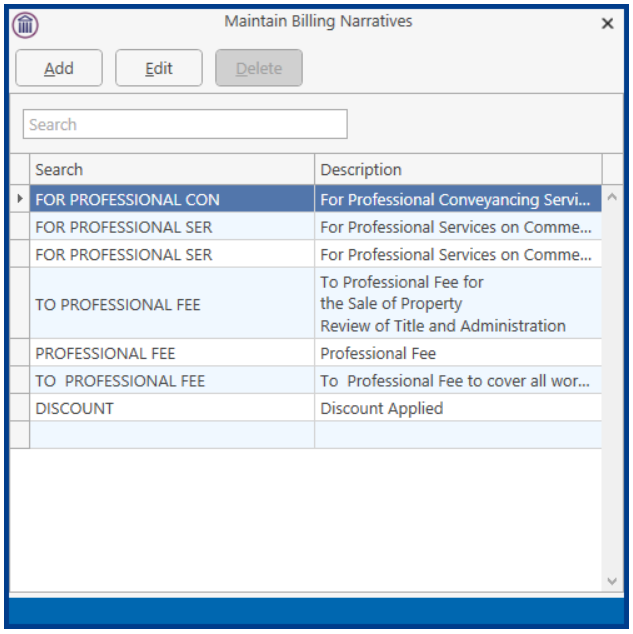
It is not possible to delete a standard narrative at this time.

MAINTAIN BILLING NARRATIVES

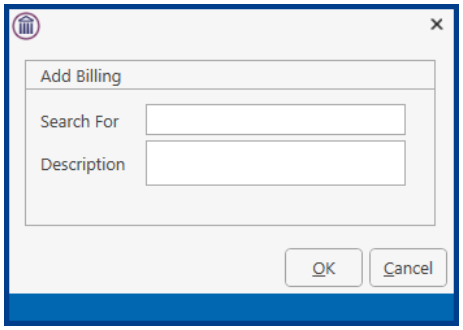
Billing narratives are used in conjunction with Draft Billing; they are used to add further explanation to a billing entry.

ADD A BILLING NARRATIVE

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



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



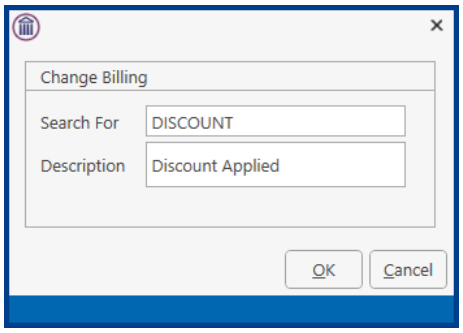
Input the Billing Description in the Description box
Input a search code e.g. PROF for Professional Fees

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

AMEND A BILLING NARRATIVE

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

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



Make any changes required

4. Click the **OK** button.

DELETE A BILLING NARRATIVE

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

PART 2: SETTING UP CASE PLANS

INTRODUCTION

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

OBJECTIVES

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

PREPARATION NEEDED

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

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

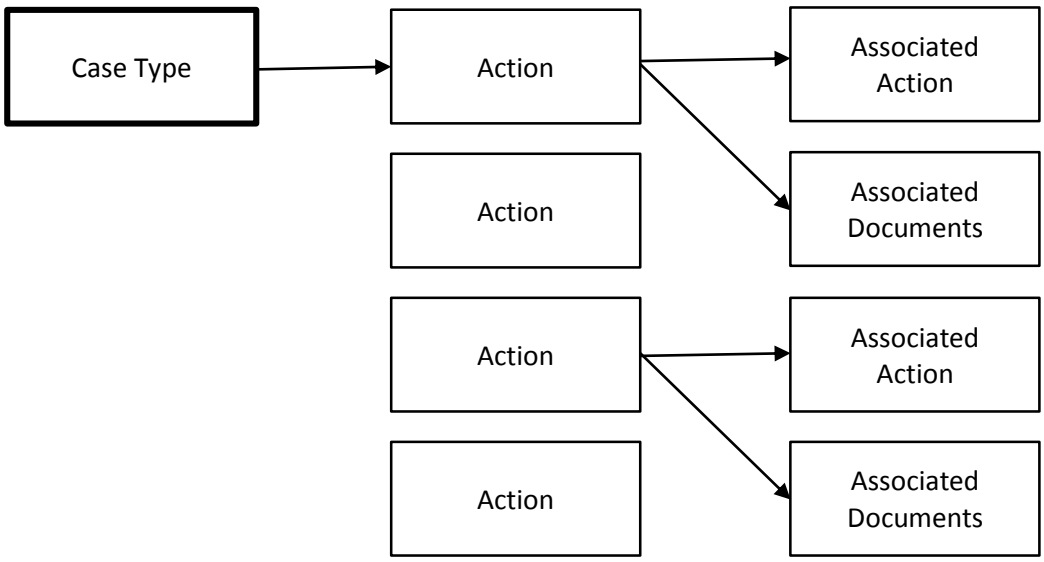
Remember that good preparation will ensure your maximise the benefits of your Keyhouse Console.

BACKGROUND OVERVIEW

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

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

Case Action Flow/Plan

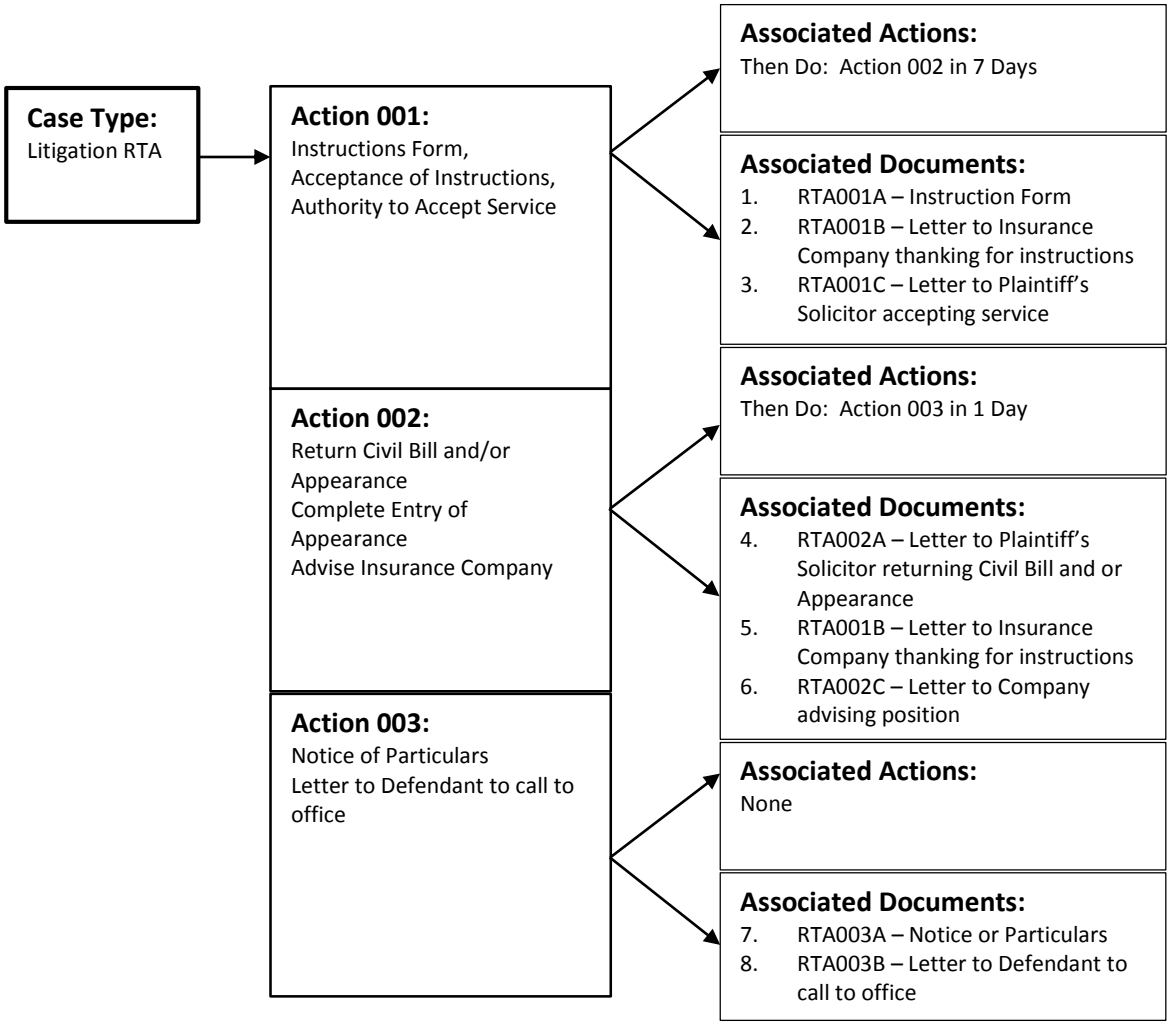


Explanation:

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

Example

Case Flow Plan for a Litigation case type



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

Frequently used Icons

Add an Existing Action

Create a New Action

Edit an Action

Delete An Action

Print the Selected Case Plan

SET-UP OF CASE TYPES

INTRODUCTION

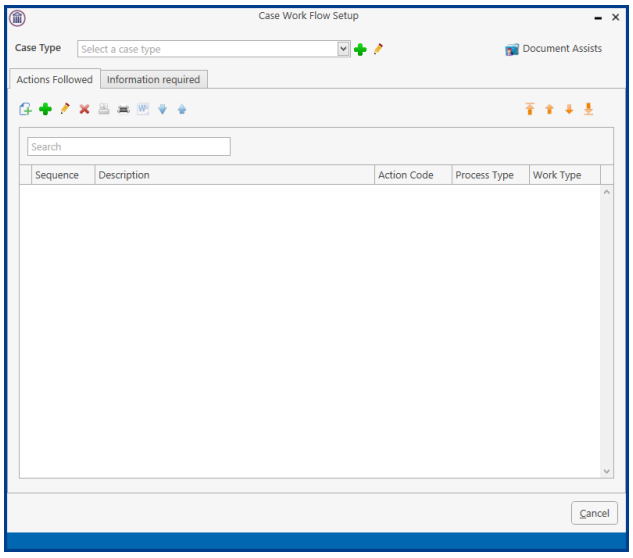
As previously mentioned the set-up of different case types will involve quite an amount of consideration but once the list of different case types is compiled the set-up of the different case types is reasonably straightforward. The set-up of the case type is the first step in case set-up section of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

In this section we familiarise ourselves with the following tasks:

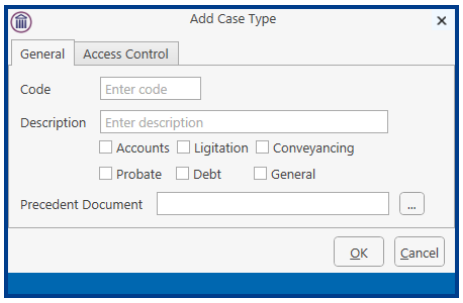
- Adding New Case Types
- Removing Case Types
- Amending Existing Case Types

ADDING NEW CASE TYPES

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



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



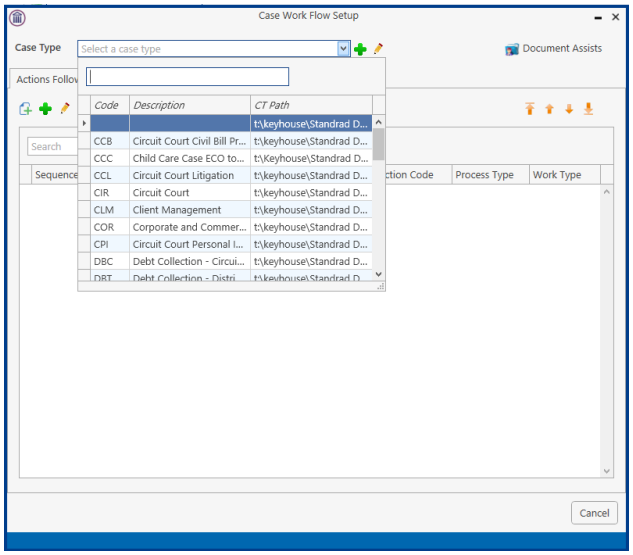
4. Type in an appropriate code in the Code box e.g. LIT for Litigation, this code must be unique and 3 characters in length.

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

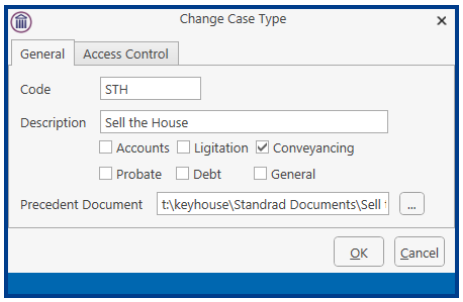
5. Type a description in the Description box e.g. Purchase Work Flow.
6. Below the Description Box you can see a series of tick boxes. Tick the most appropriate category for the case type.
7. Leave the Precedent Documents blank, it will create a storage location for the precedent documents.
8. When completed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

CONTROLLING ACCESS TO A CASE PLAN

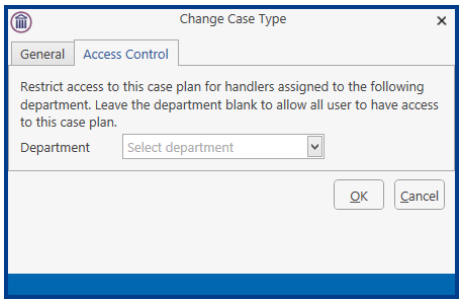
1. Select Setup from the list of Tabs
2. Select Case Work Flow Setup from the Ribbon. Click on the Down Arrow beside Case Type to get the list of all existing case plans. The following dialogue box will appear.



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



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

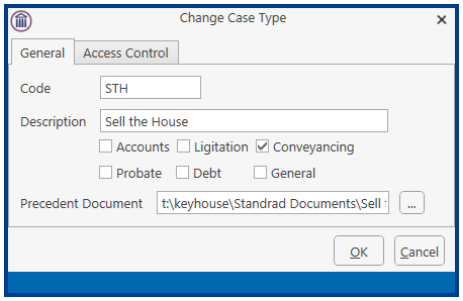


6. Click on the Down Arrow to get a list of departments, select the department to use this cae plan.

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

AMENDING AN EXISTING CASE TYPE

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



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

REMOVING A CASE TYPE/PLAN

It is not possible to remove a Case Type/Plan at this time.

SET-UP OF CASE ACTION FLOW

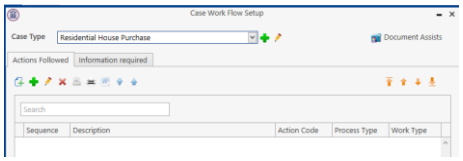
INTRODUCTION

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

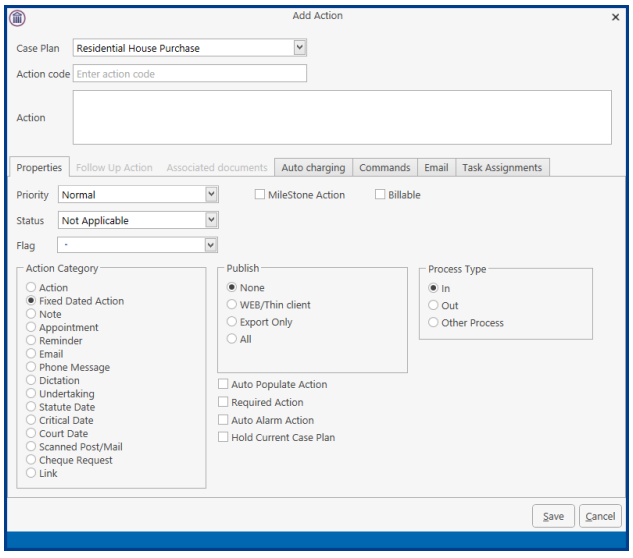
- Set-up of a Case Action Flow
- Creating New Actions
- Amending Existing Actions
- Removing Actions
- Importing Zipped Case Plan Files
- Exporting Case Plans as Zipped Files

SETTING UP A CASE ACTION FLOW

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



3. The following dialogue box will appear.

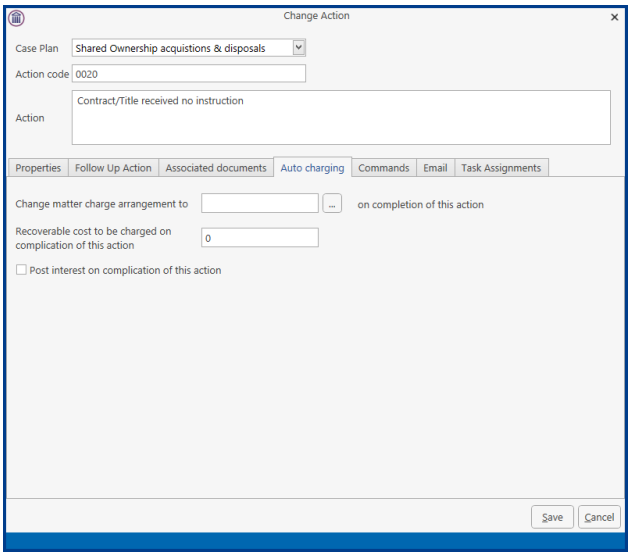


4. Add a Unique Number Code for this action in the action code box. This code should be representative of the position the action/step is in the case plan e.g. RHP02 is the second step in the Residential House Purchase Case Plan.

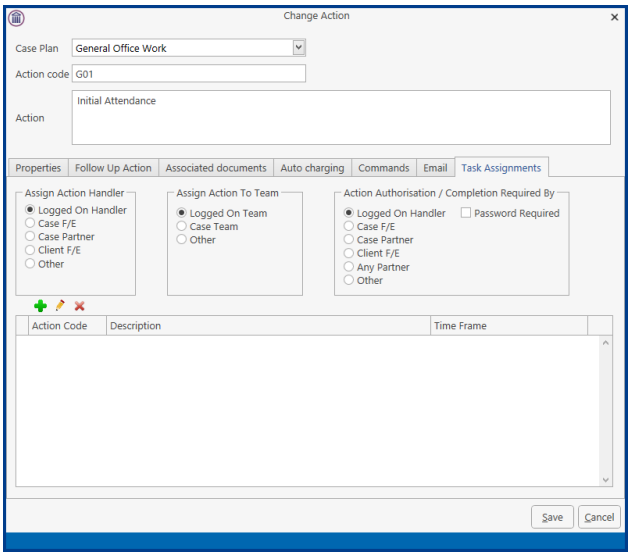
5. Complete the following details in the Properties Tab.

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



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



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

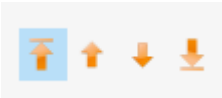
1. Select the Action you want to remove.
2. Click on the Red X under the Actions Followed Tab.
3. A message box will appear asking you "Are you sure you want to delete this item?".
4. Click the Yes button to remove.

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

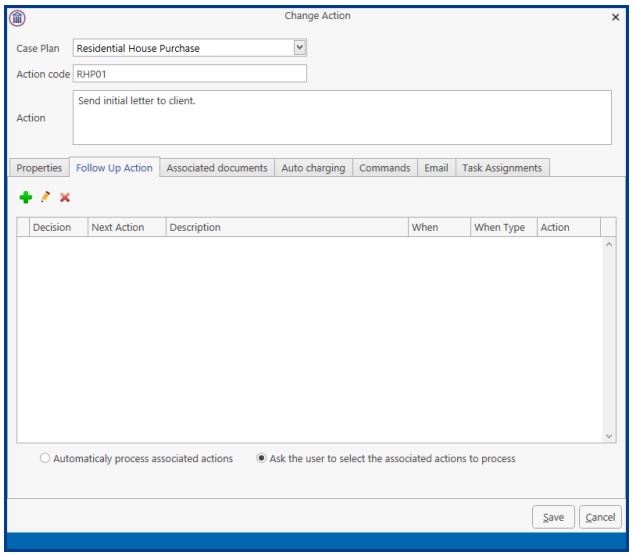
Once the action has been inputted it is then possible to add an associated action to it. Associated actions are actions connected with the main action. In this section we will familiarise ourselves with the tasks.

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

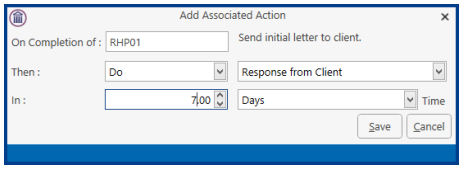
CREATING AN ASSOCIATED ACTION

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.

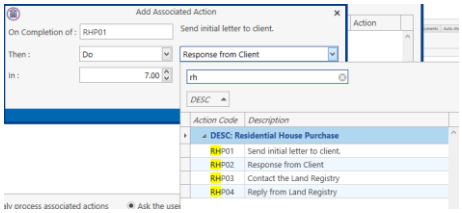
1. Select the required Case Plan as before.
2. All the actions in this case type are displayed.
3. Select the Action you want to add the associated action to.
4. Click on the Follow Up Action Tab



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



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



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 REMOVE AN ASSOCIATED ACTION

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

TO AMEND AN ASSOCIATED ACTION

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

SETTING UP ASSOCIATED DOCUMENTS

INTRODUCTION

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

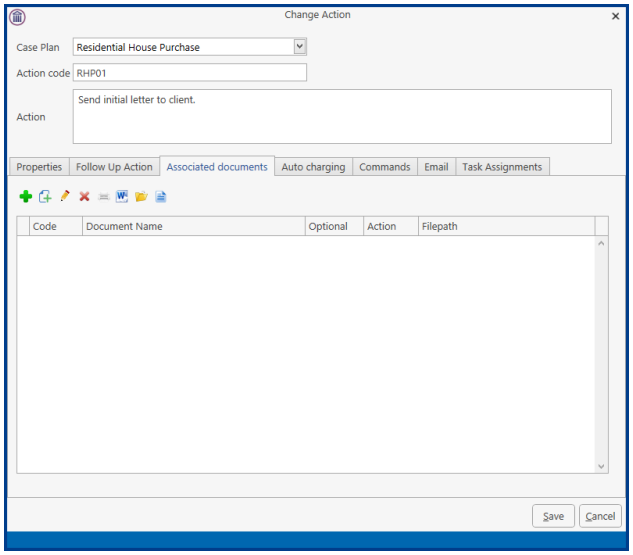
There may be times when you may need to customise an existing library document to meet your requirements. In order to do so you may need to insert extra fields into the document or maybe create your own fields.

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

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

CREATING A NEW ASSOCIATED DOCUMENT

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



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

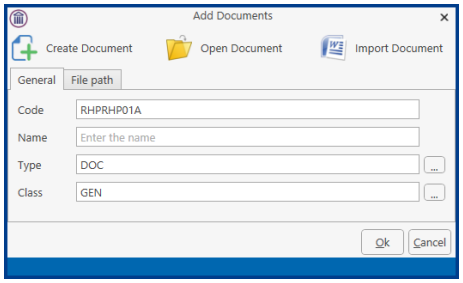
Delete an associated document

Select a document to import

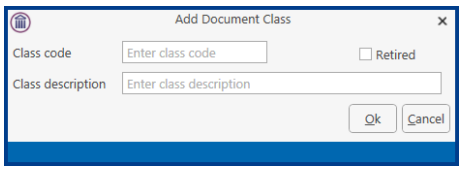
Open selected document

Document Properties

6. To create a new document click on the Green Plus. The following dialogue box appears.



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

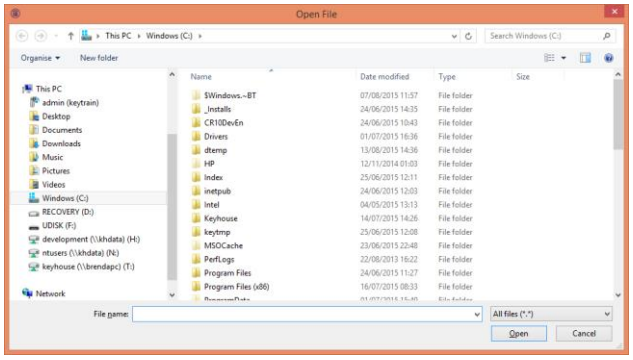


12. The newly created Class will then be available in the Document Class window.
13. Click on the Create Document button, a blank Word document will open. Create the document as required.
14. The document will then be visible in the associated document window of the action.

IMPORT A DOCUMENT TO CREATE A NEW ASSOCIATED DOCUMENT

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

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



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

TO REMOVE AN ASSOCIATED DOCUMENT

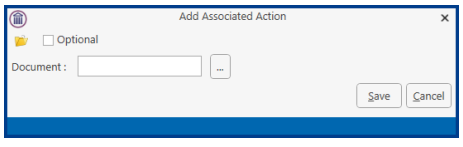
1. Select the Associated Document you want to remove.
2. Click on the Red X.
3. A message box will appear asking you " Are you sure you want to delete this Associated Document? Click the Yes button and the associated document is removed.

TO AMEND AN ASSOCIATED DOCUMENT

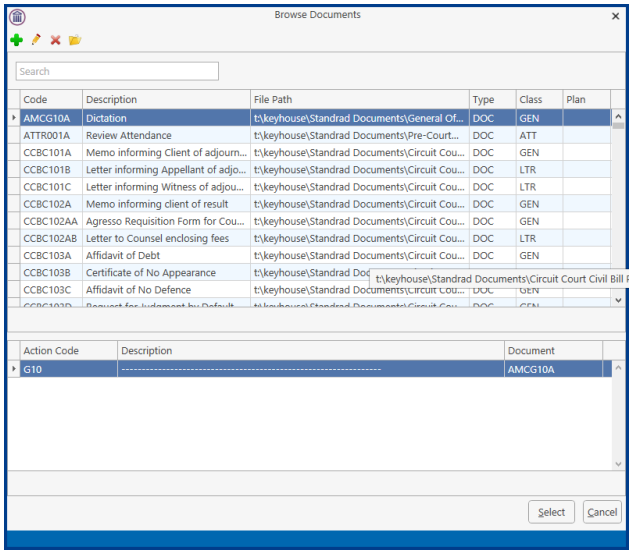
1. Select the Associated Document you want to amend.
2. Click on the Open Selected Document located on the Associated Documents screen.
3. Amend the document as required.
4. When complete save the changes and close the document.
5. Return to the Keyhouse Console.

ADD AN EXISTING ASSOCIATED DOCUMENT

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



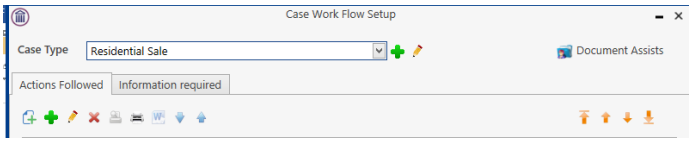
3. Click on the Browse Button to display a list of documents in your document library. The following Document Library dialogue box is displayed.



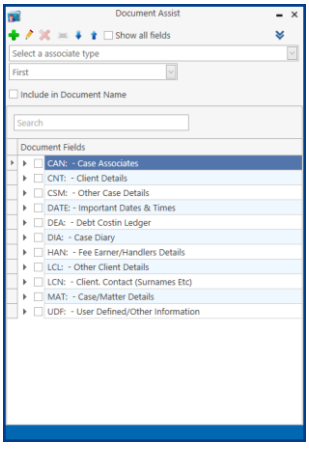
4. Search for the Document required using the search facility.
   To use the search:
   a. Type part of the document name in the search box provided and click enter if needed.
   b. A list of documents will be returned. Select the document required and click on the Select button.
5. You have the choice 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.

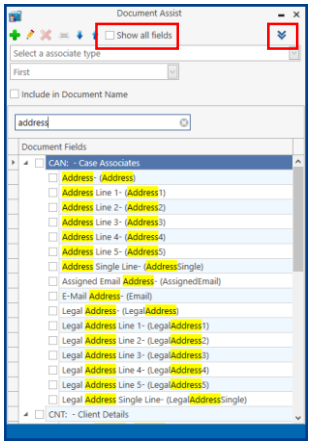
CODING A PRECEDENT DOCUMENT

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.

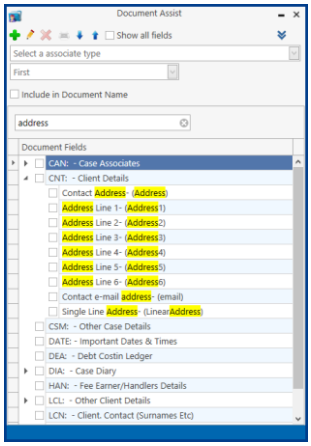
1. From the Case Work Flow Setup window open Document Assist.
2. 

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





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:

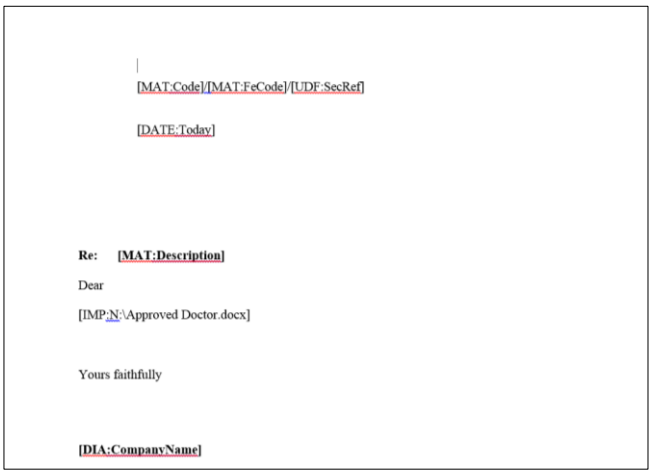
E.g. [SYS:dpopup('XXX')] where XXX is the category name you assigned when setting up the Popup paragraph

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]



7. Save and close the document.

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.
   - ii) Second Solicitor on a file use the following code for his/her name [CAN:Name.Solicitor#02]. This will allow the user to add the second solicitor's name to the document.
   - iii) If you want to cater for multiple solicitors on a file then the code would be the following code for his/her name [CAN:Name.Solicitor#??]. This will pause and ask the user which solicitor's name they want added to the document.

   b) Example of Advanced Codes:
   - i) [CAN:Name.Solicitors#??] produces a separate letter for each solicitor selected.
   - ii) [CAN:Name.Defendant#@,] lists multiple defendants in a document with a "comma" between them.
   - iii) [Can:Name.Defendant#@&] list multiple defendants in a document with an "and" between them.
   - iv) [CAN:Name.Defendant#@R] lists multiple defendants in a document with a "line" between them.

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

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

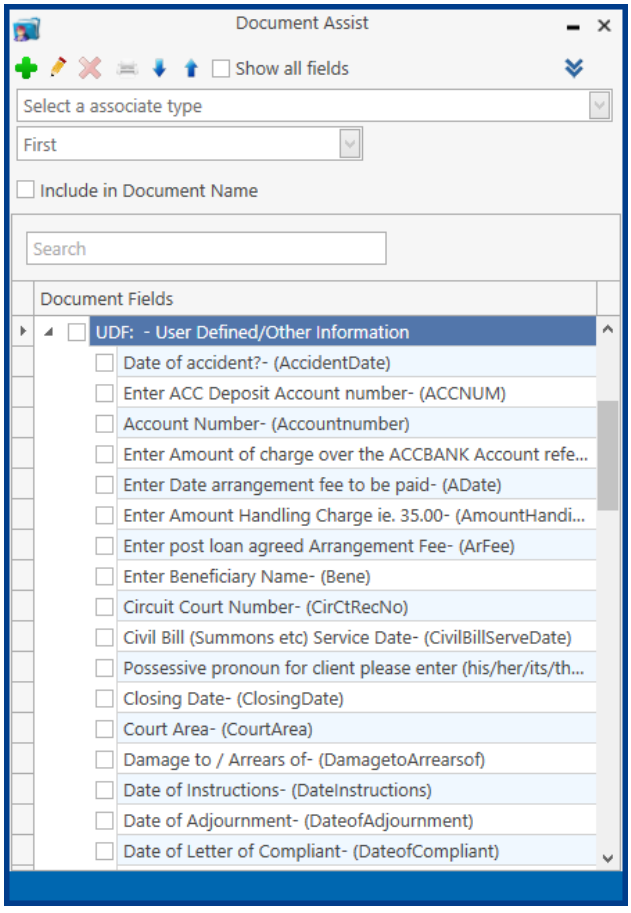
Note: To view additional fields in each category put a tick in the **All Fields** Check Box
Show all fields at the top of the Document Assist dialogue box.

CREATING USER DEFINED FIELDS

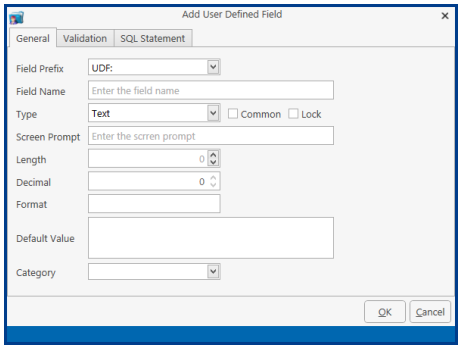
On occasion you may want to insert information that is not available from the existing field lists in this case you can create your own fields this will allow you the flexibility to customise your own documents. The information behind these fields will be requested at the point the User generates the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

1. In the Document Assist window.

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



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

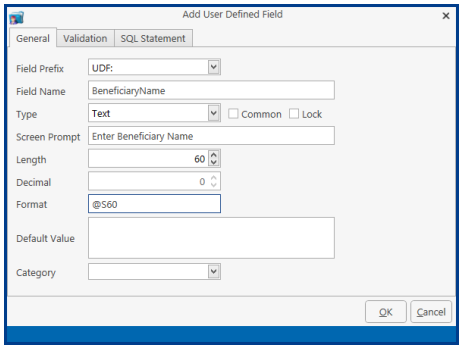


4. Fill in the following information:

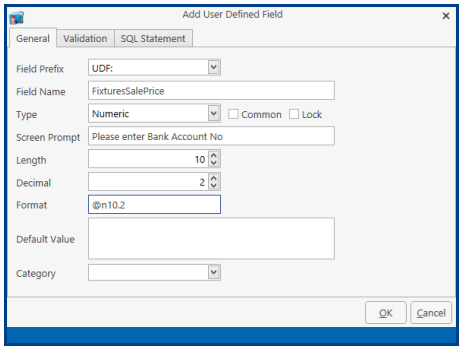
File/Table: The File/Table Name is UDF for User Defined Fields

Field Name: Type in a Field Name in the box provided, this must not contain spaces.

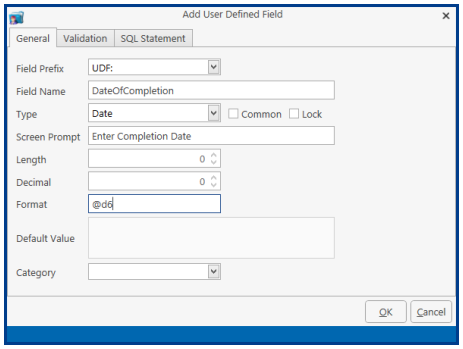
Type: Select the **Type** from the drop down list provided i.e. the type of information that will be inputted i.e. Text, Dates or Numbers.



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



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



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

Common: If you want this field always visible in the User Defined list tick this box.

Screen Prompt: The Screen Prompt is the description displayed to the User at the point the document is generated e.g. “Please enter court date?”

Length: Is the Amount of characters that can be inputted in this field. Adjust using the **Up And Down Arrows** as required.

Decimal: Decimal will only be applicable to numbers: this is the amount of decimal places you want visible. Adjust using the **Up And Down** arrows as required.

Format: If the data type is **Date** click on the browse button to select the preferred date format. Otherwise the data type and length will determine the format.

Default Value: This is the value you would like to default to. If applicable, type the default value in the box provided.

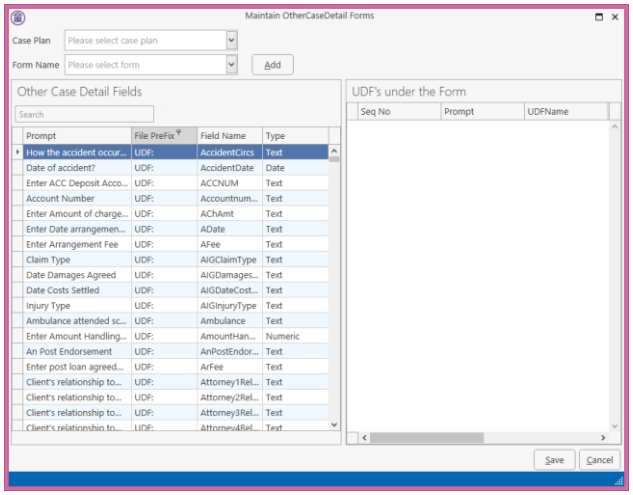
5. Validations can be added for stricter control of the information inputted. A useful option is the “always prompt” command which can be used for fields where the information changes frequently for example the Secretary’s Reference.
6. Click the OK Button.
7. To insert this field as before, insert your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

UDF Forms

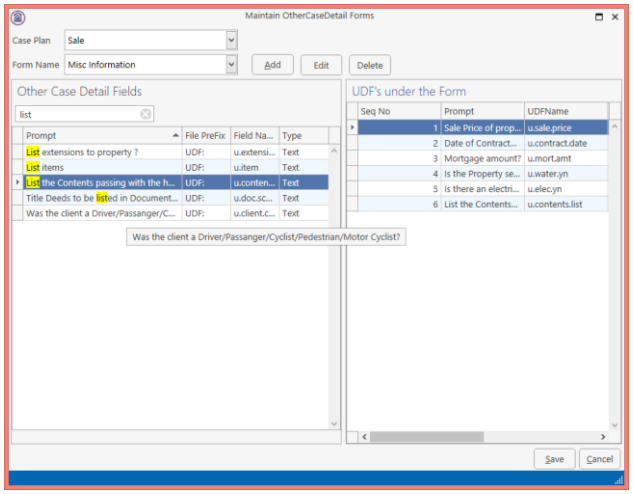
Certain cases/matters may need you to capture specific information that will require you to create UDF fields in Keyhouse. These fields can be gathered together using UDF Forms.

Create a UDF Form

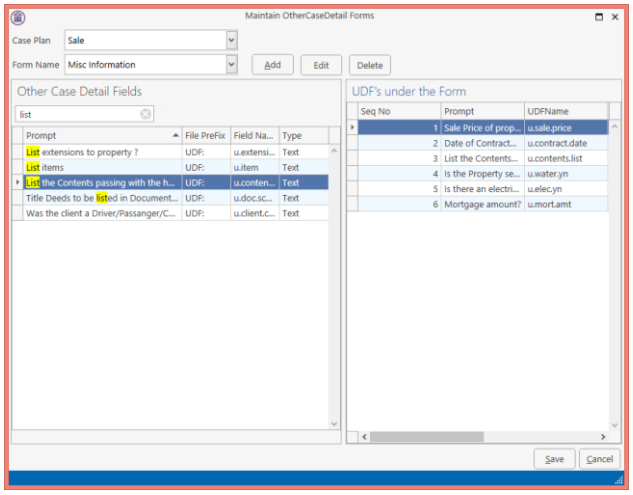
1. Select the Setup Tab and then select UDF Form Details



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



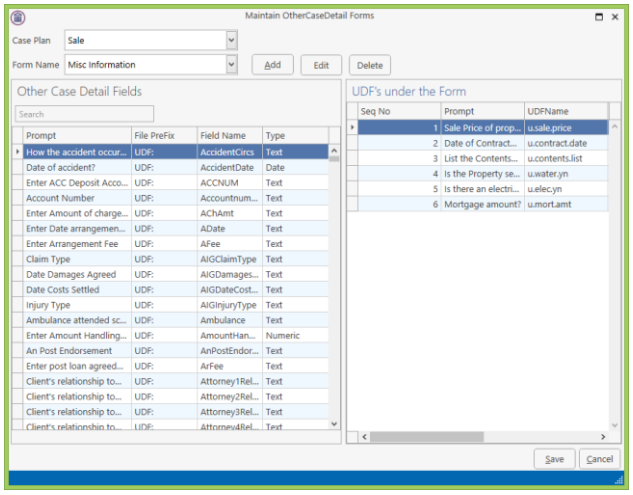
5. The order the items appear in the form can be changed by dragging the item to the new location in the list.



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



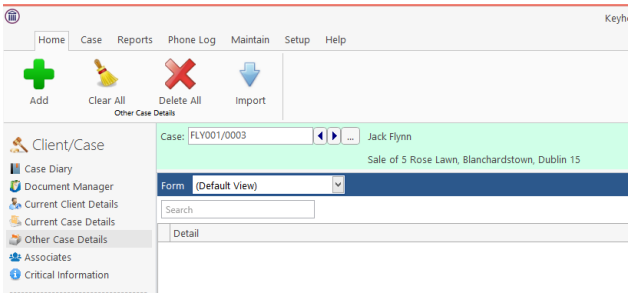
4. Make the required changes
5. Click Save and OK.

DELETE A UDF FORM

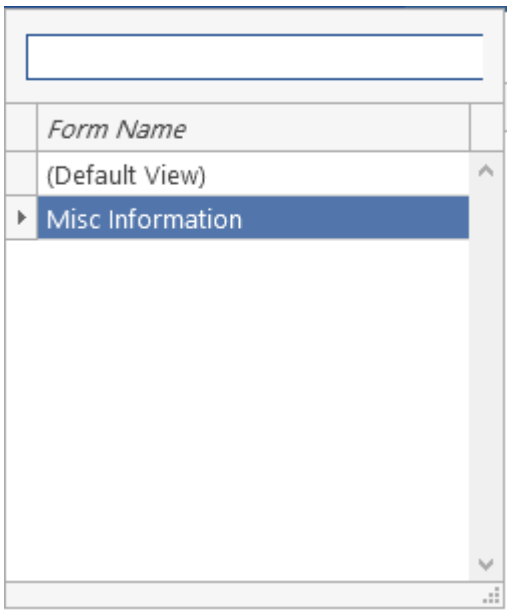
1. Go to the Setup Tab and select the UDF Form Details.
2. Enter the Case Plan associated with the UDF Form to be changed
3. Select the UDF Form to be changed
4. Click the Delete Button to remove the form.

APPLY THE FORM TO A MATTER

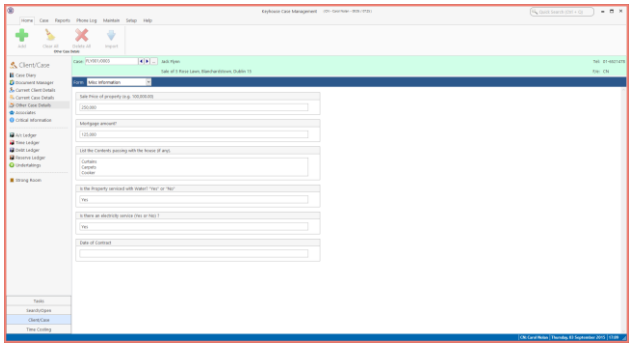
1. Open the required matter and check the correct Case Plan has been selected on the Current Case Details screen
2. Go to the Other Case Details Screen.



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



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



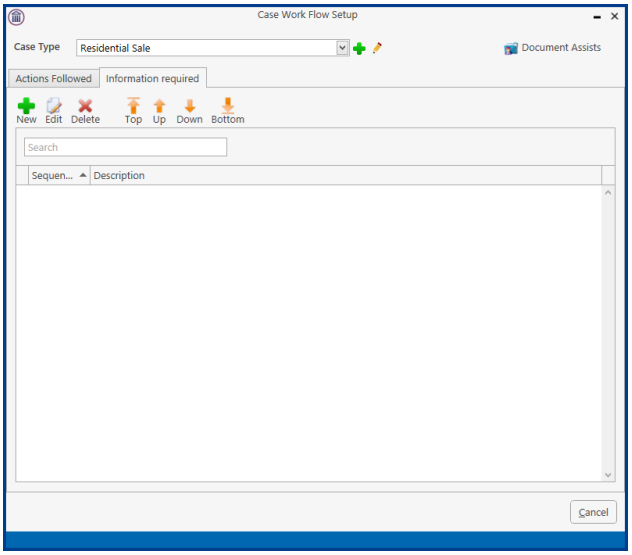
6. The information is now available to use in correspondence if it is included in Case Plan Precedents.

ADDING INFORMATION REQUIRED TO A CASE ACTION FLOW

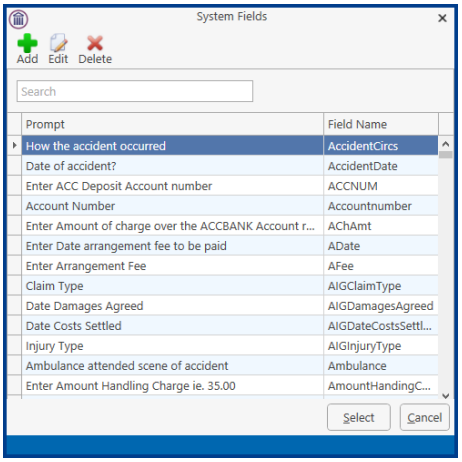
INTRODUCTION

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

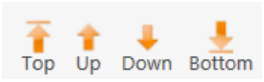
1. From the Setup Tab select Case Work Flow Setup.
2. Select the required Case Work Flow as before.
3. Select the Information Required Tab. The following dialogue box will appear.



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



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



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

APPENDIX

APPENDIX 1: SAMPLE CASE ACTION FLOW

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

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

CIRCUIT COURT ROAD TRAFFIC DEFENCE ACTION FLOW				
Action 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 Bill and/or Entry of Appearance Send Civil Bill/Advise to Ins Co	Letter to PI's Solr returning Civil Bill and/or Appearance Appearance Ltr in Ins Co advising position	RTA002A RTA002B RTA002C	003 in 7 days
003	Notice for Further Particulars Letter to Defendant to call to office	Notice for Particulars Letter to Defendant	RTA003A RTA003B RTA003C	

APPENDIX 2: SAMPLE OF A BLANK PRECEDENT DOCUMENT

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

VENDOR INSTRUCTION SHEET
RESIDENTIAL HOUSE

1. INSTRUCTION DETAILS:

a. Date of Instruction:
b. Fee Earner
Handler

2. CLIENT/VENDOR INFORMATION

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

3. ASSOCIATED PARTIES:

a. Name of 1st Purchase:
Address of 1st Purchaser:

b. Name of 1st Purchase:
Address of 1st Purchaser:

c. Purchaser's Solicitors:
Address:

d. Phone No: Office: Fax:
Email:

e. Auctioneer:

f. Local Authority/County Council:

g. Lending Institute:

4. PROPERTY DETAILS:

a. Sales:

b. Deposit to be paid:

c. Closing Date:

d. Interest Rate:

e. Sale Price includes the following:

f. Sale Price excludes the following:

g. Description of Property: ALL THAT AND THOSE

h. Is the Property Mortgaged? Yes/No

i. Are there any extensions carried out in the Property? Yes/No

j. Where are the Title Deeds?

k. Title Deeds to be listed in Documents Schedule:

<u>Outstanding Information for File no:</u>

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:CIMartialCde]		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 1st Purchaser: [CAN:Name.Purchaser#01]
Address (Home): [CAN:LinearAddress.Purchase#01]

Name of 2nd Purchaser: [CAN:Name.Purchaser#02]
Address (Home): [CAN:LinearAddress.Purchase#02]

Name of Other Solicitor: [CAN: Company.Solicitors#01]
[CAN:LinearAddress.Solicitors#01]

Telephone: [CAN:Phone.Solicitors#01] Fax No: [CAN:Fax.Solicitor#01]

CLIENT DETAILS

RSI No: [LCN:CISSNumber#01] Spouse RSI No: [LCN:CISSNumber#02]

Spouse's Name: [CNT:Spouse]

Date of Marriage: [qCNT:DateofMarriage]

Is the Property Mortgaged? YES/No

Are there any extensions carried out to the Property? Yes/No

Where are the Title Deeds? [CAN:Company.Bank#01] [CAN:Company.Build#01]

CONTRACT FOR SALE

Sale Price: [UDF:SalePrice] Closing Date: [UDF:ClosingDate]

Deposit to be paid: [UDF:Deposit] Interest Rate:

Description of Property: ALL THAT AND THOSE [UDF:DescProp]

Does the sale price include the following:

[UDF:ContentsList]

What fixtures does client wish to exclude from sale:

[UDF:ContentsProp]

Is there anything unusual about this sale that you wish to draw our attention to?

Title Deeds to be listed in Documents Schedule:

[UDF:DocSchedule]

Other Information for File No: [MAT:Code]