Kleos 6.7 (November 2019)

New & improved features
Kleos 6.7 (released in November 2019) comes with improvements in many domains.

**Contents**

1. CASES: Case situation (dashboard)  3
2. IDENTITIES: Manage access rights on identities  7
3. ACTIVITIES: Case budget (alert on overspent)  10
4. DOCUMENTS: Massive duplication of documents from one case to another  14
5. DOCUMENTS: assign an owner to a document  15
6. DOCUMENTS: add an image signature to a document (PDF)  16
7. BILLING: set office expenses percentage at case or case type level  18
1 CASES: Case situation (dashboard)

This new feature introduces the possibility to access instantly an overview of the most relevant information related to a case when opening it.

This includes: graphs showing the current financial situation, last and next steps (tasks and appointments), the recently modified documents and the notes.

The "Case Situation" is the first tab inside each case (left of “General”) and is symbolized by this icon:

It is organized in five widgets, from left to right: Last documents, Appointments, Tasks, Financial status, Notes

GOOD TO KNOW:

- (access to the widgets respects your permissions to modules and features of Kleos)
- Each widget has a + button allowing the creation of a new item.

Last documents widget
Shows the documents that were created/modified/imported in the case, most recent being on top of the list).
Just double-click to open and edit a document.
If all the items cannot be shown, a “More” link will lead you directly to the documents tab of the case
Use the + button to create a new one.
You may also import a documents directly by dragging & dropping it inside this widget

Appointments widget
Shows the last event from the calendar and also the upcoming events. Simply hover over each element to show more details, or click on it to edit. If all the items cannot be shown, a “More” link will lead you directly to the Calendar tab of the case. Use the + button to create a new appointment.

Tasks widget
Shows the last completed tasks in the case and a list of upcoming tasks. Simply click on one to edit. If all the items cannot be shown, a “More” link will lead you directly to the Tasks tab of the case. Use the + button to create a new one.

Financial status widget

The graph on the left shows the amounts of fees/expenses/disbursements, each distinguishing billed/not billed.

The graph on the right shows the total spend hours, also distinguishing billed/not billed.

The first table on the right shows the “RESERVE” (excluding VAT) : it compares the not billed amount with the amount of provisions : if provisions exceed the not billed amount, then you have a reserve. If not, you should invoice activities or create a new provision.

The table on bottom right shows a summary (including VAT) of invoices, credit notes (only final documents, also Proforma if applicable in your country) and payments that occurred.
The difference shows the global unpaid amount, also showing the overdue amount (unpaid amount on invoices/provisions whose due date has passed).

GOOD TO KNOW:

- You may use the + button to create a new activity or invoice/provision.
- If a budget has been defined for the case, the caps on fees and/or hours will also be shown in the financial situation (see the dedicated section Case Budget of this document).

Please read the next sections in this document to know more about the Case Budget.

**Notes widget**

Shows the notes related to the case.

Simply click on one to edit it.

Use the + button to create a new note.

**Configuration of the Case Situation**

Inside the case situation screen, click on this icon (bottom right)...
Here you may decide to:

- Make the Case situation be the default tab when accessing a case (if so, leave the box unchecked), or the General tab (check the box)
- Hide or show the financial status (depending anyway on your permission to access financial information)
- Hide or show the notes
2 IDENTITIES: Manage access rights on identities

Kleos 6.7 introduces a new feature giving the possibility to limit the visibility of some identities (clients typically) to some office members.

To activate the feature for a member (or a group)
From the configuration menu: access the Authorization Manager, AREA : Identity; and check the KLEOS ACTION : Manage authorization identities

NB : usually only Administrators have access to the Authorization Manager.

From that moment, the related user (or group) is now allowed to set authorizations on identities.

To grant authorization to users (or groups of users) on an identity
Select an identity to be protected.
The menu More... contains a new item : “Authorization”

Kleos opens then a window where the user can set an Identity authorization for the selected identity. The Identity authorizations can be assigned to everyone or for a single user or group of users.
By default the switch “Set permission” is deactivated, meaning that all the office members are authorized to visualize and manage the selected Identity.

- Click on “Set permissions”
- Select the user(s) or group that should have access to the identity
- Select the specific access rights (Edit and or Delete)
- Then OK

Once an authorization has been set on an identity, Kleos updates the tab “Authorizations” inside the identity, as shown below:
Through this tab “Authorizations” of an identity, the User can check which User/Groups are authorized to manage this Identity; on the right is available the button “Set Authorizations” to set up additional authorizations (if user have the right to do so).

GOOD TO KNOW :
- Currently, it’s not possible to set visualization permission while creating a new Identity. So, just after creating an identity, access the More..., Authorization menu to protect the identity.
- Authorizations can only be set on external identities (clients, external contacts), not on office members

Once an identity has been hidden to another office members/groups, this Identity will be not visible in the Identity list and it will not appear as search result in the advanced/quick and saved search controller.

Visibility of protected identities inside cases
If the user has access to a case where a protected identity is involved, he will be able to access the identity, but only from the case.

Also, when an Identity with access limitations is added in a Case, Kleos shows a warning message to the user in order to inform that it could be required set up Case authorization in order to maintain that Identity not visible at all:
3 ACTIVITIES: Case budget (alert on overspent)

To allow the control of time spent in a case Kleos 6.7 introduces the possibility to define a budget and be alerted when the limit is reached or passed.

In the General tab of each case, two new information: Registered hours and Registered fees. For each one, a cap can be set/edited by clicking in the gear icon.

Alternatively, setting the caps can be done from the Activity tab of the case, in the “More... Options” menu.

The activity option window then shows a new section named “budget”:
The options are:

- **Cap on hours**: represents the cap on the worked hour
- **Cap on fees**: represents the cap on the amount of fees (time-based or flat).
- **Warning threshold**: represents a warning threshold defined as a percentage of the cap.
- **Count only unbilled hours/fees**: By default, this parameter is not selected, and all the registered hours and fees are added to check the caps.
  When the option is selected, only the unbilled hours and fees are considered in order to check the caps.

**Budget set on REGISTERED hours/fees**

The cap(s) that have been set appear in the General tab of the case:

The total of Hours/fees that have been registered also appear here, in orange if they are above the threshold but below the budget:
Alert when an activity is created

Every time an activity is saved in a case with a budget, Kleos checks that the cap is not being reached and shows a warning message requesting a confirmation (the message is not blocking).

Budget set on UNBILLED hours/fees

When the option “Count only unbilled hours / fees” is active on a case, the unbilled fee and hours are considered instead of the registered hours/fees.

Each time the user invoices fees, those fees are excluded from the budget calculation. This behaviour is useful when a recurrent price agreement is applied for a case.
If the number of unbilled hours or unbilled fees reaches the threshold (if set), they appear in orange, .. or in red if they exceed the budget.
4 DOCUMENTS : Massive duplication of documents from one case to another

To accelerate the duplication of document from a case to another, it is now possible to select several documents to be copied.

Then click on the usual Copy/Duplicate button, Kleos opens the window below:

You can select the destination case.

Regarding the destination folder, two options are possible:
- **Duplicate in the same folder structure folder** is CHECKED (default) : the documents will be duplicated in the same folders as in the original case. Missing folders will be created in the destination case.
- **Duplicate in the same folder structure folder** is UNCHECKED : all documents will be copied in a single folder in the destination case (specify this folder by choosing in the list on Virtual folder)

**GOOD TO KNOW :**
- Kleos will NOT duplicate massively the following files: emails, Invoices and e-courts documents
- The version of document to copy is the version of the origin document at the moment of copy. If the document in the case of origin is checked out, the last checked-in version will be copied.
5 DOCUMENTS: assign an owner to a document

From Kleos 6.7, it’s now possible to assign a specific member of the firm as being the “Owner” of a document.

This allows to make distinction between the Creator of a document, and the “Responsible” of an important document (=the Owner).

The new field **Owner** can be populated in several screens of Kleos (and at anytime):

Typically when:
- Creating a new document
- Checking-in a document
- Importing a document
- Editing the properties of a document

![Document creation screen](image)

**GOOD TO KNOW:**
- The column **Owner** can be added in the grids that show documents
- The advanced search screen on documents allows to use Owner as a criteria

Also, the standard report related to documents now includes the Owner.

And users that have access to the Jasper report editor can also use these field within their custom reports.

**GOOD TO KNOW:** by default, the Owner of a document is its Creator (this is also true for all documents created before Kleos 6.7).
6 DOCUMENTS : add an image signature to a document (PDF)

This new feature allows the user to add an image (typically reproducing a handwritten signature) on a PDF document.

From the general Documents tab, or from the Documents tab in a case, use the **Sign** button.

The **Sign** button is only available for the PDF documents and for the MS Word documents with an attached PDF.

**GOOD TO KNOW :**
- The feature doesn’t support PDF’s that are protected by a password and PDF-A format (archive).
- The signature (image) to be inserted in the PDF should be created previously and stored on your PC.

Select the image to be inserted (on your PC)

It is then possible to:
- Move and resize the rectangle to indicate where the signature will be inserted.
- Assign a distinct name to the final PDF
- Select the destination folder of the signed PDF
After clicking on **Sign**, a new PDF (with the signature) is added to the case inside the specified folder.
7 BILLING : set office expenses percentage at case or case type level

Until now it was already possible to set an automatic percentage of expenses (so-called Office Expenses) to be invoiced based on a percentage of the fees of an invoice.

This percentage was applied to all the invoices, and could only be changed, manually, on each invoice.

Kleos 6.7 introduces the possibility to set a percentage of Office Expenses at four levels (each level overruling the rate defined at the level above itself):
- law firm level
- case-type level
- case level
- invoice level

GOOD TO KNOW : the possibility to set office expenses is allowed only to the user who has access to the billing setting (Billing and Setup > Billing Configurations).

Setting a percentage of Office Expenses at LAW FIRM LEVEL

From the Configuration menu, select Billing an then Office Expenses

You may then select a Rate that will be applied to all the coming invoices ;

Setting a percentage of Office Expenses at CASE TYPE LEVEL

From the Configuration menu, select Case , then Case types and double click on the desired case type.

You may then check the box Custom office expense rate and enter an Office Expenses rate to be applied to all invoices created in cases of this type.
Setting a percentage of Office Expenses at CASE LEVEL
Inside a case, in the Billing tab, More... Options you may:

- See if the percentage of office expenses is inherited from the percentage defined on the Case type or Office level (radio button “Based on Case type/Office level”);
- Define a custom value for the case (option “Case specific rate”). The value of the percentage cannot be equal to 0%.
- Disable the office expenses calculation for the case

Also, in the Billing tab of a case, sub tab Billing conditions, Invoicing the same information is visible:
When invoices are created
Kleos automatically applies the office expenses percentage based on the following behaviour:

- **SITUATION 1**: percentage value defined only at law firm level
  - The expense percentage is based on the value defined for the law firm
- **SITUATION 2**: percentage value defined both for the office and for the case type
  - The expense percentage is based on the value defined for the case type
- **SITUATION 3**: percentage value defined for the office, case type and case
  - The expense percentage is based on the value defined for the case, (and can still be changed at invoice level)

GOOD TO KNOW :

- The percentage of office expenses is applied only when creating a new invoice.
- Changing the percentage on the case or case type level or law firm level will not impact already created invoices.

- Other details on the behaviour of the feature are provided in the Full release Guide (PDF)

End of document