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<td>Documents</td>
<td>99</td>
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<tr>
<td>Activities</td>
<td>101</td>
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<tr>
<td>Calculations</td>
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<td>General</td>
<td>104</td>
</tr>
<tr>
<td>Billing</td>
<td>109</td>
</tr>
<tr>
<td>Accounting</td>
<td>112</td>
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Kleos Knowledge Center

Part 1 - Getting started
Part 1 - Getting started

Installation

Kleos is a Case Management System designed by lawyers for lawyers. It has all the features to conveniently manage your cases. All the information in Kleos is safely stored in the cloud. You can use your license to install Kleos on different computers and to access data from any of them.

In order to work with Kleos, you have to install it on your computer. The software runs on your computer, while all the data and documents are stored in the cloud. For this reason, you need an Internet connection to work with Kleos.

Before installing Kleos, check if your computer meets the technical requirements. You can use Kleos using Windows Vista / 7 / 8.0 / 8.1 / 10. Kleos will not run on computers using Windows XP as operating system.

<table>
<thead>
<tr>
<th>Technical requirements</th>
<th>Minimum</th>
<th>Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>OS: Windows Vista</td>
<td>RAM: 1GB</td>
<td>RAM: 4 GB</td>
</tr>
<tr>
<td></td>
<td>Free disk space: 300 MB</td>
<td>Free disk space: 300 MB</td>
</tr>
<tr>
<td></td>
<td>Internet connection: 3 MB/s</td>
<td>Internet connection: 10 MB/s</td>
</tr>
</tbody>
</table>

The first step to install Kleos is to download the installer from this URL: https://kleos.wolterskluwer.com/world

Click on the Install Kleos button to download the installer. Once the download is complete, run the installer and follow the instructions on the screen.
When the installation is complete, you can click on the Kleos icon and run the software.

The login screen shows three fields: Office, Username and Password. Use the information provided by Wolters-Kluwer to log in into the product.

Your user will be automatically locked if you try to log in using a wrong password five times in a row. The counter of failed attempts is reset to zero each time you successfully log in into the software.

You can install Kleos on as many computers as you want, but you can’t use the same Kleos license on more computers simultaneously. If you try to log in into Kleos from two computers using the same user, the first computer will be disconnected once you log in from the second one.
Please, contact the Kleos Support Service if you need more information:

- URL: https://support-wolterskluwer.force.com/kleos/s/?language=en_US

**Desktop configuration**

The desktop is Kleos’s main screen. The first time you log in into Kleos it looks empty.

You can configure your desktop to display several boxes containing the most relevant information of your Office, such as recent cases, pending tasks and next calendar events and appointments.

To do so, click at the center of the screen.

It is also possible to open the configuration screen from the configuration icon in the upper right corner of the screen.
The desktop tab of the configuration screen contains six icons, one for each tile of the desktop. Click on the icons to activate or deactivate the panels. Select your personal configuration and return to the desktop.

Most users configure their desktop to show the "Recent cases", "My tasks", "Calendar overview" and "To be followed up" boxes.
**Basic Office configuration**

It is strongly recommended to configure the basic information of your Office, such as firm name, address and Office members. This information is used to personalize the documents and the communication with your clients and the various parties of the cases.

To configure your Office information navigate through the configuration screen and select the "Office" tab.

The “Office” option is selected by default. It contains the basic information of your Firm and is empty by default. Click on the “Open” button to define the basic data.

Kleos will create an identity and will use it to identify your Firm. This identity will be permanently linked to your law firm in Kleos. However, you will always be able to modify those data.

It is strongly recommended to include all the relevant information of your firm, such as name, main address, legal form or VAT number.
You can include your Firm’s logo. Kleos will be able to use the logo to personalize your documents. To add a logo, click on the building icon in the General tab of the window.

Kleos can use the most common picture formats, such as .jpg, .png and .bmp.

At this stage, it is important to review the number of licenses. Note that you can install Kleos on all the devices you like, but you can’t use the same license on more computers simultaneously. The number of licenses limits the number of members of your Office who can use Kleos.

Select the “Contract & Authorizations” option.
Click on the “Contract manager” icon.

The contract manager window contains information about the number of licenses available, the expiration date of the licenses and the space available for data storage.

Please, see Configuration of Kleos accounts and profiles on page Error! Bookmark not defined. if you would like to define new Office members, to assign Kleos licenses to Office members or to change the authorization profiles of users.

**First steps with Kleos**

Kleos is a complex software, but its user interface was designed to make it easy to use. All Kleos screens share some basic features. The first step to improve productivity in working with Kleos is to get familiar with these features.

The Global search command is located in the upper right corner of all Kleos screens. This is the quickest way to search information in Kleos. You can use it to perform a search in the entire Kleos database.
The Home button navigates directly to the desktop. It is located on the left of the main menu.

The configuration button navigates through the configuration screen. It is located on the right of the main menu, in the upper right corner of all the Kleos screens.

You can use the main menu to navigate to the main Kleos screens. It is located at the top of all the Kleos screens.
Kleos allows you to work on many cases simultaneously. You can open a case and use the main menu to navigate to another screen. You can return quickly to the open cases using the quick switchbar, located on the right of the screen.

The Quick-Add button is located on the right of the main menu. It is the quickest way to create data entities in Kleos. You can use the Quick-Add button to create cases, documents, identities, appointments or any other type of data from any Kleos screen.
The Help button is between the Quick-Add button and the Configuration button. It is the quickest way to access the online Kleos documentation. You can also use it to activate or deactivate the Infodrops.

All the Kleos screens share some standard design characteristics.
A search box located in the upper left corner allows to carry out the most frequent searches quickly. Opposite to the global search box, there is a local search box. This means that the search box in the cases screen will only find cases and the search box in the documents screen will only find documents.
The advanced search command is located next to the search box. It opens a window to combine all the fields of a data entity to carry out a specific search. Through the advanced search you can perform searches using the extra fields defined by the user (see Configuration of extra fields on page 47 to learn more about extra fields).
At the top center of several screens you can find quick-filter buttons.
The local menu is located in the top right corner of the screen. The most frequent actions are visible; the least frequent ones are grouped under the “More” option. The same options are accessible using the contextual menu (right button of the mouse). All the Kleos screens include a contextual menu.
You can sort the list by column clicking on the column header. The contents of a list can be filtered by the values in a specific column using the funnel placed on the right of the column header. It is possible to combine filters on different columns.

<table>
<thead>
<tr>
<th>Creation...</th>
<th>Created by</th>
<th>Last modification</th>
</tr>
</thead>
<tbody>
<tr>
<td>20/12/2016 13:17</td>
<td>(Clear Filter)</td>
<td>10/03/2016 10:00</td>
</tr>
<tr>
<td>16/06/2016 17:04</td>
<td>Select All</td>
<td>17:02</td>
</tr>
<tr>
<td>6/06/2016 15:25</td>
<td>10/03/2016 10:00</td>
<td>16/06/2016 16:06</td>
</tr>
<tr>
<td>10/03/2016 17:28</td>
<td>ADMIN Kleos</td>
<td>10/03/2016 17:28</td>
</tr>
<tr>
<td>10/03/2016 17:28</td>
<td>ADMIN Kleos</td>
<td>10/03/2016 17:28</td>
</tr>
</tbody>
</table>

Columns can also be arranged differently. To do so, click on the column header and drag-and-drop it to the desired location.

To hide or show columns, right-click on the header of any column and select or deselect the columns that you want to show or hide.

If you want to reset the screen layout to its default values, click on the small configuration icon at the bottom right corner of the screen and select “Reset Layout”.

---

![Image of screen layout with options for sorting, filtering, and arranging columns.](image-url)
My first case

Kleos is a Case Management System. Everything in Kleos is built around cases. In Kleos a case is a virtual folder. You can add many different types of information to a Kleos case, such as, for instance, documents, notes, contacts, e-mails, appointments, due dates, and tasks.

To create a new case, click on the “New case” icon in the cases screen.

<table>
<thead>
<tr>
<th>Event Date</th>
<th>Created by</th>
<th>Creation...</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADMIN Kleos</td>
<td>14/05/2016</td>
<td></td>
</tr>
<tr>
<td>ADMIN Kleos</td>
<td>14/05/2016</td>
<td></td>
</tr>
<tr>
<td>ADMIN Kleos</td>
<td>14/05/2016</td>
<td></td>
</tr>
<tr>
<td>ADMIN Kleos</td>
<td>14/05/2016</td>
<td></td>
</tr>
</tbody>
</table>

The only field required to create a case is the name of the case, but it is strongly recommended to add information about the parties and other operational details of the case. It is possible, for instance, to search for a case setting the name of one of the parties as search criteria.

Kleos provides different ways to create a case. You can create a case from any screen using the “New case” option in the “Quick-Add” button. From the cases screen, you can use the “New case” button in the menu or the “New case” option of the contextual menu by right-clicking on the mouse.
Kleos Knowledge Center

Part 2 - Users’ manual
Part 2 – Users’ manual

Introduction. What is Kleos

Kleos is a Legal Management Software. It has been designed to manage law firms’ case and client records, but it also includes features to manage documents, schedules, appointments and invoices.

The legal business is a very complex one. In Europe there are over 80 different specialized legal branches on average. Each law firm is a unique combination of partners, procedures, clients and specialties. Kleos includes a wide set of features to meet almost all management needs of most law firms. On the other hand, most law firms should make minor adjustments to their working process in order to obtain larger efficiency improvements using Kleos.

Kleos combines a relational database and a documental database. This means that you can use Kleos to manage structured information and to store a large volume of documents. The technical complexity of handling simultaneously two different databases using two different architectures is hidden to users. Kleos handles this complexity for you.

All the information in Kleos is safely stored in the cloud. When you use Kleos you are working with a remote database located in a secure architecture of distributed servers. You don’t have to worry about accidental losses of information caused by computer viruses or cybercrime attacks. Your data and documents are protected through a massive deployment of safety measures, including data encryption, security protocols and distributed servers.

In order to work with Kleos you need a Windows Vista or newer operating system and an Internet connection. The mobile versions of Kleos (iOS and Android) provide the basic features for mobile devices (phones and tablets).

Cases are the key data entity in Kleos. Everything in Kleos is built around cases. A case is a virtual folder that you can use to record structured information and to store documents.

Cases are strongly related to identities. An identity could be a person, partnership, organization, or business that has legal existence. Identities are used to define the parties in a case, to identify the participants of appointments and the recipients of e-mails and invoices.

Lawyers handle thousands of documents every year. Kleos can handle a large volume of documents keeping their references to the relevant cases and identities.

In Kleos, time management consists of a combination of calendar events, appointments and tasks. All of them can be used to generate activities representing billable work. Activities are used to generate invoices.

Kleos’s standard workflow includes the following steps:

- Create a case and register the parties.
- Work on the case generating documents and registering calendar events, appointments and tasks.
- Generate the activities that summarize the billable work carried out for the case and the invoices.
- Archive the case once it is closed.
**Case management**

Kleos is a Case Management System. Everything in Kleos is built around cases. A case is a virtual folder in Kleos. You can add various types of information to a Kleos case, such as, for instance, documents, notes, contacts, e-mails, appointments, due dates, and tasks.

Kleos offers different ways to create a new case. New cases can be created using the New case button in the main menu, the New case button in the menu of the cases screen and the contextual menu by right-clicking on the mouse in the cases screen.

The only required field is the case name. To create a case on the fly, write the name of the case and click OK. This way of working allows to create a case quickly and to populate it later with the documents and all the information needed. Even if the case name is the only mandatory field, it is strongly recommended to add information about the parties and the operational details of the case.

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If you populate all the relevant information, you will be able to optimize your work in the next steps. For instance, you will be able to generate documents, reports and invoices in just a few steps, and searches on cases will be more effective.

The case window contains many tabs. At a closer look you will notice a resemblance between the tabs of the case window and the elements of the main menu. This is because everything in Kleos is built around cases. For instance, documents only make sense as part of a case. The same goes for tasks, activities, appointments and calendar events. You can use the main menu to access the full list of documents, tasks or activities. You can use the document tab of the case window to access the list of documents included in the selected case.

To add a party to a case, click on the "Add party" icon on the main screen of the case window.

Choose the type of party and select an identity. The default Kleos configuration includes the most frequent types of parties. You can add more types from the configuration screen. See The configuration screen on page 92 to learn more about configuration of case types.
The identities should be registered in the Kleos database in order to use them as party types, but it is possible to register a new identity from the case parties window by using the "Add new identity" button.
Some identities can have multiple addresses. You can add new addresses or select a different one using the button below:

The "reference" field is used to describe how the party refers to a specific case. It is very useful to make communication with parties easier, especially when working with corporations.
The "linked identities" information describes the relationship between different identities.
Navigate through the various tabs of the case window to get acquainted with the information that can be registered in a case.
A sub-case is a case related to another one. When you create a sub-case, Kleos assigns a new case code but keeps the reference of the original case.

Creating a new sub-case is very easy, just click on the “new sub-case” button. The sub-case inherits only the reference code from the original case. All the other information (parties, documents, tasks, etc.) has to be defined from scratch.

Sub-cases can be used in a variety of different situations. For instance, they can be used to split complex cases containing a lot of documents into smaller pieces to manage lawsuits and appeals as separate cases, and to manage different but related lawsuits for the same client.

The number of sub-cases related to a case is displayed in the general tab of the case window.

The number in brackets is the number of cases with the same reference code. This includes the original case and all the other cases created as sub-cases. Click on the Sub-cases button to see the list of the related cases.

A Sub-cases button is available in all the tabs of the cases window, but its behavior is different for each tab.

In the documents tab, the Sub-cases button recovers the list of documents of all the related cases. In the tasks tab, it recovers the list of tasks.
Kleos can be configured to include additional information on cases through the extra fields.

Kleos allows the definition of extra fields for different data entities. Some of them are closely related to case management. For instance, extra fields can be defined for cases, case types and party types. See Configuration of extra fields on page 47 to learn more about extra fields.

Identity management

Identities represent all the natural and legal persons that interact with your Office. Identities are used in cases, activities, calendar events and invoices.
The identities screen shows the full list of identities. The quickest way to find an identity is to use the search box located at the top left of the screen. Other ways to find identities are the advanced search and the filters in the column headers.

Kleos allows to register lots of information about identities. Generic information is displayed in the general tab and in the additional info tab.

It is possible to expand the identity information stored in Kleos by defining extra fields for identities. See Configuration of extra fields on page 47 to learn more about extra fields. The extra fields for identities will be available for all entities registered in Kleos.

It is also possible to include additional entities through the Profiles feature. A profile is a set of fields aggregated under the description of the role of an identity. You can add as many profiles as you like to an identity. The definition of profiles is described in, The configuration screen on page 92.

Linked identities are used to describe relationships between identities. For instance, it is possible to define an identity (legal person) as a different identity’s (legal person) employee. It is also possible to define extra fields for connections between identities. For instance, a link between identities described as “employees” can include an extra field defined as “position in the company”.

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Document management

Kleos’s documental database can handle an infinite number of different documents.

Kleos’s internal editor is used to edit and view memos, phone reports and e-mails in EML or MSG formats. Kleos includes a PDF viewer. Kleos will use your default document processing software to edit documents. Kleos will use the software installed on your computer to edit other types of files.

All the documents handled by Kleos are safely stored in the cloud. When you edit a document using your default word processor, the document will automatically be uploaded to the Kleos documental database.

While working with your text editor you will be working with a temporary file. To upload the file to the cloud automatically, you have to save and close your document. After closing the text editor, Kleos will display a document window with all the information related to your just-edited document.

Click the "check-in" button to accept the changes and upload the file to the cloud. The "Undo" button discards the changes.
It is recommended to import a document to Kleos through the drag-and-drop option. Kleos will show a dialog window to complete the import.

When you drop a document into an open case, your document will be imported into that case. When you drop a document into the cases list or any other Kleos screen, the case field of the dialog window will be empty and you will have to select a case.

It is possible to drag-and-drop a set of files. This is the recommended way to import a set of documents. The "Import" button imports the documents one by one, asking for the details of each document. The “Bulk import” button imports all the documents without including their details.
The drag-and-drop function can be used to import e-mail attachments.

The recommended way to import a document is through the drag-and-drop function. Nonetheless, you can import a document through the Import button of the documents screen and of the documents tab of the case window.

Select a document and complete basic information: title, description and case. A preview of the document is available in the “preview” panel on the right. If you tick “show always”, a preview will be generated for each future imported document.
In some cases you may need to recover a document from the cloud and use it on a local computer. You only have to use the “copy to” feature. The “copy to” feature is available from the document screen and the document tab of the cases window.

A single document or a set of documents can be recovered as well as the original editable document or a PDF copy of the document. A copy could take some time, depending on the size of the selected documents and on your connection speed, yet you can continue to work with Kleos. The files will be downloaded in the background. Kleos will display a message when the download is complete.
Document generation

Document generation in Kleos is based on the extensive use of templates. Kleos’s default configuration includes templates for the most frequent documents. It is possible to add additional templates that will be available under the “Office Templates” category.

It is very easy to create new documents. You’ll just have to give it a name, choose a template and click OK. The template will be downloaded from the cloud and the new document will be opened from your default word processor.

See Configuration of templates on page 50 to learn more about how to define new templates. See Documents in Part 4 - Reference on page 99 to learn how to edit the existing templates.

e-mail management

Kleos includes the basic features of a standard e-mail client. You can use Kleos to send and receive e-mails. E-mails can be sent using the "Quick-Add" icon, from the "documents" tab of the cases screen and from the "documents" screen. Kleos allows the definition of e-mail templates with a standard text to be used in most e-mail communications.
The “Send” button sends e-mails and stores a copy among the documents of the case. The “Save” button allows users to save e-mails as drafts and send them later.

To configure an e-mail account, open the “general” tab in the “configuration” screen. Select an e-mail option and add a new e-mail account. You have to include the technical information of your e-mail provider. Once the connection has been checked, you can start using your e-mail account from Kleos.

You can have as many e-mail accounts as you like, but only one can be defined as the default account. See Configuration of on page 49 to learn more about e-mail configuration.
Installation and configuration of the Outlook plugin

The Outlook plugin for Kleos is available from the Kleos download page:
https://kleos.wolterskluwer.com/world/

To install the plugin, download and execute the file, and follow the instructions on the screen.

Once installed, the plugin adds new features to Outlook to automate the connection between Kleos and Outlook:

- Import e-mails. This feature copies e-mails and their attached files into a Kleos case. E-mail and files will be imported as documents into the selected Kleos case.
- Import files. This feature imports attached files into a Kleos case as documents without importing the e-mail.
- Send by Kleos. This feature sends an e-mail from Outlook importing the e-mail sent as a document of the selected Kleos case.

Calendar and tasks

Time management is based on calendar events and tasks in Kleos. Appointments are just a type of calendar event. Calendar events occur on a specific date at a specific time. When you define a calendar event in Kleos you are booking a time slot for a specific task. For instance, appointments with clients or court hearings are managed as calendar events in Kleos.

A task in Kleos is a specific job that should be performed by someone by a given date.

Calendar events and tasks share some characteristics. Both can be used to generate activities. Activities are very important in Kleos because they register billable work and can be used to generate invoices.
To create a new event, click on the "New" icon.

Activities created from calendar events will be assigned to the same case. For this reason it is recommended to assign an event to a specific case, though it is not mandatory.

The event will be displayed in the agenda of all the Office members registered as participants of the event.

The dialog window to create tasks is very similar.

When you create a new event or a task, you can define the next steps related to an event. To do so, expand the extra fields section and select the desired next steps. You can define the creation of new tasks, appointments, activities, documents and e-mails related to an event. When you click on OK, new dialog windows will be displayed to create additional elements.

It is possible to customize the list of calendar event types and task types. See the Calendar, tasks section of Part 4 - Reference on page 98 to learn more about this.
Follow-ups

Follow-ups work as an internal communication tool. When you assign a follow-up to someone in your Office, you are asking him/her to act on a document, an e-mail, a memo or a phone report: read, review, write, print...

You can define as many follow-ups as you want for each document and assign them to the same person or to more persons. For instance, if you receive a follow-up to review a document, you can define a new follow-up for someone else asking him/her to review the document for you.

Follow-ups are displayed on the Kleos desktop.

Follow-ups can be created for documents, e-mails, memos and phone reports. To define a follow-up, click on the “edit follow-up” command.

This button is available from the list of documents of a case and from the general list of documents. For memos and phone reports, a follow-up can be defined at the time of their creation.

Close a follow-up to remove it. When you close a follow-up, Kleos will give you the option to create tasks, appointments and activities related to it.
Deadline management

A deadline is a date when something must be finished. Once defined, deadlines are displayed in the calendar, in the task panel of the agenda and in the list of tasks of the tasks screen. Kleos allows defining different types of deadlines. It is possible to define sequences of tasks related to the deadline type. When a deadline is created, also chained tasks are created based on the criteria set in the deadline definition.

It is possible to add as many tasks as needed to the sequence of tasks. “Days before” indicates how many days in advance a task must be completed. For the first task of the list, the days before indicate the number of days before the deadline. For the rest of the tasks, it indicates the days before the previous task.
When creating deadlines, Kleos will try to fit all the tasks in the sequence between the current date and the deadline date. If this is not possible, Kleos will display a warning. Kleos proposes a sequence of tasks and dates, which you can however modify. It is possible to add new tasks to the sequence (VERIFY), remove tasks, and change the dates proposed by Kleos. Tasks can be assigned to any member of the Office.

Kleos doesn’t perform integrity checks related to the sequences of tasks. The deadline of a task can be set before the deadline of the next task in the sequence. In this way, the tasks structure is very flexible.

**Activity management**

Kleos can use activities to generate invoices. An activity can be defined as a set of one or more billable items. Kleos uses activities to generate invoices. Activities are created while the case is managed.

It is possible to create activities from different places:

- “Quick-Add” button.

- “New” button in the activities screen.
• The new command in the contextual menu displayed by right-clicking on the mouse.

• “New” button in the activities tab of the cases screen.

• “New activity” button, available when you create a new calendar event or a new task.
- **Stopwatch.**

- **From the activities sheet in the activities screen.**

All the activities should be assigned to a case. To create an activity choose a type. A default set of billable items can be assigned to each type of activity. See Activities in the configuration screen on page 92 to learn more about the configuration of activities and billing items.

It is possible to add as many billable items as you like to an activity.

The rates of the billing items are taken from the fee tables. A billable item could be a fee or an expense. Time, quantity and rates can be used to calculate the amount of billable items.

Click “OK” to save the activity. The “OK & New” button saves the activity and creates a new one, using the same case as default.
Billing and accounting

Kleos can use activities and billing items to create invoices. Most frequently, invoices are created by using the “New Invoice” button on the billing tab of the case window. Select an activity and click on the button. You can also use the contextual menu available by right-clicking on the mouse.

The client of an invoice has to be the party in a case with a billable profile. Tax information (such as VAT number) is included in the billable profile.
After selecting the billing items, Kleos will generate a summary of the invoice. Invoices, credit notes and provision notes are stored in Kleos as billing documents. These can be saved as drafts or final versions. Drafts are not included in the accounting system. They can be edited and deleted. When a billing document is saved as final, Kleos will assign it the invoice number and will include it in the accounting system. Final billing documents cannot be modified.

It is possible to generate invoices and other billing documents from the Billing screen. Click on the relevant button of the menu and select the case. All billing documents are linked to a specific case in Kleos.

Kleos includes the basic features of a simple accounting system. All invoices, credit notes, rollback credit notes, and provision notes generated with Kleos will be registered in the accounting system. Billing documents must be assigned to a valid fiscal year. The easiest way to configure a valid fiscal year is to add a new fiscal year to the existing accounting system. Navigate to the configuration screen and accounting tab and select accounting. Select the accounting system, add a new year and mark it as active.
To complete the process, open the fiscal year by double-clicking on it and generate the periods. It is possible to generate monthly or quarterly periods.

Kleos includes an optional advanced billing module with the following features:

- Massive invoicing or batch billing. It generates a set of invoices using the activities that haven’t been billed previously.
- Merge different pending activities into one single invoice. By default, Kleos generates an invoice for each activity.
- Workflow process to validate invoices.
- Splitting invoices

Please, consult the specific documentation on advanced billing to learn more about these features.
The core of the accounting system is located in the billing tab of the configuration screen. Here you can find the configuration of the accounts related to each item of the invoices.

When you create a billing document, the amounts are incorporated into the corresponding accounts and journals according to the rules described by this screen.

The accounting screen contains all the information related to the Kleos accounting features.
Information is organized in several tabs. Journals, Searches and Others allow accessing to accounting information. With the Reports tab you can print the accounting reports.

The Export tab contains the export options of the accounting information. The accounting export wizard guides users interactively to generate files that can be used to transfer accounting information to an external accounting software.

**Basic reports**

Kleos includes several different pre-defined reports. To find them, look for the Reports button present in many Kleos screens.
The list of items displayed in any Kleos screen can be printed using the “Print List” button:

<table>
<thead>
<tr>
<th>Date</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>14/05/2016</td>
<td>ADMIN Kleos</td>
</tr>
<tr>
<td>31/05/2016</td>
<td>ADMIN Kleos</td>
</tr>
<tr>
<td>31/05/2016</td>
<td>ADMIN Kleos</td>
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<tr>
<td>31/05/2016</td>
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<td>31/05/2016</td>
<td>ADMIN Kleos</td>
</tr>
<tr>
<td>31/05/2016</td>
<td>ADMIN Kleos</td>
</tr>
</tbody>
</table>

The default Kleos configuration contains the reports.

**Kleos Connect**

**What is Kleos Connect**

Kleos Connect is a secure document exchange platform. It allows sharing documents with the external parties of your cases directly from Kleos, removing the risks related to the exchange of confidential documents by e-mail.

Instead of sending e-mails with large attachments, your contacts will receive e-mails with notifications. They will only have to click on the links in the e-mails to download the documents that you want to share.

**How to activate Kleos Connect**

To start using Kleos Connect you have to activate the Kleos Connect module. Navigate to the Configuration screen, select the Office tab, click on “Contract & Authorizations”, and select the “Contract manager” icon.
Safe sharing of documents

The “Share” menu option appears in the menus once Kleos Connect has been activated. Select the document and click on the “Share” icon.

When a file is shared, Kleos asks for the recipient of the file and sends him/her an e-mail with a link to the Kleos Connect portal. The recipient will have to register him/herself to the Kleos Connect portal by using his e-mail address in order to download the file.

Kleos Connect keeps control of the files and tracks the operations related to all files (sharing, up- and downloading).

Kleos Mobile

Kleos Mobile is available for iOS and Android devices. The application is available for download and installation from Apple iTunes and Google Play. Install the application and use your Kleos credentials (Office name, user name and password) to start using Kleos.
The main screen displays latest cases, next appointments, pending tasks, and icons to access the latest activities and document list.

Select one of the cases from the latest cases list to access case information directly. Select the latest cases tag or the folder icon to access the full list of cases.

Documents stored in Kleos are available from Kleos Mobile through the document list of the case and the general document list. Select a document to download it to your mobile device. You can use your mobile device to upload documents to Kleos. Documents can be uploaded from the file system or your mobile device, alternatively you can take a picture and upload it as a document.

You can use Kleos Mobile to access appointments, calendar events and tasks registered in the Kleos agenda. It is also possible to create new appointments and tasks. All the information stored in the Kleos database with Kleos and Kleos Mobile is immediately available on all devices.
Part 3 - Manual for administrator
Part 3 - Manual for administrators

Configuration of extra fields

Extra fields are used to expand and personalize the information stored in the Kleos database. Kleos manages the information stored in the extra fields in the same way as the original information fields. For instance, advanced search options allow the definition of search criteria using extra fields.

Kleos allows the definition of extra fields for cases and identities in the general tab of the configuration screen. All the extra fields defined for cases will be available for all cases and all extra fields defined for identities will be available for all identities.

Alternatively, there is another option to define extra fields. The extra fields defined in this way will only be available for the cases and identities consistent with the scope of the definition of the extra fields. Secondary fields can be defined for the following data entities:

- Profiles. Profiles are defined for identities. It is possible to define as many profiles as needed. Each profile can contain a specific set of extra fields that will be created when the profile is assigned to an identity. The extra fields related to profiles will only be available for the identities that include the profiles.
- Case types. It is possible to define extra fields related to case types. They will only be available for cases belonging to the case type.
- Party types. It is possible to define extra fields for the party types of the cases. They will only be available for the identities defined as the corresponding party type.
- Relationship between identities and relationships between party types.
All the Kleos windows to define extra fields look the same.

The top menu allows the definition of new groups and fields. The list of groups and fields is displayed on the left. The right side of the window displays the characteristics of the selected field.

All the extra fields should be included into a group. Click on the “Create group” button and enter a name. The groups of extra fields are just a way to aggregate fields with the purpose of displaying them in an organized way in the Kleos windows. No extra fields can be defined until at least a group has been created.

It is strongly recommended to follow a systematic approach to define extra fields:

- Define the type of the extra field.
- Define the name of the extra field. It is recommended to use a descriptive name. It is possible but not recommended to use the same name in extra fields for different data entities. For instance, an extra field can be defined for cases named “internal_reference” and the same name (internal_reference) can be used in an extra field for identities.
- Define the label that will be displayed on the screen to identify an extra field. It is strongly recommended to use a descriptive label as similar as possible to the name of the extra field. The relative position of the extra fields on the screen can be modified with the arrows.
- Define the validation criteria of the field. The validation options depend on the type of the extra field.
It is possible to add, edit or delete the configuration of the extra fields anytime. Deleting an extra field means deleting all the data stored in it. Moving an extra field from a Kleos data entity to another means duplicating the extra field and replicating manually all the information stored in the original extra field before deleting it.

The definition of the extra fields requires some preliminary planning:

1. Identify the additional information you’d like to have in Kleos.
2. Identify the scope of each piece of data by choosing in which data entity you want to define an extra field.
3. Identify the type and the validation rules of the extra field.
4. Aggregate the extra fields of each data entity in groups.

Once you have completed planning, you can start to define the extra fields in Kleos.

**Configuration of e-mail**

Kleos includes the basic characteristics of a standard e-mail client. It is possible to send and receive e-mails directly from Kleos.

To configure the e-mail account, open the “general” tab in the “configuration” screen. Select the e-mail option and add a new e-mail account.

![E-mail accounts](image)
You have to include the technical information of your e-mail provider. Once the connection has been checked, you can start using your e-mail account from Kleos.

You can have as many e-mail accounts as you wish, but only one can be defined as default account. The default account will be used to send e-mails, unless otherwise defined.

**Configuration of templates**

Templates are used to generate documents. Kleos can generate legal documents, contracts, letters, e-mails, billing documents and many other types of documents.

Templates are based on a combination of standard fixed text, variable fields and forms for data entry. Variable fields can be filled using information taken from the Kleos database for the specific data entry forms.
The Kleos templates consist of two types of files: templates and text blocks. Templates are very similar to documents. They contain text and references to fields. Text blocks are more complex. Some text blocks contain fragments of text. Some other text blocks contain definitions of variable fields. The latter text blocks are responsible for binding the field definitions of the templates and the information stored in the Kleos database.

Kleos includes an internal template editor. To activate it, go to the configuration screen, general tab and select “My preferences”.

Select Internal “MS Word” editor to activate the internal template editor. If you select “External default application”, Kleos will use your default word processor to edit the templates.
Configuration of activities and billing items

To configure this module you will have to define activities, billing items and fee tables. Activities are used as containers of billing items. Billing items describe what can potentially be billed to customers, such as fees, expenses or disbursements. Fee tables describe the generic and specific rates used by default to compute the monetary value of the billing items.

Kleos offers multiple ways to configure activities and billing items. On the other hand, it is recommended to use activity types to describe the legal services provided to clients, and billing items to describe the types of billable components of the activities.

For instance, “legal representation” should be defined as an activity, and “hourly fee” as a billing item.

Each activity type can contain as many billing items as needed. For instance, the activity “legal representation” can be defined as to contain “hourly fee” and “travel expenses” as default billing items. When an activity of the “legal representation” type is created, Kleos will include empty billing items of the types “hourly fee” and “travel expenses” as components of the activity. Users can modify the amount and the fee of these billing items to compute the amount of each billing item. The amount of the activity is computed as the sum of the values of all the billing items.

Users can remove or add new billing items from/to the activities. For instance, if a specific “legal assistance” service doesn’t require a travel, the billing item “travel expenses” can be removed. If a specific “legal assistance” requires a travel by car it is possible to add a “kilometre” billing item. The definition of an activity and the corresponding billing items are just a way to make the definition of activities and billing items easier, but does not limit the specific contents of activities.

To configure the activities module, navigate to the activities tab of the configuration screen.

![Activities configuration screen](image)

It is possible to add, edit and remove activities and billing items. Fee tables can be deactivated, but they cannot be removed.
Fee tables contain the default fees for the billing items. Users can define as many fee tables as they like. Generic fees apply to billing item categories. For instance, the category “kilometer” can include many billing items related to travel expenses. A generic fee for the “kilometer” category applies to all the billing items included in this category. On the other hand, specific fees only apply to specific billing items.
Part 4 - Reference

Common elements

All the Kleos screens share common elements and features.

The Log Out button is located at the top center of the screen. For security reasons, it is strongly recommended to exit Kleos using the Log Out button. It is possible to exit Kleos using the standard closing window button, but the session will remain registered as open in the server.

Also the user name and the Office name are located at the top center of the screen. They are printed on the screen for information purposes only. If you want to use a different account, you have to log out from Kleos and log in again with the new user and password.

On the top left of the screen you will find date, time of the day and a reminder of that day’s appointments. Click on the reminder to navigate to the calendar screen.

In the bottom right corner of the screen you will find a binder with the follow-ups you have been assigned. The icon will show an empty binder if no follow-ups have been entered.
It is possible to change the configuration of the activities, identities, tasks, documents and activities screens. You can hide, show, resize or rearrange any column. To resize a column place the mouse between two columns. You can drag a column when your standard cursor changes to a double-header horizontal arrow.

It is also possible to arrange columns differently. To do so, click on the column header and drag-and-drop it to the desired position.

To hide or show columns, right-click on the header of any column and select or deselect the columns that you want to show or hide.

If you want to reset the layout of the screen to its default values, click on the small configuration icon in the bottom right corner of the screen and select “Reset Layout”.

The Global search button is located in the top right corner of all the Kleos screens. It is the quickest way to search information in Kleos. You can use it to perform a search through the entire Kleos database.

Click on the arrow on the right of the Global search box to recover a list of the latest global searches performed. It is possible to individually remove items from the list and to clear the entire list.
With the Home button on the left of the main menu you can navigate directly to the desktop.

The Configuration button navigates to the configuration screen. It is located on the right of the main menu, in the top right corner of all the Kleos screens.

The main menu is used to navigate to the main Kleos screens. It is located at the top of all the Kleos screens. This menu is available in all the Kleos screens.
The Quick-Add button is located on the right of the main menu. It is the quickest way to create data entities in Kleos. You can use the Quick-Add button to create cases, documents, identities, appointments or any other type of data from any Kleos screen.

The elements created through the Quick-Add button are not related to any case by default. You will have to specify a case from the corresponding dialog window.

The Help button is located between the Quick-Add button and the Configuration button. The Help option opens the Kleos Support Community pages in your default web browser. The About option will show a dialog box with the Kleos version installed in your computer. The Infodrops options activate and deactivate the Infodrops. The Infodrops are updated at each new release of Kleos.
The quick-switch bar is located on the right of the screen. It contains three buttons: Windows, Cases and Documents. These buttons are active with open windows, cases or documents. Click on the button to obtain a list of the open elements, and click on the element you want to navigate.

The stopwatch is located at the bottom center of the screen. It can be activated from any Kleos screen. When you stop it, a dialog box will pop up with the option to create a new activity.
The desktop

The desktop boxes can be activated and deactivated from the configuration screen.

The "Recent cases" box contains a summary of your latest cases used. The list of recent cases is different for each user in the same Office. Each user will see his/her personal list of recent cases. You can use the “Recent cases” box to open or to edit a case. See The cases screen on page 61 to learn more about the differences between opening and editing a case.

The “My tasks” box contains the list of tasks assigned to a user. The tasks listed in the “My tasks” box can be used to open a task and the case related to the task and mark the task as completed. Once a task is marked as completed it will be removed from the “My tasks” box.

The “My calendar” box contains the list of the next calendar events and appointments entered in the user’s calendar. “My calendar” can be used to edit, delete and copy to a new date calendar events and appointments. If the calendar event or appointment is linked to a case, it is possible to open that case.

The “To be followed up” box contains the follow-ups assigned to a user or by a user. You can use the “To be followed up” box to open the related document, view (in read–only mode) a copy of the related document, mark the “follow-up” as done, open the case related to the document marked as follow-up, send the related document by e-mail, print the related document or close the follow-up.

The “Timesheet overview” box contains the list of the activities created on that day. This box can be used to create a new activity and to edit or delete an existing activity. Activities of a specific user can be created by other users. The Refresh button refreshes the list of today’s activities.

The “Pending operation” box is related to the import of documents from external legal databases. This feature is available in France, Italy, Belgium, and Spain.

It is possible to carry out searches on external databases from the “Global search” feature and from the external database screen. Documents taken from external databases are not automatically imported into Kleos. You have to select them from the “pending operations” list and import them into a case.

All the features of the desktop boxes are available from the box menu located in the bottom left corner of each box, or through the contextual menu by right-clicking on the mouse.
The cases screen

The cases screen shows the list of cases. By default, the last cases used appear at the top of the list. You can use the common features of the Kleos screens to configure the list as you like.

The search box searches cases by name, reference and description. These are by far the most frequent searches. You just have to enter some text and search starts automatically when you stop writing. The down arrow shows the list of the latest searches and the stored searches used recently.

If you want to recover the full list of cases, click on the small "x" on the right of the search criteria.
The case menu is located in the top right corner of the cases list and contains the following options:

- **New.** This option creates a new case. If your Kleos configuration includes more than one type of case, you will have to select a case type from a dialog window.
- **Open.** This option opens the selected case from the list in a case window. This is the standard option when you are going to work on an existing case. You can also open a case by double-clicking on it.
- **Add.** This option will add new content to the selected case without opening it.
- **Reports.** This option opens the report selection window. Through this window you can select and print reports related to cases.
- **Edit (under the More option).** This option opens a dialog window to edit the basic information of a case.
- **Add sub-case.** This option creates a new case keeping the reference of the selected case. The behavior of this option is almost identical to “New”, but here the reference of the selected case is a basic piece of information of the new case.
- **Archive.** This option updates the status of the case as “archived”. It is recommended to mark completed cases as archived and to keep only active cases as opened.
- **Re-open.** This option updates the status of an archived case to “open”.
- **Duplicate.** This option creates a new case as a duplicate of the selected one. All the information and contents of the original case are duplicated into the new one.
- **Authorization.** This option opens a dialog window to manage the access rights of the selected case.
- **Delete.** This option permanently deletes a case and its information.

### Advanced search of cases

The advanced search screen allows complex searches by combining almost all the fields of the cases data structure. It is possible to use the extra fields for cases defined in the configuration of your Office. The extra fields will appear at the bottom of the page.

The “Search” button performs a search using the combined fulfilled fields as search criteria.

The “Recent cases” button performs the search, but it will recover the 25 latest cases that fulfil the search criteria only.
The “Clear criteria” button clears all the fields on the screen.
If you want to cancel the advanced search and return to the cases list, click on the “X” button at the top right corner of the search screen.

The “Stored searches” button shows the list of stored searches. You can perform a search by clicking on the corresponding element of the list.
The “Save” button opens a dialog window to save the current search criteria among stored searches.
The case window

The case window is Kleos’s main window. It is used to manage the information and documents of the cases. Information is organized in tabs and boxes.

The window contains up to six tabs: General, Documents, Calendar, Tasks, Activities and Calculation. The General tab contains four data boxes: Label, Office members, Parties and Extra fields. The Notes box is available in all the tabs of the window.

Structure of information of the case window:

- General tab
  - General information box
  - Office Members box
  - Parties box
  - Extra fields box
- Documents tab
  - Document explorer box
  - Document list box
- Calendar tab
- Tasks tab
- Activities Tab
  - Activities box
  - Billing items box
- Calculation tab
- Notes box
General tab – General information box
The general information box contains the basic descriptive data of a case, such as type, reference and description.

The general information menu is located in the upper right corner of the box and contains the following options:

- **Edit.** Opens a dialog window to edit the basic information data.
- **Reports.** Opens the Report Viewer window. You can use this window to generate and print reports related to cases with your current Kleos configuration.
- **Sub-cases.** This option will only be active if other cases are related to the current one. The number in brackets indicates how many other cases are related to a specific case. This option will perform an advanced search to recover the list of cases related to the current one.
- **Refresh and Refresh all** recover updated information about a case from the database. More users in the Office can work on the same case simultaneously. This option refreshes information on the screen with the changes made by other users.

The behavior of the buttons “Add sub-case”, “Archive”, “Re-open”, “Duplicate”, “Authorization” and “Delete” is the same as the corresponding options of the menu of the cases screen (For more information see The cases screen on page 61).

General tab – Office members box
The “Office members” box shows the relations among the Office members involved in the resolution of a case. This information is not necessarily related to the authorizations of a case. Authorizations describe the users who have access to case data stored in Kleos. “Office members” is just a list of people working on a case, but not necessarily as Kleos users.

The “Office members” menu is located in the top right corner of the screen. Through this menu it is possible:

- to add a new Office member to a case,
- to edit the role of the selected Office member in a case,
- to remove the selected Office member from a case.

General tab – Parties box
The “Parties box” contains the description of the parties in a case. Different types of parties and relations between the parties can be defined. For instance, it is possible to define the opposite party and the opposite party’s lawyer, both as related parties.
The menu of the “Parties box” is located in the top right corner of the box. It is possible to perform the following actions:

- **Add party.** This option opens a dialog window to define a party in a case by selecting the type and the identity (contact) of the party. It is possible to create a new identity (contact) on the fly if it is not already registered in the database. An additional address for a party can also be added if necessary.
- **Edit party.** This option opens a dialog box to edit the role of an identity in a case, to include an additional address or to edit the linked identities.
- **Add linked identity.** This option allows defining an identity linked to the selected party.
- **Edit identity.** This option opens the identity window to edit information related to a contact. Note that the parties in a case are just references to the contact cards registered as identities in Kleos. In order to edit the name or main address of a party, you have to modify the data of the identity card.
- **Show cases (active/all).** This option generates an advanced search to recover the list of cases.
- **Delete.** This option removes the selected contact as a party in the case.

**General tab – Extra fields**

If your current Kleos configuration includes Extra fields for cases, this option will allow you to access them.

The configuration, type and validation rules of extra fields are part of the definition of the extra fields (see configuration/cases/extra fields).

**Documents tab**

The “Documents tab” contains the Documents Explorer and the list of the documents.

The Documents Explorer is located on the left. It contains the structure of virtual folders. The number in brackets indicates the number of documents contained in each folder. By default, the Documents tab shows all the documents of a case (virtual folder named “All folders”). You can click on any folder to filter the documents list.
A folder is assigned when a document is created in or imported into Kleos. To change a document’s folder select the “Property” option of the menu (under the “More” option).

It is possible to configure the structure of virtual folders from the documents tab of the configuration screen with the option “Others”. Click on the “Document work folders” icon to arrange the structure of virtual folders.

The menu of the Documents tab of the case window contains the same options as the menu of the documents screen (see The Documents screen on page 80). When these features are used from the Documents tab, the case is always pre-defined. For instance, if you use the new document feature from the document tab of the case window, the document will be assigned to the open case. When you use the same feature from the documents screen, the case will be empty and you will have to select it.

It is possible to replace a case by another case defined as a sub-case of the current one.

The Documents tab of the case window has two features not available on the documents screen:

- Import folder. This option opens a dialog window to select a file system folder. All the documents of the file system will be imported into Kleos and uploaded to the cloud.
- Sub-cases. Performs an advanced search to show the list of all the documents included in the current case and related sub-cases. The search results will be displayed on the documents screen.
**Calendar tab**

The Calendar tab contains the list of calendar events and appointments related to a case. The view of the list can be customized as described in the **Common elements** on page 55.

The menu of the Calendar tab of the case window contains the same options as the menu of the calendar screen (see **The calendar screen** on page 75). A case always appears as pre-defined in the Calendar tab of the case window, while it is empty and needs selecting when used from the calendar screen.

The sub-cases feature is unavailable in the menu of the calendar screen. This option performs an advanced search to list the calendar events and appointments assigned to the selected case and related sub-cases.

**Tasks tab**

The Tasks tab contains the list of tasks related to a case. As all the other Kleos lists, the view of the list can be configured as described in the **Common elements** on page 55.

The menu of the Tasks tab of the case window contains the same options as the menu of the tasks screen (see **The activities screen** on page 82). A case always appears as pre-defined in the tasks tab of the case window, while it is empty and needs selecting when used from the tasks screen.

The sub-cases feature of the menu is unavailable in the menu of the tasks screen. This option performs an advanced search to list the tasks related to an active case and related sub-cases.

**Activities tab**

The Activities tab contains the list of activities related to a case. The upper part of the tab contains the activities. The lower part contains the billing items. On the right you will find the financial overview summary, containing fees, expenses and disbursements described by the activities and the billing items of a case.
The menu of the Activities tab contains the same options as the menu of the activities screen. The only difference is that, in the activities tab of the case window, a case always appears as pre-defined with the value of the selected case (see The activities screen on page 82).

The sub-cases option is only available in the menu of the activities tab. It performs an advanced search of all the activities related to an active case and all the other related cases through the sub-cases option.

**Billing tab**

The Billing tab is used to generate invoices. Invoices can be generated from existing activities, but it is also possible to define new activities in order to generate invoices.

**Billing items tab**

The Billing items tab shows the list of unbilled billing items.

The menu contains the following options:

- New invoice. This option creates a new invoice by using existing activities and billing items or by creating new ones. An accounting and a journal must be selected before completing the selection of the billing items.
- New credit note. This option creates a new credit note. Credit notes have a standard structure. The amount of the credit note must be defined.
- New provision note. This option creates a new provision note. Provision notes have a standard structure in Kleos. It is possible to define amounts for disbursements and fees and expenses.
- Edit. Opens the selected activity for editing.
- Set as billed. Defines the selected billing item as billed.
- Reports. Opens the Report Viewer window. You can use this window to generate and print reports related to pending billing items.
- Add past external expense/disbursement/provision. This option defines additional expenses, disbursements and provisions. It is possible to define a date before the current date.
- Import provisions. This option recovers information on provisions from the accounting system and links them to an open case.
- Options. This option allows the definition of a default accounting for the open case. It is also possible to register special price agreements for certain clients.
- Refresh. This option refreshes the list of the elements.
- Delete. This option deletes the selected billing item.
Documents tab

The Documents tab contains the list of billing documents related to an open case.

Some options of the menu are equivalent to the Billing items tab: new invoice, new credit note, new provision note, reports, options and refresh.

The different options are:

- New rollback credit note. This option creates a new rollback credit note for the selected invoice.
- Generate document. Generates a new billing document from the list of templates.
- Send. Sends the selected document by e-mail. The billing document must be defined as final.
- View document. This option opens a read-only copy of a billing document using the default PDF browser.
- Open accounting entry. This option opens the accounting entry related to the selected billing document on the accounting screen.

Clients tab

The Clients tab contains a summary of invoices, provision notes and credit notes by client.
The menu contains the following options (different from those of the Billing items tab and Documents tab):

- **Add.** This option adds a new client as potential recipient of billing documents within an open case. It is possible to include a reference number.
- **Edit.** This option edits the reference of the selected client.
- **Delete.** This option removes the selected client from the list of potential recipients of billing documents. A client can be removed from the list only if he/she has no billing documents assigned.
- **Case documents.** This option performs an advanced search to recover all the documents related to the selected customer.

**Calculation tab**

The calculation tab computes payments and amortization schedules for loans and delayed payments.

The menu of the Calculation tab includes the following items:

- **New interest calculation.** This option includes a new interest rate for the active case. Interest rates are used to compute amortization schedules.
- **New debt calculation.** This option includes a new debt rate for the active case.
- **New index calculation.** This option includes a new index value for the active case.
- **Edit.** This option opens the selected item (interest, debt or index) for editing.
- **Print.** This option generates a report including a calculation overview. The report is shown on the screen and can be printed.
- **Refresh.** This option refreshes the list of elements.
- **Delete.** This option deletes a selected element from the list.

**Notes box**

On the right of the case window, there is the Notes box. Notes are short and unstructured text that could be used to add any type of reminder, hint or comment related to the case.

It is possible to hide the notes box using the small arrow located on the left of the box.

In the top right corner of the box there are three icons.

You can use them to:

- add a new note,
- edit the selected note,
- remove the selected note.
- The Notes box is available in all the tabs of the case window.
The identities screen contains the list of identities (contacts) registered in Kleos. The design of the list can be configured, as described in the Common elements on page 55.

Through the search box you can search identities by name. You can use the first name, the second name or the name of the company. It is possible to recover the latest searches and the stored searches from the drop-box list on the right of the box.
The Advanced search allows complex searches of identities. All the fields can be combined as you like. If you have defined extra fields for identities (see Configuration of extra fields on page 47), you can use them in the advanced search.

The identities menu is located in the top right corner of the list. It contains the following options:

- New. This option opens the Identity window to create a new identity.
- Edit. This option opens the Identity window of the selected identity to edit the contents.
- Reports. This option opens the Report Viewer window. You can use this window to generate and print the reports related to identities present in your current Kleos configuration.
- Show cases. This option performs an advanced search and shows the list of cases that include the selected identity among the parties.
- Outlook import. This option imports the Outlook contact list to Kleos. This option requires the installation of the Kleos Outlook plug-in.
- Deactivate. An identity registered as a party in a case cannot be removed. On the other hand, in some cases it could be necessary to prevent the use of an identity no longer in use. Deactivated identities are not displayed in standard searches to avoid future accidental use. Deactivated identities can be recovered through advanced searches.
- Reactivate. This option reactivates a deactivated identity.
- Delete. This option deletes the selected identity

Identity window

The Identity window contains all the information about the identities in seven tabs.
The **General information tab** contains the information to identify an identity. The information differs for natural and legal entities.

Below general information there is the main address of the identity. An additional address can be defined for an identity using the “Notes and other addresses” tab.

The Contacts box of the General information tab contains the information to contact an identity. You can add telephone numbers, fax numbers, e-mail addresses, websites and messenger and Skype IDs.

The **Additional info tab** contains extended information on the contacts (for instance, the VAT number). This information is configured for each specific country as part of the local Kleos configuration.

The **Notes and other addresses tab** contains two boxes:

- In the Notes box you can write unstructured text notes related to an identity. Notes can be added, edited and deleted.
- The Other addresses box allows the registration of additional addresses for an identity. You can register as many additional addresses for an identity as you need. Short descriptions of additional addresses can be added to make it easier to identify them. For instance: “summer residence” or “legal department Office”.
- The **Linked identities tab** shows the relationship between different entities. From this tab you can access two different boxes. The first one contains the identities linked to the selected identity. The second one shows the identities to which the selected identity is linked.
- The **Profiles tab** is very useful to add further information to specific groups of contacts. For instance, if the contact is a client, then you will probably have to register additional client-specific information. Each time you add a new profile to an identity, the fields related to that profile will be added to the identity information. Information on each profile is defined through specific sets of extra fields in the configuration screen (see [Configuration of extra fields](#) on page 47).
- The **Extra fields tab** contains the extra fields defined at the time of your Kleos installation (see [Configuration of extra fields](#) on page 47).
- The **Documents tab** shows the list of documents related to the selected identity. This tab can be used to work with documents in the same way as you would usually work from the documents tab of the case window or the documents screen. Please, look at [The Documents screen](#) on page 80 for a description of the features.
The calendar screen

The calendar screen contains various elements to provide a clear view on your schedule and pending work.

The center of the screen shows a traditional calendar view. At the top center of the screen there are controls to configure the look of the calendar based on different views: Day, Work Week (Monday to Friday), Week (Monday to Sunday), Month and Agenda. The Agenda combines the information from calendar and tasks and shows the next calendar events as a list and the pending tasks. The button “Today” shows the agenda for the current day.

On the left of the screen you have a global view of the calendar on four months. You can use this view to select a specific day, week or month. The days marked in bold indicate scheduled calendar events.

In Kleos, you can view the agenda of two different users simultaneously. To do so, you have to configure the agenda to view a single day. Below the header of the Calendar box two boxes identify the owners of the agenda. If you select two different users, Kleos will display both agendas.
On the right of the screen you will see the list of pending tasks and due dates. You can use the box under the header to apply different filters to the list.

The calendar screen does not include a quick search box. The search option will open an advanced search window. The results of the searches in the calendar screen are displayed as a list.

The calendar menu contains the following options:

- **New.** It opens the event window to create a new calendar event or appointment.
- **Edit.** It opens the event window including the information about the selected calendar event. It is possible to edit all the information on the event, including date and time.
- **Add/New document.** This option allows the creation of a new DOC or DOCX document using a template. A document must be assigned to a case before creating it. It is possible to choose the style sheet and the template. The document will be created using your default text editor. Once saved, the document will be automatically uploaded to the cloud.
- **Add/New e-mail.** This option creates and sends an e-mail optionally using a template. You have to specify a case before writing the e-mail.
- **Add/New memo.** This option creates a new memo using Kleos’s internal text editor. Follow-ups can be assigned to the memo after it has been created.
- **Reports.** This option opens the Report Viewer window. You can use this window to generate and print reports related to calendar events present in your current Kleos configuration.
- **Copy to new date.** This option creates a copy of the selected calendar event in the date and time selected. The description of the calendar event includes a note that the event is a copy of a previous one.
- **Open case.** This option opens the case related to a calendar event or appointment.
- **Go to.** This option allows a quick navigation to a different calendar date.
- **Synchronize with Outlook.** If you have Outlook installed on your computer and it is correctly configured in Kleos, this option will synchronize the calendar events and tasks of Kleos and Outlook.
- **Delete.** This option deletes the selected calendar event.
Event window

The Event window is used to create or edit a calendar event. The window contains two tabs: event and notes. The Event tab contains all the relevant information about an event. The Notes tab allows the insertion of unstructured text notes related to a calendar event.

You can indicate the type of event using the type field. In Kleos, from a practical point of view, there is no difference between meetings, appointments or hearings. All of them are just different types of calendar events.

Under the Additional Fields header there are five buttons:

- New task
- New appointment
- New activity
- New document
- New e-mail

These buttons create elements related to the new or updated activity. For instance, if you select new task, after saving the event Kleos will create a new task through the corresponding dialog window. It is possible to combine these buttons in the way you like.

The Notes tab includes three basic features:

- Add. This option creates a new text note using Kleos’s internal simple text editor.
- Edit. This option allows editing the selected text note.
- Delete. This option deletes the selected text note.
**Tasks screen**

The Tasks screen contains the list of tasks. You can use the quick filters in the top center of the screen to arrange the list. It is possible to display only the pending tasks of the full list of tasks. You can also display only the tasks assigned to you or the tasks of all users. The authorization scheme defined in the configuration of your Office will determine the tasks that a user can or cannot see.

The search box performs searches using the subject of the task and the description as criteria. The advanced search is similar to other Kleos advanced searches. It allows a combination of all the fields to carry out complex searches.

As in other Kleos screens, it is possible to reuse previous searches or to save your search criteria for a later use.

The tasks menu contains the following options:

- **New.** This option opens the task window to create a new task.
- **Edit.** This option opens the task window and includes all the information of the selected task.
- **Set as completed.** This option marks the selected task as completed. The task will no longer be displayed in the list as a pending task.
- **Add/New document.** This option allows the creation of a new DOC or DOCX document using a template. You have to assign the document to a case before creating it. It is possible to choose the style sheet and the template. The document will be created using your default text editor. Once saved, the document will be automatically uploaded to the cloud.
- **Add/New e-mail.** This option creates and sends an e-mail optionally using a template. You have to specify a case before writing an e-mail.
- **Add/New memo.** This option creates a new memo using Kleos’s internal text editor. Follow-ups can be assigned to the memo after it is created.
- **Reports.** This option opens the Report Viewer window. You can use this window to generate and print the reports related to tasks present in your current Kleos configuration.
- **Open case.** It opens the case related to the task.
- **Synchronize with Outlook.** If you have Outlook installed on your computer and it is correctly configured in Kleos, this option will synchronize the calendar events and tasks of Kleos and Outlook.
- **Delete.** This option deletes a selected task.
**Task window**

The task window is used to create new tasks or to edit existing ones. The window contains two tabs: task and notes. Task contains all the relevant information about a task. Notes allow the insertion of unstructured text notes related to a task.

As in the calendar event window, there are five buttons under the Additional Fields header:

- New task
- New appointment
- New activity
- New document
- New e-mail

They work exactly in the same way as in the calendar event window (see Event window on page 77).

The Notes tab includes three basic features:

- Add. This option creates a new text note using Kleos’s internal simple text editor.
- Edit. This option edits the selected text note.
- Delete. This option deletes the selected text note.
The Documents screen

The Documents screen shows the list of documents stored in Kleos. The list can be arranged using Kleos’s standard features described in the **Common elements** on page 55.

At the top centre of the screen there is a quick filter to display the latest document or all the documents. With the search box you can search documents by name and description. The drop-box list can be used to recover the latest searches and the stored ones.

Advanced search allows a combination of all the fields related to documents to perform more complex searches. The search results can be filtered by document type. Documents can be searched by content using the full text search.
The Documents menu is located in the top right corner of the list of documents. It contains the following options:

- **New document.** This option creates a new DOC or DOCX document using a template. The document must be assigned to a case before creating it. It is possible to choose the style sheet and the template. The document will be created using your default text editor. Once saved, the document will be automatically uploaded to the cloud.
- **New e-mail.** This option creates and sends an e-mail optionally using a template. You have to specify a case before writing the e-mail.
- **New memo.** This option creates a new memo using Kleos’s internal text editor. Follow-ups can be assigned to the memo after it is created.
- **New phone report.** This option creates a phone report using Kleos’s internal text editor. It is possible to include the identities (contacts) related to the phone report. Follow-ups can be defined for the phone report after it is created.
- **Import file.** This option opens a dialog window to import a file into Kleos. The file will be uploaded to Kleos once you have chosen the case and the file. You can also import files to Kleos with the drag-and-drop feature.
- **Import e-mail.** This option connects Kleos with the e-mail server of your e-mail accounts registered in Kleos. The dialog window shows the list of e-mails stored in the e-mail server. To import an e-mail as a document, you have to select the e-mail and choose the case.
- **Edit.** This option downloads the selected document from the cloud and opens it with the appropriate software installed on your computer. If you edit a DOC or DOCX file, Kleos will open the document using your default text editor. If the document is a PDF file, Kleos will use your default PDF browser. If the document is a memo or a phone report, Kleos will use its internal text editor. An updated version of the document will be uploaded to the cloud when you complete the edition and close the editor saving the file.
- **View.** This option downloads a copy of the selected document and opens it using the appropriate software. The original document will not be updated in the cloud.
- **Send.** It is the equivalent of the “New e-mail” option, but here the selected file is added to the e-mail as an attachment. If the selected file is not a PDF, Kleos will offer the choice to convert the document into a PDF and send it, instead of the original editable document.
- **Edit and close a follow-up.** This option manages follow-up assignments of a selected document. With the edit option you can create a new follow-up or modify an existing one. The Close option will remove the follow-ups assigned to the selected document.
- **PDF/Create.** This option is only available for DOC and DOCX documents. It creates a copy of the selected document in PDF format. The PDF version of the document will be stored as a complement to the original DOC/DOCX document. By default, PDF files are generated on your local computer. A virtual printer installed on your local computer is required (for instance, PDFCreator). It is possible to configure Kleos to generate the file using a generic PDF generator hosted in the Kleos cloud. To activate this option navigate to the configuration screen / general tab / my preferences button /Documents tab. See Part 4 - Reference, The configuration screen, General on page 92.
- **PDF/View.** With this option you can view the PDF version of a document, which should have already been created using the PDF/Create feature.
- **PDF/Delete.** This option deletes the PDF version of a document previously created through the PDF/Create function.
- **Property.** This option shows a dialog window to change the name, description or case of a selected document.
- **Print.** Prints the selected document.
- **Copy to.** This option generates a local copy of a document. You have to choose the file system folder through a dialog window. It is possible to select many documents and download all of them at the same time. In this case, all the documents will be downloaded to the same file system folder.
- **Duplicate.** This option creates a duplicate of a selected document.
- **Authorization.** With this option you can manage a document’s access rights. It is possible to grant or revoke access authorizations for each document in the database.
- **History.** This option shows a dialog window with the list of the editing actions on a selected document.
• Reports. This option opens the report selection window. Through this window it is possible to select and print reports related to documents.

• Refresh. This option refreshes the list of documents. The updated list will keep the same search criteria as the previous list.

• Check-in. This option checks if a selected document is currently being edited. If this is the case, its updated version (open in the text editor) will be uploaded to the Kleos cloud replacing the stored one.

• Undo changes. This option checks if a selected document is currently being edited. If this is the case, all the changes are discarded and the document stored in the cloud is downloaded and opened again.

• Delete. This option deletes a selected document.

The recommended way to import documents to Kleos is through the drag-and-drop feature. You simply need to drag a file from your file system and drop it into Kleos. If you drop the document into a case window, the document will be automatically assigned to the case. If you drop the document into the documents screen, you will have to choose the case using a drop-box list.

It is possible to drag-and-drop more documents simultaneously. Select all the documents you want to import and drop them into Kleos. Using this option, you can import documents sequentially through a separate dialog window for each document, or you can import all the documents at once using the “Bulk import” option. The Bulk import option assigns all the documents to the same case.

The activities screen

The activities screen contains the list of the activities and billing items (see Activity management on page 35 to learn more about the difference between activities and billing items).

At the top centre of the screen there are the quick filters to quickly recover all the activities, the activities of the current month and the activities of the current day. It is also possible to list your activities as well as the
activities of all the firm’s users. The list of activities is filtered according to the configured authorizations, i.e. you can only see the activities of the users for whom you have been granted authorization.

You can switch between activities and billing items using the tabs in the bottom left corner of the screen.

The search box searches activities by type and description. You can recover the latest searches and the stored ones from the drop-box list located on the right of the search box. Advanced search combines the information fields related to activities to perform complex searches. It is possible to save the search criteria for later use from the drop-box list of the search box or using the stored searches button.

The menu of the activities screen includes the following options:

- **New.** This option creates a new activity using the activity window.
- **Activities sheet.** This option opens the activities sheet (see activities sheet chapter, page #).
- **Edit.** This option opens the selected activity in the activity window.
- **Reports.** This option opens the report selection window. Through this window it is possible to select and print the reports related to activities and billing items.
- **Open case.** This option opens the case related to an activity.
- **Recalculate.** This option is only active in the activities tab. It is unavailable in the billing items tab. Through this option it is possible to select a new fee table for the selected activity, and to recalculate the monetary value of the billing items included in the activity.
- **Set as billed.** This option marks the selected activity as billed.
- **Delete.** This option deletes the selected activity.
The activity window

The activity window is used to create and edit activities. The upper part of the window contains information related to an activity. The lower part contains the list of the billing items included in an activity.

![Activity Window](image)

From a technical point of view, an infinite number of billing items can be included in an activity. On the other hand, each kind of activity is made up of a logical and limited number of billing items. Your default Kleos configuration includes a standard set of activities. Each one is pre-configured to include a logical set of billing items by default. This configuration can be customized from the configuration screen (see handbook for administrators, configuration of activities and billing items, page #).

The menu of the billing items box contains the following options:

- **Add fee.** Creates a new billing item structured as a fee.
- **Add expense.** Creates a new billing item structured as an expense.
- **Delete.** Deletes the selected billing item.
- **Recalculate all.** This option recalculates the total value of the activity by computing the updated values of the billing items.
- **Restore rate.** This option is only active if you have changed the value of the rate of any of the billing items. The option restores the rates to their original value.

To edit a billing item from the list, simply click on it and change the desired values of the fields.

The activity window is slightly different when you use it to create or edit activities. When you use it to create a new activity a new button appears next to the “Ok” button. The “Ok>New” button saves the current activity in the Kleos database and opens a new empty activity window.
The activities sheet

The activities sheet is the quickest way to register a set of activities. In many Law Firms it’s the lawyer or assistant who register activities and billing items as a batch task, once per week or once per month. The activities sheet is an alternative data entry tool to the standard activity window. It has been designed to boost the productivity of the data entry task.

The window shows a list of both activities and billing items with a simple tree structure. It is very easy to work with the activities sheet, but you have to follow a systematic procedure (please see Activity management on page 35).

The menu of the activities sheet contains the following options:

- **New activity.** This option creates an activity according to the selected type and the corresponding billing items as defined in your personal Kleos configuration.
- **New billing item.** This option creates a billing item according to the selected type and assigns it to the selected activity. You can add as many billing items of a certain type as you want to an activity.
- **Set billing status.** This option updates the status of an activity as billable or not billed.
- **Delete.** This option deletes a selected activity or billing item.
- **Set work type.** This option updates the type of an activity as normal or urgent.
- **Expand all.** This option expands the tree of activities and billing items. As a result, the list will show all the activities and billing items.
- **Collapse all.** This option collapses billing items into activities. As a result, the list will only show activities.

It is possible to expand or collapse the billing items of an activity by clicking on the small arrow on the left of the activity icon.

It is possible to create activities and billing items using the buttons above the list as well as keyboard shortcuts:
- New activity button or Control-A. This option creates a new empty activity. The related billing items will be created when the type of activity is selected.
- New billing item button or Control-B. This option creates a new empty billing item inside the selected activity. This is the most practical way to create a new billing item of a type not included by default in the selected activity type.

**The billing screen**

The billing screen displays the list of billing documents. The list can be filtered by accounting and type of documents.

The menu includes the following options:

- New invoice. This option creates a new invoice from existing activities and billing items or by creating new ones. An accounting and a journal must be selected before completing the selection of the billing items.
- New credit note. This option creates a new credit note. Credit notes have a standard structure. You will be required to set the amount of the credit note.
- New rollback credit note. This option creates a new rollback credit note for the selected invoice.
- New provision note. This option creates a new provision note. Provision notes have a standard structure in Kleos. It is possible to define amounts for disbursements and fees and expenses.
- Edit. Opens the selected billing document for editing.
- Generate document. Generates a new billing document from the list of templates.
- Send as e-mail. Sends the selected document by e-mail. The billing document has to be defined as final.
- Print. This option allows the printing of the selected billing document.
- Open case. This option opens the case related to the selected billing document.
- View document. This option opens a read-only copy of the billing document using the default PDF browser.
- Reports. This option opens the Report Viewer window. You can use this window to generate and print reports related to billing documents.
- Open accounting entry. This option opens the accounting entry related to the selected billing document in the accounting screen.
- Copy to. This option generates a local copy of the selected billing document.
- Refresh. This option refreshes the list of elements.
- Delete. This option deletes the selected billing item.
The accounting screen contains all the information related to the Kleos accounting system. The information is structured on various tabs.

- The Journals tab contains the list of journals. Each one contains the list of accounting entries. It is possible to filter the list by interval of dates and accounts.
- The Searches tab performs advanced searches to recover specific accounting entries.
- The Others tab includes country-specific lists of accounting entries.
- With the Reports tab you can select and print reports related to the accounting system.
- The Export tab contains the list of exports made by users. It is possible to view the content of the exports using the “Open export” option. It is also possible to create new exports.
- The Reminders tab defines reminders related to accounting. Reminders are related to a case and include a minimum amount. When the cumulated amount pending of billing is greater than the minimum amount, an alert is displayed.
The configuration screen

Desktop
The desktop is designed to select the tiles that will appear on the main screen of Kleos.

The desktop can be configured using any combination of tiles. Click on the boxes to select or deselect the tiles.

Office
The Office section of the configuration screen is used to configure the information of your Legal Firm.
The Office section contains the following elements:

**Office**

This option displays general information about the Firm. Office data is stored in a special identity record. Click on the “Open” button to edit the information. This button will open a specific version of the identity window (see Identity window on page 73).

**Office location**

This option displays the list of your Firm’s locations. Kleos is configured with one location by default, but more can be added. To do so, use the New button in the menu located in the top right corner of the screen.

**Office members**

This option displays the list of Office members. The Office members are registered as identities in Kleos. It is not mandatory to register all the members of a firm. Vice versa, all the Kleos users must be registered as identities.

The identity window used to register the Office members contains an additional Accounts tab. It is used to define the Kleos account assigned to the Office member.
The User Accounts Wizard is a tool to create a new user and to simultaneously assign him/her a Kleos user account. Following a step-by-step procedure, you will first provide the basic information on the Office member (full name, group and profile), then you will assign a Kleos account.

Office member groups
This option selects the list of user groups. To include an Office member into a group, click on the group to edit it and on the Office member using the corresponding button. You can define as many groups as you like. It is possible to include the same user in more groups.

Contract & Authorizations
This option contains three buttons:

- **Contract manager.** The contract manager contains the summary of Kleos of your firm. The cloud space available for your documents is displayed at the bottom of the window.
- **Authorization manager.** This is one of the main components of the Kleos configuration. It contains the authorization grants for each group of Kleos users. Select the group in the left box, then select the area in the middle box and assign or revoke the specific grants in the right box (see Handbook for administrators).
- **Contract information.** This option opens the summary of your Kleos licenses in a browser.
- **Activities log.** This option displays the details of the activities of the Kleos Office users. It is possible to filter the list by users and dates.

![Authorization Manager](image)

**Case**

From the Case section of the configuration screen you can configure the types of cases, the types of party types, the conflict check rules and the detailed authentication profile for case management. It contains the following options:

**Case numberings**

This option defines the format of case numbering. Kleos is configured to use two different numberings by default, one for open cases and one for archived cases. It is possible to define additional number sequences.

The menu of the case numbering option contains three elements:

- **New.** This option defines a new numbering sequence.
- **Edit.** With this option you can change the configuration of the selected numbering sequence.
- **Delete.** This option deletes the selected numbering sequence.
Numbering sequences are built combining different elements such as date, separators and sequences. It is possible to define almost any type of sequence. To include a new element into a sequence click on the “Add” button and select the type, value and format.

Case types
Configuring case types is usually one of the most important steps in the Office configuration. Kleos’s default configuration contains a small set of the most frequent case types. Most Offices have to define a new list of case types more relevant to the Firm’s specialization.

The menu contains the following options:
- New. This option defines a new case type.
- Edit. This option edits information on the selected case type.
- Deactivate. This option deactivates the selected case type.
- Reactivate. This option is hidden unless the user selects it to show not active case types. It allows the reactivation of a deactivated case type.
- Show/hide not active. This option shows or hides the case types defined as not active.

It is possible to define specific extra fields for each case type. The extra fields for case types do not override the general extra fields for cases (see configuration, general, extra fields for cases). It is a complementary definition of extra fields. If you have defined general extra fields for cases and specific extra fields for a case type, the case window will show both sets of extra fields.

The definition of extra fields for case type is exactly the same as the definition of generic extra fields (see Configuration of extra fields on page 47).
Case party types

Kleos’s default configuration includes a set with the most frequent party types. The list of party types can be edited. Party types are displayed in the case window sorted in the same order of the list displayed on the configuration screen. It is possible to move party types up and down the list to fit your sorting preferences.

The menu contains the following options:

- New. This option defines a new party type.
- Edit. This option edits information on the selected party type.
- Move up. This option moves the selected party type one position up.
- Move down. This option moves the selected party type one position down.
- Deactivate. This option deactivates the selected party type.
- Reactivate. This option is hidden unless the user selects it to show not active party types. It allows the reactivation of a deactivated party type.
- Show/hide not active. This option shows or hides the party types defined as not active in the list of party types.

It is possible to define specific extra fields for each party type. Extra fields for party types are defined exactly in the same way as other extra fields (see Configuration of extra fields on page 47).
Conflict check rules

The “conflict check rules” is a mechanism provided by Kleos to alert of potential conflicts of interest between the parties in different cases. Kleos allows the definition of simple conflict rules establishing that an identity acting as a specific party type cannot be defined as specific party type in any other case. For instance, an identity acting as “opposing party” in one case cannot be defined as client in another case.

Conflict check rules may be defined as active or inactive. An active rule will prevent the definition of an identity as a party in a case. An inactive rule will display a warning but won’t prevent the definition of the conflicting identity as a party in the case.

The menu contains the following options:

- New. This option defines a new conflict check rule.
- Edit. This option updates the selected conflict check rule.
- Delete. This option deletes the selected conflict check rule.

Authorization profile

Authorization profiles are a pre-defined set of specific access rights to cases. Kleos can use authorization profiles to handle case data. Each profile describes the specific permissions granted to each user or group of users. When an authorization profile is assigned to a case, the case automatically inherits all the permissions defined in the profile.
The same authorization profile can be assigned to many different cases, making it easier to configure access rights to cases.
Identity
Identity link types
In Kleos you can define any kind of relationship between identities. Kleos’s default configuration includes the most frequent types of relationships, but it is possible to define new ones and to customize the existing ones. The menu contains the following options:

- New. This option defines a new identity link type.
- Edit. This option updates the selected identity link type.
- Delete. This option removes the selected identity link type.

In Kleos it is possible to add further information to better describe connections between identities. For instance, a link can be defined to describe that an identity describing a physical person is an employee of an identity describing a corporation. This link can be named “employee”. Kleos allows the definition of custom extra fields as part of the definition of “employee”. For instance, you can include the employee’s position and department. This information is defined as extra fields of the link type (see Configuration of extra fields on page 47).
Profiles
Profiles are used to describe specific groups of users. For instance, it is possible to define groups for lawyers, experts, notaries or any other type of identities.

The menu contains the following options:

- New. This option defines a new profile.
- Edit. This option updates the selected profile.
- Delete. This option removes the selected profile.

Profiles are very useful to register additional information on identities. Kleos allows the definition of additional extra fields for each profile, including all the information on an identity’s profile (See identity window, page 76).

Additional information linked to profiles is defined as extra fields (see Configuration of extra fields on page 47).
Calendar, tasks and deadlines

Event/Task type

Kleos’s default configuration includes a wide set of calendar event types and task types. It is possible to define new types or to customize the existing ones.

In Kleos, calendar events, tasks, and deadlines have the same data structure. They are all defined from the same window. The window changes dynamically to display the information related to calendar events or tasks.

The menu contains the following options:

- **New.** This option defines a new event or task type.
- **Edit.** This option updates the selected event or task type.
- **Delete.** This option removes the selected event or task type.

The edition window is slightly different for calendar event types and task types. When you create a new type, the window displays the configuration of a calendar event. If you define the element type as a task, the window changes its configuration. In terms of data structure, tasks include a field labelled as reminder. This field indicates when a reminder of the task will be included in the task box of the desktop by default.

Kleos handles deadlines as a special type of tasks. To define a deadline type just select “deadline”. The sequence of tasks related to that deadline will be displayed between generic information and location information.
The sequence of tasks has a specific menu:

- **New.** This option defines a new task as part of the sequence of tasks related to the deadline. Select the type of task and the number of days in which the task should be completed.
- **Edit.** This option edits the selected task of the sequence.
- **Delete.** Removes the selected task from the sequence.

**Documents**

**Document templates**

Templates are the main component of Kleos’s document automation features. Templates can be defined as pre-written blocks of text including assorted tags and metadata. Kleos combines templates with contextual information stored in the database to create full documents. This way of working saves a lot of time in document processing.

Please, see **Configuration of templates** on page 50 to learn more about how to define new templates.

The menu contains the following options:

- **Edit.** This option opens the selected template using the default text editor configured in your local computer (usually MS Word).
- **Delete.** This option removes the selected template.
- **Import template.** With this option you can upload a file from your computer to Kleos to be used as a document template.
- **Import e-mail template.** With this option you can upload a file from your computer to Kleos to be used as an e-mail template.
- **Import text block.** With this option you can upload a file from your computer to Kleos to be used as a text block. Text blocks are used from templates to generate more complex documents.
- **View.** This option uploads the copy of a selected item (template or text block) to view it in your default text editor.
- **Duplicate.** This option generates a copy of the selected template in the Kleos database. This is the recommended way to generate new versions of a specific template.
- **Check in.** This option uploads the template that you are currently editing in your word processor to the Kleos database.
• Undo changes. This option discards the changes you have made to the template that you are currently editing using your text editor.
• Properties. This option displays a dialog window that could be used to edit name, description, virtual folder and other information on the selected template.

Others – Document work folders
Case documents are organized in virtual folders. With the “Document work folders” you can edit the structure of the virtual folders. All cases have the same folder structure.

The menu contains the following options:
• Add. This option creates a new folder which will be stored in the selected folder. To create a new folder at the top of the hierarchy you have to select the Documents folder.
• Edit. This option edits the name of the selected folder.
• Delete. This option deletes the selected folder. All the sub-folders defined inside the selected folder will also be removed.
**Activities**

**Activity types**

An activity is a specific task that could be billed to a client. Activities belong to a specific activity type. Each activity type can contain several different billing items. For instance, a representation activity may include a professional fee and many expenses (travel tickets, hotel and lunches).

From a practical point of view, activity types can be defined as a way of aggregating billing items under a name that makes sense from a business point of view.

The menu contains the following options:

- **New.** This option creates a new activity type.
- **Edit.** This option edits the selected activity type through the activity type window.
- **Deactivate/Reactivate.** Activities can’t be removed from the Kleos database because this could produce integrity errors in the historical data. For this reason, you have to deactivate the activities that you don’t want to use any more. It is possible to reactivate a deactivated activity type.
- **Show/Hide not active.** This option switches between displaying and hiding deactivated activity types in the activity types list.

![Activity Window]

Each activity type contains a list of specific billing items by default. It is possible to add, edit or remove billing items from the list.
Billing item types
This topic is displayed below the Activities tab only when the user account doesn’t include the billing module. Otherwise, billing item types are configured in the billing tab.
Billing items are the basic units used to compute the amount of invoices. A billing item represents a specific type of fee, expense or disbursement.

The menu contains the following options:
• New. This option creates a new billing item. The field Kind indicates if the billing item is a fee or an expense.
• Edit. This option edits the selected billing item from the billing item window.
• Deactivate/Reactivate. It is not possible to remove billing items from the Kleos database. You have to deactivate the billing items that you don’t want to use any more. It is possible to reactivate a deactivated billing item.
• Show/Hide not active. This option switches between displaying and hiding deactivated billing items in the billing items list.

Fee tables
Fee tables contain the default values for the billing items. Each fee table contains a list of billing items including a default value. You can define as many fee tables as you want.

The menu contains the following options:
• New standard fee table. This option creates a standard fee table using the fee table window.
• New custom fee table. This option creates a custom fee table. The difference between standard and custom fee tables is that the latter can be defined as “related”, which can be described as the condition allowing the use of custom fees instead of standard ones.
• Open. This option opens the selected fee table in the fee window.
• Deactivate/Reactivate. It is not possible to remove fee tables from the Kleos database. You have to deactivate the fee tables that you don’t want to use any more. It is possible to reactivate a deactivated fee table.
• Duplicate fee table. This option creates a duplicate of the selected fee table.
• Derive fee table. This option creates a new fee table using the same valid dates as the selected one.
• Show/Hide not active. This option switches between displaying and hiding the deactivated fee tables in the fee tables list.

The fee window is used to define the fees of the billing items. The list of fees is built using the menu placed above the list of billing items and fees. It contains the following options:
• New specific fee. This option defines a new fee for a type of billing item.
• New generic fee. This option defines a new fee for a specific billing item.
• Open. This option opens the selected fee in the fee window.
• Delete. This option deletes the selected fee.
See **Configuration of activities and billing items** on page 52 to learn more about how to define and use fee tables.

**Calculations**

**Interest types**

This configuration option allows the definition of different interest types. Interest types are used to calculate the economic value of several billing items.

It is possible to define as many interest types as wished. The menu contains three options: New, Edit and Delete, through which interest types can be created, modified or removed.

The creation and edition of interest types occurs through the interest type window.
For each interest type it is possible to define different values for different time intervals. Use the button Add to include a new rate and time interval. The Edit button updates the value of the rate or the time interval. It is not possible to define overlapping time intervals for the same interest type.

**General**

**Extra fields for cases**

Extra fields for cases are a mechanism to expand structured information registered in cases. All the extra fields defined in this section will be available inside all the cases of your database, including those created before the definition of the extra fields.

The extra fields are created using the Extra fields for the cases window.

The menu of the window contains the following options:

- **Add group.** All the extra fields should be added to a group of fields. This option creates a new group. To create a new group, click on this button and enter a name.
- **Add field.** This option creates a new field inside a selected group. The first step to create a field is to define its type. Once the type has been defined, the window configuration changes to display additional information related to the values allowed for the new field.
- **Move up/down.** This option moves a selected field or group up and down the list.
- **Delete.** This option deletes a selected field or group.
- **Preview.** This option displays a preview of how groups and fields appear in the case window.

See **Configuration of extra fields** on page 47 to learn more about extra fields.
Extra fields for identities

The extra fields for identities allow the definition of additional structured information for identities (contacts). All the extra fields defined in this section will be available for all the identities of your database, including those created before the definition of the extra fields.

Extra fields are created using the Extra fields for identities window.

The menu of the window contains the following options:

- **Add group.** All the extra fields should be added to a group of fields. This option creates a new group. To create a new group, click on this button and enter a name.
- **Add field.** This option creates a new field inside a selected group. The first step to create a field is to define its type. Once the type is defined, the window configuration changes to display additional information related to the values allowed for the new field.
- **Move up/down.** This option moves a selected field or group up and down the list.
- **Delete.** This option deletes a selected field or group.
- **Preview.** This option displays a preview of how groups and fields appear in the identity window.

See *Configuration of extra fields* on page 47 to learn more about extra fields.

Suggestions

Kleos allows the registration of different lists of predefined treatment and protocol titles. They are used in the relevant edit windows as suggested text. It is possible to register titles for natural identities (individuals), titles for legal identities (companies, corporations and government entities), address forms and address types.

All of them are stored as unstructured lists.
E-mail accounts
This option opens the e-mail accounts window to display the list of registered e-mail accounts. It is possible to define as many accounts as needed, but only one can be defined as default.

The menu of the window contains the following options:
- Add. This option launches the wizard for the configuration of e-mail accounts.
- Edit. This option edits information on a selected e-mail account. The initial window contains the basic configuration parameters of the account. To edit the technical details click on “Show provider configuration”.
- Delete. This option deletes the selected e-mail account.
- Set as default. This option sets the selected e-mail account as the default account.

See Configuration of on page 49 to learn more about the configuration of e-mail accounts.

My preferences & Global settings
Each of these options opens a window allowing the configuration of several specific parameters related to the general behavior of Kleos and some of its main data entities.

It is possible to configure the following parameters:

My preferences
- General tab
  - Show document compiler errors. When this option is active, Kleos will display the errors related to the integration of the templates’ variable fields when a document is open in MS Word.
  - Template editor. It is possible to choose between the internal editor and the default external application (usually MS Word).
  - Import e-mail from Outlook. It is possible to choose between EML or MSG formats.
  - Enable delivery receipts. When active, e-mails are sent including the delivery receipt request.
- Enable read receipts. When active, e-mails are sent including the read receipt request.
- Use advanced e-mail editor. When active, the e-mail editor embedded into Kleos will display all the editing options.
- Regional settings. Opens the regional settings configuration window of your computer.
- External accounting import tool. The external accounting export is an additional module of Kleos. The field describes the location and name of the connector (executable file) that will translate the standard Kleos export to the format of the external accounting software.

**Documents tab**
- Default format for documents. It is possible to switch between DOC and DOCX.
- Enable direct check-in. When active, documents are automatically uploaded to Kleos when you save&close the document in MS Word.
- No silent mode in PDF conversion. When active, Kleos will display the errors and warnings related to local conversion to PDF.
- Read-only files extensions. If the document has any of the extensions included in the list, Kleos will no try to download and open it for editing.
- Enable automatic files import from folders. When active, Kleos will automatically upload all the documents stored in the specified local folder.

**Activities tab**
- Default activity type for stopwatch. This option defines a default activity when the stopwatch is used to create an activity.
- Default billing item for stopwatch. This option defines a default billing item that will be linked to the activity created through the stopwatch.
- Closing a case. Default activity type. This option defines a default activity related to the closing of a case.
- Minimum time elapsed. It describes the minimum length of an activity. It is not allowed to register activities shorter than the defined value.
- Document creation. This set of options defines default activities when phone reports, memos, or documents are created.
- Document import. This set of options defines default activities when documents or e-mails are imported into Kleos.
- Document edit. This set of options defines default activities when phone reports, memos, or documents are edited.

**Events tab**
- Displays the confirmation panel when a calendar appointment is moved. Self-explaining.
- Default event owner. This option defines the default owner of the new calendar event.
- Document creation. This set of options defines default calendar events when phone reports, memos, documents or e-mails are created.
- Document import. This set of options defines default calendar events when documents or e-mails are imported into Kleos.
- Document edit. This set of options defines default calendar events when phone reports, memos, or documents are edited.

**Tasks tab**
- Default task owner. This option defines the default owner of the new tasks.
- Displays deadlines in the scheduler. When active, deadlines are shown in the calendar. When non active, deadlines are shown only in the pending tasks list.
- Document creation. This set of options defines default tasks when phone reports, memos, documents or e-mails are created.
- Document import. This set of options defines default tasks when documents or e-mails are imported into Kleos.
- Document edit. This set of options defines default tasks when phone reports, memos, or documents are edited.
• Synchronization options tab
  o Synchronize items from. This option defines the number of past days that will be synchronized between the Kleos calendar and the Outlook calendar.
  o Default types for appointments and tasks. This option defines default types assigned to appointments and tasks imported from Outlook.
  o Behavior when new Outlook appointment/task. This pair of options defines how Kleos will handle case assignment for the appointments and tasks imported from Outlook.
  o Behavior when items changed both in Outlook and Kleos. This option defines how Kleos will handle conflicts between Kleos’s and Outlook’s agendas. It is possible to give preference to Kleos, Outlook or to display a dialog window when a conflict is detected.

Global settings
• Activities tab
  o Duration. This option defines the format used to describe the length of tasks. It is possible to switch between time format and numerical format.
  o Manage internal rates. When active, this option uses internal rates to calculate activities’ margins.
  o Timesheet day duration. Maximum length of working hours declared in the timesheet.
  o Time slice variation. This option defines the length of the time intervals for the activities.
• Calendar tab
  o Appointment default duration. This option defines the default length of appointments.
  o Working day duration. This pair of fields defines the working day limits.
• Documents tab.
  o Versioning. This set of options defines the configuration of document versioning.
  o E-mail tracking. When active, every time an e-mail is sent, a unique ID is added to the e-mail. This code is used to automatically import e-mails to Kleos.
  o Enable folders management for case. When active, it is possible to define specific folders for each case.
  o Override common set text blocks with local ones in the compiling process. A template can include many text blocks. Sometimes the same variable is defined in more than one text block. This option defines which text block will be used as reference.
• System tab.
  o Force password expiration. When active, Kleos will force the expiration of the password after a specified number of days.
• Identity tab.
  o Enable the identity manager. When active, this option defines a specific person in the Office as preferred contact.

Color for calendar and tasks
This option defines additional colors for calendar events and tasks. It is possible to add as many additional colors as you like.
The menu of the color settings window contains the following options.

- Add. This option adds a new color.
- Edit. This option edits the name or the color of the selected color.
- Delete. This option removes the selected color.

Internet speed test
This option performs a test of the speed of your Internet connection.

Billing
Document models
This topic contains models of invoices, credit notes and provision notes. All of them are managed by Kleos as billing documents.
The menu contains the following options:

- Edit. This option edits the document model through the billing document model window.
- Show/Hide not active. This option switches between displaying and hiding deactivated billing document models in the list.
Document models are created from a pre-defined structure of a standard invoice. It is possible to select which elements will be displayed in the model.

Each document element is linked to a specific credit and debit account. When a billing document is created, the amount of each element is transferred to the corresponding accounts of the accounting module. This is the mechanism used by Kleos to automate accounting.

**Billing item types**

Billing items are the basic units used to compute the amount of invoices. A billing item represents a specific type of fee, expense or disbursement.

The menu contains the following options:

- **New.** This option creates a new billing item. The field Kind indicates if the billing item is a fee or an expense.
- **Edit.** This option edits the selected billing item through the billing item window.
- **Deactivate/Reactivate.** It is not possible to remove billing items from the Kleos database. You have to deactivate billing items that you don’t want to use any more. It is possible to reactivate a deactivated billing item.
- **Show/Hide not active.** This option switches between displaying and hiding the deactivated billing items in the billing items list.
Document templates

This topic creates, edits and deletes templates related to the billing module, mostly invoices.

The menu contains the following options:

- **Edit.** This option opens the selected template using the default text editor configured in your local computer (usually MS Word). Kleos includes an internal template editor that can be used instead of MS Word.
- **Delete.** This option removes the selected template.
- **Import template.** With this option you can upload a file from your computer to Kleos to be used as a document template.
- **Import e-mail template.** With this option you can upload a file from your computer to Kleos to be used as an e-mail template.
- **Import text block.** With this option you can upload a file from your computer to Kleos to be used as a text block. Text blocks are used from templates to generate more complex documents.
- **View.** With this option you can upload a copy of the selected item (template or text block) to view it in your default text editor.
- **Duplicate.** This option generates a copy of a selected template in the Kleos database. This is the recommended way to generate new versions of a specific template.
- **Check in.** This option uploads the template that you are currently editing in your word processor to the Kleos database.
- **Undo changes.** This option discards the changes you have made to the template that you are currently editing using your text editor.
- **Properties.** This option displays a dialog window that could be used to edit name, description, virtual folder and other information of the selected template.
Others / Office expenses
This option configures the default rate for the expenses.

Accounting
Fiscal entity
Kleos includes one fiscal entity by default, but can manage as many fiscal entities as you need. The menu contains the following options:

- New. This option creates a new fiscal entity.
- Edit. This option renames the selected fiscal entity.
- Delete. This option deletes the selected fiscal entity. Kleos’s accounting system requires that at least one fiscal entity is registered in the database.

Accountings
Each fiscal entity of Kleos can have accountings. Fiscal years are defined as a component of accountings.
The menu contains the following options:

- **New.** This option creates a new accounting.
- **New From.** This option creates a new accounting as a copy of the selected one.
- **Edit.** This option opens the accounting window to edit the selected accounting.
- **Delete.** This option deletes the selected accounting. It is only possible to delete an accounting if it doesn’t include any data.
- **Authorization / Authorization Within case.** These options define the granting of access for the accountings.
- **Show/Hidden inactive.** This option displays or hides inactive accountings in the list.

The fiscal year is defined as a component of the accounting.

To create a new fiscal year click on Add button and define the interval of dates (usually a natural year).
Chart of accounts

Kleos includes each country’s standard chart of accounts by default. It is possible to define new accounts and link them to the Kleos accounting system.

The menu contains the following options:

- **New.** This option creates a new account.
- **Edit.** This option edits the selected account.
- **Delete.** This option deletes the selected account. Accounts in use cannot be deleted.
- **Print.** This option opens the report viewer to print the chart of accounts.
- **Show only not used / Show all.** This option switches between displaying only the accounts not used or all the accounts.

Journals

Kleos manages several account journals. Each one is internally related to the corresponding accounts. It is possible to define additional journals if needed.

The menu contains the following options:

- **New.** This option creates a new journal.
- **Edit.** This option renames the selected journal.
- **Delete.** This option deletes the selected journal. Some journals are required for the accounting systems and cannot be deleted.

VAT rates

Kleos can manage different VAT rates. Each VAT rate must have a unique ID code. This code is used in the definition of the structure of the invoices (see Billing on page 109).