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**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.
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 9 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 Error! Bookmark not defined. 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”.
Document management

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

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.

<table>
<thead>
<tr>
<th>Virtual folder</th>
<th>Size</th>
<th>Case reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procedure</td>
<td>27 KB</td>
<td>16/0011 - Gibson/Gallbex</td>
</tr>
<tr>
<td>Briefwisseling</td>
<td>27 KB</td>
<td>16/0024 - Beard/Dawson</td>
</tr>
<tr>
<td></td>
<td>0 KB</td>
<td>16/0003 - Arcane Studio/Nelson</td>
</tr>
</tbody>
</table>

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 Error! Bookmark not defined. to learn more about how to define new templates. See Documents in Part 4 - Reference on page Error! Bookmark not defined. 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 Error! Bookmark not defined. 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 Error! Bookmark not defined. 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:

![Print List](image)

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.