GhostConvey

Version 16

May 11, 2017

LexisNexis®

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Purpose

The purpose of this guide is to illustrate the changes to GhostConvey contained in the version 16 release. These notes supplement the existing training offered at our branches and the material available on the Online Training website.

Scope of the Changes

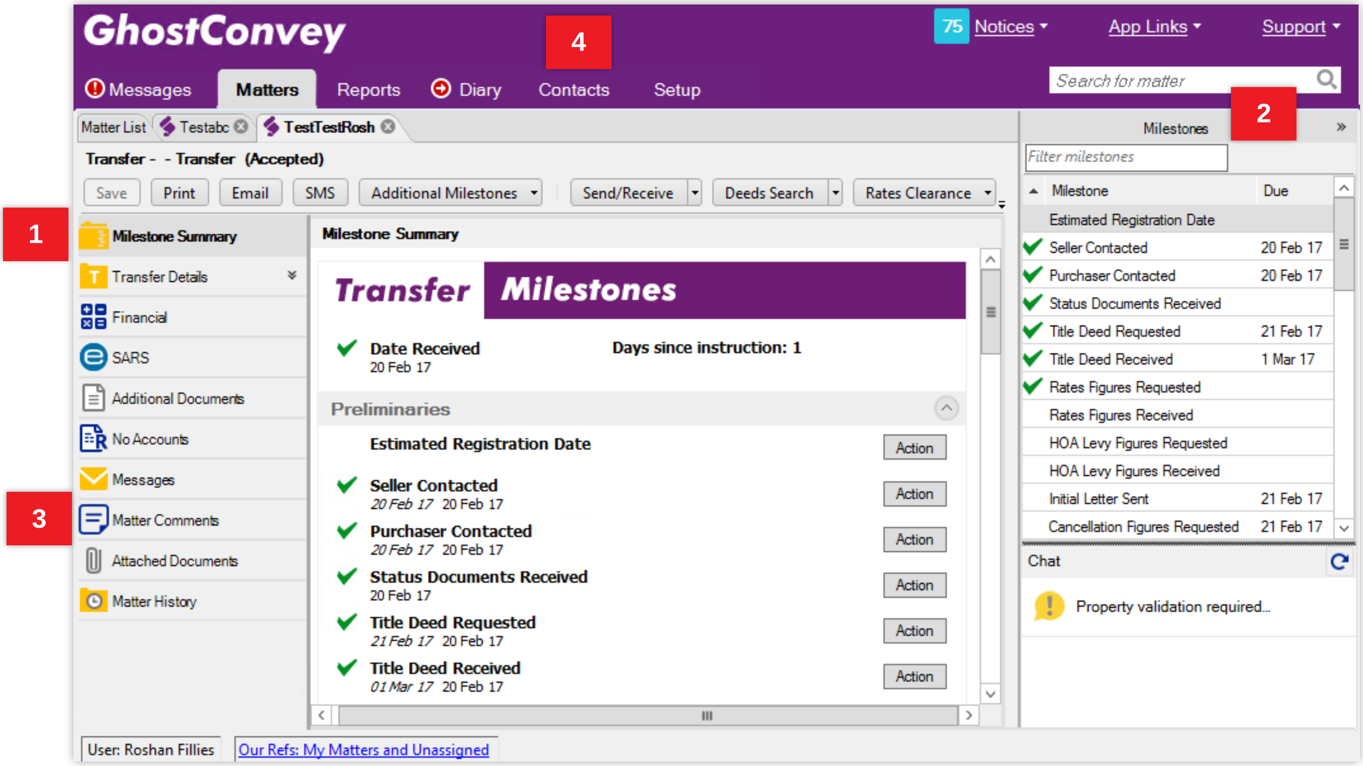
The following new features and/or adjustments are included in the GhostConvey version 16 release:

- Milestone Changes
  - Milestone Summary menu for all matter types
  - Milestone panel
  - Additional (user configured) milestones
- Global Contacts tab
- Matter Comments menu
- Classic Setup migration to .Net
- Workflow customisation
  - Milestone Process Configuration in Setup

Visual Changes

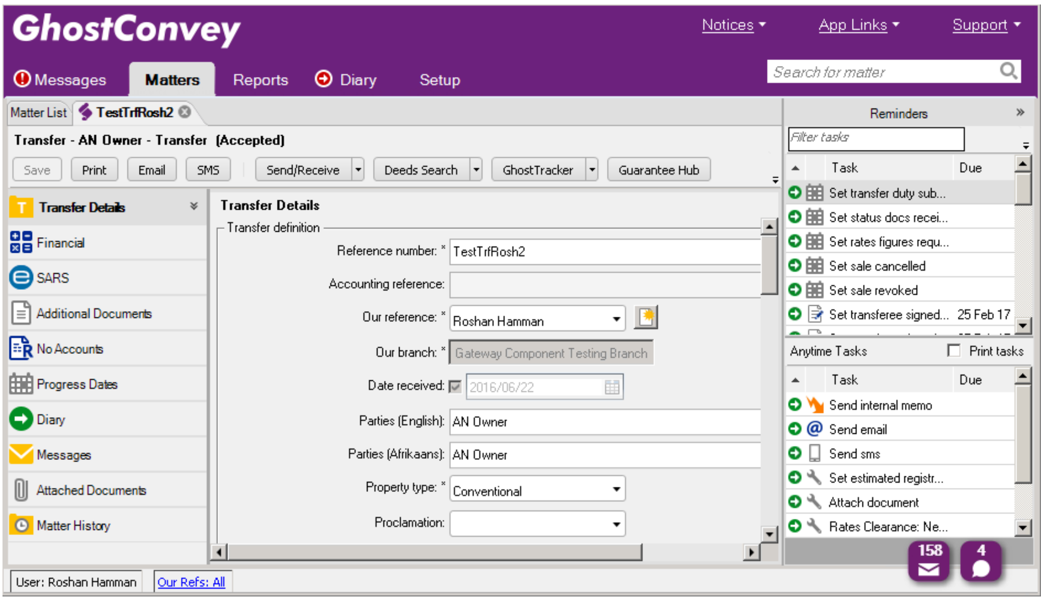
Areas where visible changes have been made to the main matter screen:

1. New **Milestone Summary** menu for all matter types
2. *Reminders* and *Anytime tasks* panel has been replaced with a **Milestones** panel which works hand-in-hand with the **Milestone Summary** menu.
3. New **Matter Comments** menu
4. New global **Contacts** tab



Changes 1 and 2 will only be visible on matters created in GhostConvey version 16.

Existing matters remain unimpacted.



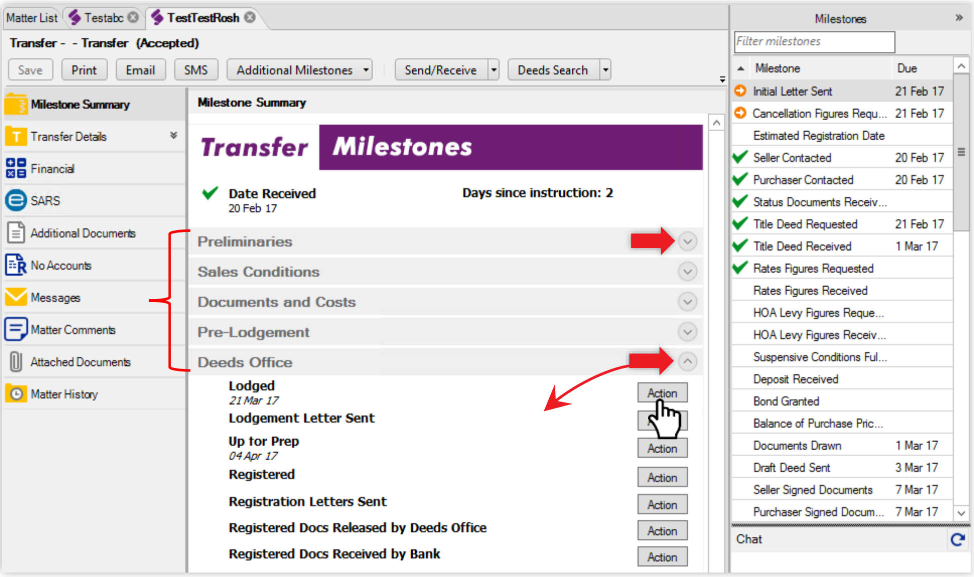
GhostConvey V16 view of a matter created in GhostConvey V15

Milestone Summary Menu

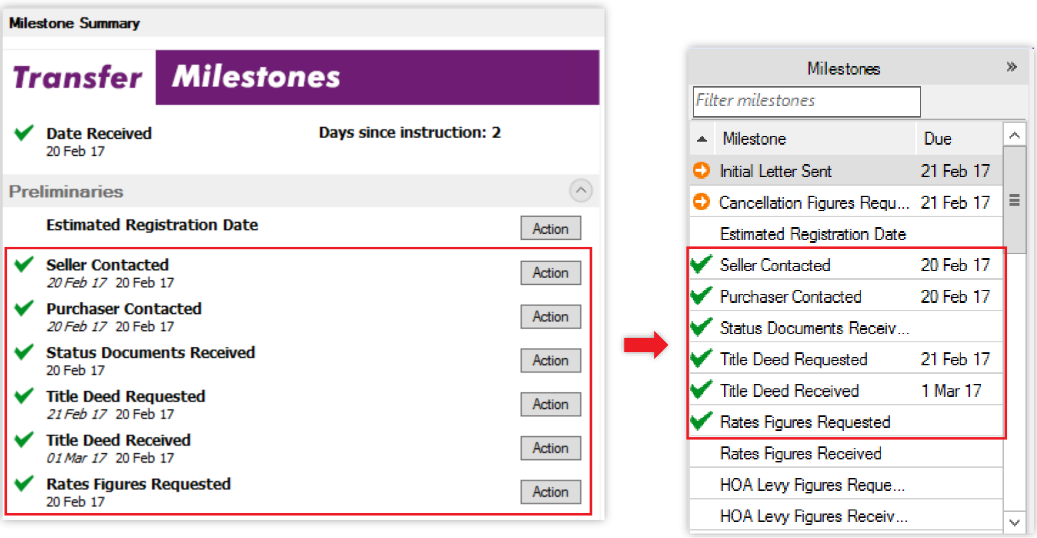
All new matters created in version 16, regardless of matter *type* will have a **Milestone Summary** menu. The **Milestone Summary** menu and **Milestones** panel work hand-in-hand and replace the *Matter Diary* and *Progress Dates* menus.

- The **Milestone Summary** groups are modelled on the basic workflow of a matter from date of instruction until date of registration. These groups can be *expanded* or *collapsed* as needed by clicking on the drop-down arrows at the end of each group heading. The milestones relevant to each group are thus revealed.

- Milestones are processed or completed by clicking on the **Action** buttons.

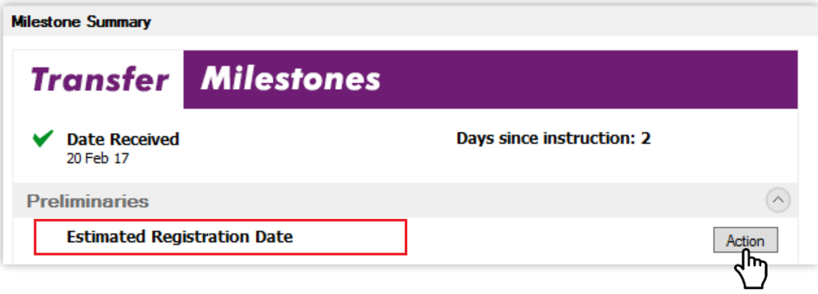


- Once a milestone is actioned the **Milestone** panel is automatically updated.
    - A green tick next to a milestone indicates that it has been actioned.
    - The date in the **Due** column refers to the date on which the milestone was actioned.



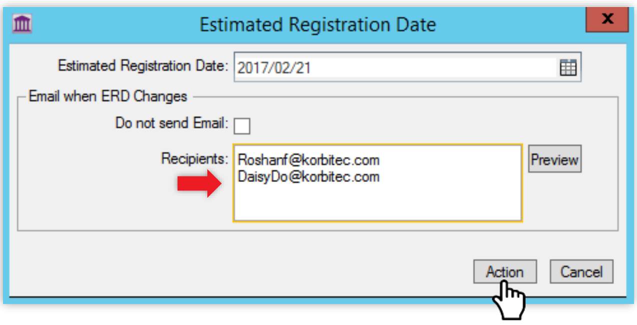
Actioning Milestones

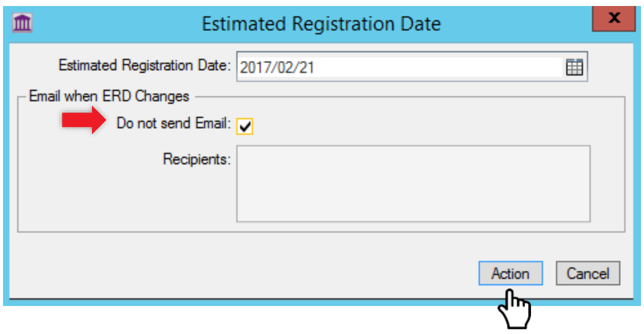
1. On the **Milestone Summary** menu, select the milestone, for example, ***Estimated Registration Date***, and click **Action**.



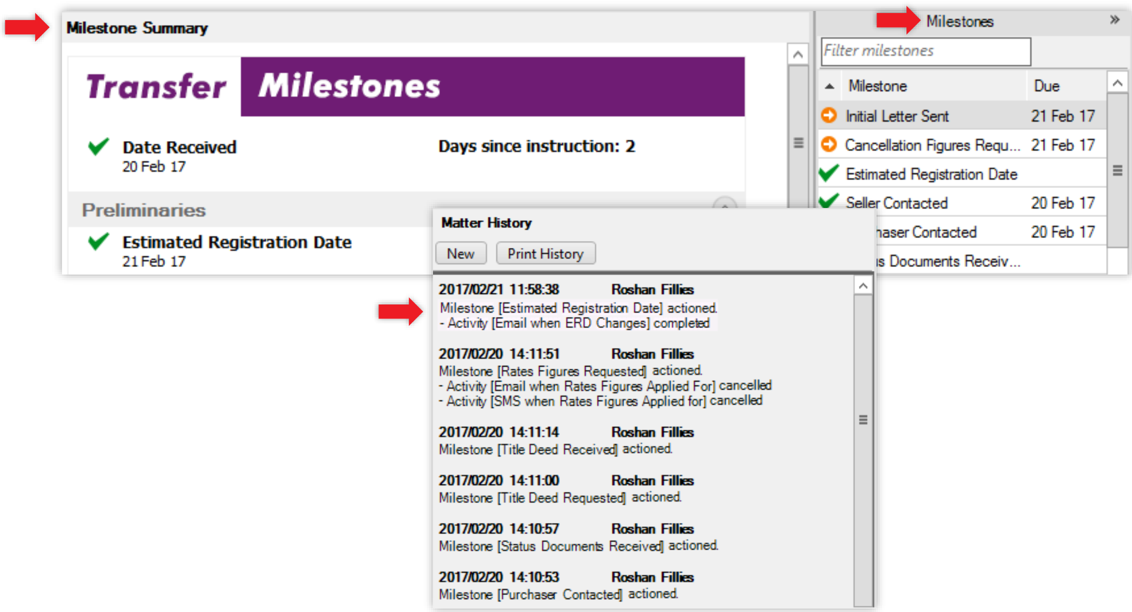
2. When actioning a milestone, the dialog box will display the action date, **Recipients** field (select or capture recipients for email or SMS messages) and a reason field, if applicable. Any user-configured activities associated with the milestone such as notifications, will also be triggered.

   - You can choose to send or not send emails and SMSs. To send the email/SMS, add the recipients and click **Action** or, select the **Do not send Email/SMS** checkbox and then click **Action**.





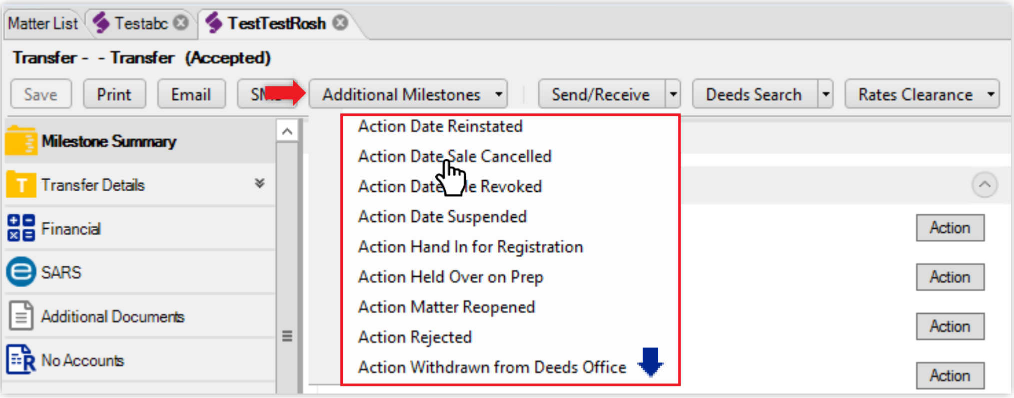
3. The **Milestone Summary, Milestones** panel and **Matter History** will be updated simultaneously.



Additional Milestones

Milestones that do not form part of the core workflow, can be actioned from the **Additional Milestones** drop-down list. These milestones can also be *inserted* into the **Milestone Summary** menu, provided they have been set up to do so. The **Milestone Process Configuration** menu in **Setup** is discussed on page 30.

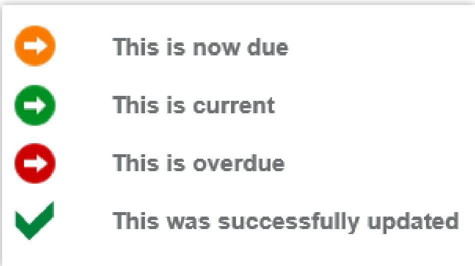
- Additional milestones are actioned by selecting them from the drop-down list and completing any details you are prompted for.
- A blue arrow [ ] indicates that the additional milestone may be inserted into the main workflow.

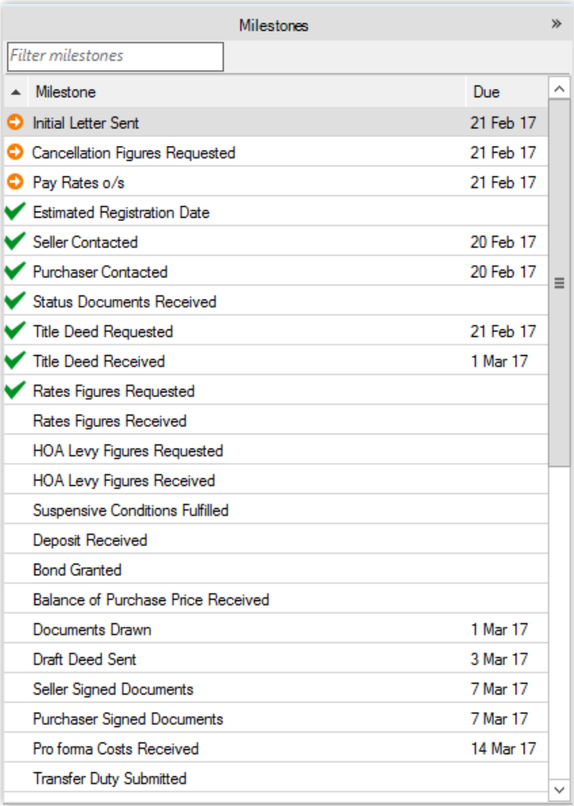


Milestones Panel

The **Milestones** panel replaces the ***Reminders*** and ***Tasks*** panel. All the milestones for the matter are listed here and, if applicable, a due date will be displayed.

- The icons next to each milestone indicates its current state in the workflow.

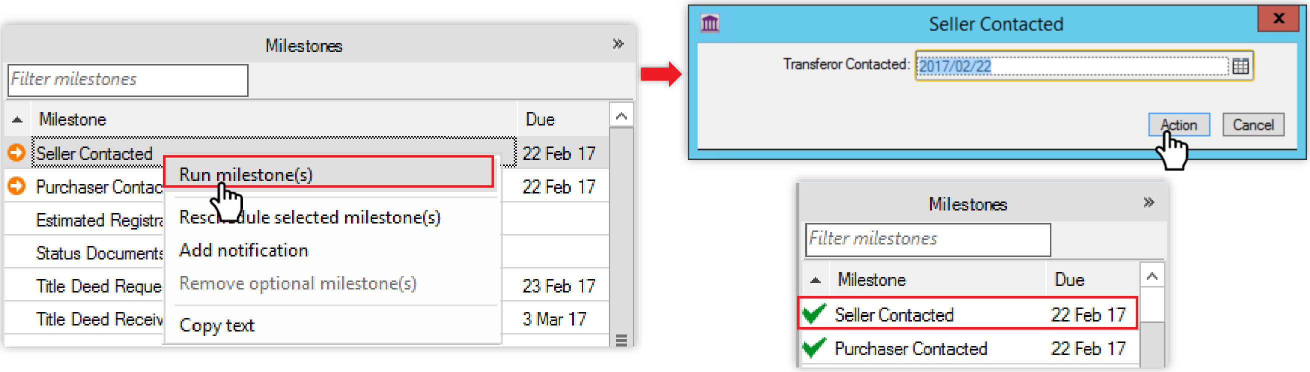




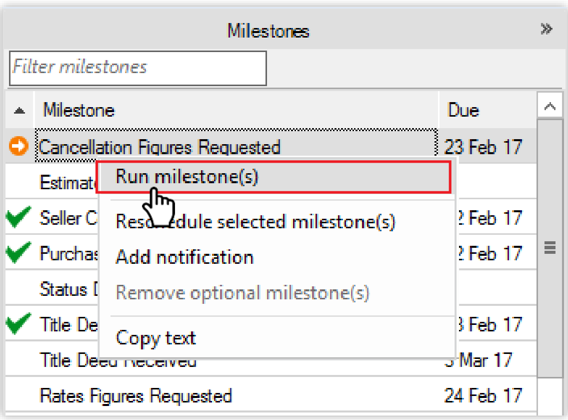
Running a Milestone

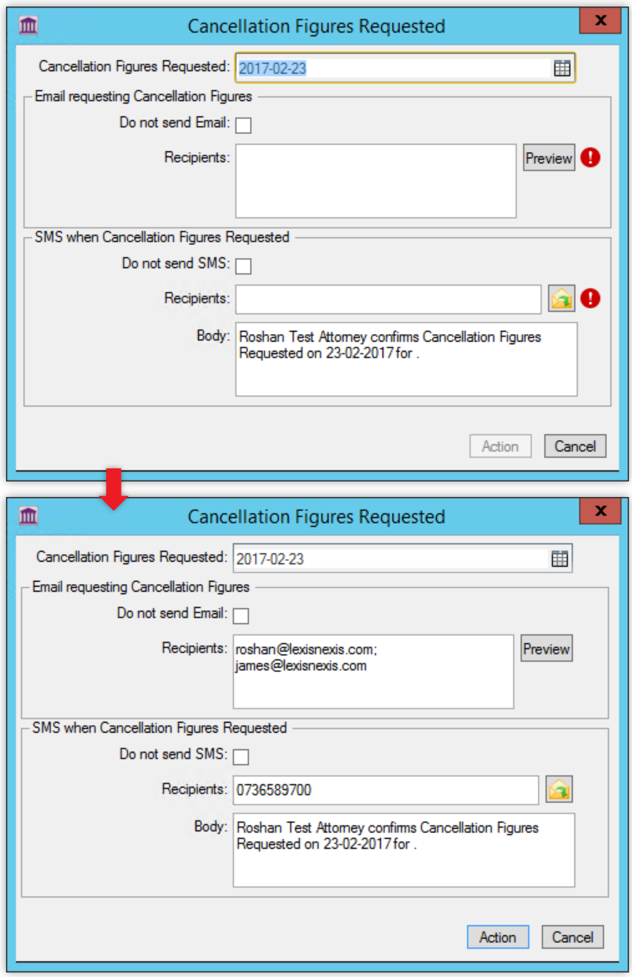
All the milestones that appear on the **Milestone Summary** menu, are displayed on the Milestones panel. Any other milestones must be actioned from the **Additional Milestones** drop-down. Milestones are displayed according to their workflow order.

1. Milestones can be updated by double-clicking or right-clicking and selecting *Run Milestone(s)*.



Note: Some milestones have triggered actions that will occur at the same time the milestone is actioned, such as Email or SMS messages you can send to the relevant stakeholders.



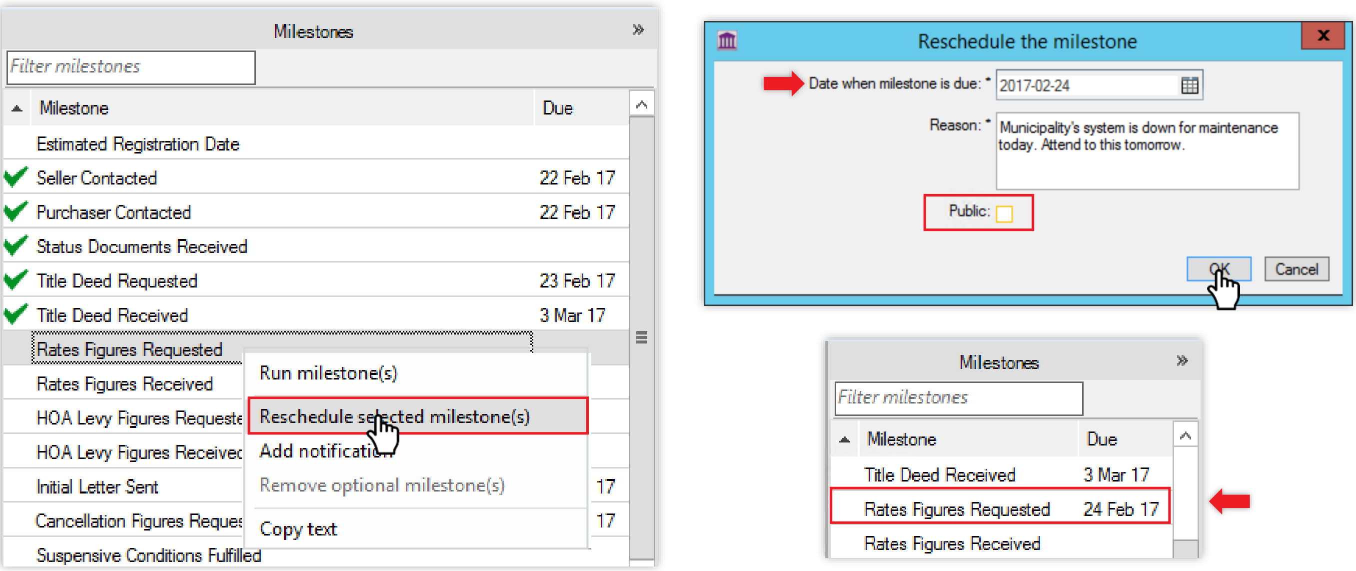


- The **Recipients** requirement remains mandatory until the **Do not send Email / SMS** checkboxes are selected. The warning icons [!] are reminders that you need to enter at least one email address to send an email and one cell phone number to send an SMS.
- Clicking the **Action** button will update the milestone and send the notifications.

Rescheduling a Milestone

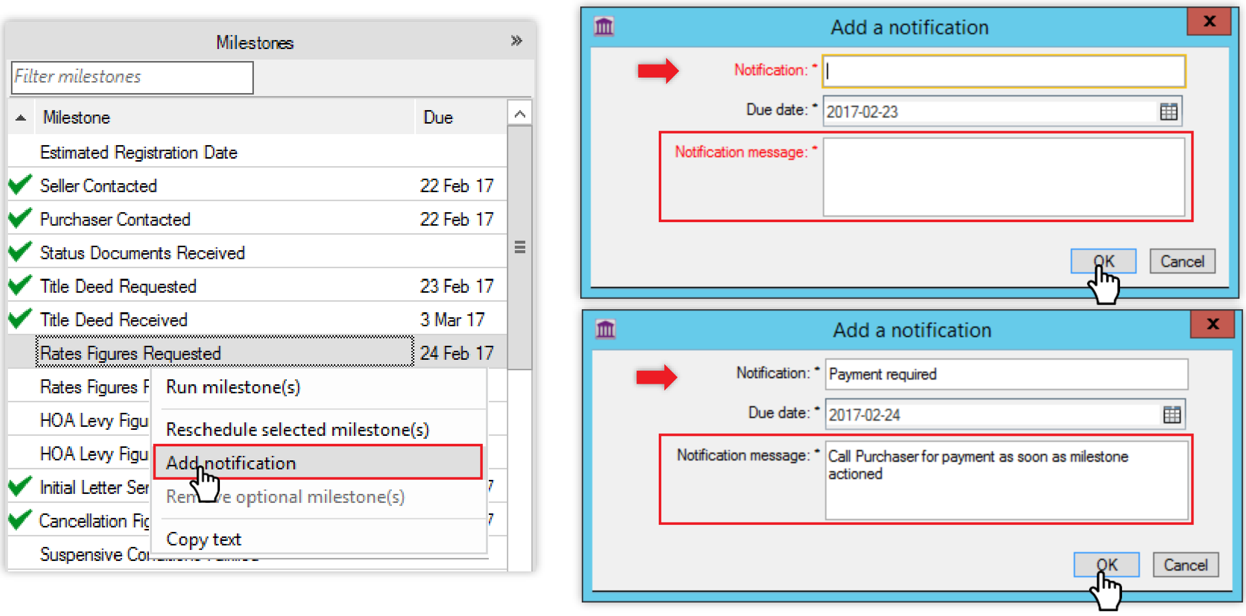
2. Milestones can be **rescheduled**, if necessary and you will be prompted to provide a due date and a reason for rescheduling. The due date on the Milestones panel is updated automatically as soon as you have completed the rescheduling activity.

   - You also have the option of sharing this information by selecting the **Public** checkbox. If the checkbox is selected, the ***Reason*** comment will be shared on GhostTracker and will appear in the reports generated in GhostConvey.

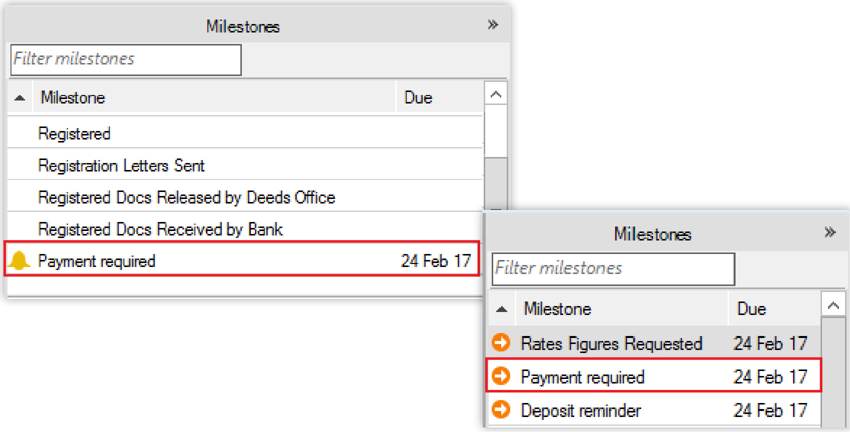


Adding a Notification

3. A **Notification** can be added to a milestone. The notification will pop up on the scheduled ***due date***.



Note: Notifications act as reminders and are added at the bottom of the **Milestones** list when created. They are moved to the top of the list on the scheduled due date:

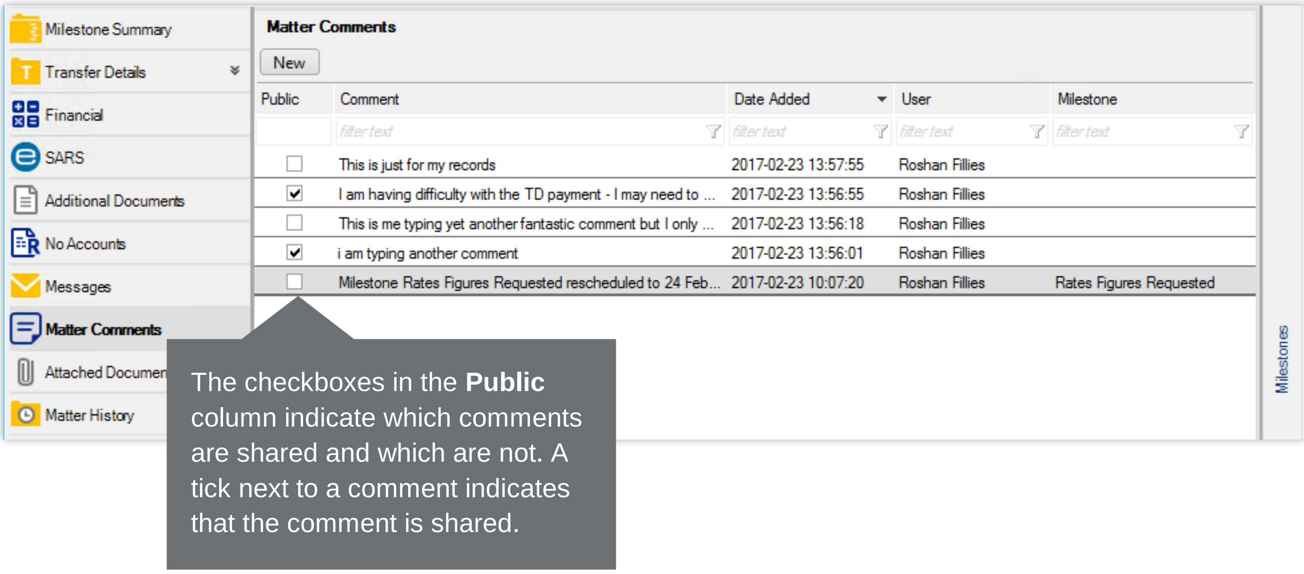


Matter Comments

The **Matter Comments** menu allows you to post remarks to your matter and also decide which remarks are for your attention only, such as file notes and which remarks you wish to share (by selecting the **Public** checkbox).

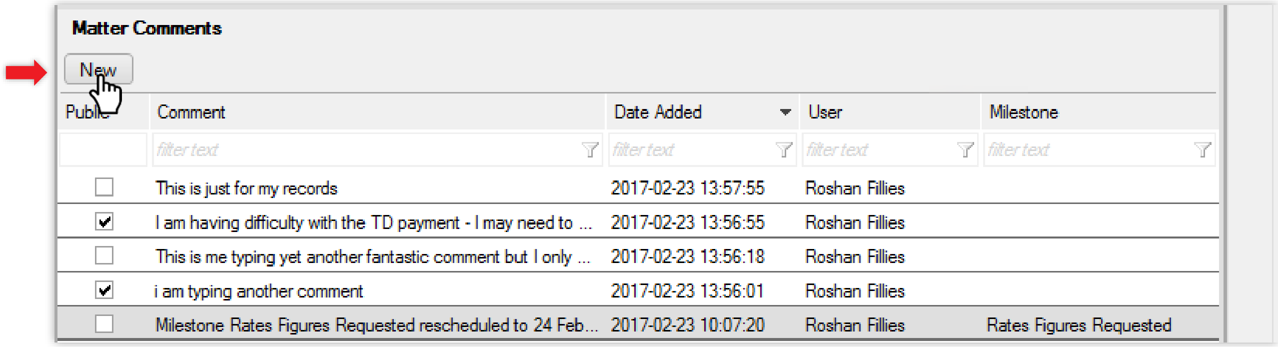
Note:

- Comments are added to the **Matter History** regardless of whether they are shared
- The reasons given for *rescheduled* milestones are displayed in the **Matter Comments**.



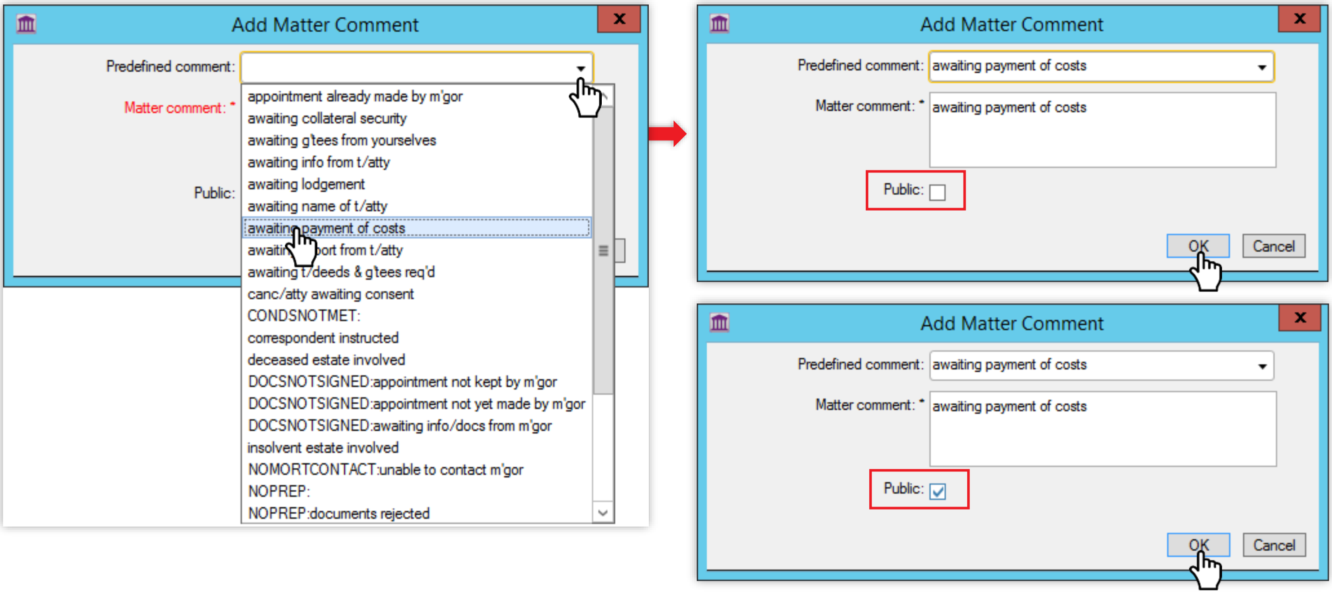
Creating Matter Comments

1. Under **Matter Comments** click the **New** button.

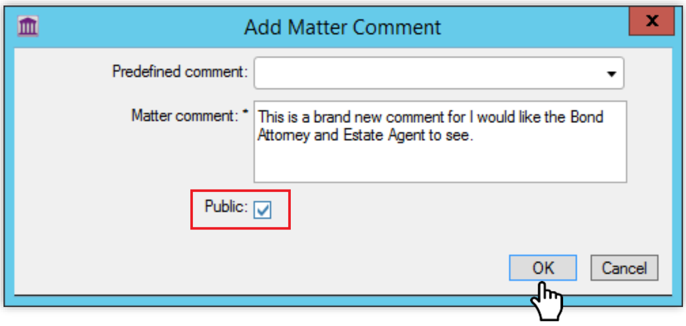


2. Select a **Predefined comment** from the drop-down list or type an ad hoc comment in the **Matter comment** block. Select the **Public** checkbox, if applicable and click OK.

- To add a predefined comment, click the drop-down list, select the comment, select/deselect the **Public** checkbox on the **Add Matter Comment** dialog box and click OK.



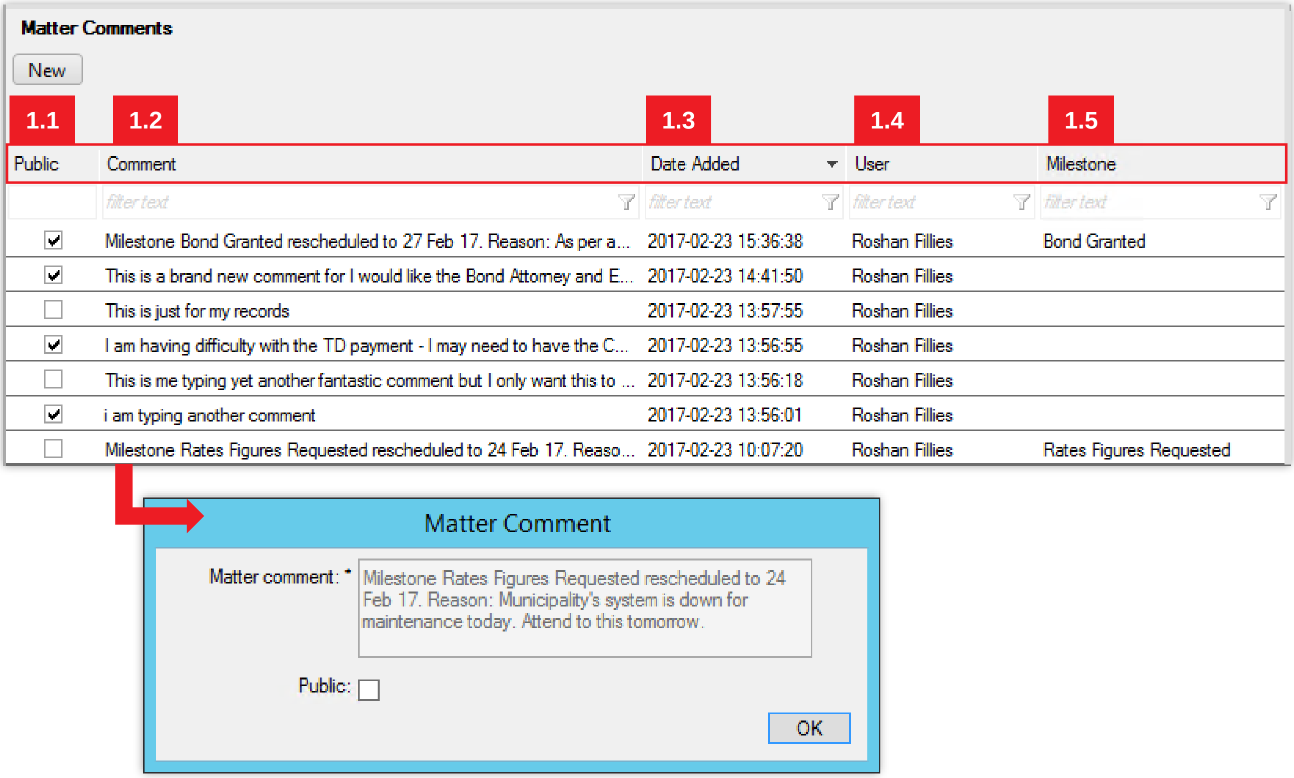
- To add an ad hoc comment, simply type your comment in the **Matter comment** block, select/deselect the **Public** checkbox and click OK.



Viewing Matter Comments

1. All the comments raised on a matter are displayed in the **Matter Comments** list. The following details are displayed:

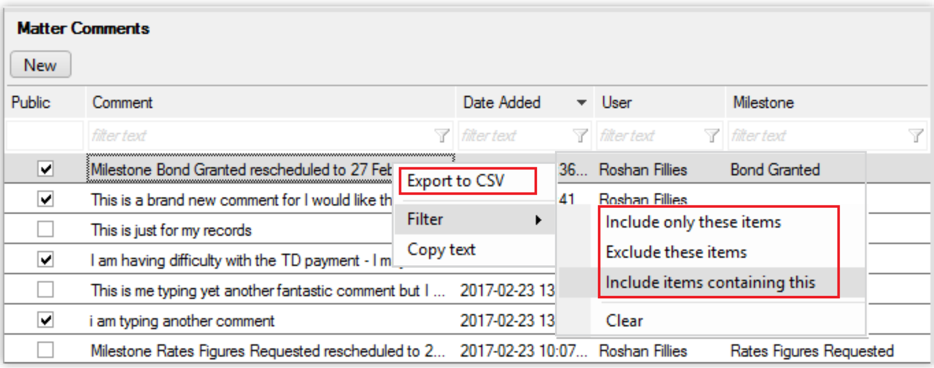
    1.1 ***Public*** indicator. If the checkbox in this column is selected it means that the comment is shared on GhostTracker.
    1.2 ***Comment*** preview. Usually only the first line of a comment is displayed. Double click on a comment in the list to view the full details.
    1.3 ***Date added*** refers to the date and time the comment was added.
    1.4 ***User*** refers to the GhostConvey user who added the comment.
    1.5 If the comment was raised from a milestone the relevant milestone will be listed here.



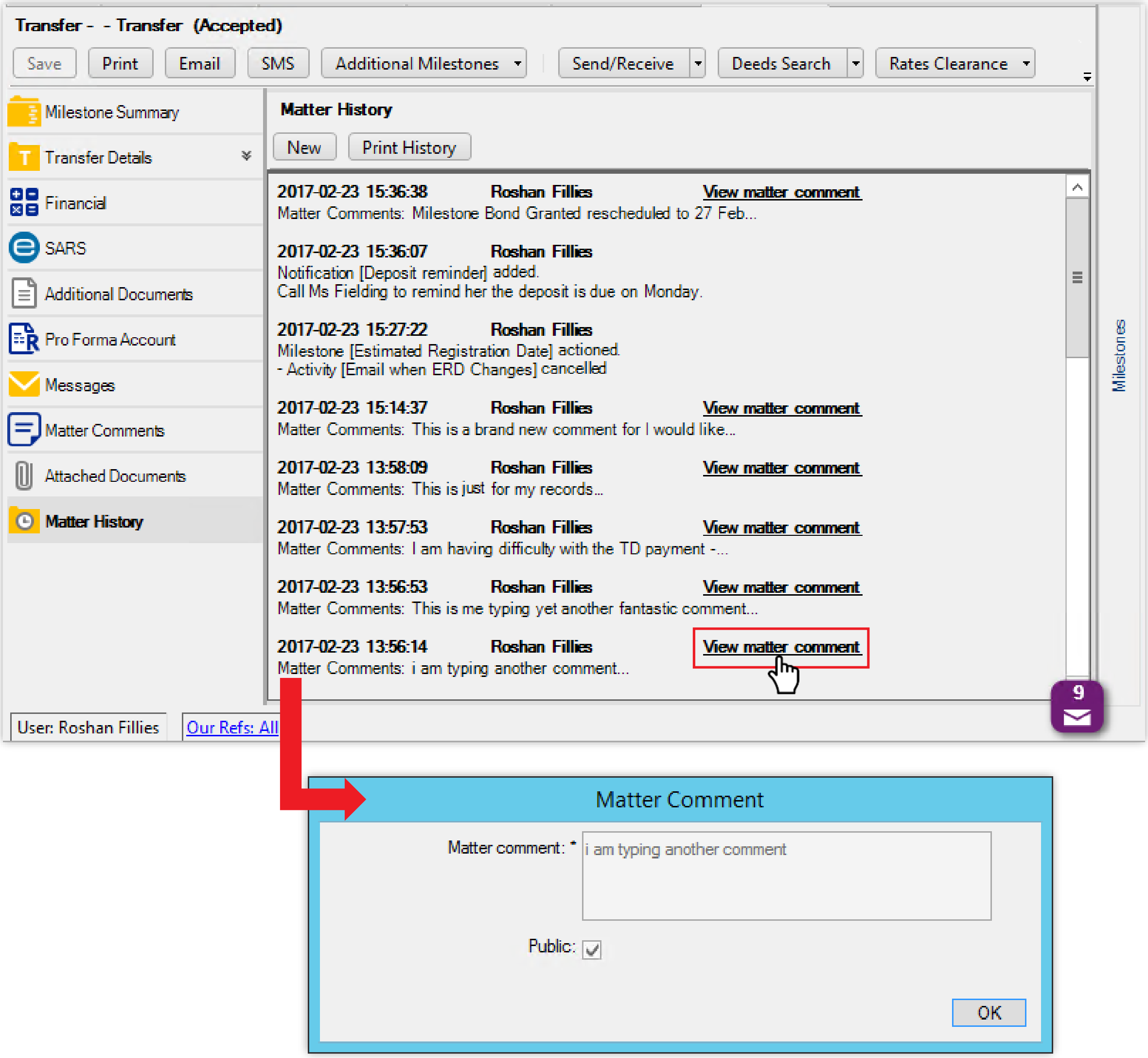
*Double-click on an item in the **Comment** column to read the full comment.*

Note: Comments can be exported as csv files. You can export the full list by clicking on **Export to CSV**, or export the **filtered** list by selecting one of the highlighted filtering options.

The highlighted menus appear when you right-click within the comments list.



2. Comments can be viewed on the **Matter History**. The comment is recorded in the same manner as all other matter activities, with a brief preview of the comment appearing in the body text of the recorded entry. To view the full matter comment details, click the **View matter comment** link next to the recorded entry.

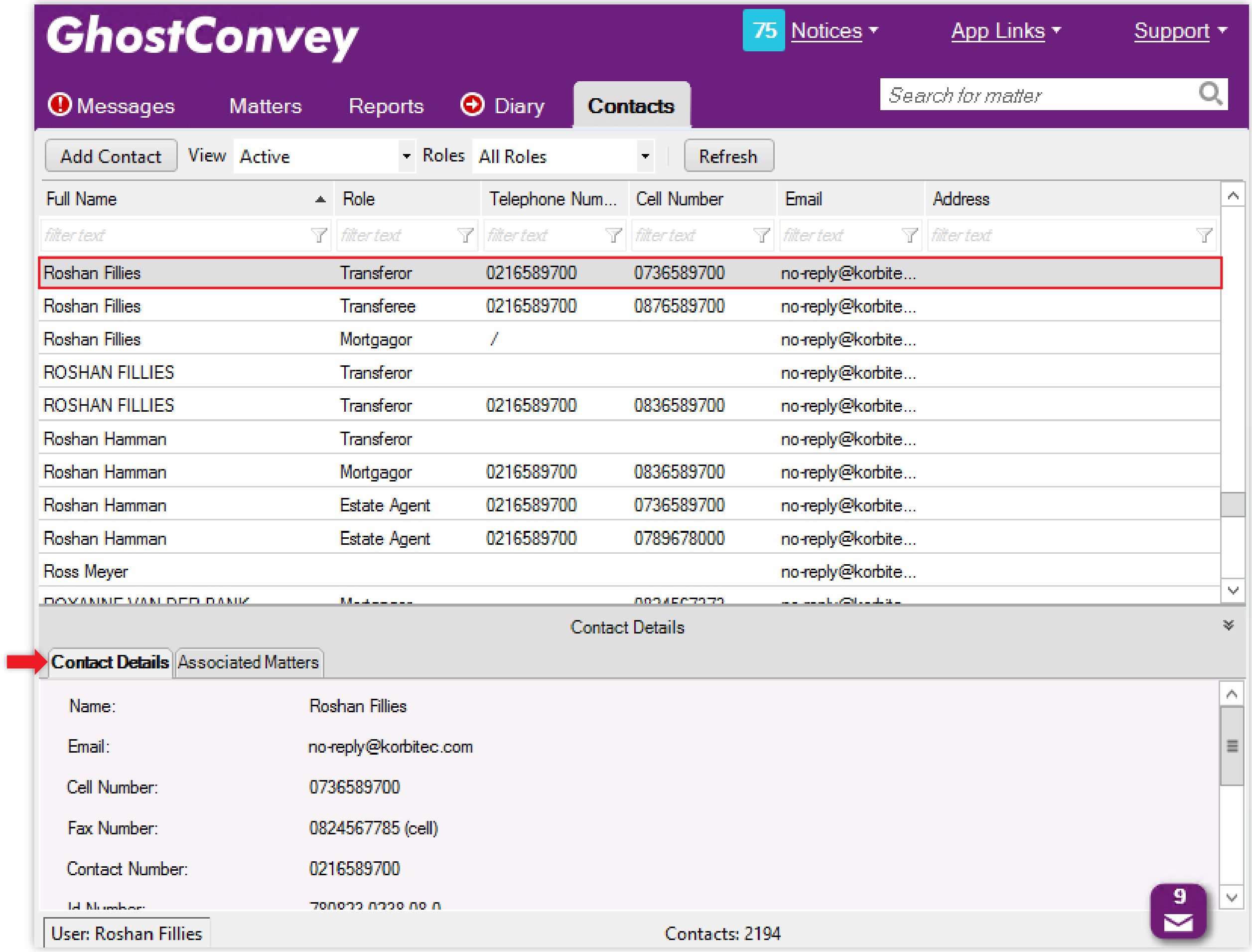


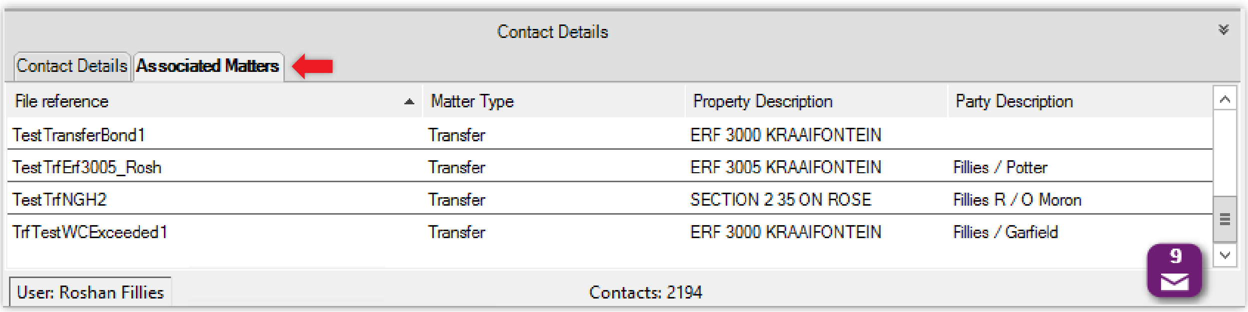
Note: The last matter comment to be captured will feature in the Reports under the **Progress Comments** column. For a full audit trail it will be necessary consult the **Matter Comments** and/or **Matter History** menus.

Global Contacts Tab

The **Contacts** tab is a new GhostConvey feature that allows you to select and import contacts stored within your existing GhostConvey database, across matters. The global contacts list is *automatically updated* with every matter created. You can also manually add and edit contacts, as we will explain further on.

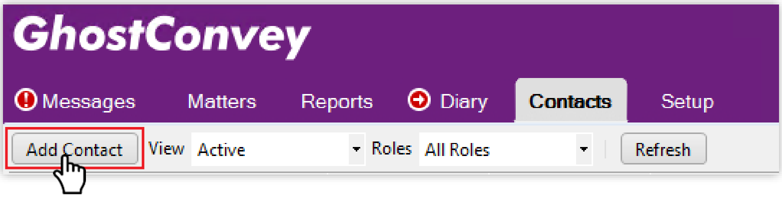
- The pane at the bottom of the window shows you the contact information for the highlighted party on the **Contact Details** tab.
- If you click on the **Associated Matters** tab, you will be able to see which matters the selected contact is linked to and in what capacity.



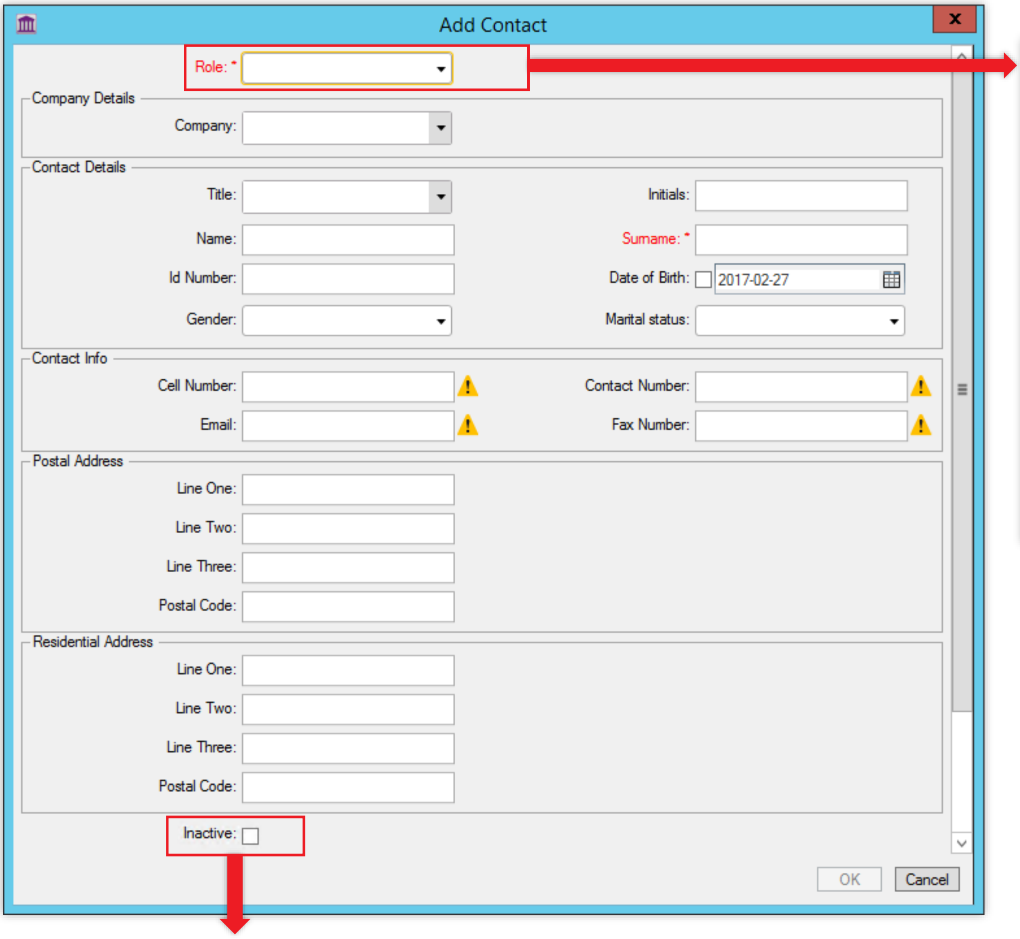


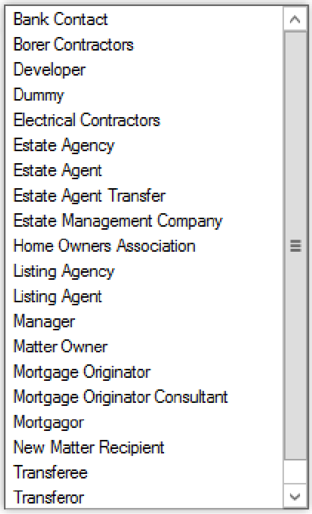
Adding a contact to the global list

1. To manually add a new contact, click the **Add Contact** button on the toolbar.



2. Complete the **Add Contact** form, paying particular attention to the ***Role*** and other mandatory fields which are highlighted in red and / or indicated with a warning icon [⚠]. Click OK to save the new contact when you are done.





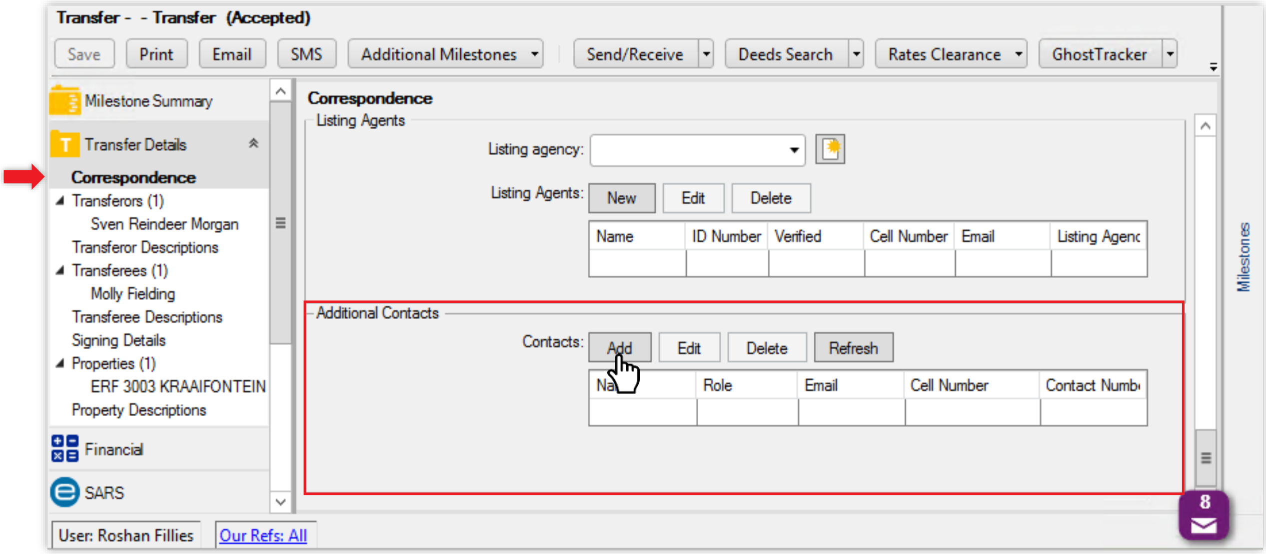
Role drop-down list. Roles can be added or edited under ***Common>Recipient Roles*** *in* ***Setup****.*

Note: You have the option to indicate whether a contact is active or inactive. Inactive contacts are typically associated with archived matters.

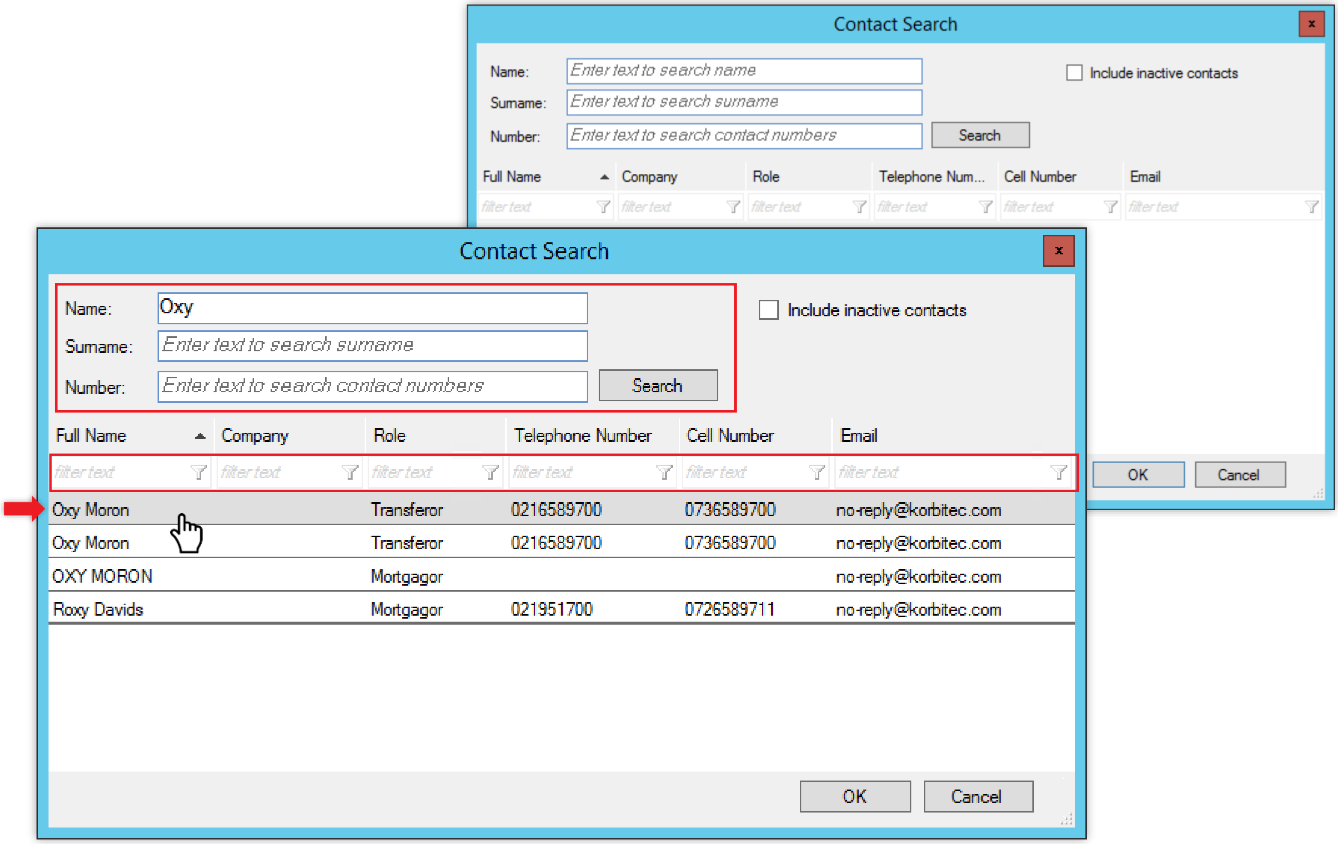
Importing a contact to a matter

You can import a contact from the global list into your matter. This is done under **Additional Contacts** on the ***Correspondence*** sub-menu of your matter.

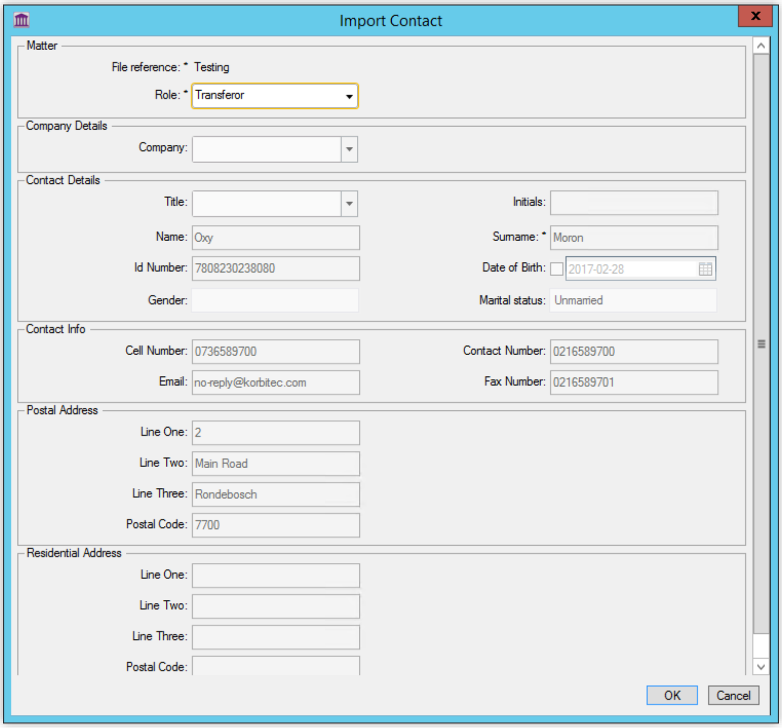
1. To import a contact, click the **Add** button.



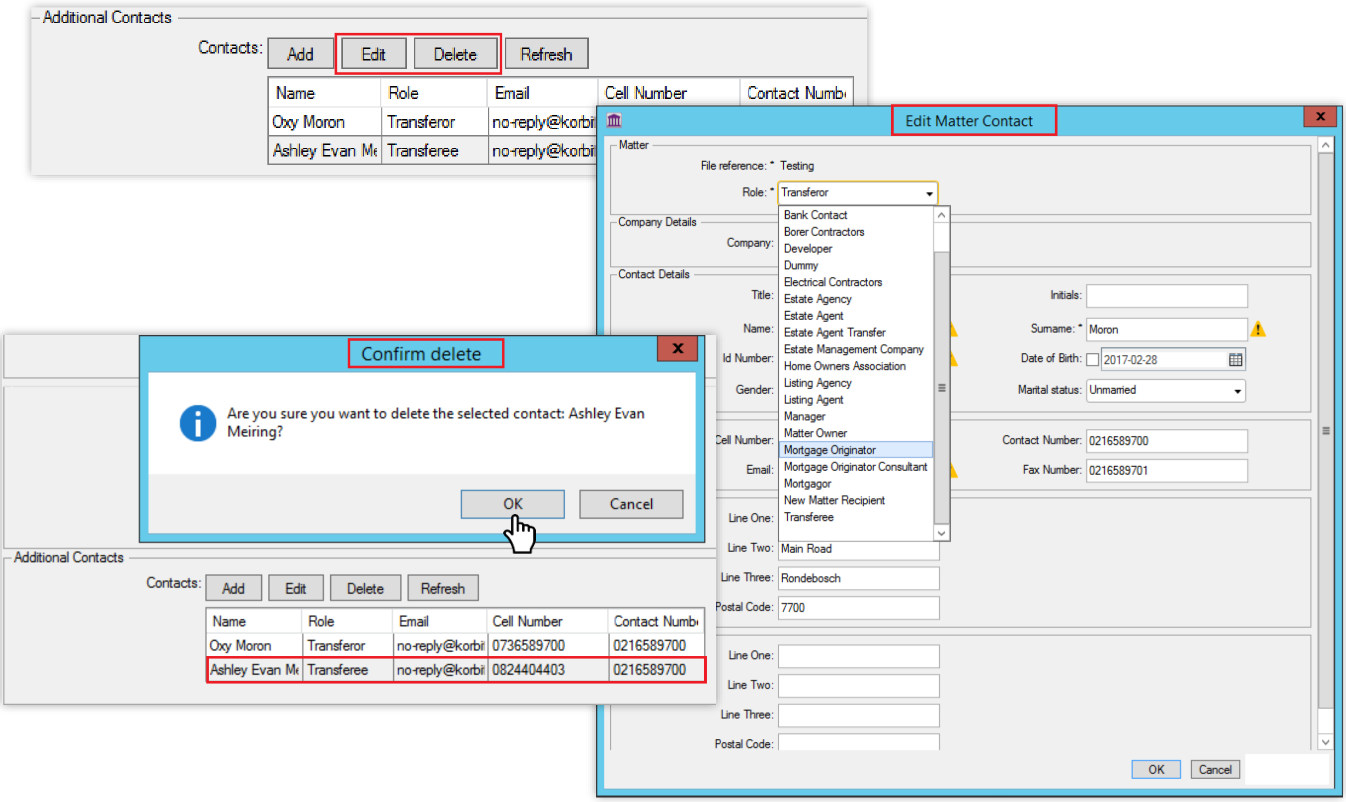
2. A **Contact Search** window will open. Here you can search on the *name*, *surname* or *contact number* of the person you want to add. If the list is lengthy you can *filter* the search results according to the column headings. Double-click on a contact to select it, or select the contact and click **OK**.



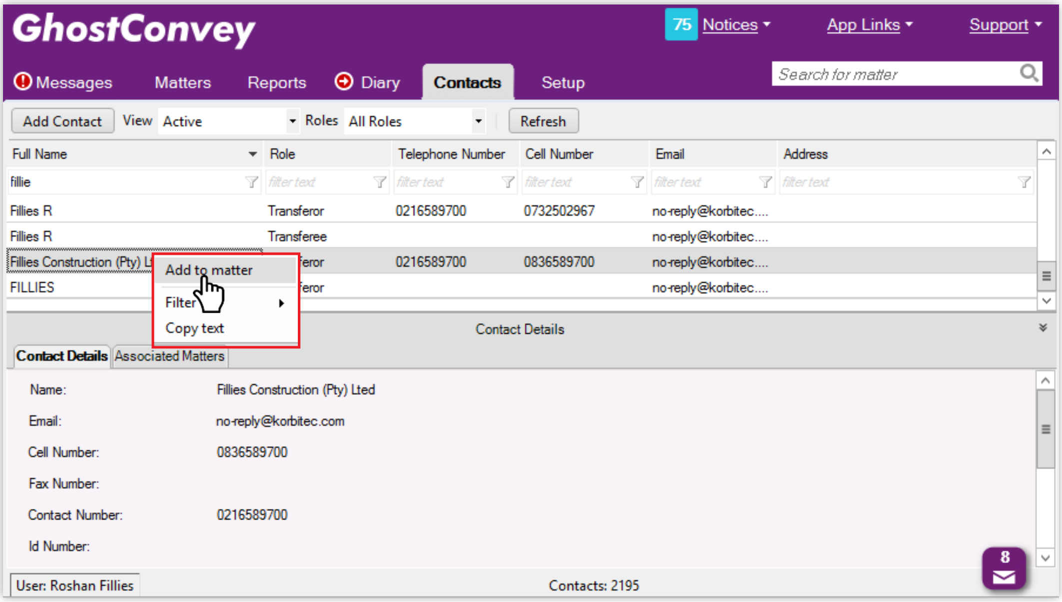
3. The selected contact's information will appear on your screen. The only editable detail on this screen is the ***Role****.* Click the drop-down arrow and select the appropriate role for the contact then click OK.



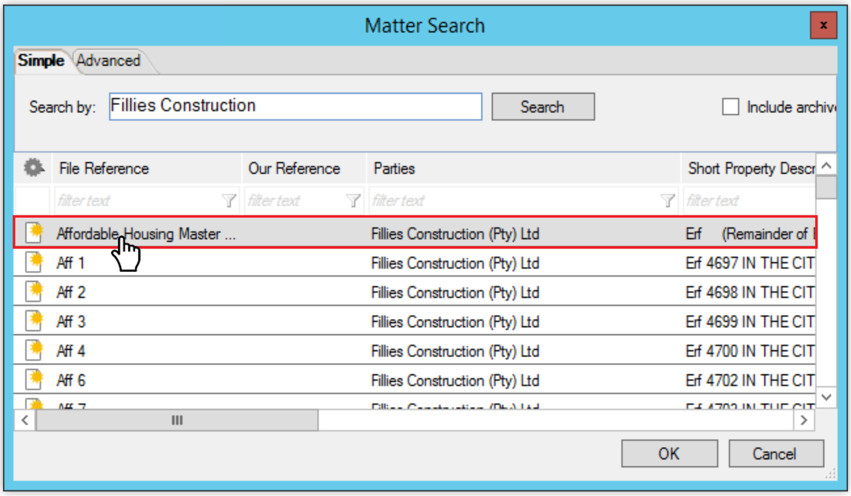
4. If necessary, you can ***edit*** or ***delete*** any contacts you have added. To edit contact information, simply select the contact and update the details on the **Edit Matter Contact** screen. When deleting a contact, you will be prompted for confirmation before the contact is deleted.



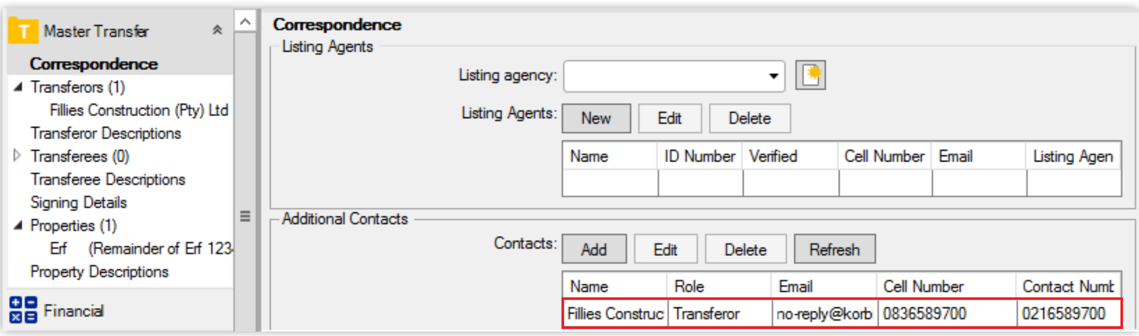
5. You can add a contact to a matter directly from the global contacts list, by right-clicking on a contact and selecting the **Add to matter** option.



- A matter search window will open allowing you to search for and select the matter to add the contact to.

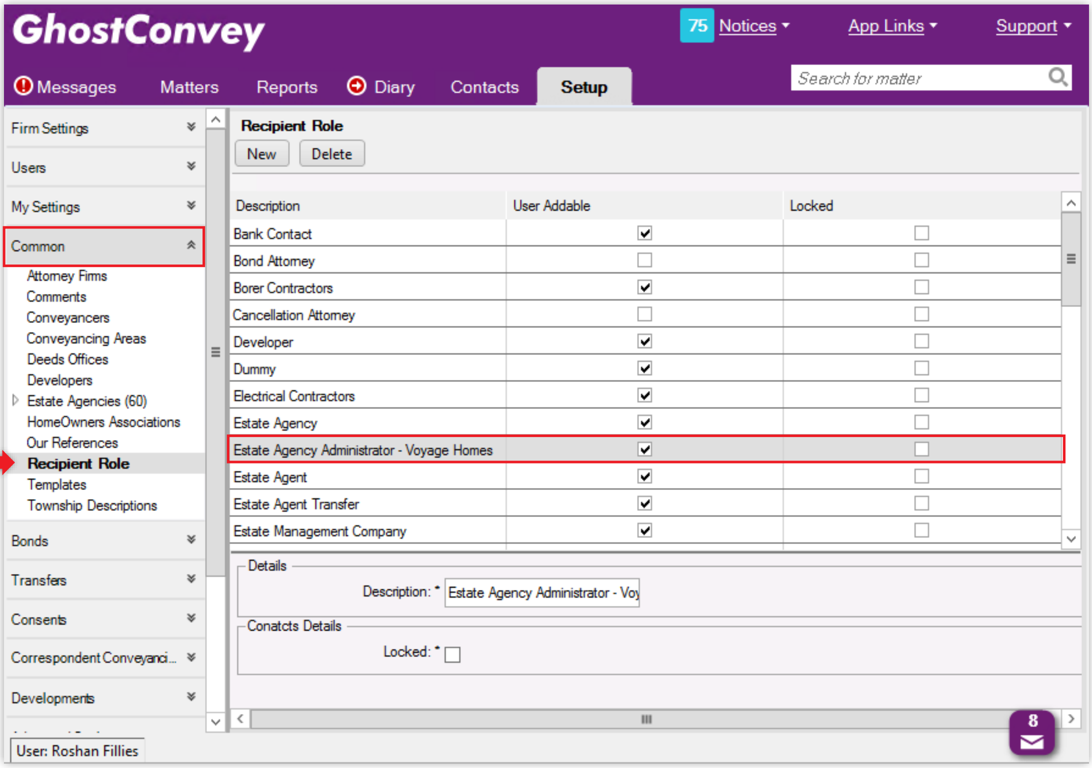


- The contact will be added to the **Additional Contacts** section of the selected matter.



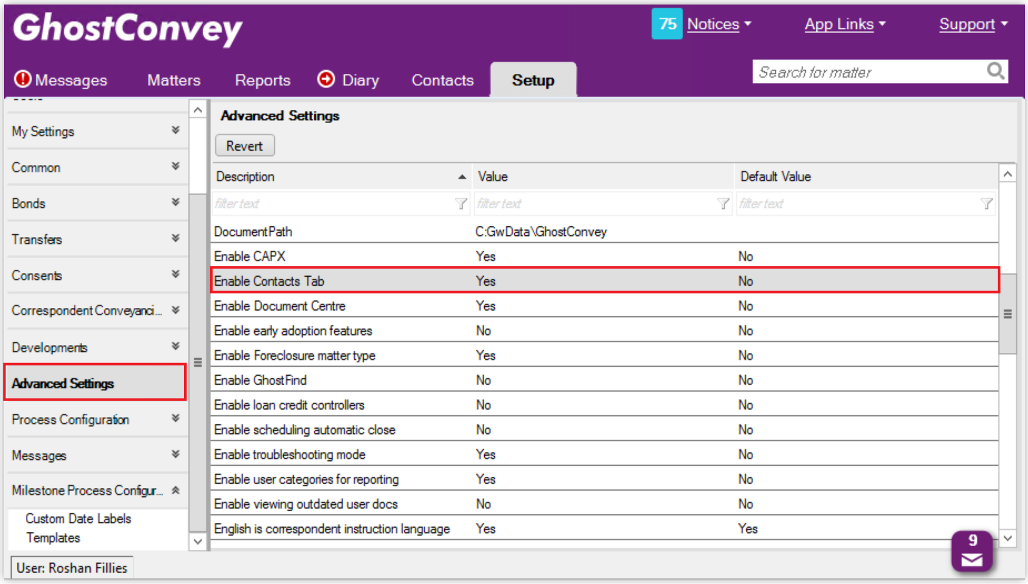
Custom contact roles

Custom contact roles can be defined in **Setup** on the **Common** tab under the **Recipient Role** category. This is useful if your firm deals with specific stakeholders across different matters on a regular basis as it allows you to add specific roles for reporting purposes.



Activating Contacts

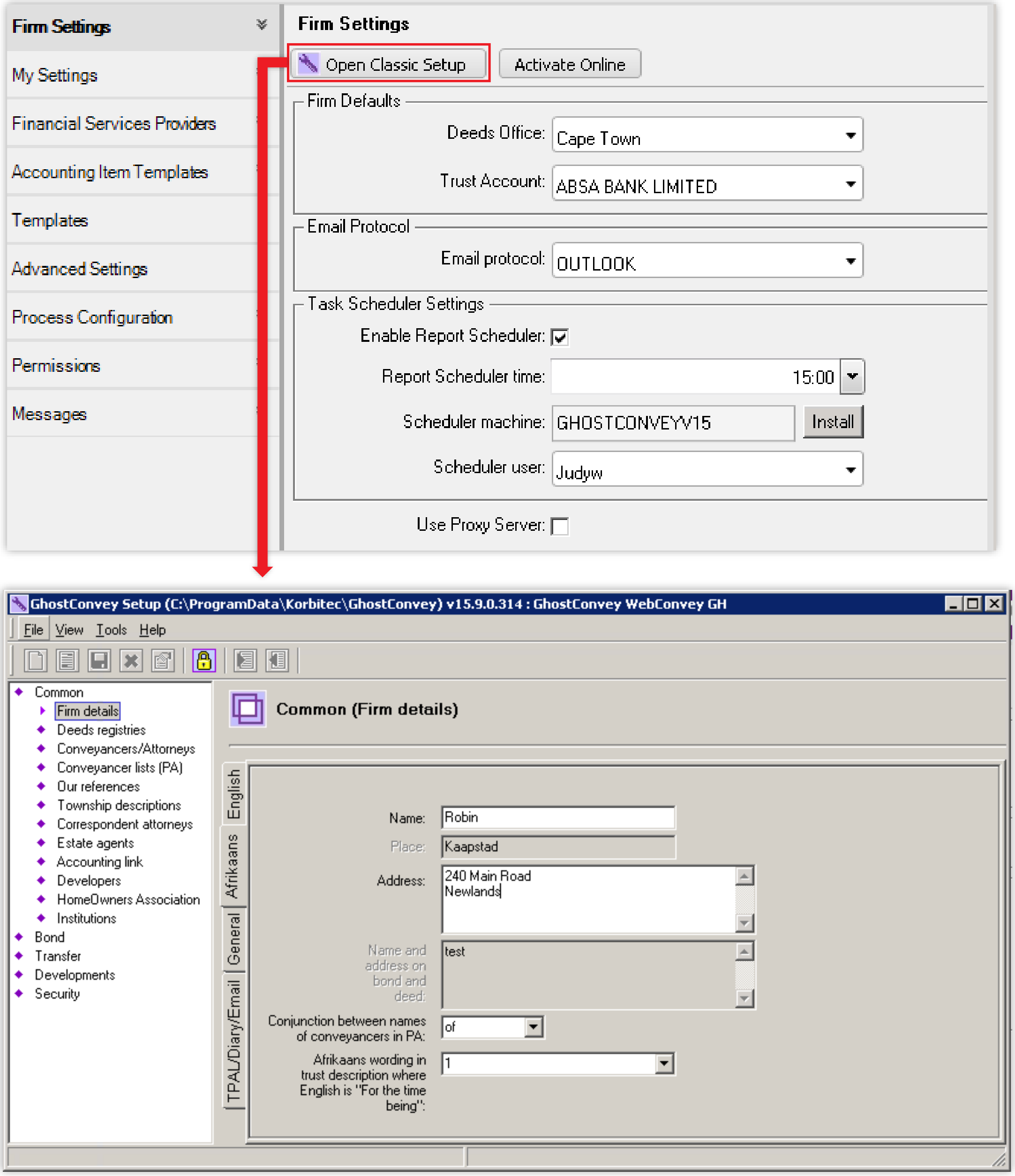
The **Contacts** tab is not switched on by default. The setting is located in **Setup** under the **Advanced Settings** menu and can only be activated by a GhostConvey System Administrator. Once activated it is always available from the tabs list on the banner.



Setup

Classic Setup Migration

The **Open Classic Setup** button has been removed and all previously classic GhostConvey settings are now consolidated under the **Setup** tab.



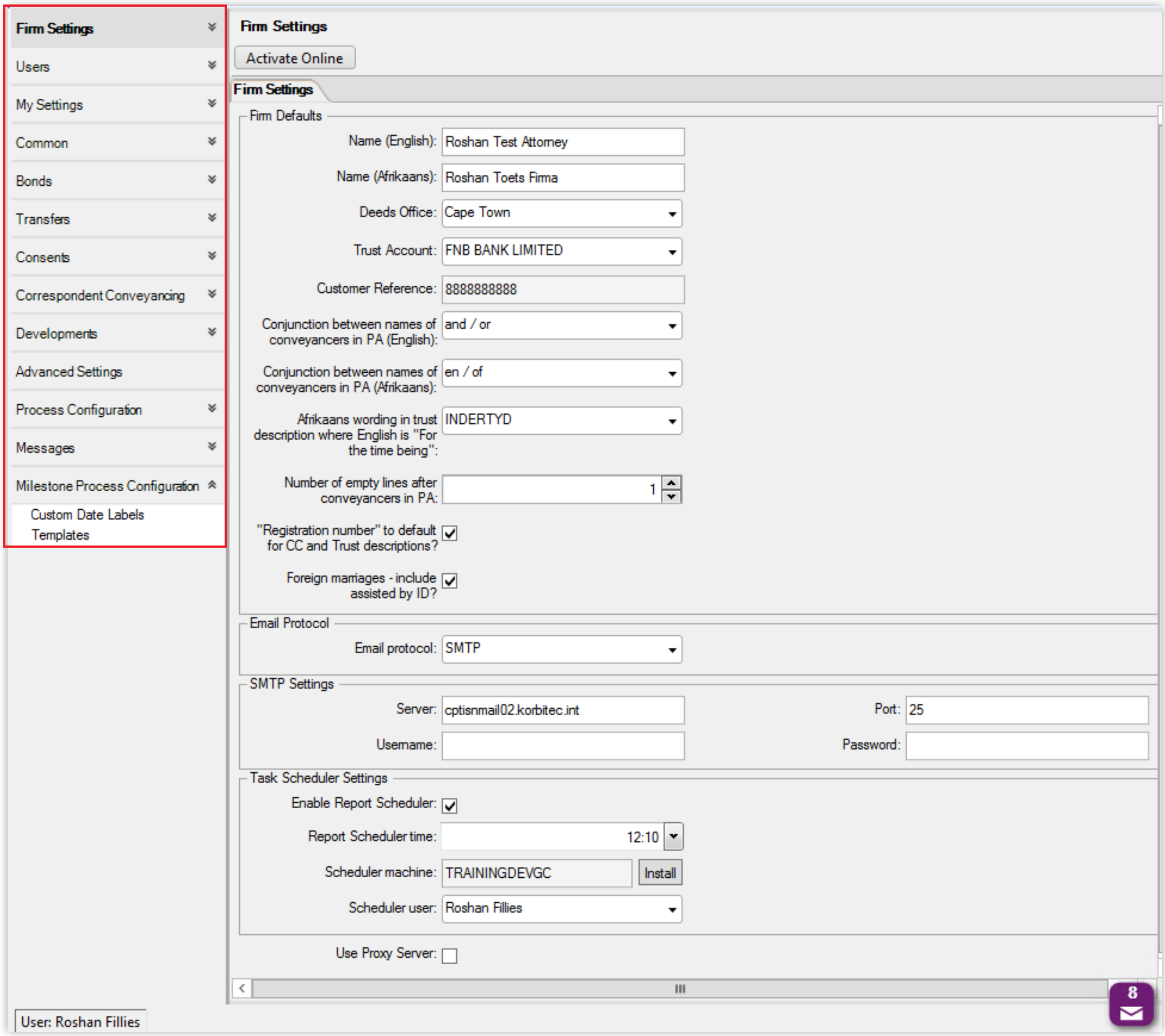
Note: It is recommended that **Setup** operations only be accessed by the designated system administrator(s) at the Firm as changes made here affect all GhostConvey users.

Menu panel

The menu panel gives you access to the various functional settings for GhostConvey. The arrows [] at the end of each menu button indicate that there are additional sub-categories grouped under the main menu.

With the version 16 update, changes have been made that affect the look and feel of the following **Setup** features:

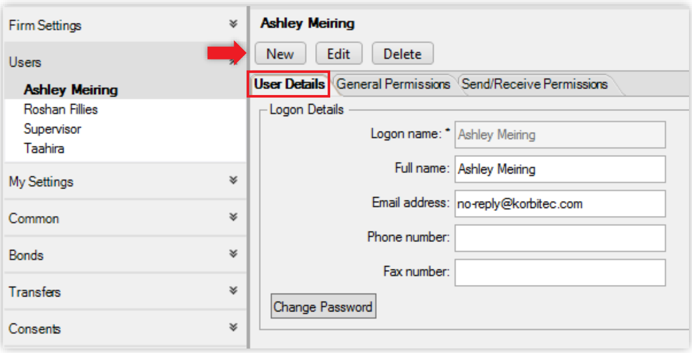
- Users
- Common
- Bonds
- Transfers
- Consents
- Correspondent Conveyancing
- Developments
- Advanced Settings



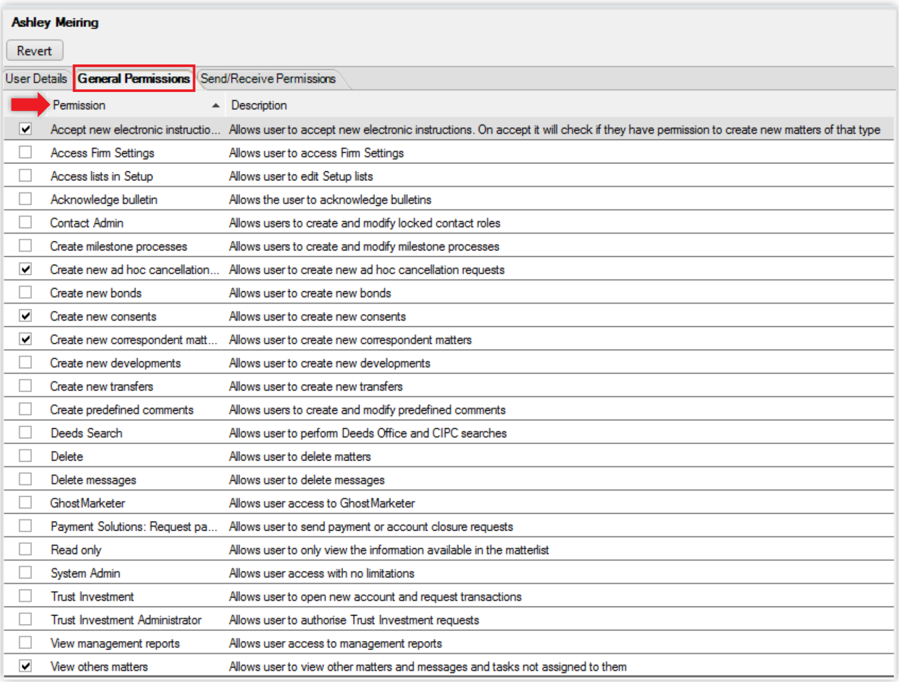
Users

The **Users** menu combines the previous **Permissions** menu and classic **Security** category. Here you can *add*, *edit* or *delete* users. The tabs at the top of the screen allow you to:

- Create new GhostConvey users under **User Details**

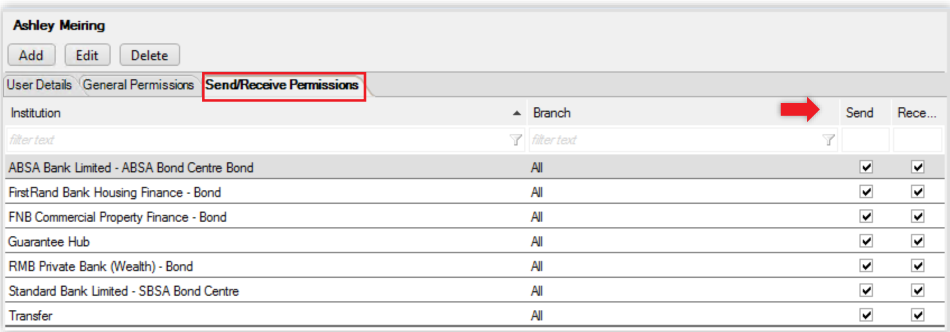


- Assign **General Permissions**



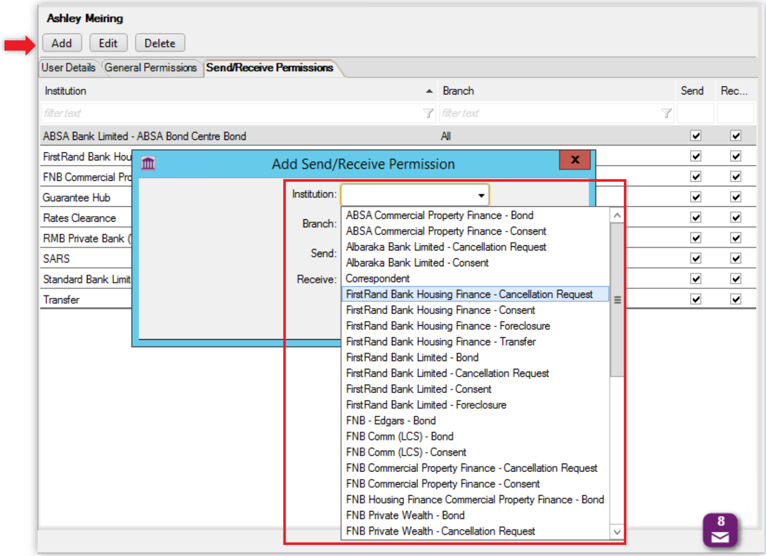
	Permission	Description
✓	Accept new electronic instructio...	Allows user to accept new electronic instructions. On accept it will check if they have permission to create new matters of that type
	Access Firm Settings	Allows user to access Firm Settings
	Access lists in Setup	Allows user to edit Setup lists
	Acknowledge bulletin	Allows the user to acknowledge bulletins
	Contact Admin	Allows users to create and modify locked contact roles
	Create milestone processes	Allows users to create and modify milestone processes
✓	Create new ad hoc cancellation...	Allows user to create new ad hoc cancellation requests
	Create new bonds	Allows user to create new bonds
✓	Create new consents	Allows user to create new consents
✓	Create new correspondent matt...	Allows user to create new correspondent matters
	Create new developments	Allows user to create new developments
	Create new transfers	Allows user to create new transfers
	Create predefined comments	Allows users to create and modify predefined comments
	Deeds Search	Allows user to perform Deeds Office and CIPC searches
	Delete	Allows user to delete matters
	Delete messages	Allows user to delete messages
	GhostMarketer	Allows user access to GhostMarketer
	Payment Solutions: Request pa...	Allows user to send payment or account closure requests
	Read only	Allows user to only view the information available in the matterlist
	System Admin	Allows user access with no limitations
	Trust Investment	Allows user to open new account and request transactions
	Trust Investment Administrator	Allows user to authorise Trust Investment requests
	View management reports	Allows user access to management reports
✓	View others matters	Allows user to view other matters and messages and tasks not assigned to them

- Assign specific **Send/Receive Permissions**



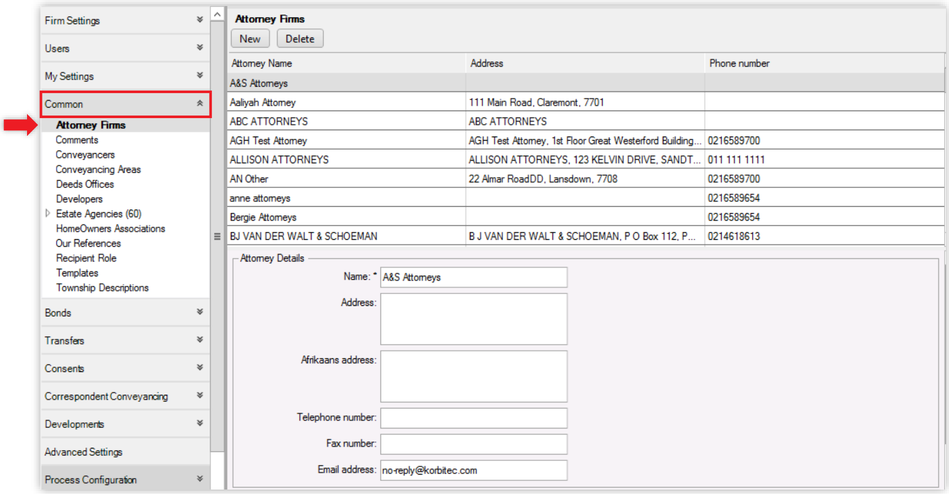
Institution	Branch	Send	Rece...
ABSA Bank Limited - ABSA Bond Centre Bond	All	✓	✓
FirstRand Bank Housing Finance - Bond	All	✓	✓
FNB Commercial Property Finance - Bond	All	✓	✓
Guarantee Hub	All	✓	✓
RMB Private Bank (Wealth) - Bond	All	✓	✓
Standard Bank Limited - SBSA Bond Centre	All	✓	✓
Transfer	All	✓	✓

- Add institutions to a GhostConvey user's Send/Receive list and set the appropriate permissions per institution.

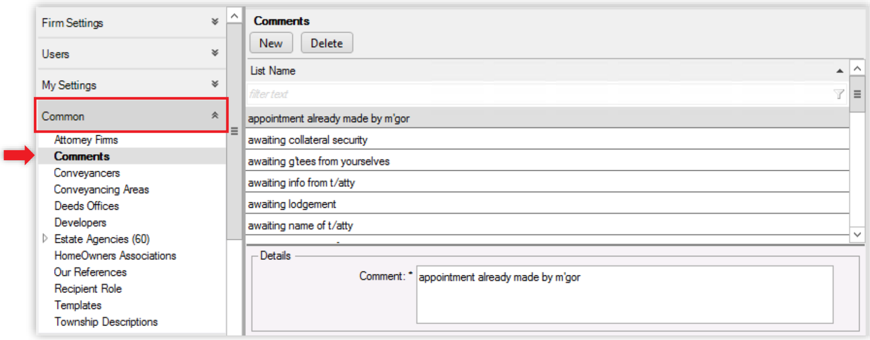


Common

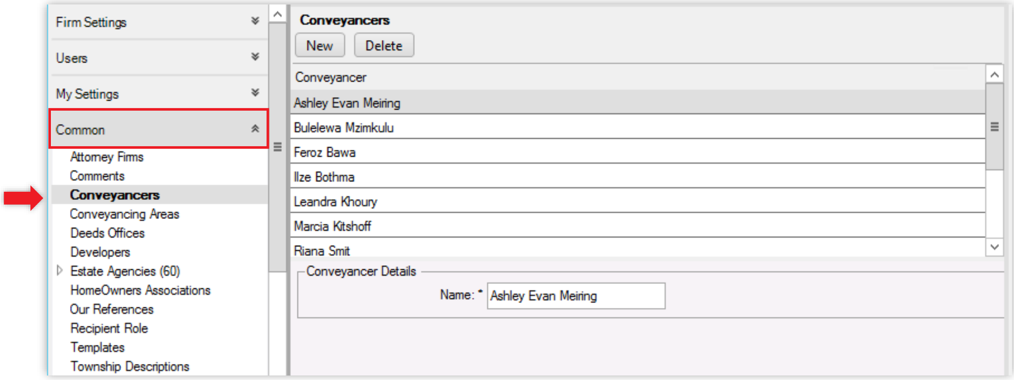
- Previously *Correspondent Attorneys*, the new **Attorney Firms** category is where you can create and save the details of attorneys frequently used as lodging agents.



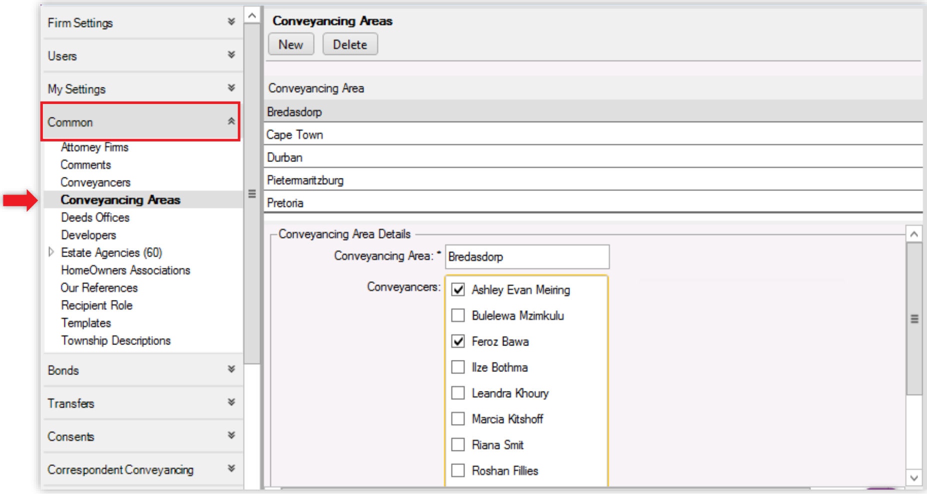
- The new **Comments** section houses a list of predefined comments and allows you to add additional customised comments. These user comments will appear in the predefined comments list when posting a matter comment.
  - Simply click on **New** to add a custom predefined comment.



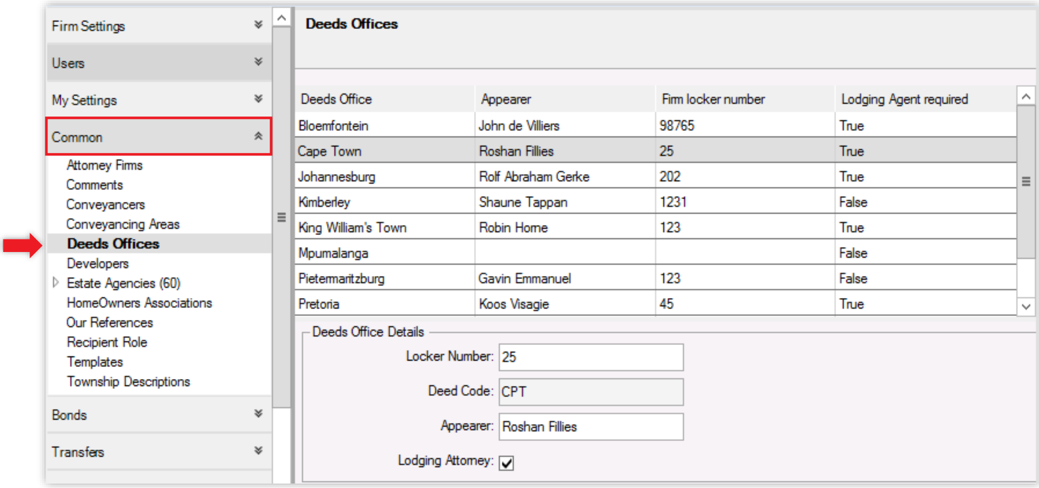
- The **Conveyancers** section (previously *Conveyancers / Attorneys*), contains the list of appearers and preparers and is where the conveyancers' list for the firm is managed.



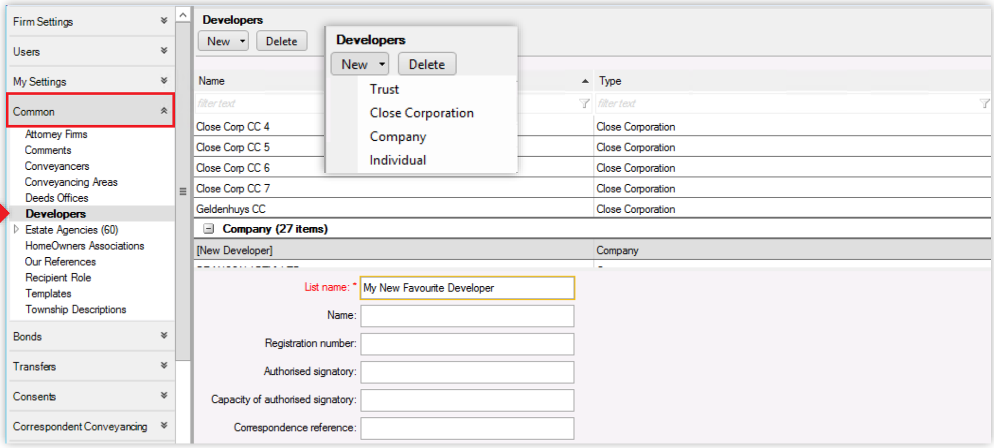
- The **Conveyancing Areas** section (previously *Conveyancer lists (PA)*), is where the regional conveyancer lists are managed.
  - Simply click on an area and select / deselect the checkboxes next to the conveyancer's you wish to add to / remove from a particular region. Your progress is auto-saved.



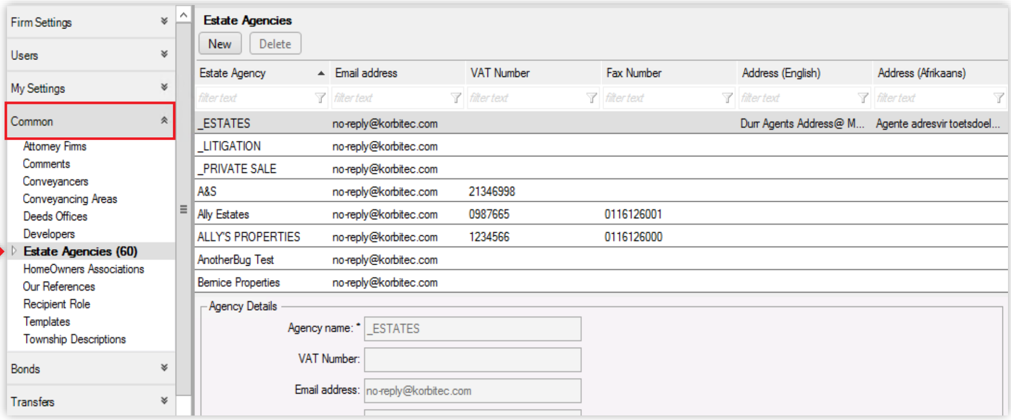
- **Deeds Office** (previously *Deeds Registries*) is unchanged.
  - Simply click on a Deeds Office in the list and complete / update the **Deeds Office Details** section that relates to it.



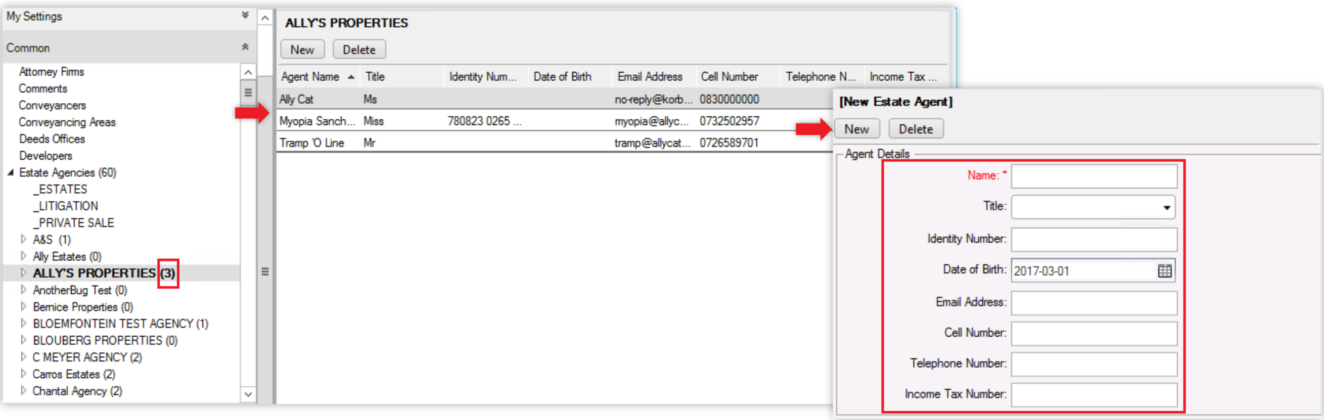
- The **Developers** category is new and is where you can now save details of developers the Firm frequently works with.
  - Add a new developer by clicking the **New** button, specifying the type of business entity and completing the relevant information.



- **Estate Agencies**, (previously *Estate Agents*) is unchanged.
  - Add a new agency by clicking the **New** button in the **Estate Agencies** list.

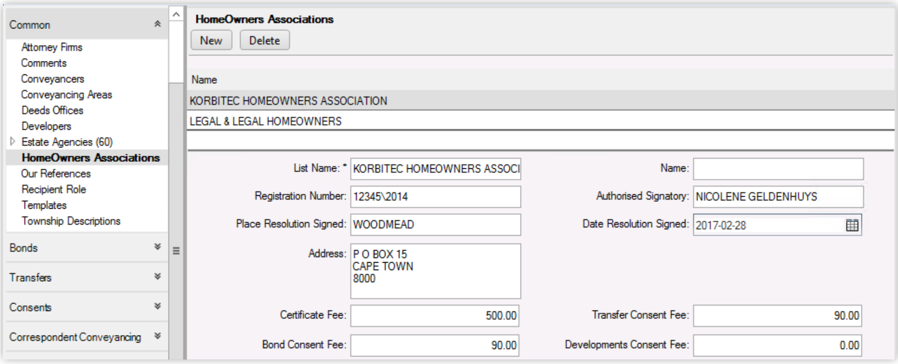


  - The number in brackets next to the agency indicates the number of estate agents associated with it. Clicking on an agency will reveal the details of the associated estate agents.

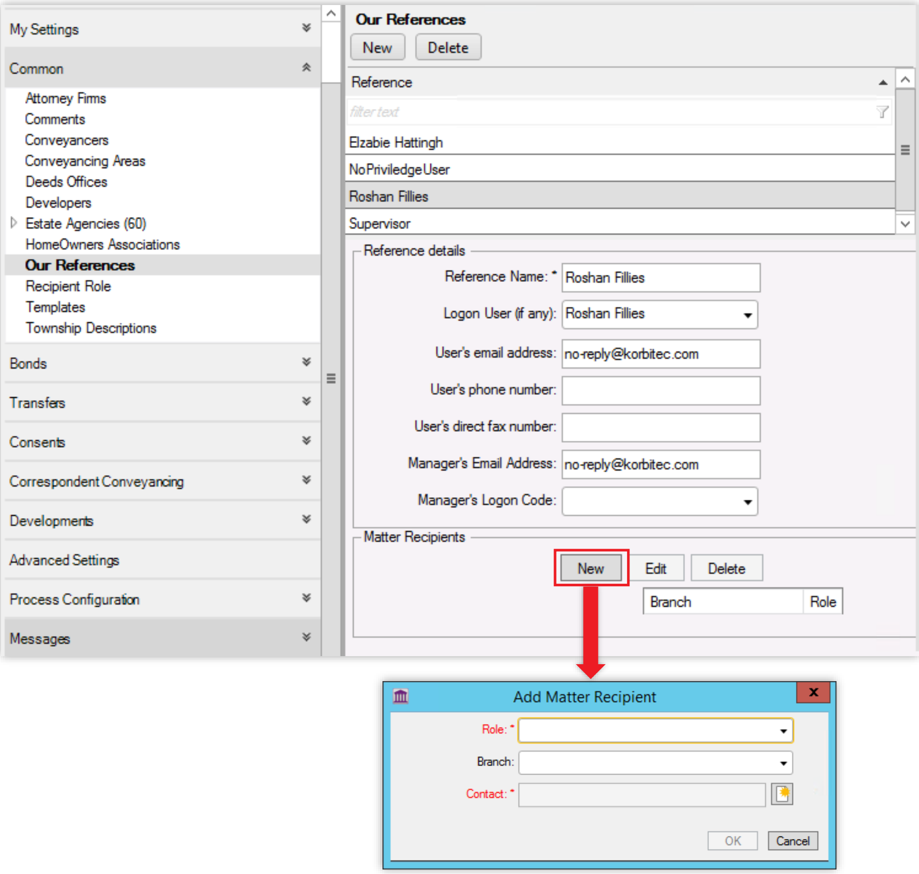


  - To add new or additional agents, select the Estate Agency, click the **New** button and complete the required information in the **New Estate Agent** dialog box.

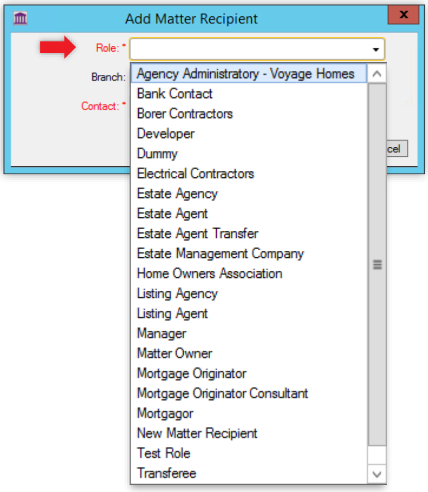
- The **Home Owners Associations** category is unchanged.

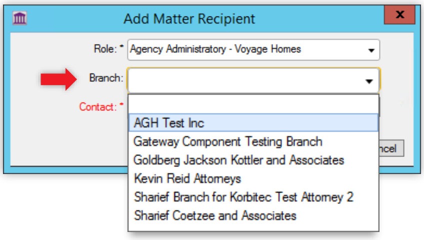


- The **Our References** category has a new **Matter Recipients** feature that enables you to assign a recipient / contact, such as a manager, marketing contact, etc. to a matter automatically when the matter is created. The roles list is made up of system shipped roles and custom roles created under **Common**>**Recipient Roles**.
  - To assign a **Matter Recipient** to an **Our Ref.**, click the **New** button

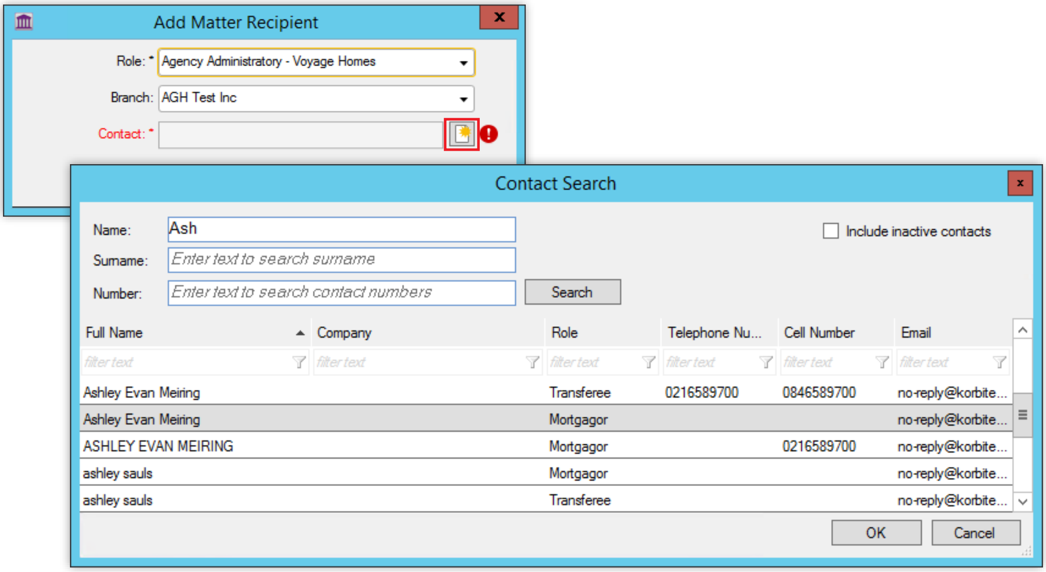


- Select the **Role** and **Branch** (if applicable) from the respective drop-down lists.



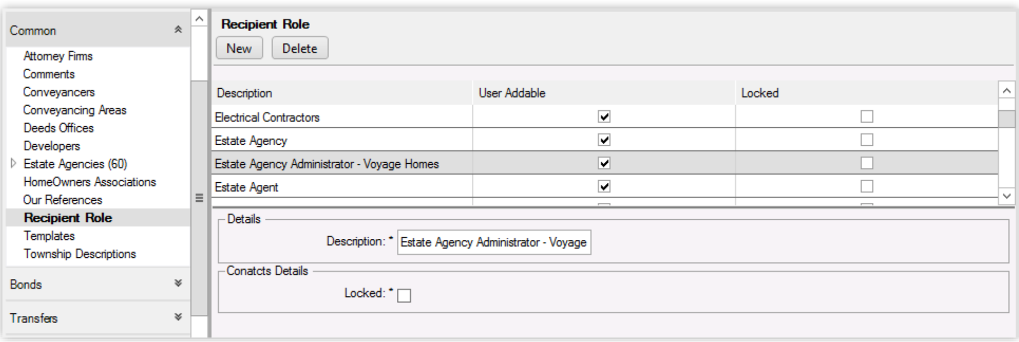


- Click the **New** icon at the end of the **Contact** field. This will open the **Contact Search** window. Search for and select the required contact and then click **OK**.



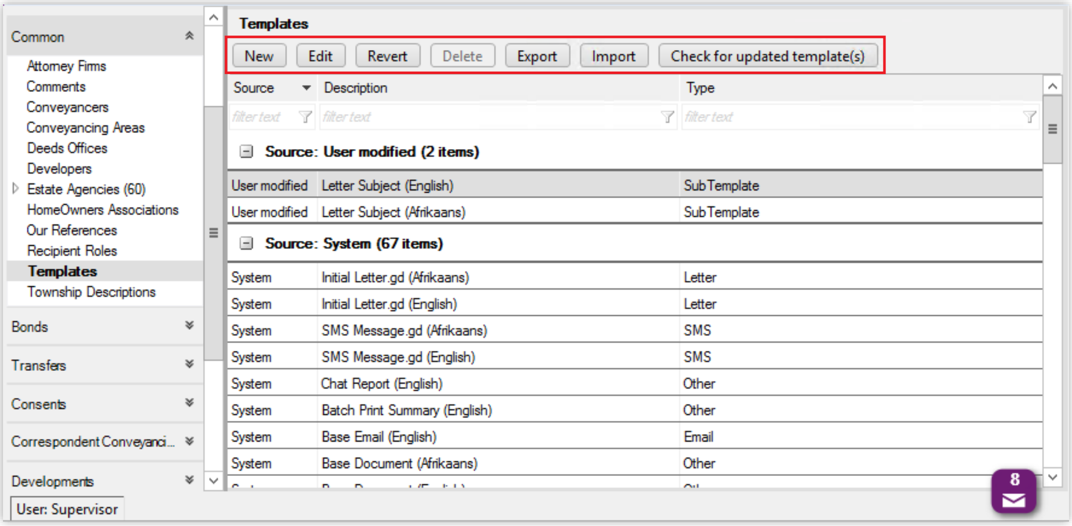
- **Recipient Roles** is a new category that allows you to create custom contact roles for common stakeholders across different matters, such as the recipients of GhostConvey pipeline reports generated by the firm.

  - Add additional recipient roles by clicking the **New** button.



Templates

- The **Templates** section is where the system templates used for reports, email and letters are stored. System templates can be *modified*. Modified system templates are automatically saved as *user templates*.
    - If a user template is created, you can switch to the system template by clicking the **Revert** button on the toolbar.
    - The **Import / Export** buttons allow you to save templates to your local PC for customisation and thereafter import the modified templates into the **Setup>Templates** section.
    - The system templates are maintained by our document assembly team (KODA). When the templates are updated, GhostConvey will automatically check for updates. To manually check you can click the **Check for updated template(s)** button.

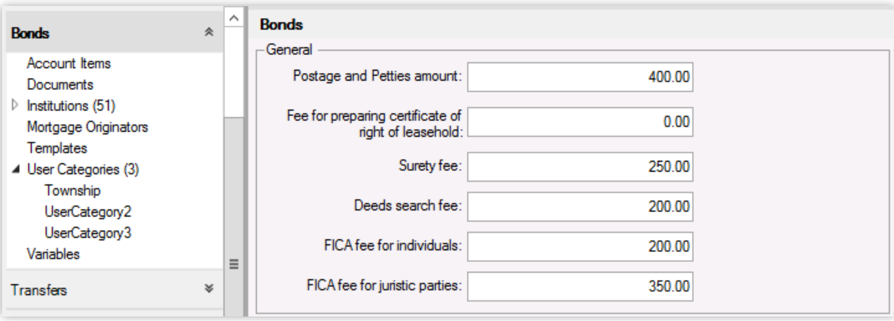


Note: It is strongly recommended that only users with the required permission and training attempt to modify the templates. If you are unsure of how to make the desired changes, please contact our Support Team for assistance.

Bonds

The following frequently used functions relating to Bonds are managed under this menu:

- Generic account items such as postage and petties, FICA fees, Deeds Search fees etc.
- Account items and relevant narratives on the accounts for fees and disbursements. Includes both system and user account items.
- Documents
- Enabling / adding of institutions and branches of institutions
- Management of bond originators



Transfers

The following frequently used functions relating to Transfers are managed under this menu:

- Generic account items such as postage and petties, FICA fees, Deeds Search fees etc.
- Account items and relevant narratives on the accounts for fees and disbursements. Includes both system and user account items.
- Service provides such as borer contractors and electricians
- Estate management companies, managing agents and municipalities
- Notaries
- Title deed institutions for cancellation requests