WHAT'S NEW IN KEYHOUSE ADMINISTRATION

VERSION 5.4.5.1

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We are constantly improving and implementing new features in our software. The attached guide is a summary of what has been added and improved in our system. This guide has been designed as a quick way to see all the changes with your latest upgrade.

We have made improvements in the following areas:

Security

- Partner Tab
- User Permissions – Time Write Off
- User Permissions – Maintain Client and Case Details
- Profile Control Access

Maintain

- Employee Reference No & Team Leader
- Set Default Time as Chargeable/Non Chargeable

Administration

- Activating Document Folders
- Set a Default Associate Type

Setup

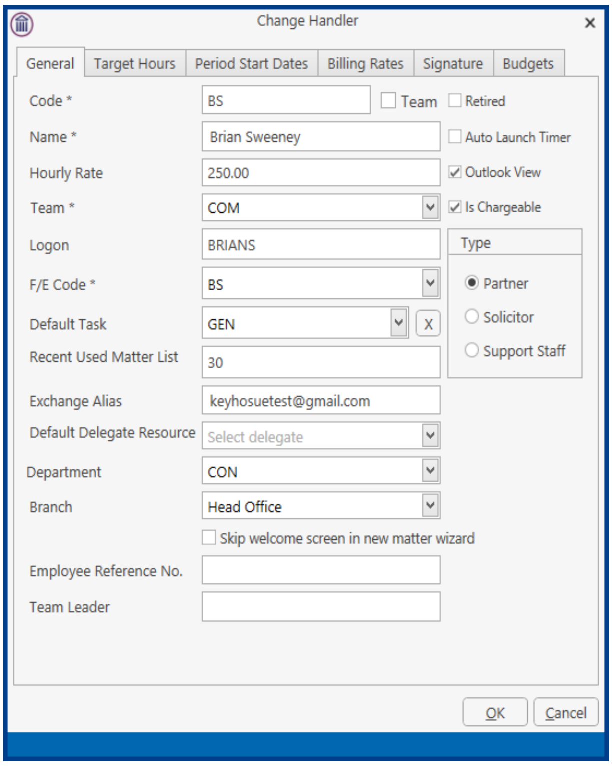
- Prevent Completed Actions from being changed
- UDF Forms
- Client Other Details
- Copy & Paste Workflows

Security

001 Partner Tab

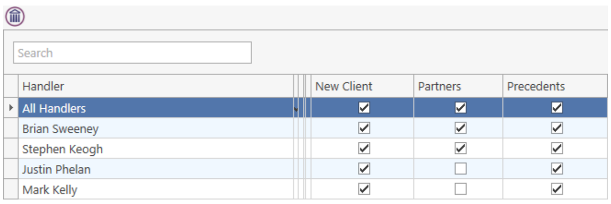
KEYD-3519

Partner Tab giving easy access to Management Reports. Access to this Tab is given on the Handler Tab by selecting the Type of Handler as Partner.



It is possible to restrict to access to the Management Reports for specific partners.

- Go to the Set Up Tab and click User Setup
- Select Handler Control Access
- Ensure the Partners box is ticked to prevent access.



Search

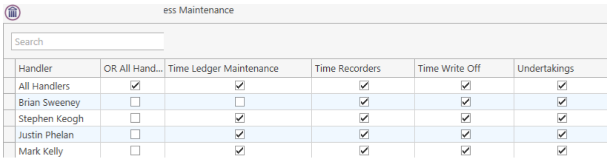
Handler	New Client	Partners	Precedents
All Handlers	☑	☑	☑
Brian Sweeney	☑	☑	☑
Stephen Keogh	☑	☑	☑
Justin Phelan	☑	☐	☑
Mark Kelly	☑	☐	☑

002 User Permissions – Time Write Off

KEYD-2995

It is now possible to prevent users from writing off time. This will ensure that only authorised people can delete recorded time from a matter.

- Go to the Set Up Tab and click User Setup
- Select Handler Control Access
- Ensure the Time Write Off box is ticked to prevent access.



ess Maintenance

Search

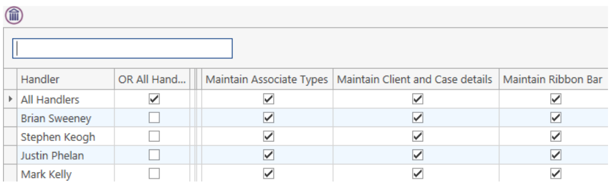
Handler	OR All Hand...	Time Ledger Maintenance	Time Recorders	Time Write Off	Undertakings
All Handlers	☑	☑	☑	☑	☑
Brian Sweeney	☐	☐	☑	☑	☑
Stephen Keogh	☐	☑	☑	☑	☑
Justin Phelan	☐	☑	☑	☑	☑
Mark Kelly	☐	☑	☑	☑	☑

003 User Permissions – Maintain Client and Case Details

KEYD-3229

It is possible to prevent users from changing Client/Matter details once a Client/Matter has been set up. This will ensure that details can only be changed by authorised persons.

- Go to the Set Up Tab and click User Setup
- Select Handler Control Access
- Ensure the Maintain Client and Case details box is ticked to prevent access.



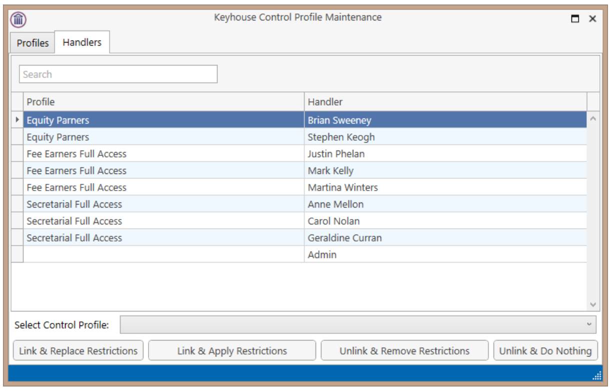
Handler	OR All Hand...	Maintain Associate Types	Maintain Client and Case details	Maintain Ribbon Bar
All Handlers	☑	☑	☑	☑
Brian Sweeney	☐	☑	☑	☑
Stephen Keogh	☐	☑	☑	☑
Justin Phelan	☐	☑	☑	☑
Mark Kelly	☐	☑	☑	☑

004 Profile Control Access

IF-69

The Profile Control Access has been updated. Users can still be added to profiles however, you have the option to update profiles when additional access is given or access is removed, remove users from profiles without changing their access or remove a user and give them full access.

- Create the Profiles as normal
- Switch to the Handlers Tab
- Select the users to be applied to a Profile.
- In the Select Control Profile, select the required profile and click Link & Apply Restrictions.
- If the profile access has been changed, then select the users concerned and click Link & Replace Restrictions.
- Use Unlink & Remove Restrictions to remove a user/s from a profile and give them full access.
- Use Unlink & Do Nothing to remove a user/s from a profile but keep their current access levels.



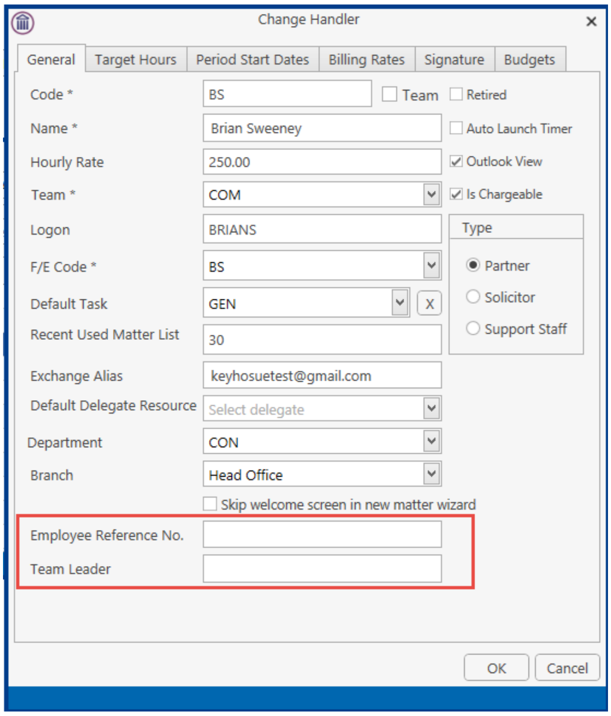
Maintain

005 Employee Reference No. & Team Leader

IF180

An employee's Staff Number and Team Leader can be added for each handler.

- Go to the Maintain Ribbon and select Hander
- Choose the required Handler
- Enter the Team Leader and click OK

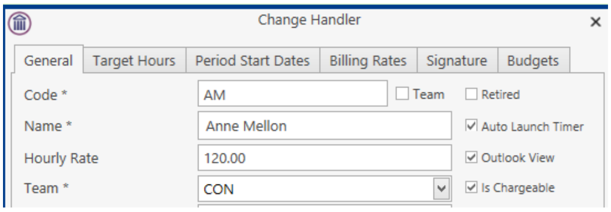


006 Set Default Time as Chargeable/Non Chargeable

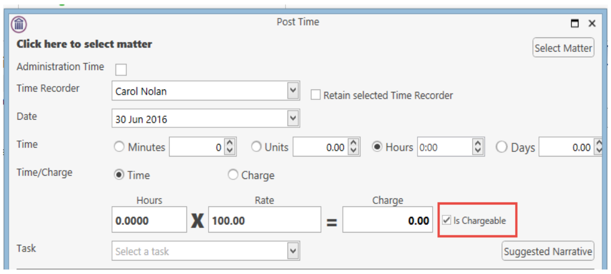
KEYD-3398

It is now possible to set the default for time recording to either Chargeable or Non-Chargeable. If this box is ticked all time recorded by the Handler will automatically be charged.

- On the Maintain Ribbon go to Handlers
- Double Click on the Handler required
- Tick/Untick the Is Chargeable box as required and click OK.



When a time slip is created the time will be shown as chargeable



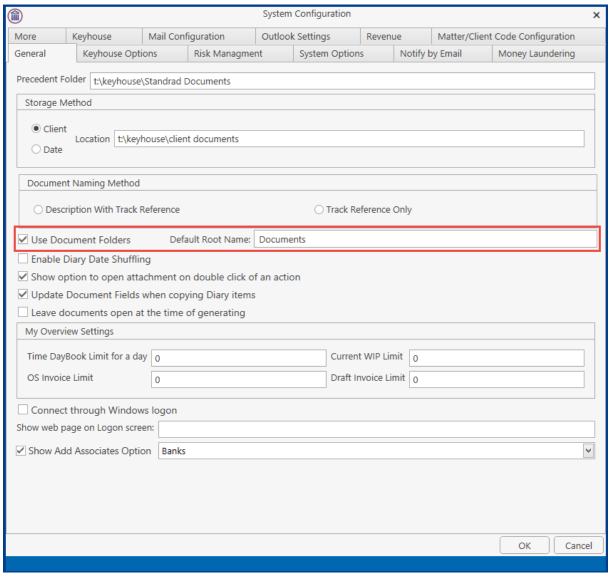
Administration

007 Activating Document Folders

Keyd-2549

Users can set up a Folder structure, similar to Windows Explorer, within a Workflow. This can be based on the nature of the documents, not just their classification. The folder structure will then be available in Scan Capture, Word and Outlook which will allow you to add documents and emails to appropriate folders when saving them to Keyhouse. Additional folders may be added on a case by case basis without impacing the Workflow.

- Go to the Setup Ribbon and select Administration
- Select System Option
- Go to the General Tab
- Tick Use Document Folders

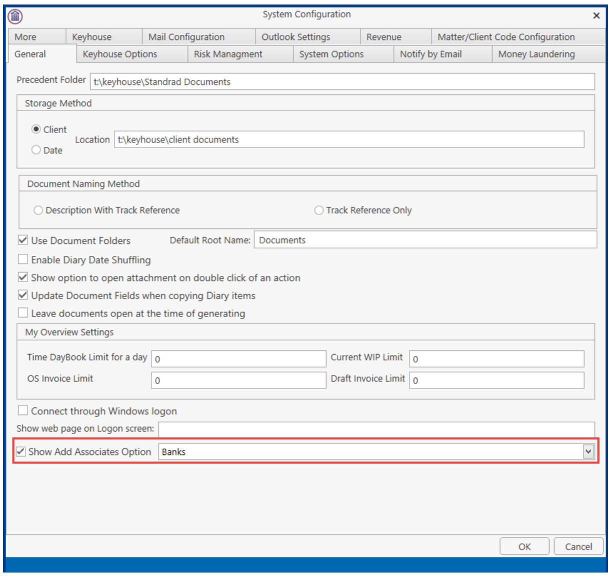


008 Set a Default Associate Type

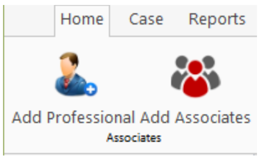
Keyd-2549

Default Associate can be used when there is one type of associate that is being set up more frequently that all the others e.g. debtors. This will help speed up the process of setting them up.

- Go to the Setup Ribbon and select Administration
- Select System Option
- Go to the General Tab
- Tick the Show Add Associates Option.
- Use the drop down to select the Associate type required and click OK.



When you click on Associates in a Matter and go to the Home Ribbon, a new Icon appears beside Add Professional



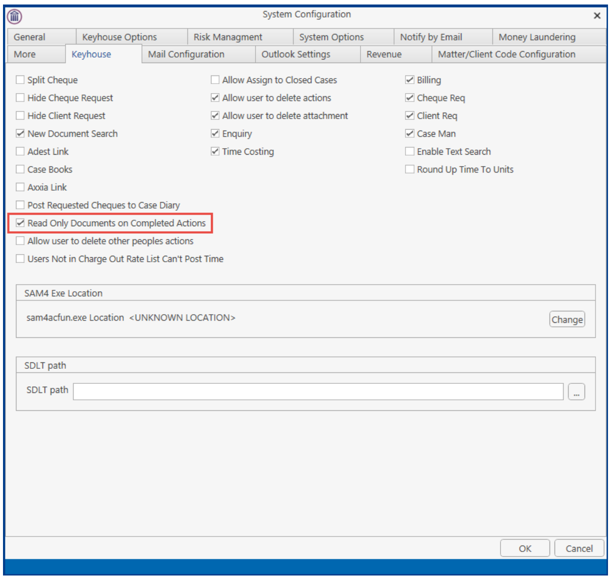
Setup

009 Prevent Completed Actions from being changed

KEYD-2891

It is possible to prevent users from changing an action once it has been completed. Actions would have to be marked as uncomplete before a change could be made.

- Go to the Setup Ribbon and select Administration
- Select System Option
- On the Keyhouse Tab tick the Read Only Documents on Completed Actions

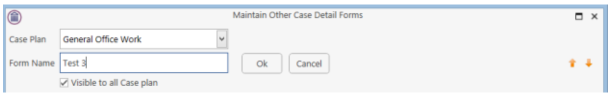


010 UDF Form

KEYD-3035,
KEYD-3009

The UDF form can now be made for a specify workflow/case plan or can be made available for all workflows/case plans. This will stop the need of setting up multiple forms with the same information requrements for each Workflow.

- Go to the Setup Ribbon and select UDF Form Details.
- Select the Case Plan to be used if required otherwise leave blank.
- Click Add and enter the name of the Form.
- Tick Visible to all Case plan
- Complete the form as normal.

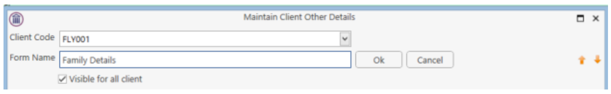


011 Client Other Details

KEYD-3035

The Client Other Details Form can be created for an individual client or for use with all clients. This will ensure that users will not have to create forms for multiple cilents, each with the same information requirements.

- Go to the Setup Ribbon and select Client Other Details.
- Select the Client to be used if required otherwise leave blank
- Click Add and enter the name of the Form.
- Tick Visible to all client
- Complete the form as normal

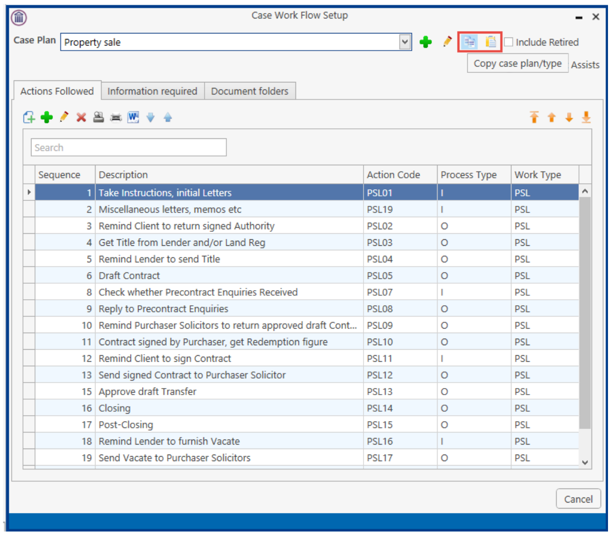


012 Copy & Paste Workflows

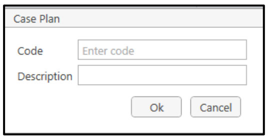
KEYD-3541

It is possible to copy and paste workflows. The copied documents in workflow will not be linked the original documents. The need to create new documents will be removed as it will allow for documents to be changed without affecting the original workflow. However the Follow Up Actions are linked to the original Workflow. These will need to be amended in the new Workflow.

- Select the workflow to be copied and click Copy case plan/type



- Click Paste
- Enter the Code and Description for the new Case Plan



- Click OK