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WHAT'S NEW IN KEYHOUSE
END USER INTERFACE
VERSION 5.5.1.1

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:

Time Costing	Minimise the Timer Admin Time – Minus Time
Case Management	No Win No Fee Open Multiple Document from One Action Cut/Copy Multiple Document from One Action Take Multiple Action in the Case Diary Convert Multiple Email Attachments to PDF from Case Diary Import/Export Documents Case Import Charge Arrangements Advanced Search Layout Print Documents as PDF Debt Ledger – Create View Composite Billing – Select Billing Matter using Advanced Search
Strong Room	Box No Search
My Overview	Review Layout
Security	Password Policy
Brief Builder	Save Grid on Brief Builder Screen Resize Columns Build a Brief based on Previous Brief Prepare Brief for E-Court
Billing	Approve Invoices

Time Costing

001 MINIMISE THE TIMER

KEYD-3397

The timer can now be minimised. This will ensure that it is not blocking any part of the screen.

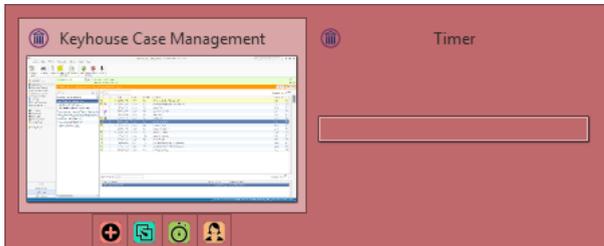
- Start the timer
- Click the Minimise button



- The timer is now on the task bar



- To restore the timer, hover the mouse over the Keyhouse Icon on the Task Bar



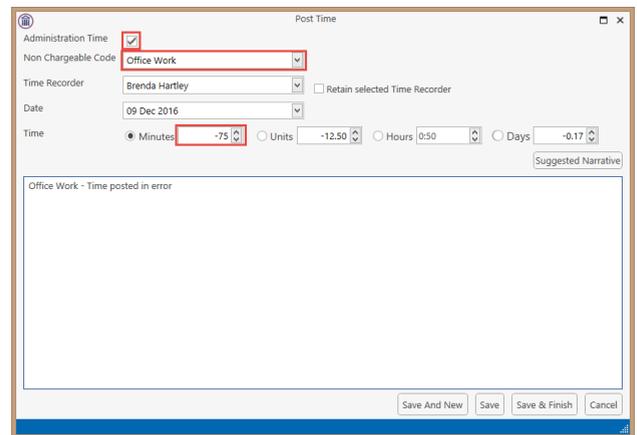
- Click the Timer to restore the restore it

002 ADMIN TIME – MINUS

KEYD-4227

Occasionally Admin time may have been entered in error. This cannot be edited once the Day Book is posted. Users can now create a time entry with a minus value to reverse the entry.

- Go to the Time Costing Screen
- Click New Time Slip
- Tick the Admin Box and enter the Non-Chargeable Code
- Enter the minus sign and then the required value in the appropriate box



- Save and Finish

Case Management

003
KEYD-4274

NO WIN NO FEE

As some matters are charged based on a 'No Win No Fee' basis, there is now the option to flag a matter as No Win No Fee.

- Open the case to be marked as No Win No Fee
- Open the Current Case Details

The screenshot shows the 'Current Case Details' window with the following fields and options:

- Client Code: REV001, Description: Michael Gladney vs Jane Eyre
- Matter: 0001
- Fee Earner: Carol Nolan, File Ref: Enter File Ref
- Secretary: Select secretary, REF 2: Enter User2
- Partner: Brian Sweeney, REF 3: Enter User3
- Department: Debt, Your Ref: Enter YourRef
- Work Type: Debt Collection, Mark as Important: , Statement:
- Old Reference: Enter old reference, Branch: Select branch
- No Win No Fee (highlighted with a red box)
- Case Plan & Status: Case Plan/Type: General Office Work, File Colour: Select file colour, Case Status: [Empty], Record No: Enter record no

- Tick the No Win No Fee box on the General Tab and click OK

004
KEYD-4295
KEYD-4302

OPEN MULTIPLE DOCUMENTS FROM ONE ACTION

The ability to open, copy and cut multiple documents has been added to the Case Diary.

- Click on the require action and open the Attachment section at the bottom of the screen

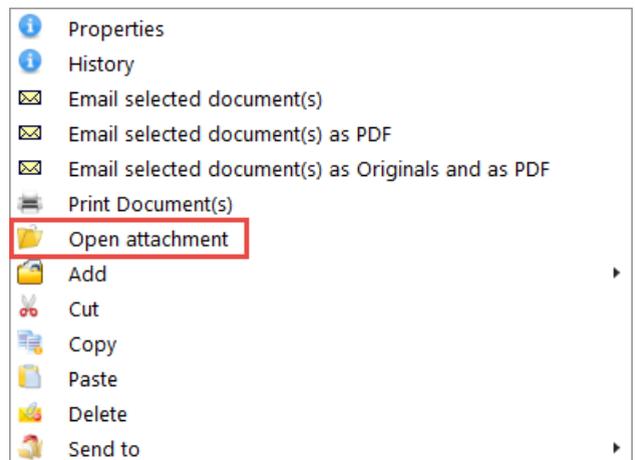
- Select all the documents using the <Shift> Key or select non-adjacent documents using the <CTRL> Key

The screenshot shows the Case Diary table with the following columns: Date, Time, Handler, Synopsis, and Action Co. The Attachments section below shows a list of documents with the following columns: Type and Document.

Date	Time	Handler	Synopsis	Action Co.
08 Dec 2016	14:25	BH	sharpsscanner@keyhouse.ie_20090514	G22
08 Dec 2016	14:18	BH	Review File	G16
08 Dec 2016	14:18	BH	Scanned Post/Mail	G22
08 Dec 2016	14:18	BH	Phone Call	PHE
08 Dec 2016	14:17	BH	Critical Date	G23
08 Dec 2016	14:17	BH	Letter to Barrister	G07
08 Dec 2016	14:16	BH	Letter to Client	G02
08 Dec 2016	14:16	BH	Letter to Solicitor ?	G03
08 Dec 2016	14:15	BH	Letter to Solicitor	G03
02 Dec 2016	11:49	CN	Payment received	O01
30 Nov 2016	16:49	BH	New Referral	R001
02 Nov 2016	15:52	CN	Manual Debt Breakdown Amendment	R004
02 Nov 2016	15:51	CN	Manual Debt Breakdown Amendment	R004
02 Nov 2016	15:15	CN	Payment received	O01

Type	Document
Document	sharpsscanner@keyhouse.ie_20120224
Document	sharpsscanner@keyhouse.ie_20100
Document	sharpsscanner@keyhouse.ie_201
Document	sharpsscanner@keyhouse.ie_20090514

- Right Click and select Open attachment



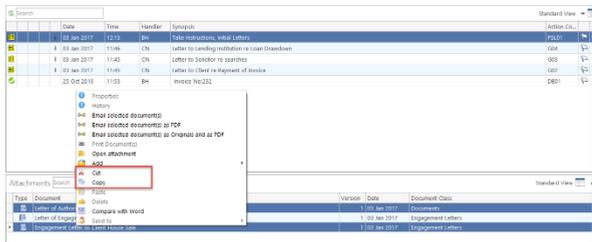
- All selected documents will open

005
KEYD-4302

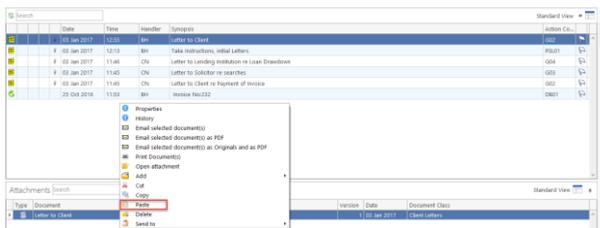
CUT/COPY MULTIPLE DOCUMENTS FROM ONE ACTION

From time to time it may be necessary to cut or copy multiple documents from one action or case to another. To do this:

- Highlight the action with the required documents
- In the Attachments section, select the documents and right click
- Select Cut or Copy from the list depending on the requirement



- Select the action that the documents are to be pasted to
- Click in Attachments section, right click and select Paste



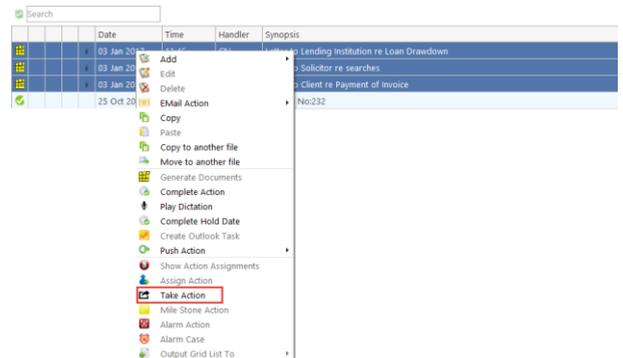
- Alternatively move to the new matter and paste to an action

006
KEYD-4183

TAKE MULTIPLE ACTIONS IN THE CASE DIARY

It is now possible to take multiple actions using the Case Diary.

- Open the Case Diary of the matter concerned.
- Select the actions to be taken.
- Right click and select Take Action



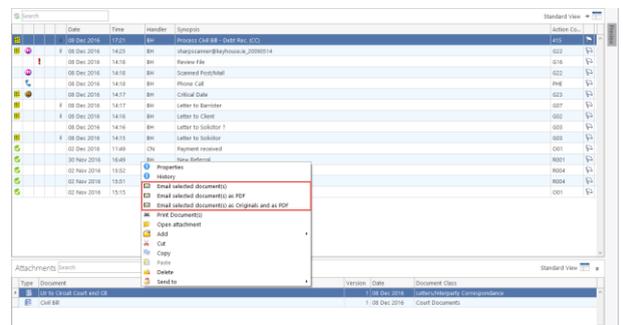
- The actions are now in your name.

007
KEYD-4302

CONVERT MULTIPLE EMAIL ATTACHMENTS TO PDF FROM CASE DIARY

Documents can be converted to PDF when sending emails from the Case Diary.

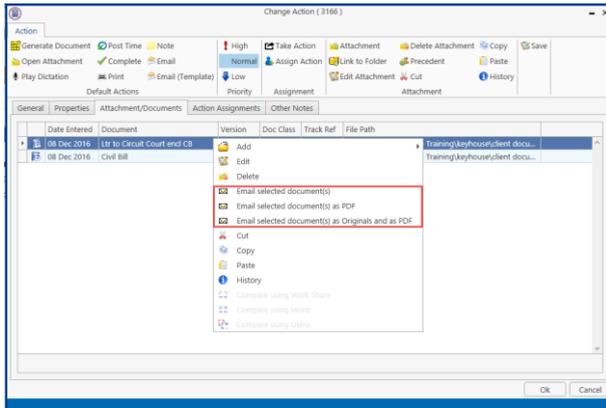
- Go to the action in the Case Diary
- Select the required document/s in the Attachment section of the Screen.
- Right Click and select the required action



- Complete email as normal.

Alternatively

- Go to the action in the Case Diary
- Right click and select Edit from the list
- Go to the Attachment/Documents Tab
- Select the required document/s and right click



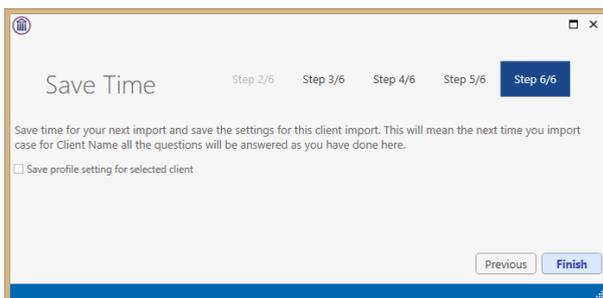
- Select the required option
- Process the email as normal.

NOTE: Where there are multiple documents in the action, all documents can be selected and added to the email.

008 CASE IMPORT

KEYD-3489

When importing cases, it could appear that nothing is happening causing users to click the Finish Button. This results in the import process starting again causing duplicated cases. To prevent this from happening, the Finish Button will now only recognise the first click. Repeated clicking will not import the cases again.



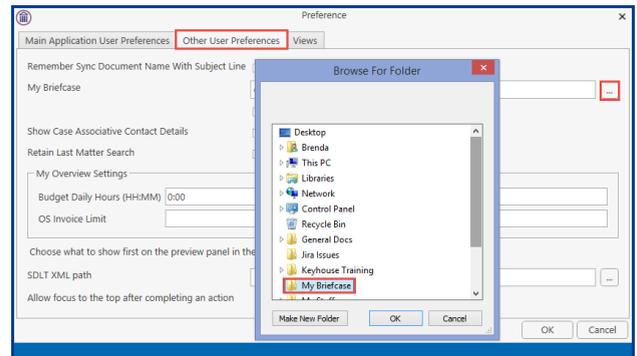
NOTE: The larger the import file the longer it may take to import.

009 IMPORT/EXPORT DOCUMENTS

KEYD-4315

From time to time it may be necessary to export documents to use when access to Keyhouse would not be available e.g. working off site. These documents will then need to be imported back to Keyhouse once edited.

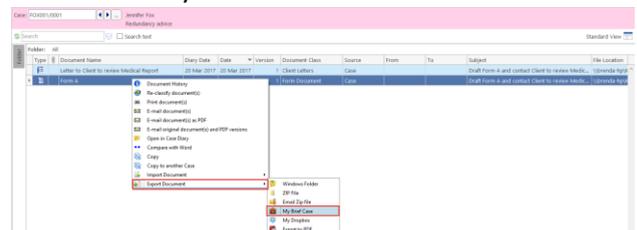
- Create a folder on your computer to hold the exported files
- Go to Keyhouse and click on the Setup Tab
- Click Personal Settings and select Preferences
- Go to the other User Preferences Tab



- Click on the Browse Button to the right of My Briefcase.
- Locate the folder you created to hold the exported files, click OK and click OK again. This links the folder to Keyhouse
- Move to the required case and open the Document Manager.
- Select the documents to be exported.

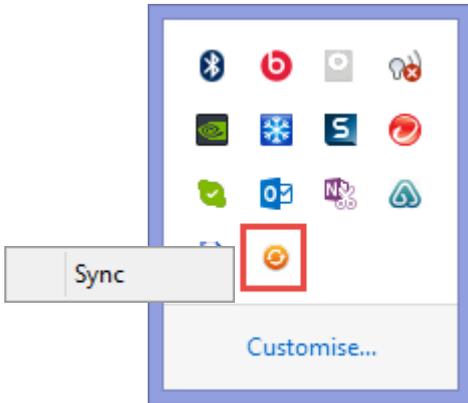
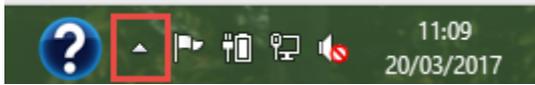
TIP: Use the <Shift> or <Ctrl> buttons to select multiple documents.

- Right click in a blue area and select Export Document.
- Then select My Briefcase



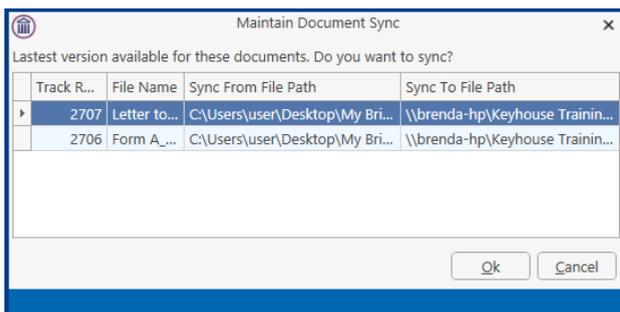
- Go to the Document Folder on your computer to view the documents.
- Make any changes needed to the documents and save.

- To update Keyhouse, open the case and go to the Document Manager.
- Right click on the Keyhouse Framework Sync button on the bottom right of the screen and click Sync. If the button is not visible, click on the up arrow in the bottom right of the screen to see all icons.

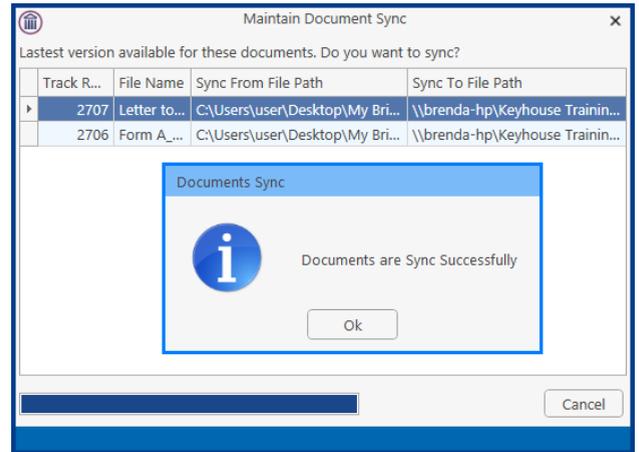


NOTE: This icon can be added to the Task Bar by clicking on Customise and setting the Icon to Show Icon and Notifications

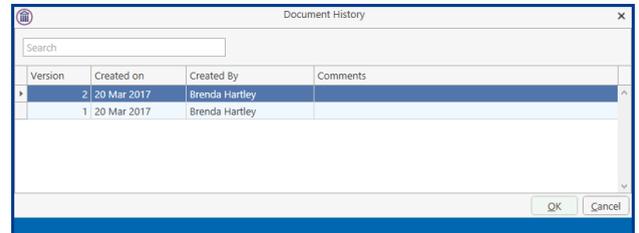
- The following Dialog Box will appear



- Click OK. Only documents that have been changed will be updated by creating a new version of the document.



- The most recent version of the document is now visible on the system.
- To see the original version, right click on the document and select Document History



- Double click on the original version to open it. Right click to email or revert to this version.

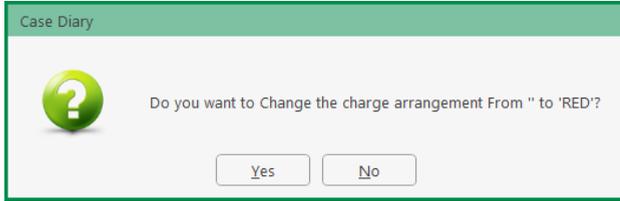
NOTE: All future versions of the document should be saved as new versions. See the Outlook and Word Add-In Manual for further information.



Where an action has a default charge arrangement set in the workflow, the charge arrangement on the case can be updated on completion of this action.

- Complete the action.

- The following dialog box will appear detailing the charge arrangement associated with the action.



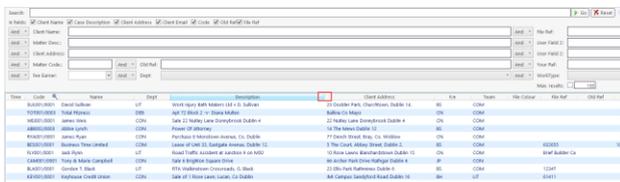
- Click Yes to update the charge arrangement on the case.

011 ADVANCED SEARCH LAYOUT

KEYD-3711

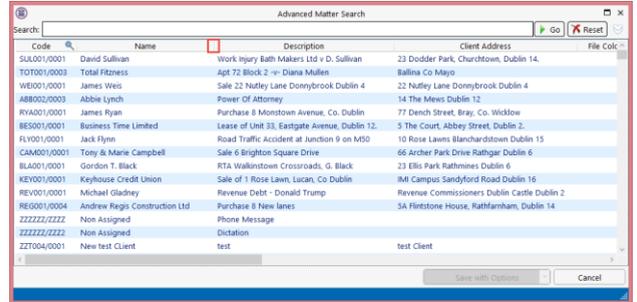
The layout of the Advanced Search can be changed to suit each individual user's requirements. Columns can be widened and repositioned. The layout can also be changed with the Advanced Screen for Emails. The changes will be saved automatically.

- Go to the Advanced Search Screen.
- Click the column to be repositioned and drag to its new location
- To resize a column, click on the line to the right of the column heading and drag right to increase the column width and to the left to reduce the column width



- To reset the Advanced Screen for Emails, select an email and click Assign to Case
- Click on the column heading to be repositioned and drag to its new location.

- To resize a column, click on the line to the right of the heading to be resized and drag.

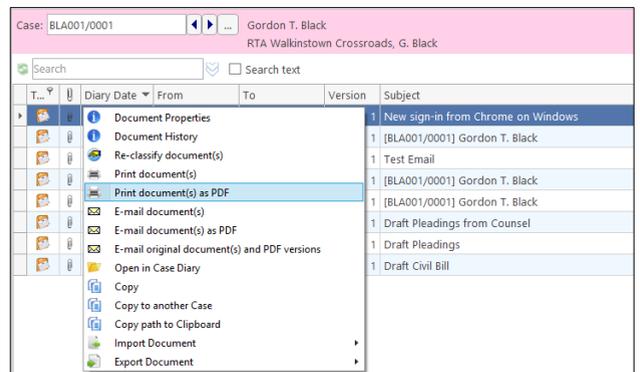


012 PRINT DOCUMENTS AS PDF

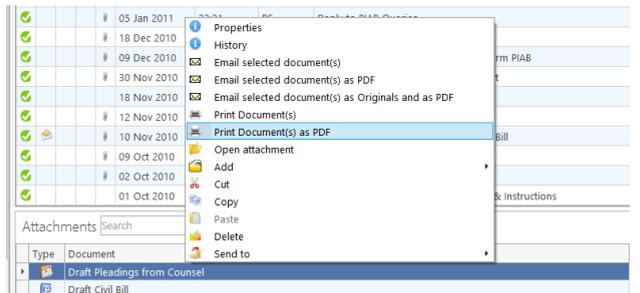
KEYD 4643

To facilitate the printing of Emails, a new Print Document as PDF has been added the Right Click Menus on the Document Manager and the Attachments section on the Case Diary.

Document Manager View



Case Diary View



013

KEYD-3711

DEBT LEDGER – CREATE VIEWS

Along with other screens in Keyhouse, views can now be created in the Debt Ledger. These views are set the same way as all other views.

014

KEYD-4592

COMPOSITE BILLING – SELECT BILLING MATTER USING ADVANCED SEARCH

The Advanced Search option will now appear when setting the Billing Matter on the Current Case Details.

- Go to the Current Case Details for the matter.
- Open the Billing Details screen.
- Click on the Browse Button under the Composite Billing Matter heading.

Strong Room

015 BOX NO SEARCH

KEYD-4241

Box No has been added to the options for searching in the Strong Room.

- Go to the Strong Room on the Search/Open Screen
- Right click on the Header Row and select Show Column Chooser

Item Description	Status	Open/Closed	Destroy Date	
Alex Jones/Will o...	I	O		<ul style="list-style-type: none"> Sort Ascending Sort Descending Clear Sorting Group By This Column Show Group Panel Show Column Chooser Best Fit Best Fit (all columns)
George J Abbott/...	I	O		
Gordon T. Black/...	I	O		
George J Abbott/...	I	O	08 Aug 2014	
Year end backup...	I		19 Jun 2014	
AAA Securities Lt...	I		19 Jun 2014	
Margaret Ryan/...	I		18 Jun 2014	
Ann Marie Cullen...	I		30 Aug 2014	
Year End Backup...	I		18 Jun 2014	

- Select Box No and drag and drop to the required location on the Header Row

ATR	Item Code	Matter Code	Box Number	Item Type	Item Description
	0000123133			Wills	Alex Jones/Will of Alex Jones dated 1/12/16
	0000123132	ABB001/0005		Deeds	George J Abbott/RTA The Rise, Stillorgan
	0000123131	BLA001/0001		Deeds	Gordon T. Black/RTA Walkinstown Crossroads, G. Black
	CDA1111	ABB001/0004	123	Deeds	George J Abbott/Title Deeds - Code CDA 1111
	0000123130		123213213	Backup Tapes	Year end backup 2011
	0000123129	AAA001/0001	253152	Company Seals	AAA Securities Ltd/Company Seal
	0000123128	RVA002/0001	67	Wills	Margaret Ryan/Will which included additions for beneficiaries
	D1234	CUL001/0001	45	Deeds	Ann Marie Cullen/Deeds for 101 Dun Emer Drive, Dublin 6
	0000123127		12	Backup Tapes	Year End Backup 2013 (SERVERD1)
	0000123126	FEN001/0001	4	Wills	Richard Feeneil/Will
	0000123125	AAA002/0002	3	Papers	AAA Worldwide Removals/Student Complaint File
	0000123124	AAA002/0002	2	Company Seals	AAA Worldwide Removals/Company Seal
	LEA1811	EVE001/0003	213	Lease Agreements	Ever Green Insurance Corporation/Leasehold Agreement for T...
	test	OWE001/0001	255	Deeds	Peter Owen/Test Deeds for Section 23 Property
	123123	AAA001/0001		Wills	AAA Securities Ltd/My Will 2
	AAA00100001	AAA001/0001		Wills	AAA Securities Ltd/My Will
	AAA00100001	AAA001/0001		Wills	AAA Securities Ltd/My Will
	12345		12	Backup Tapes	Friday 1 Backup
	ABB00100001	ABB001/0001	44	Deeds	George J Abbott/Title Deeds for second property
	DEE	TAR001/0001	223	Deeds	George Tarrant/Deeds for Commerical Premises
	ABC000	ABB001/0001		Papers	George J Abbott/Personal Papers

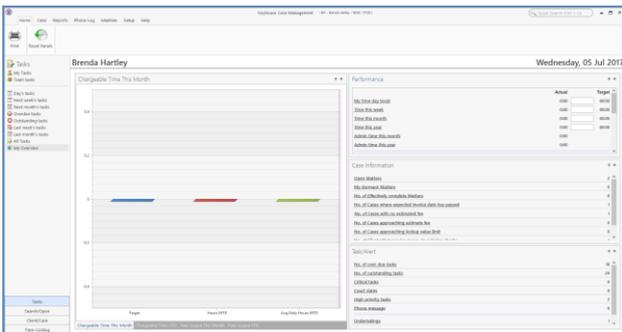
- Save the view in the normal way

My Overview

016 REVIEW OF LAYOUT

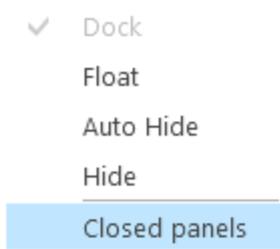
KEYD-4479

The My Overview Screen has been redesigned to improve the information provided to Fee Earners. It provides a more visual display of the recorded information.



The Layout of the information can be changed to suit the users' requirements.

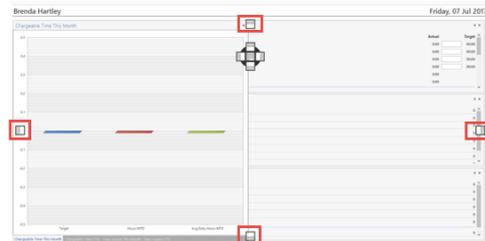
- Right click on the chart and click Float. The chart can then be resized to fit the screen.
- Click X to close.
- Clicking the X will also hide the charts.
- To Open a closed chart, right click on the screen and select Closed Panels.



- The names will appear at the top of the screen

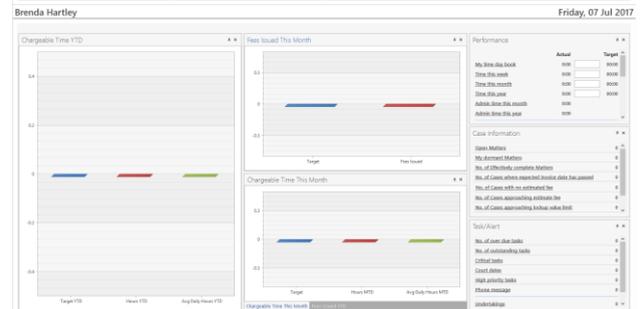
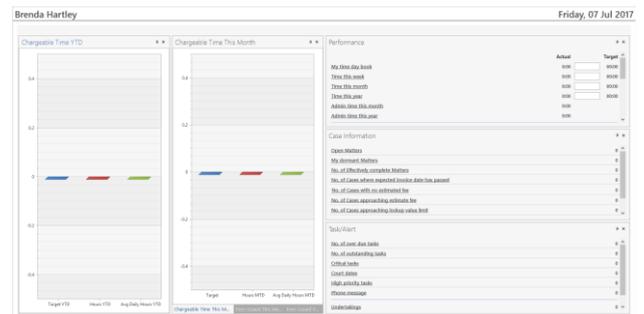


- Click on the name of a chart to view it.
- Column sizes can be adjusted by dragging to resize
- To reposition data on the screen, click on the heading e.g. the Fees Issued chart and drag until the positioning icons appear.

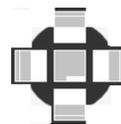


The highlighted icons indicate the location on the screen while the Cross indicates the position in the selected location of the screen.

- Then drop on the preferred position.



- To create tabs, click on the heading and drag down until the Cross Icon appears



- Drop in the centre of the Icon

- Tabs will appear at the bottom of the section

Performance		
	Actual	Target
My time day book	0:00 <input type="text"/>	00:00
Time this week	0:00 <input type="text"/>	00:00
Time this month	0:00 <input type="text"/>	00:00
Time this year	0:00 <input type="text"/>	00:00
Admin time this month	0:00	
Admin time this year	0:00	
<hr/>		
Fees this month	0 <input type="text"/>	0
Fees last month	0 <input type="text"/>	0
Fees year to date	0 <input type="text"/>	0
Fees last year to date	0 <input type="text"/>	0
Fees last year	0 <input type="text"/>	0
<hr/>		
Outstanding invoice	0 <input type="text"/>	0
Current work in progress	0 <input type="text"/>	0
Draft invoice	0 <input type="text"/>	0
Outstanding fees	0	
Debtors days	0	
<hr/>		
Outlay balance	0	
Current lockup value	0	

- Changes are saved automatically. By clicking the Reset button, the changes can be removed.

The screenshot shows a software interface for 'Brenda Hartley' on 'Friday, 07 Jul 2017'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options like 'Home', 'Tasks', 'Reports', 'Performance', 'Case Information', 'Tasks/Alerts', and 'Help'.
- Main Area:**
 - Changeable Time YTD:** A line chart showing time usage over the year.
 - Fees Issued This Month:** A line chart showing fees issued over the month.
 - Changeable Time This Month:** A line chart showing time usage over the current month.
- Performance Table:** A table with columns for 'Actual' and 'Target' values for various metrics, including time and fees.

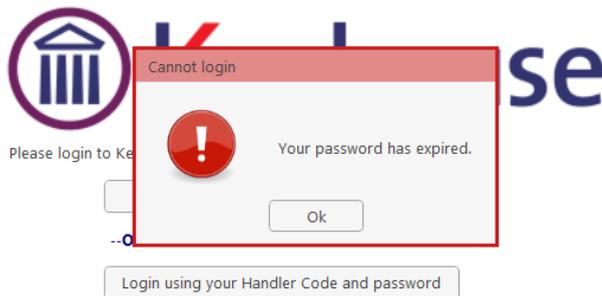
Security

017
KEYD-4257

PASSWORD POLICY

As security becomes more and more important, a Password Policy option has been introduced to Keyhouse. If the policy has been activated, after a specified time you will be forced to change your password.

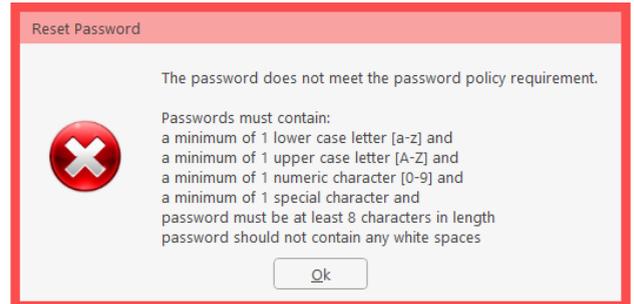
- Log in using your normal method.



- Click OK.
- Enter your Handler ID, old password and then your new password and link to your Windows Login if required.

A screenshot of the Keyhouse login interface. The main header shows the Keyhouse logo and the text 'Please login to Keyhouse'. Below this is a 'Log in using your Windows ID' button. A red 'OR' separator is shown. Below the separator are four input fields: 'Handler:', 'Old Password:', 'Password:', and 'Confirm:'. At the bottom, there is a checkbox labeled 'Link this login to your Windows Login' and a 'Login' button.

- If the password does not meet the policy requirements, the following message will be displayed.



- Re-enter the password to confirm and click OK.

NOTE: The option to link your password to your Windows ID may be removed by your system Administrator.

If this option is applied the Log On Screen will appear like the image below.

A screenshot of the Keyhouse login interface. The main header shows the Keyhouse logo and the text 'Please login to Keyhouse'. Below this are two input fields: 'Handler:' and 'Password:'. At the bottom is a 'Login' button.

Note: Passwords can also be changed using Personal Settings on the Setup Ribbon

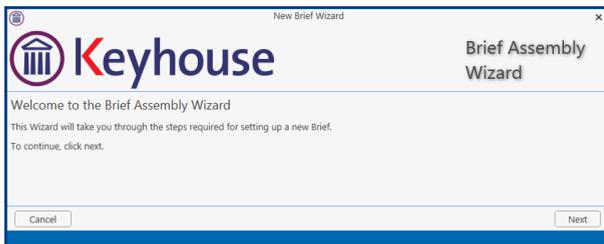
Brief Builder

018
KEYD-4130

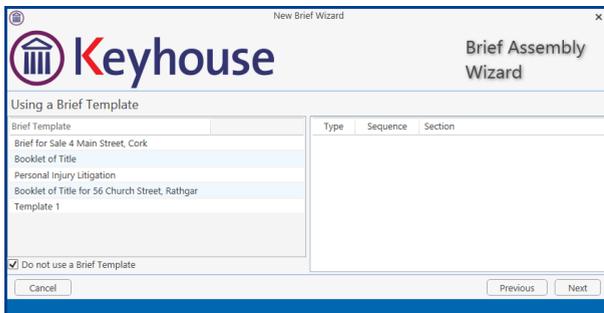
SAVE GRID ON BRIEF BUILDER SCREEN

When creating a Brief you may want to limit the documents/classifications that are available for selection. This can be done by creating and saving views.

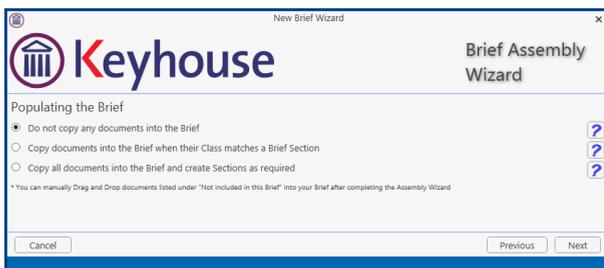
- Go to the Document Manager.
- Click on the Create Brief icon.



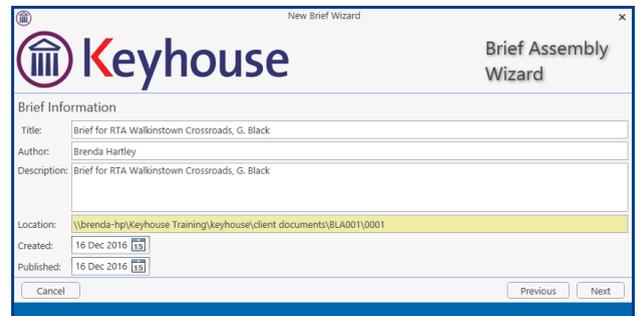
- Click Next.



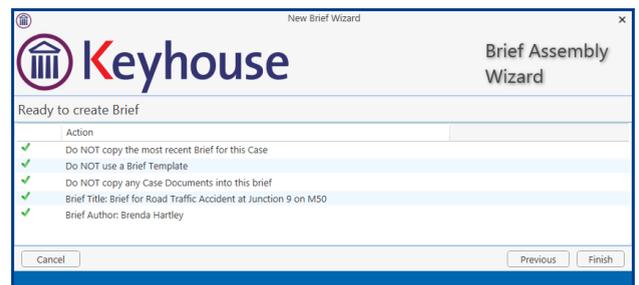
- If you do not want to use a Template, click Do not use a Brief Template.
- Click Next.



- Tick Do not copy my documents into the brief and click Next.



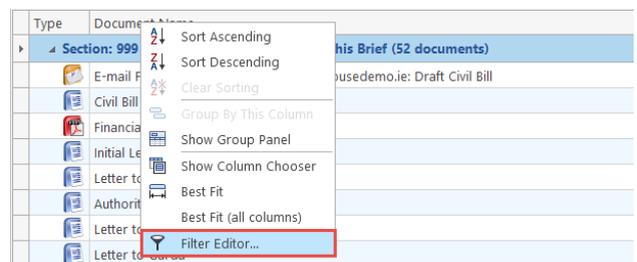
- Edit the details as required and click Next.



- Click Finish.

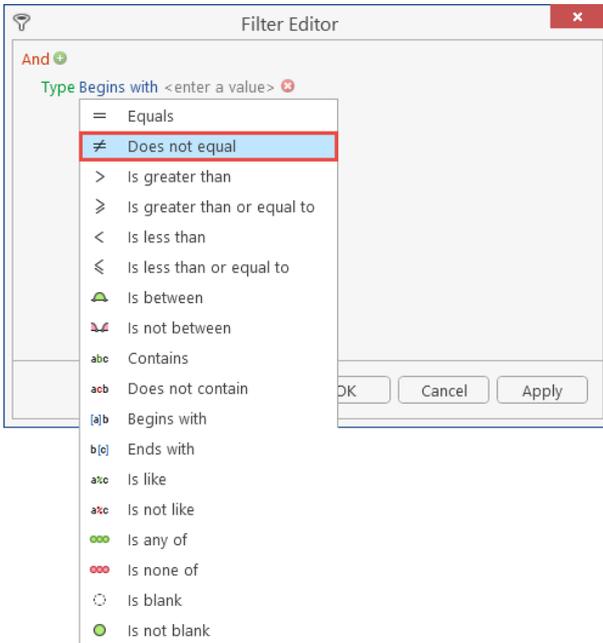


- Click on the Black Arrow to expand the list of documents.

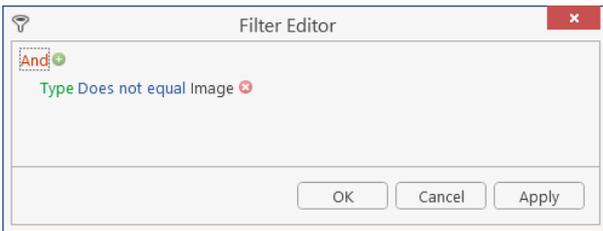


- Right click on Type on the Header Row and select Filter Editor.

- Click on Begins with and select Does not equals.



- Click on Enter a value and type Image.

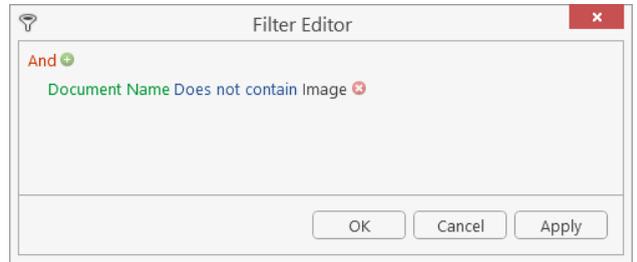


- Click Apply and OK.
- All image files have been removed from the documents.
- Save the view as normal.



- To use the Document Name column to block image files, right click on Document Name in the Header Row.
- Select File Editor.
- Click on Begins With and change to Does Not Contain.

- Click on Enter a value and type Image.



- Click Apply and OK.

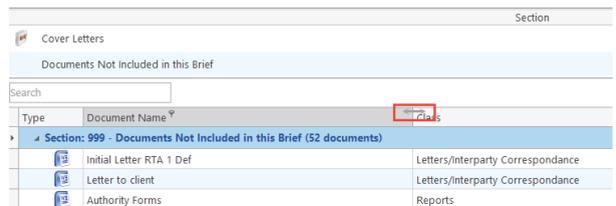
NOTE: The Filter can be edited by clicking on the pencil in the bottom right of the screen

019 RESIZE COLUMNS

KEYD-4130

The Column width of the columns on the Brief Builder screen are now adjustable.

- Click on the line between each column in the Header Row.
- Drag in the required direction.



BUILD A BRIEF BASED ON A PREVIOUS BRIEF

This new version of Keyhouse now allows for new briefs to be created based on any previous brief rather than just the last one.

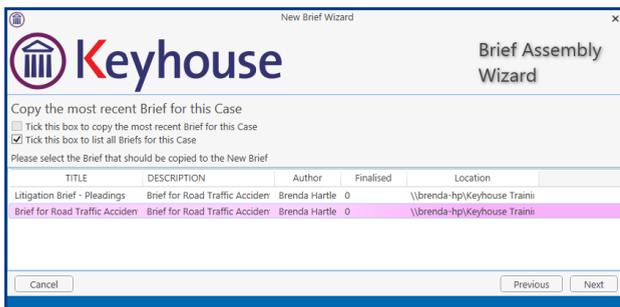
- Click to the Document Manager and select Compile Brief.



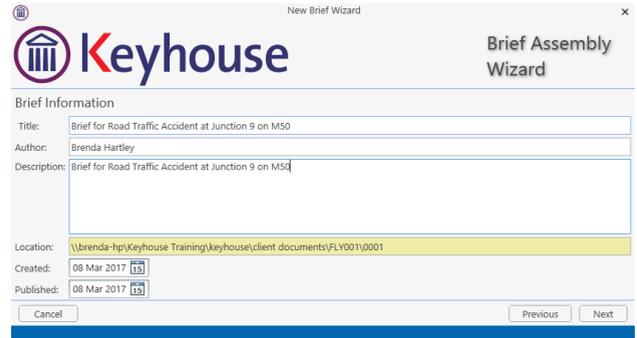
- Click New Brief and click Next.



- Select Tick this box to list all Briefs for this Case.



- Select the brief to be copied and click next.

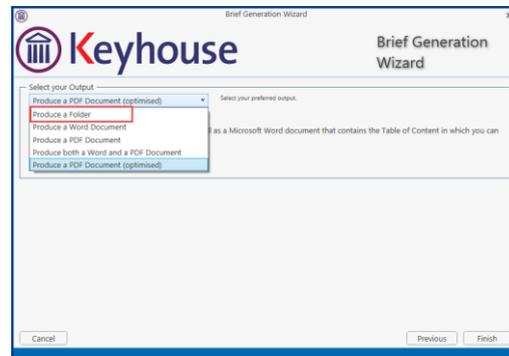


- Complete the brief as normal.

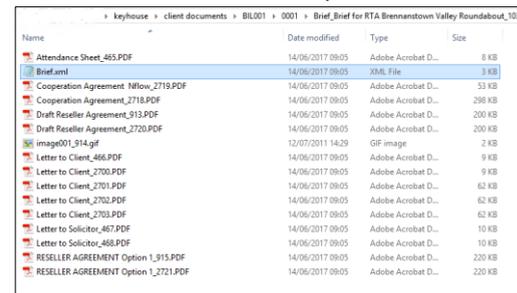
PREPARE BRIEF FOR E-COURTS

With the increased use of IT in the court system, the brief can be exported to a folder to allow it to be added to the E-Court system.

- Prepare the brief in the normal way and generate.
- On the Select your Output screen, select Produce a Folder from the drop-down list.



- Click Finish. The brief will generate as normal.
- An .XML file will be created and stored in the documents folder which opens automatically.



- The folder can then be downloaded to a memory stick or CD.

Billing

022
KEYD-4590

APPROVE INVOICES

In some cases it may be necessary to approve an invoice using the Case Management system rather than waiting for the Accounts Department to release the invoice.

- Create the invoice in the normal way and release.
- Open the Draft Invoice and click Approve.

The screenshot shows a 'Draft Invoice' window. On the left sidebar, the 'Approve' button is highlighted with a red box. The main area contains 'Matter Details' for 'TRA001/0001' with handler 'Stephen Keogh' and description 'Management Fees - Dispute'. A table at the bottom shows invoice items:

Type	Narrative	Net	VAT Value	Fee Earner
F	Professional Fee	1,010.00	232.30	Stephen Keogh

At the bottom, a summary shows: Fees: 1,010.00, Outlay: 0.00, Miscellaneous Fees: 0.00, VAT: 232.30, Bill Total: 1,242.30.

- The invoice will generate and can then be printed.
- It will not appear on the Accounts Ledger until it has been posted by the Accounts Department.

NOTE: This option will only be available if you have been given permission by the System Administrator