

WHAT'S NEW IN KEYHOUSE ADMINISTRATION

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:

UDF Forms Maintain UDF Form Details

Maintain SDLT Field Name (UK Clients Only)

Security Password Security

Handler Access - Approve Invoices

Administration IManage Integration

Change Field Names

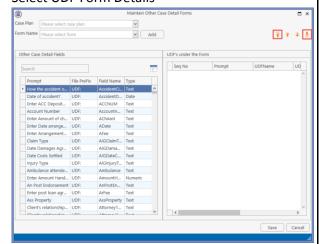
Case Workflow Setup Charge Arrangements

UDF Forms



An option to move directly to the bottom or the top of the UDF List has been added.

- Go to the Setup Screen
- Select UDF Form Details



 Click the first arrow to go to the top of the list and the last arrow to get to the bottom of the list.

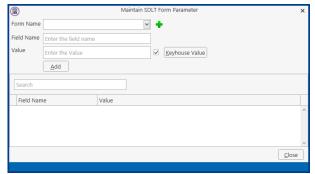
Maintain



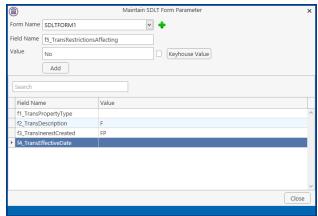
To prevent incorrect information being added to this field, users are now prevented from adding spaces and certain non-alphanumeric characters used for coding i.e. " $\mathfrak{t} \in \mathfrak{A}$ *-= <> / :: '[] \ |.

Go to the Maintain Tab and select Other Codes.

• Select SDLT Form Parameter



- Click on the Drop Down to enter the Form Name or click the Add button to create a new Form Name
- Enter the Field Name. This can be alpha, numeric or symbols, excluding the symbols mentioned below.
- Enter the Value if required
- Click Add

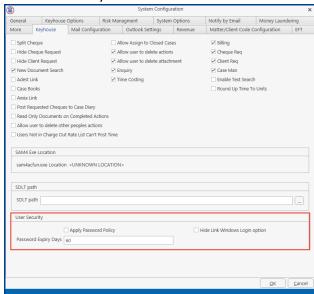


Security



n line with best practice, a company password policy can now be activated in Keyhouse. This is set using the Administration Options.

- Click on the Setup Tab and select Administration from the Ribbon
- Click to the Keyhouse Tab

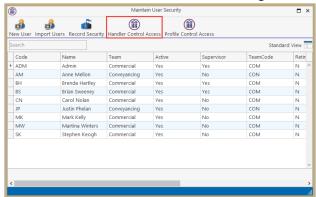


- To apply a policy, tick the Apply Password Policy box
- To prevent users linking their password to their Windows ID, tick the Hide Link to Window Logon Option
- In the Password Expiry Days box, enter the number of days a password will remain valid.
- Click OK to enforce.



As it is now possible to approve invoices from the Framework, it may be necessary to control who has permission to do this.

- On the Setup Ribbon, click User Setup
- Click Handler Control Access on the dialog box



Untick to remove access from users



• Close the screen when finished

NOTE: If Profile Controls are in use, restricting access should be done for the Profile Control Access screen.

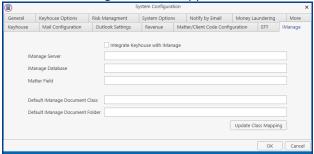
Administration



Keyhouse can be used in conjunction with IManage. To facilitate this integration a new tab has been added to the System Options screen.

- Click on the Setting Tab and select Administration.
- Select System Options and then click on the IMange Tab.

The following screen will appear

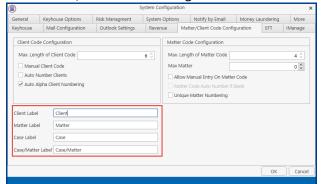


• The information required on this screen will be populated by Keyhouse.



In addition to giving a firm the ability to define their own codes, they now can define the field name for several fields.

- Click on the Setting Tab and select Administration.
- Select System Options and then click on the Matter/Client Code Configuration Tab.



 Default names have been entered but these can be changed.

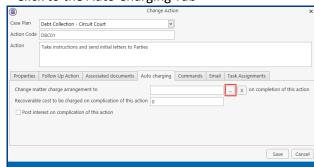
Case Workflow Setup



t is no longer necessary to add the Charge
Arrangement to the document. It can now be
added to the Auto Charging Tab on the Workflow
Action.

• Open the Workflow and select the action for the Charge Arrangement.

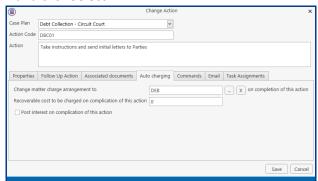
• Click to the Auto Charging Tab



• Click on the Browse Button to view all Charge Arrangements on your system.



 Highlight the charge arrangement to be used and click Select



Click Save to apply the arrangement.