

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

001
KEYD-4280

MAINTAIN UDF FORM DETAILS

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

002
KEYD-4237

SDLT FIELD NAME (UK Clients Only)

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. " £ € & * - = < > / : ' [] \ | .

- 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

Field Name	Value
f1_TransPropertyType	
f2_TransDescription	F
f3_TransInerestCreated	FP
f4_TransEffectiveDate	

Security

003
KEYD-4257

PASSWORD SECURITY

In 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

System Configuration

General | Keyhouse Options | Risk Management | System Options | Notify by Email | Money Laundering

More | Keyhouse | Mail Configuration | Outlook Settings | Revenue | Matter/Client Code Configuration | EFT

Split Cheque
 Hide Cheque Request
 Hide Client Request
 New Document Search
 Adest Link
 Case Books
 Aoxia Link
 Post Requested Cheques to Case Diary
 Read Only Documents on Completed Actions
 Allow user to delete other peoples actions
 Users Not in Charge Out Rate List Can't Post Time

Allow Assign to Closed Cases
 Allow user to delete actions
 Allow user to delete attachment
 Enquiry
 Time Costing

Billing
 Cheque Req
 Client Req
 Case Man
 Enable Text Search
 Round Up Time To Units

SAM4 Exe Location
 sam4acfun.exe Location <UNKNOWN LOCATION>

SDLT path
 SDLT path

User Security
 Apply Password Policy
 Hide Link Windows Login option
 Password Expiry Days 60

OK Cancel

- 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.

004
KEYD-4356

HANDLER ACCESS – APPROVE INVOICES

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

Maintain User Security

New User | Import Users | Record Security | **Handler Control Access** | Profile Control Access

Search

Code	Name	Team	Active	Supervisor	TeamCode	Retir
ADM	Admin	Commercial	Yes	Yes	COM	N
AM	Anne Mellon	Conveyancing	Yes	No	COM	N
BH	Brenda Hartley	Commercial	Yes	Yes	COM	N
BS	Brian Sweeney	Commercial	Yes	Yes	COM	N
CN	Carol Nolan	Commercial	Yes	No	COM	N
JP	Justin Phelan	Conveyancing	Yes	No	COM	N
MK	Mark Kelly	Commercial	Yes	No	COM	N
MW	Martina Winters	Commercial	Yes	No	COM	N
SK	Stephen Keogh	Commercial	Yes	No	COM	N

- Untick to remove access from users

Keyhouse Control Access Maintenance

Search

Handler	OR All Handlers	Profile	Access Firm Phone Log	Access to Know Your Client	Accounts User	Action Flow Setup	AMI Approval	Approve Invoice
All Handlers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anne Mellon	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Brenda Hartley	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Brian Sweeney	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Carol Nolan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Justin Phelan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mark Kelly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Martina Winters	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Stephen Keogh	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Close the screen when finished

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

Administration

005
KEYD-4552

IMANAGE INTEGRATION

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 IManage Tab.

- The following screen will appear

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

007 CHANGE FIELD NAMES

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

008 CHARGE ARRANGEMENTS

It 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.

Code	Description	Time Charge	Action	Band 1 Limit	Band 1 Rate	Band 2 Limit	Band 2 Rate
DEB	Debt Costs	C		2000.00	2.00	99999999.00	4.00
PSD	Postage & Sundries on Draft Pr...	C		0.00	0.00	0.00	0.00
RED	Revenue Demand	T		4000.00	2.50	99999999.00	0.50

- Highlight the charge arrangement to be used and click Select

- Click Save to apply the arrangement.