Keyhouse Computing Ltd.
IMI Business Campus,
Sandyford Road, Dublin 16.

Call +353 1 2902222
Email info@keyhouse.ie

What's New in Keyhouse Administration

Version 5.6.1.1

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:

Area	Item Code	Description
System Options	001	New Document Generation
	002	Prevent users running the Dashboard Report
	003	Document Access Tab
	004	Link for Partner For Windows
	005	Destroy Matters
	007	Undertaking Warning after Due Date
	007	Print Receipt for Payment & Set Default Bank
	008	Functionality to change Labels
	009	Show Current Case Detail on Case Diary
	010	AML Approval to Allow Post Time
	011	AML Check
	012	Turn On/Off the Email to and From in Case Diary
	013	Automatic Log Off
Handler Access	014	Non-Modifiable Data
	015	Document Reproduction Maintenance
Maintain Tab	016	Handler Job Description
	017	Fee Earner Code
Case Plan Set Up	018	Copy Case Plan – Optional Documents
	019	Test Doc Assist

System Options

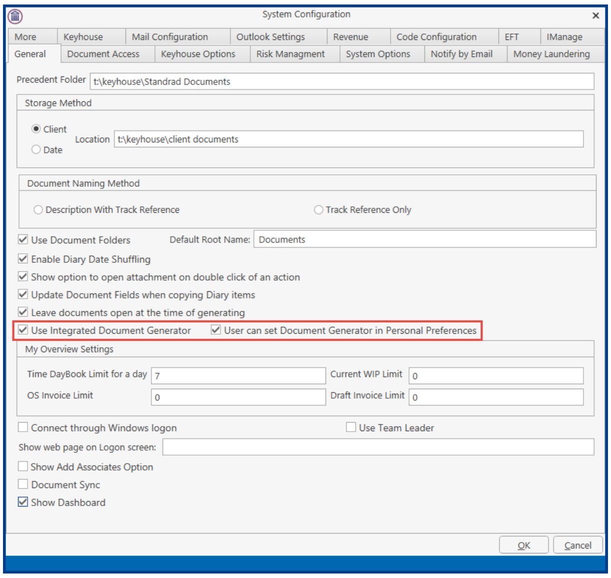
NOTE: When changes are made to the System Options, they are system wide changes and users must log out of Keyhouse and log back in before they will take effect.

001 New Document Generation

KEYD-4804

A new document generation program has been developed but this must be activated as a system level to allow users to use it.

- Go to the Setup Ribbon and select Administration, then System Options
- Click on the System Options Tab



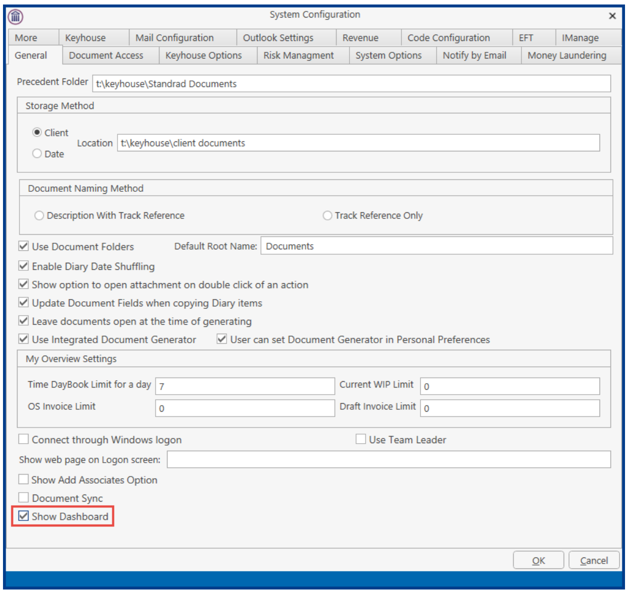
- Tick the Use Integrated Document Generator.
- To give users the option to use the old document generation system, tick the User can set Document Generator in Personal Settings. For user information see Chapter 4 in the End User Manual
- Click OK to close the system

002 Prevent Users Running the Dashboard Report

KEYD-5227

You may not want users to be able to run the Dashboard Report from the Time Ledger. This can be turned off as a global setting.

- Go to the Setup Ribbon and select Administration, then System Options
- Click on the System Options Tab
- The Show Dashboard option is ticked by default



- Untick the option and click OK.
- Users would then have to use the My Overview to see their data.

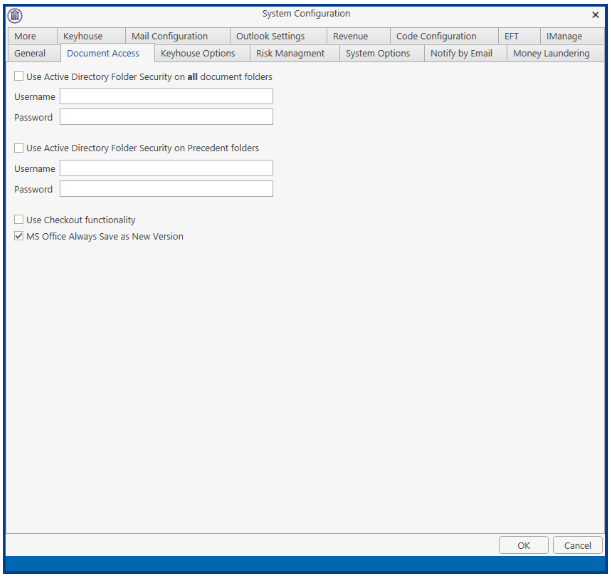
003 Document Access Tab

KEYD-4977

To help prevent unauthorised access to client documents, a new document access feature has been added. When this is activated, it will prevent users from accessing client information from the Windows Explorer folders. This must be set up in conjunction with Keyhouse and your IT provider.

- Go to the Setup Ribbon and select Administration, then System Options

- Click to the Document Access Tab



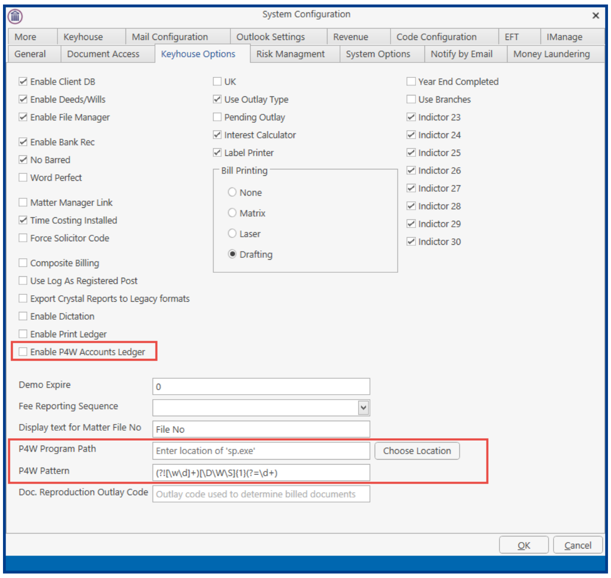
- Tick Use Active Directory Folder Security on all document folders.
- Enter the Admin Username and Password (obtained from your IT provider).
- If the Precedent Folder is to be controlled, tick the Use Active Directory Folder Security on Precedent folder.
- Re-enter the Username and Password for the Precedent Folder.
- To ensure more than one user cannot work on the document at the same time, tick the Use Checkout functionality
- Note that the MS Office Always Save as New Version is ticked by default. This will ensure that each time the document is amended, a new copy will be created.

NOTE: For information on setting up the Admin User in MS Office please contact Keyhouse Support.

004 LINK FOR PARTNER FOR WORD

KEYD-4332

For clients who use Partner for Word, an option to link to it to Keyhouse has been added. This must be activated with the help of Keyhouse before it can be used. Please contact Support for further assistance.

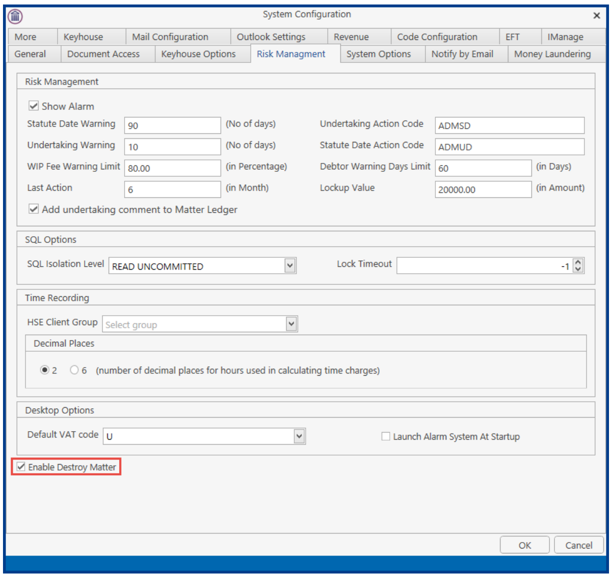


005 DESTROY MATTERS

KEYD-4688

With the introduction of the new General Data Protection Rules, it is important to have the ability to remove data from Keyhouse. This function is limited to System Administrators only and must be activated in the System Options.

- Go to the Setup Ribbon and select Administration then System Options
- Click to the Risk Management Tab
- Tick the Enable Destroy Matter option and click OK



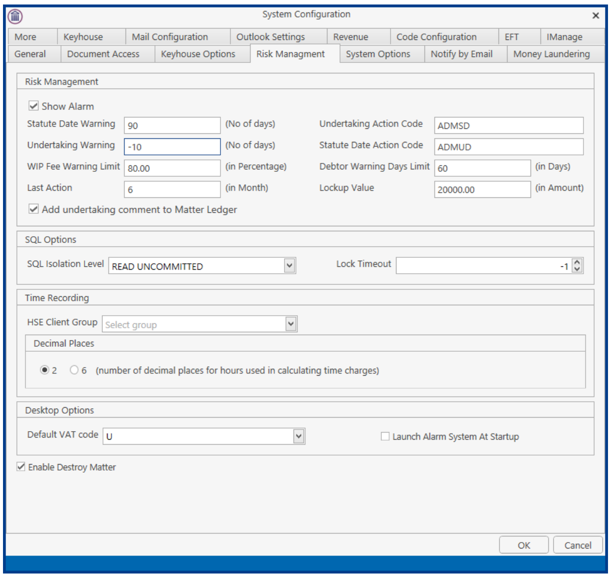
- For information on how to use this feature, please refer to Part 3 of the Administration Manual.

006 UNDERTAKING WARNING AFTER DUE DATE

KEYD-4889

Undertaking warnings, up to now, have been set to give a warning in advance of the due date. Now this date can be set to give a warning after the due date has passed.

- Go to the Setup Ribbon and select Administration, then System Options
- Click to the Risk Management Tab
- Use a minus number to indicate the number of days an undertaking can be overdue before a system warning is created.



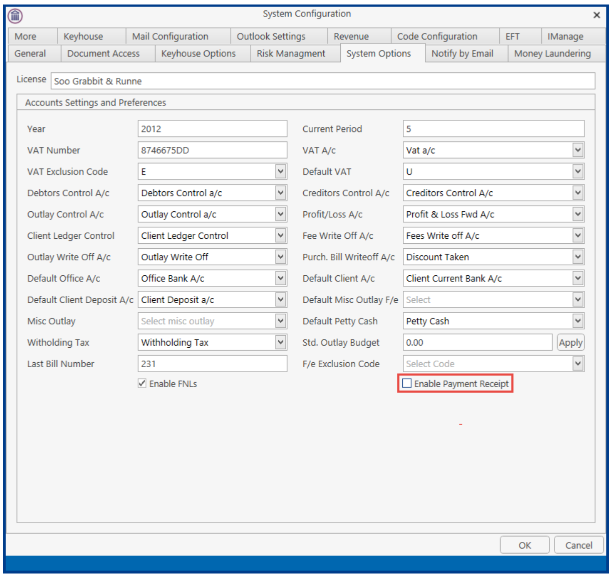
- Click Ok.

007 PRINT RECEIPT FOR PAYMENT & SET DEFAULT BANK

KEYD-4804

An option has been added to allow users to print receipts in relation to payment received. This option must be turned on at a system level.

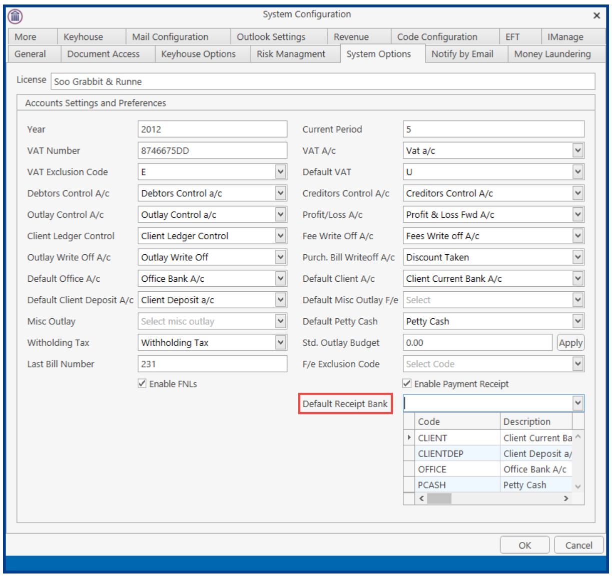
- Go to the Setup Ribbon and select Administration and then System Options
- Click on the System Options Tab



- Tick the Enable Payment Receipt and then click OK.

Once the Enable Payment Receipt is ticked, the Default Receipt Back option becomes available. This will default all payments to a specific bank.

- Click the drop-down arrow beside Default Receipt Bank

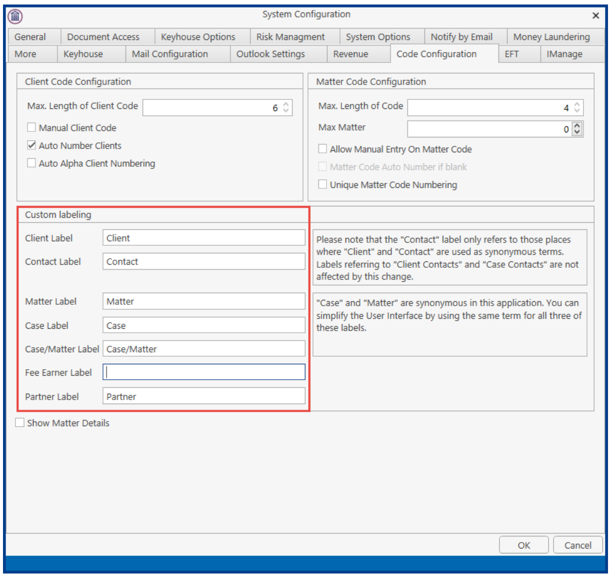


- Select from the list and click OK.
- The Accounts Department will advise on the best back to be set as the default.

008 KEYD-4793 FUNCTIONALITY TO CHANGE LABELS

Rather than using all the field labels given by Keyhouse, the System Options allows for a global change of field labels.

- Go to the Setup Ribbon and select Administration, then System Options
- Click to the Code Configuration Tab

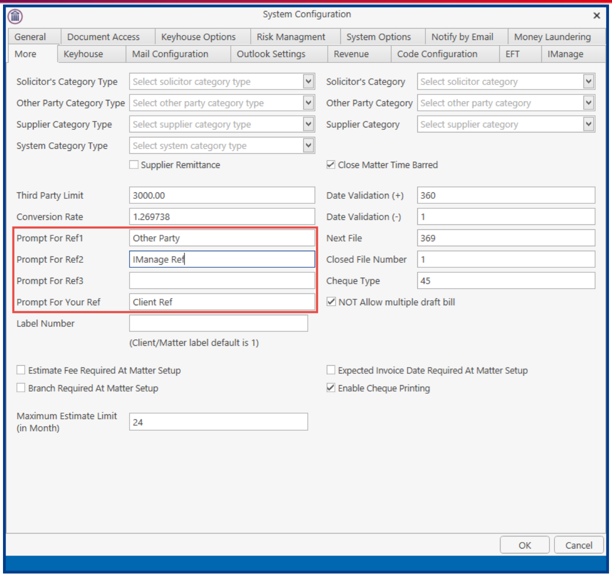


- Change the field names and click ok

009 KEYD- 3712 SHOW SELECTED CURRENT CASE DETAILS ON CASE DIARY

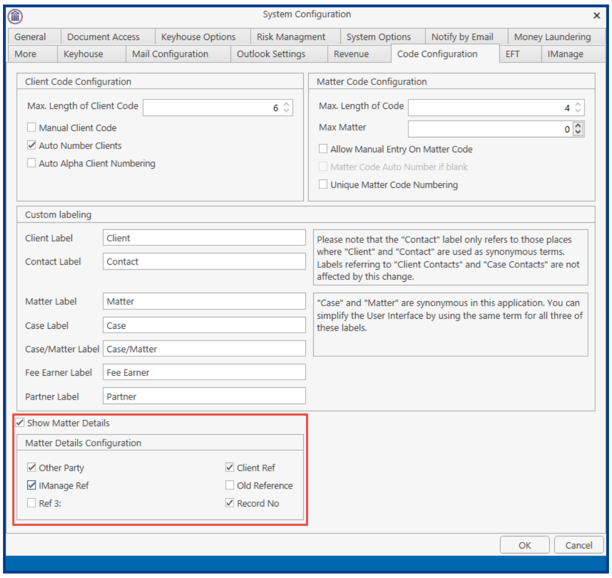
The information contained in the Ref 1, 2 and 3, Old Reference, Your Ref and Record Number fields on the Current Case Details screens can be added to the Case Diary for all matters. We would recommend that the Ref 1, 2 and 3 fields are renamed.

- Go to the Setup Ribbon and select Administration, then System Options
- Click to the More Tab
- Enter the field names and click OK



To make fields visible on the Case Diary

- Go to the Setup Ribbon and select Administration, then System Options
- Click to the Code Configuration Tab
- Tick the Show Matter Details option
- Then tick the fields to be made visible on the Case Diary.

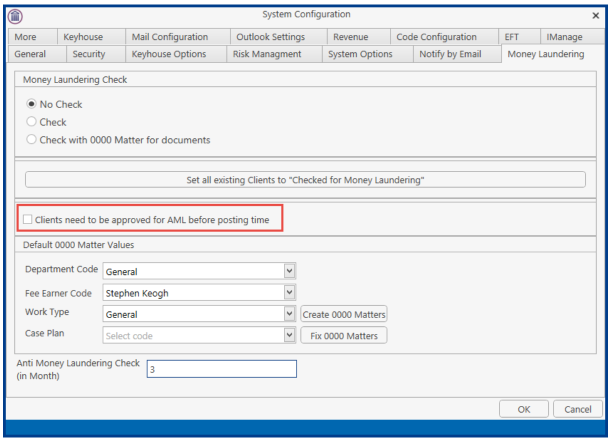


- Click OK to finish.

010 KEYD-4890 AML APPROVAL TO ALLOW POST TIME

To ensure that AML approval is confirmed, the system can be set to prevent time being posted to a matter until it has been done.

- Go to the Setup Ribbon and select Administration, then System Options
- Click to the Money Laundering Tab
- Tick the box beside Clients need to be approved for AML before posting time



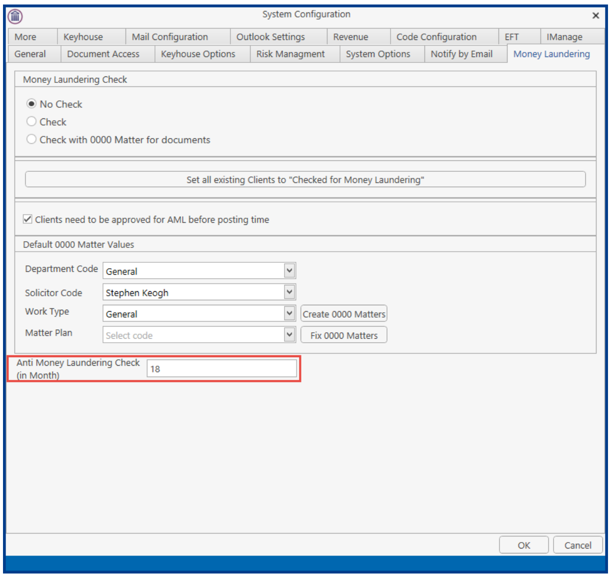
- Click OK

011 AML CHECK

KEYD-4889

The rules on AML have become more stringent and the need to monitor and review documentation is very important. An AML check date option is now available which will trigger a system warning on clients' matters.

- Go to the Setup Ribbon and select Administration, then System Options
- Click to the Money Laundering Tab



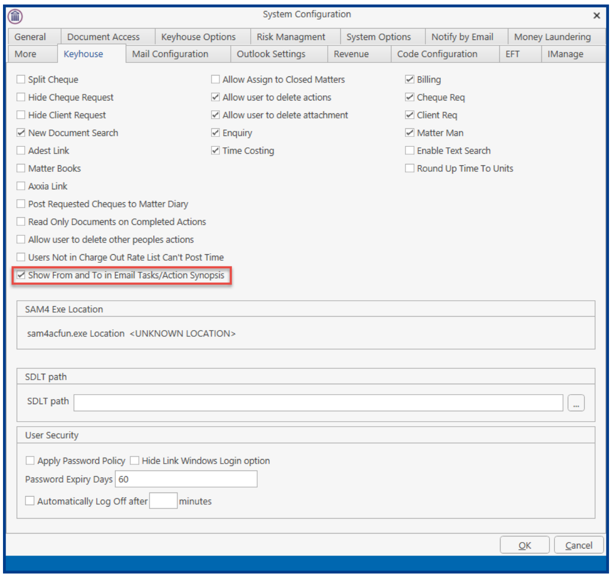
- Enter the number of months to lapse before the AML should be checked.
- Click OK

012 TURN ON/OFF THE EMAIL TO AND FROM IN CASE DIARY

KEYD-4845

By default, the To and From email details appear on the Case Diary in the Synopsis Field. Using the System Options, these can be turned off or on.

- Go to the Setup Ribbon and select Administration, then System Options
- Go to the Keyhouse Tab
- The Show From and To in Email Tasks/Action Synopsis is ticked by default. Untick to turn off



- Click OK

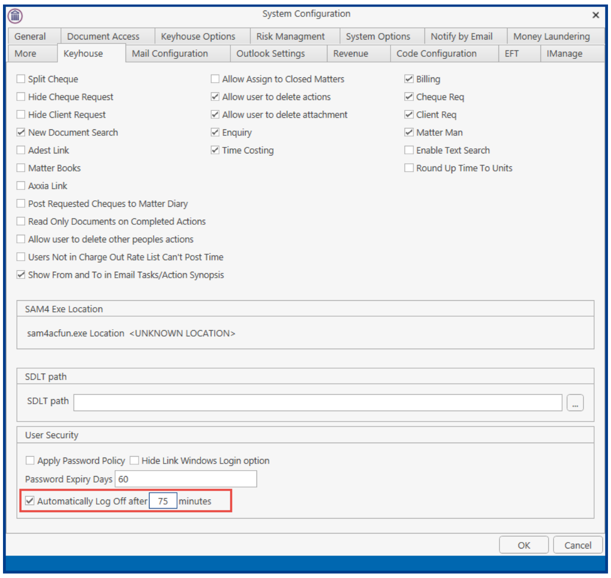
013 AUTOMATIC LOG OFF

KEYD-48

To ensure users are logged off the system when it is not in use, the System Administrator can set an automatic log off time period. This will help to improve security and confidentiality. There is also an option for individual users to set a shorter time frame in user's personal settings.

- Go to the Setup Ribbon and select Administration then, System Options

- Go to the Keyhouse Tab

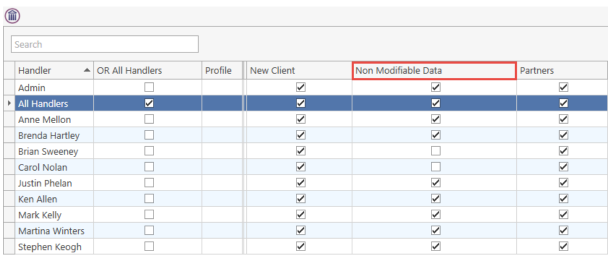


- Tick Automatically Log off and set the after value
- Click OK

Handler Access

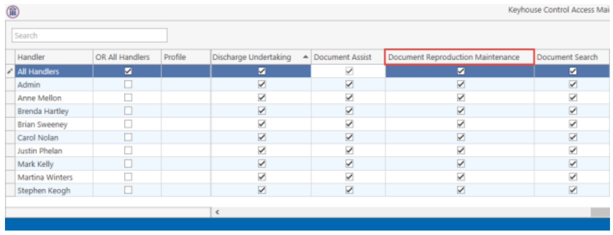
014 KEYD-5096 Non Modifiable Data

A Non Modifiable Data Option has been added to the Handler Control Access feature. This is currently limited to Client Name, but additional fields may be added over time. Unticking this box will prevent users modifying client names.



015 KEYD- Document Reproduction Maintenance

A new option has been added in relation to Document Reproduction Maintenance. This is for a specific client and can be ignored when applying user permissions.

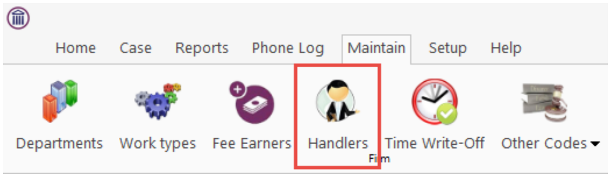


Maintain Tab

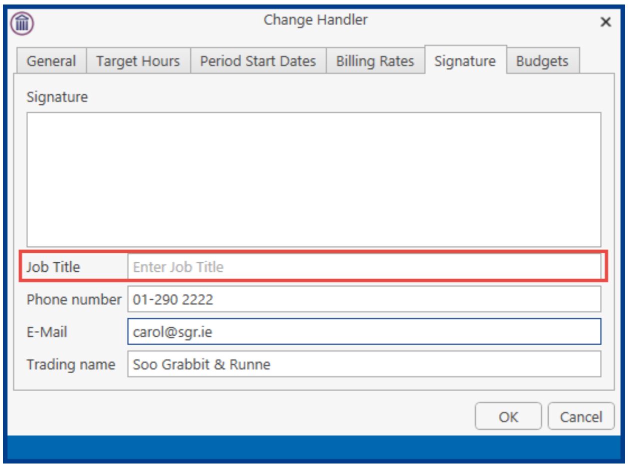
016 KEYD-4944 Handler Job Title

To facilitate the use of Job Title in documentation, this field has been added to the Handler Screens

- Click to the Maintain Tab and select Handler



- Double click on the Handler in the list and select the Signature Tab



- Complete the Job Title field and click OK.

017 KEYD-4944 Fee Earner Code

The Size of the Fee Earner code has been increased to allow for the use of up to 5 characters.

Case Plan Set Up

018 COPY CASE PLAN – OPTIONAL DOCUMENTS

KEYD-4944

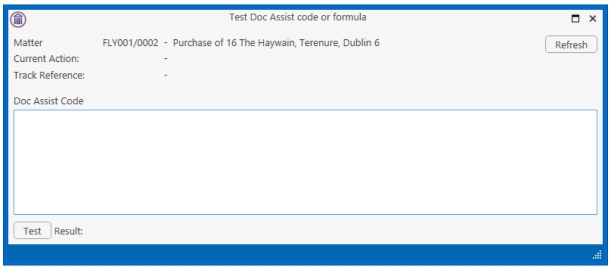
Documents set as Optional in a case plan will remain optional when the case plan is copied.

019 TEST DOC ASSIST

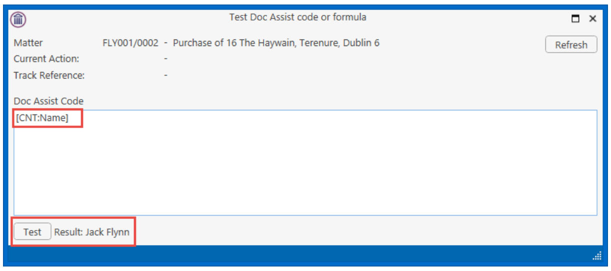
KEYD-5000

When coding documents, it can sometimes be difficult to know what field to use and what information will be returned. With the Test Doc Assist option, the System Supervisor will be able to test the code to check what information would be returned in the field.

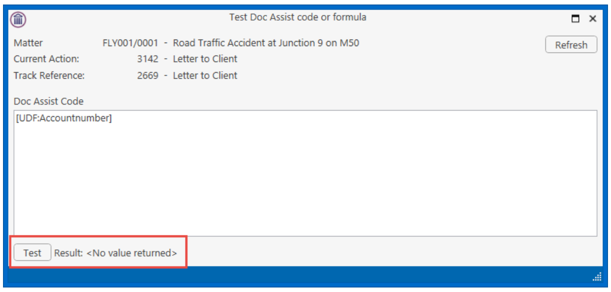
- On the Case Diary, click the Test Doc Assist button on the Home Ribbon.



- In the white box enter the code to be tested and click Test



- A result will be returned if the code is correct and the field is populated in the matter.
- If the information has not been populated on the matter, then a No Value returned message will be shown



- If the format of the code is incorrect, then the result states ***Unable to parse***