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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.



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

OO2PREVENT USERS RUNNINGKEYD-5227**THE DASHBOARD REPORT**

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

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



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



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- 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.



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.

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DESTROY MATTERS

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

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More	Keyhouse	Mail	Configuration	Ou	tlook Settings	R	evenue	Code Co	onfiguration	EFT	IManage
General	Document Ac	cess	Keyhouse Opti	ons	Risk Managmer	nt	System Op	tions	Notify by Email	Mone	y Launderir
Risk M	anagement										
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Statute	e Date Warning	90		(No o	f days)	Unde	rtaking Actio	on Code	ADMSD		
Under	taking Warning	10		(No o	f days)	Statu	te Date Actio	on Code	ADMUD		
WIP Fe	e Warning Limit	80.00		(in Pe	rcentage)	Debt	or Warning D	ays Limit	t 60		(in Days)
Last A	ction	6		(in Mo	onth)	Lock	p Value		20000.00		(in Amount)
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• For information on how to use this feature, please refer to Part 3 of the Administration Manual.

UNDERTAKING WARNINGAFTER DUE DATE

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.

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ieneral	Document A	ccess	Keyhouse Opti	ons	Risk Managme	nt	System O	ptions	Notify by Email	Mon	ey Launderin
Risk M	anagement										
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Statut	e Date Warning	90		(No of	f days)	Unde	rtaking Act	tion Code	ADMSD		
Under	taking Warning	-10		(No of	f days)	Statu	te Date Ac	tion Code	ADMUD		
WIP F	ee Warning Limit	80.00		(in Per	centage)	Debte	or Warning	Days Limit	60		(in Days)
Last A	ction	6		(in Mo	onth)	Locku	ip Value		20000.00		(in Amount)
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• Click Ok.



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

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General	Document Acces	5	Keyhouse Options	Risk N	lanagment		System Opti	ons	Notify by Email	Money	/ Launderin
License	Soo Grabbit & Runn	e									
Accour	nts Settings and Pref	eren	ces								
Year		20	12		Curre	nt F	Period	5			
VAT N	umber	874	6675DD		VAT	Vc		V	at a/c		~
VAT E	clusion Code	Е			Defau	ilt V	/AT	U			×
Debtor	rs Control A/c	De	otors Control a/c	•	Credi	tors	Control A/c	C	reditors Control A/c		×
Outlay	Control A/c	Ou	tlay Control a/c		Profit	/Lo:	ss A/c	P	rofit & Loss Fwd A/c		×
Client	Ledger Control	Cli	ent Ledger Control		Fee V	/rite	e Off A/c	Fe	ees Write off A/c		~
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Defaul	t Client Deposit A/c	Cli	ent Deposit a/c		Defau	ilt N	∕lisc Outlay F/€	Se	elect		~
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Withol	lding Tax	Wi	hholding Tax		Std. C	Jutl	ay Budget	0.	00		Apply
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- Select from the list and click OK.
- The Accounts Department will advise on the best back to be set as the default.

OO8FUNCTIONALITY TOKEYD-4793CHANGE 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

General	Documen	nt Access	Keyhouse Optio	ns	Risk Managr	ment	System O	ptions	Notify by Email	Mon	ey Launderin
More	Keyhouse	Mail	Configuration	Ou	tlook Settings	1	Revenue	Code	Configuration	EFT	IManage
Client C	Code Configu	uration				Matt	er Code Con	figuratio	n		
Max. L	ength of Clie	nt Code			6 0	Max	. Length of C	ode			4 0
Mar	nual Client Co	de				Max	Matter				0 0
	o Number Cli o Alpha Clien								Matter Code		
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Client L	abel [Client							tact" label only ref		
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Matter	Label	Matter							ynonymous in this by using the sam		
Case La	ibel [Case					abels.	Interface	e by using the same	e term io	an unee or
Case/N	latter Label	Case/Matte	r								
Fee Ear	ner Label										
Partner	Label	Partner									
Show I	Matter Detail	ls									

• Change the field names and click ok



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

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General	Document Acc		Keyhouse Optio		Risk Managmen		System Op		Notify by Email			.aunderir
More	Keyhouse	Mail C	Configuration	OL	utlook Settings		Revenue	Cod	e Configuration	EFT		IManage
Solicitor's	Category Type	Select	solicitor category	r typ	e 🗸	S	olicitor's Categ	ory	Select solicitor cate	gory		
Other Par	ty Category Type	Select	other party cates	jory	type 💌	0	ther Party Cate	gory	Select other party of	ategor	у	
Supplier C	Category Type	Select	supplier categor	/ typ	e 🗸	SI	upplier Catego	Ŋ	Select supplier cate	gory		
System Ca	ategory Type	Select	system category	type	¥							
		🗌 Sup	plier Remittance			2	Close Matter	lime E	Barred			
Third Part	y Limit	3000.	00			D	ate Validation	(+)	360			
Conversio	n Rate	1.269	738			D	ate Validation	(-)	1			
Prompt Fo	or Ref1	Other	Party			N	ext File		369			
Prompt Fo	or Ref2	IMana	ige Ref			С	losed File Num	ber	1			
Prompt Fo	or Ref3					C	heque Type		45			
Prompt Fo	or Your Ref	Client	Ref			¥	NOT Allow m	ultiple	e draft bill			
Label Nur	nber											
		(Clienț	/Matter label defa	ult is	5 1)							
Estimat	e Fee Required At	Matter	Setup				Expected Invo	ice Da	te Required At Matte	er Setup		
Branch	Required At Matte	er Setup	, ,			2	Enable Chequ	e Prin	ting			
	Estimate Limit	24										
(in Month)	2.4										

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.

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General Docur	nent Access	Keyhouse Option	ns	Risk Managme	ent	System O	ptions	Notify by Email	Mone	y Launderir
More Keyhou	ise Mail	Configuration	Out	tlook Settings	R	evenue	Code	Configuration	EFT	IManage
Client Code Con	figuration				Matte	r Code Con	figuratio	in		
Max. Length of	Client Code			6 0	Max.	Length of C	ode			4.0
Manual Client	Code				Max	Matter				0 0
Auto Number	Clients					ow Manual	Entry On	Matter Code		
🗌 Auto Alpha C	lient Numberin	g			М	atter Code A	uto Nur	nber if blank		
					U	ique Matter	Code N	umbering		
Custom labeling										
Client Label	Client							tact" label only refe		
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					affect	ed by this o	hange.			
Matter Label	Matter							ynonymous in this		
Case Label	Case					fy the User labels.	Interface	e by using the same	e term for	all three of
Case/Matter Lab	el Case/Matte	er.								
Fee Earner Label	Fee Earner									
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Click OK to finish.



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

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General	Security	Keyhouse Options	Risk Managment	System Option	s Notify by Email	Mone	y Laundering
Money	Laundering (
No	Check						
O Che	eck						
O Che	ck with 000	0 Matter for documents					
		Set all	existing Clients to "Checl	ked for Money Lau	indering"		
🗌 Clier	ts need to b	e approved for AML before	posting time				
L	its need to b		e posting time				
Default	0000 Matter	Values					
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Click OK



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

)					Configuration					
/ore	Keyhouse	Mail	Configuration	Outlook Setting	gs Reve	nue	Code	Configuration	EFT	IManage
ieneral	Document /	ccess	Keyhouse Option	ns Risk Mana	gment Sj	stem Op	tions	Notify by Email	Mon	ey Laundering
Money	Laundering Ch	ck								
No	Check									
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O Che	eck with 0000	Matter f	or documents							
			6 - 1 - 1							
			Set all exis	sting Clients to "C	necked for M	oney Laur	ndering			
Clier	ts need to be a	pproved	for AML before po	sting time						
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	ment Code Ge			~						
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• Enter the number of months to lapse before the AML should be checked.

012 KEYD-4845 TURN ON/OFF THE EMAIL TO AND FROM IN CASE DIARY

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

					system Configu							
General	Document Ac	cess	Keyhouse Option	ns	Risk Managment		System Op	tions	Notify by Email		Money	y Launder
More	Keyhouse	Mail	Configuration	Ou	itlook Settings	R	Revenue	Code	Configuration	EF	т	IManag
Split C	heque		A	llow	Assign to Closed Ma	tte	rs	V B	Silling			
	heque Request				user to delete action				heque Reg			
🗌 Hide C	lient Request		✓ A	llow	user to delete attach	me	ent	20	lient Reg			
New D	ocument Search		✓ E	nquir	у			V N	vatter Man			
Adest	Link		✓ T	íme (Costing			E	nable Text Search			
Matter	r Books							F	Round Up Time To U	Inits		
🗌 Axxia L	Link											
Post R	equested Cheque	s to Ma	tter Diary									
Read C	Only Documents of	on Comp	pleted Actions									
Allow	user to delete oth	er peop	les actions									
Users I	Not in Charge Ou	t Rate Li	ist Can't Post Time									
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Click OK



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

Click OK

					System Configu	ration				
General	Document Ac	cess	Keyhouse Opt	ions	Risk Managment	System	Options	Notify by Email	Mon	ey Launderin
More	Keyhouse	Mail Co	onfiguration	Ou	tlook Settings	Revenue	Code	Configuration	EFT	IManage
Split Cl	neque			Allow	Assign to Closed Ma	tters	1	Billing		
Hide C	heque Request		2	Allow	user to delete action	s	~	Cheque Req		
🗌 Hide C	lient Request		2	Allow	user to delete attach	ment		Client Req		
New D	ocument Search		R	Enquir	v			Vatter Man		
Adest I	ink		2	Time C	osting			Enable Text Search		
Matter	Books							Round Up Time To L	Inits	
Axxia L	ink									
Post Re	equested Cheque	s to Matte	er Diary							
Read C	only Documents o	n Comple	ted Actions							
Allow	user to delete oth	er people	s actions							
Users N	Not in Charge Out	Rate List	Can't Post Tim	e						
	rom and To in En	1011 105103								
sam4a	cfun.exe Location	<unkn< td=""><td>OWN LOCATIO</td><td>DN></td><td></td><td></td><td></td><td></td><td></td><td></td></unkn<>	OWN LOCATIO	DN>						
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	y Password Policy rd Expiry Days 6		Link Windows	Login o	ption					
🗹 Auto	matically Log Of	f after	75 minutes							

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

Handler Access



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.

earch					
Handler 🔺	OR All Handlers	Profile	New Client	Non Modifiable Data	Partners
Admin			×	~	2
All Handlers	Z		Z	✓	Z
Anne Mellon			V	Y	
Brenda Hartley				>	×
Brian Sweeney			Image: A start and a start		
Carol Nolan			✓		
ustin Phelan				×	
Ken Allen			Image: A start and a start	×	×
Mark Kelly				~	V
Martina Winters				×	
Stephen Keogh			V	~	V



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.

Search						
Handler	OR All Handlers	Profile	Discharge Undertaking	Document Assist	Document Reproduction Maintenance	Document Searc
All Handlers	Z		2	2	⊻	2
Admin			×		×	
Anne Mellon			2		×	2
Brenda Hartley			×	2	×	9
Brian Sweeney			×	2	×.	2
Carol Nolan			2	2	×	2
Justin Phelan			×		×.	×
Mark Kelly			2		×.	
Martina Winters			×	2	×	2
Stephen Keogh			2		×	

Maintain Tab



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
 Image: Click to the Maintain Tab and select Handler



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

		Change H	unuici			×
General Targ	get Hours	Period Start Dates	Billing Rates	Signature	Budgets	
Signature						
Job Title	Enter Job	Title				
Phone number	01-290 2	222				
E-Mail	carol@sg	ır.ie				
Trading name	Soo Grab	bit & Runne				
				0	DK Ca	ncel

• Complete the Job Title field and click OK.



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 <u>COPY CASE PLAN –</u> OPTIONAL DOCUMENTS

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



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.

٦	Test Doc Assist code or formula	□ ×
Matter	FLY001/0002 - Purchase of 16 The Haywain, Terenure, Dublin 6	Refresh
Current Action:		
Track Reference:		
Doc Assist Code		
Test Result:		
		.d
n the w	hite 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

	Test Doc Assist code or formula	□ ×
Matter	FLY001/0001 - Road Traffic Accident at Junction 9 on M50	Refresh
Current Action:	3142 - Letter to Client	
Track Reference:	2669 - Letter to Client	
Doc Assist Code		
[UDF:Accountnum	hber]	
Test Result: <	No value returned>	

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

	Test Doc Assist code or formula	
Matter	FLY001/0001 - Road Traffic Accident at Junction 9 on M50	Refres
Current Action:	3142 - Letter to Client	
Track Reference:	2669 - Letter to Client	
Doc Assist Code		
[CNT,name]		
[CNT,name]		
	"Unable to purse"**	