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WHAT'S NEW IN KEYHOUSE

ADMINISTRATION

Version 5.7.1.1

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	Multiple Capture Windows
	002	Set Site Wide PDF
	003	Default Setting for Handler Field on Cheque Requisitions
	004	Automatically Set Destroy Date
	005	Set Firm Domain Address
	006	Custom Labels - Associates
Permissions	007	Restrict Workflow Access in Case Diary
	008	Prevent Uncompletion of Actions
	009	Release High Value Cheques – SAM4 Only
	010	New User automatically imported to User List
Maintain	011	Retire Document Classes
	012	Create Custom Views
Creating Workflows	013	Importing Multiple Document Types
	014	AUD Fields for Case Associates
	015	Additional Coding Functionality

System Options

PLEASE 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.



By default, only 1 capture window will open even option has been added to the General Tab to allow users to open multiple capture windows.

- Go to Setup, select Administration then System Options.
- On the General tab .
 Keyhouse
 Mail Configuration
 Outdook Straining
 Revenue
 Code Configuration
 EFT
 IManage

 Document Access
 Keyhouse Options
 Risk Managment
 System Options
 Notify by Email
 Money Launderin
 Precedent Folder t:\keyhouse\Standrad Documents Storage Method Location t:\keyhouse\client documents O Date Document Naming Method O Description With Track Reference Track Reference Only Use Document Folders Default Root Name: Docum Enable Diary Date Shuffling Show option to open attachment on double click of an action Update Document Fields when copying Diary items
 Leave document Fields when copying Diary items
 Leave documents open at the time of generating
 Use Integrated Document Generator I User can set Doc Allow Multiple Capture Windows My Overview Settings Time DayBook Limit for a day Current WIR Limit OS Invoice Limit Draft Invoice Limit Connect through Windows logo Use Team Lea Show web page on Logon screen: Show Add Associates Option Document Sync Show Dashboard Preferred PDF Previewer (no preference) Car OK
- Tick the Allow Multiple Capture Windows.
- Click OK



A site wide option has been added to the General Tab to set a site wide preference for a PDF previewer.

- Go to Setup, select Administration then System Options.
- On the General tab

٦					System Configu	ırati	on						×
More	Keyhouse	Mail	Configuration	C	utlook Settings	R	evenue	Code	Configuration	E	FT	IManag	e
General	Document Ac	cess	Keyhouse Option	ns	Risk Managment		System Optio	ons	Notify by Email		Money	Launder	ing
Storage	Method												^
Clie Date	Location t	\keyho	use\client documer	nts									
Docume	ent Naming Me	thod											
O Des	cription With Tr	ack Ref	erence		<u>О</u> Ті	rack	Reference On	ly					
Use Do	cument Folders		Default Root Nan	ne:	Documents								-
🗹 Enable	Diary Date Shuf	fling											
Show o	Show option to open attachment on double click of an action												
🗹 Update	Document Field	ds wher	n copying Diary iter	ns									
Leave d	ocuments oper	at the	time of generating				Allow Multi	ple Ca	apture Windows				
🗹 Use Inte	grated Docum	ent Ger	erator 🗹 User can	set	Document Generate	or in	Personal Pref	erenc	es				
My Over	view Settings												
Time Day	Book Limit for	a day	0			Cur	rent WIP Limit	0					
OS Invoi	e Limit		0			Dra	ft Invoice Limi	t O					
Connec	t through Wind						Use Team L	eader					-
Show web		(no pre Adobe	ference)										1
Show A			viewer ise Viewer										
Docum			cript Viewer										
Show D			DF Viewer										
Preferred I	DF Previewer	(no pre	ference) 💌										~
											ОК	Car	ncel

- Click Preferred PDF Previewer and select the required option.
- Click OK

D03
KEYD-5541**DEFAULT SETTING FOR**
HANDLER FIELD ON
CHEQUE REQUISITIONS

When creating Cheque Requisitions, the system currently defaults the handler and the action to the matter fee earner. The handler can be changed on each cheque. An option has been added to default the handler on each cheque. This is located on the Keyhouse Options tab.

- Go to Setup, select Administration then System Options.
- Click to the Keyhouse Options tab se Mail Configuration Outlook Settings Rev eneral Document Access Keyhouse Options Risk Managment System Options Notify by Email Money Laun ✓ Interest Calculator Indictor 24 Fnable Bank Rec Label Printer Indictor 25 No Barred Bill Printing Indictor 26 Word Perfect Indictor 27 O None Case Manager Link Indictor 28 Time Costing Installed
 Force Fee Earner Code O Matrix Indictor 29 ○ Laser Indictor 30 Composite Billing Orafting Use Log As Registered Post Export Crystal Reports to Legacy for Enable Dictation Enable Print Ledger Fnable P4W Accounts Ledge Enable PF Cheque Process Cheque Handler ChequeHandler Demo Expire Logged In User CurrentUser Matter Fee Earner MatterFeeEarne Fee Reporting Sequence Display text for Case File No P4W Program Path Choose Location P4W Pattern Doc. Reproduction Outlay Code Default cheque request action assignee Cano ОК
- Click on Default cheque request action assignee and choose the required option.
 - 1 | Page

Cheque Handler: Defaults to the matter fee earner but enables the user to change to a different user.

Logged in user: Defaults to the person requesting the cheque on the system Matter Fee Earner: Defaults to the matter fee earner.

Click OK



To ensure the matter destroy date is set when a case is closed, set the option to automatically set Destroy Date. This will set the destruction date for all matters automatically for a specific number of years.

- Go to Setup, select Administration then System Options.
- Click to the Risk Management tab

					system conligu	auon						
More	Keyhouse	Mail	Configuration	C	utlook Settings	Reve	nue	Code C	onfiguration	EFT	IManag	ge
General	Document Ac	cess	Keyhouse Opt	tions	Risk Managment	Sy	stem Op	tions	Notify by Email	Mone	y Launde	ring
Statute	Date Warning	90		(No o	f days) Und	lertakir	ng Actio	n Code	ADMSD			^
Underta	aking Warning	10		(No o	f days) Stat	ute Da	ite Action	n Code	ADMUD			
WIP Fee	Warning Limit	80.00		(in Pe	rcentage) Del	otor Wa	arning Da	ays Limit	60	(in	Days)	
Last Ac	tion	6		(in M	onth) Loc	kup Va	lue		20000.00	(in	Amount)	
🗹 Ado	l undertaking o	omme	nt to Matter Le	dger								
SQL Op	tions											5
SQL Iso	lation Level RE	AD UN	COMMITTED		~	Lock 1	limeout				-1 🗘	II.
Time Re	cording											5
HSE Cli	ent Group	ct grou	p		~							
Decim	al Places											
۰ 2	O 6 (numb	er of de	ecimal places for	hours	used in calculating t	ime ch	arges)					l
Desktop	Options											1
Default	VAT code U				Y			aunch Ala	arm System At Star	tup		I.
Matter I	Destruction											
🗆 Enab	le Matter Destru	ction	Automatically s	et Des	troy Date Years							
										ОК	Са	ncel

- Tick Enable Matter Destruction and then Automatically set Destroy Date
- Enter the number of years after which the files should be destroyed.

Enable Matter Destruction Automatically set Destroy Date

• Click OK to apply the change

Matter Destruction



When emails that are sent "on behalf of" another user within the company are not assigned as "Outgoing" emails, leading to the software to display the email synopsis as "Email From:" rather than "Email To:" To resolve this issue an option has been added to Outlook Settings to allow the domain addresses to be added.

- Go to Setup, select Administration then System Options.
- Click to the Outlook Settings tab

ì				System Configu	ation				
General	Docum	nent Access	Keyhouse Option	s Risk Managment	System C	Options	Notify by Email	Money	Laundering
More	Keyhou	ise Mail	Configuration	Outlook Settings	Revenue	Code	Configuration	EFT	IManage
 Outlook 	Integratio	n					Auto C	reate Task	Reset Path
Outlook T	PS Path	T:\Programs							
Clarion Ex	e Path	T:\Programs							
Outlook E	xe(s)	C:\Program Fi	iles (x86)\Keyhouse	Computing Ltd\Keyhou:	e Case Outlo	ok Integr	ation		
Check F	ile Existenc	e from Outlook							
Search									
Outloo	k Name			Table			Column		
									^
Firm Dom		ess @keyhou							~
riim Dom	am Addre	ess _ @keynou	26'16						

- Enter the domain name in the Firm Domain Address box.
- Click OK

Note: Multiple domains can be added using a comma.



n addition to being able to change the name of fields such as Matter and Fee Earner, the Associate can now be changed.

- Go to Setup, select Administration then System Options.
- Click to the Code Configuration tab

General	Docume	nt Access	Keyhouse Optic	ons	Risk Managm	ent	System O	ptions	Notify by Email	Mor	ney Laund	lerii
More	Keyhouse	Mail	Configuration	OL	tlook Settings	R	evenue	Code	Configuration	EFT	IMan	age
Client C	ode Config	uration				Matte	r Code Cor	figuratio	n			
Max. Le	ength of Cli	ent Code			6 0	Max.	Length of (Code			4	0
Man	ual Client G	ode				Max	Matter				0	0
Auto	Number Cl	ients					low Manual	Entry On	Matter Code			
Auto	Alpha Clier	nt Numberin	g			M	atter Code J	Auto Num	nber if blank			
						Ur	nique Matte	r Code N	umbering			
Custom	labeling											
Client L	abel	Client							tact" label only ref			s
Contact	Label	Contact				Label		o "Client	act" are used as syr : Contacts" and "Ca ge.			
Matter	Label	Matter							ynonymous in this			
Case La	bel	Case					mplify the of these lal		rface by using the s	same ter	m for all	
Case/M	atter Label	Case/Matt	9 r									
Fee Ear	ner Label	Fee Earner										
Show N	Aatter Deta	ils										

• On the Custom labelling section, scroll to find Associate Label.

			^
Matter Label	Matter	"Case" and "Matter" are synonymous in this application. You	
Case Label	Case	can simplify the User Interface by using the same term for all three of these labels.	
Case/Matter Label	Case/Matter		
ee Earner Label	Fee Earner		
Partner Label	Partner		
Associate Label	Associate		

- Change the name. Do not set the name as a plural e.g. Case Contact not Case Contacts
- Click OK

Permissions

007
KEYD-5349**RESTRICT WORKFLOW**
ACCESS IN CASE DIARY

A new restriction has been added to User Permission to prevent users changing the workflow that has been assigned to a matter.

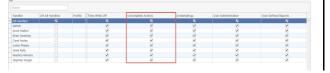
Untick the box to remove permission.

(D			
[Search			
	Handler	OR All	Profile	Access change WF in Case Diary
Þ	All Handlers	Image: A start of the start		
	Admin			
	Anne Mellon			\checkmark
	Barbara Brennan			
	Brenda Hartley			\checkmark
	Brian Sweeney			
	Carol Nolan			\checkmark
	Justin Phelan			
	Mark Kelly			
	Martina Winters			
	Stephen Keogh			\checkmark



To ensure that the audit trail is correct, it is now possible to prevent people from Uncompleting actions once they have been marked as complete. This is set in the Handler Control Access.

- Open the Setup tab and click to User Setup
- Click on Handler Control Access
- Scroll across to Uncomplete Actions



• Untick the box to remove access from the users.



Permission controlling the release of high value cheques has been added.

	Search				
	Handler	OR All H 🔻	Precedents	Release High Value Cheques	SAM4
Þ	All Handlers		Z	Z	Z
	Sarah Kelly				\checkmark
	Stephen Keogh		\checkmark		\checkmark
	Martina Winters				\checkmark
	Mark Kelly				\checkmark
	Justin Phelan				\checkmark
	Gerry Murray		\checkmark	 Image: A start of the start of	\checkmark
	Carol Nolan				\checkmark
	Brian Sweeney		\checkmark		\checkmark
	Brenda Hartley				\checkmark
	Barbara Brennan		\checkmark		\checkmark
	Anne Mellon				\checkmark
	Admin		~		~





NEW USER AUTOMATICALLY IMPORTED TO USER LIST

U p until now when a new user was set up using the Maintain Tab, the user then had to be imported using User Setup option on the Setup Tab. This is no longer required as the user will automatically be imported. However, it will still be necessary to set up the user as a Fee Earner.



t was possible to delete Document Classes as this could cause problems with existing documents, it is now only possible to retire the document class.

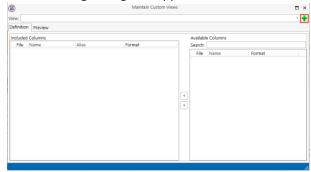


Although user can modify the standard Search Views provided by Keyhouse, not all information is available in the view. Custom views can be created using fields from the Current Case and Extra Case Details fields. These view, in turn, could be used for reporting purposes by exporting the data to Excel. The option to create custom views is limited to Supervisors.

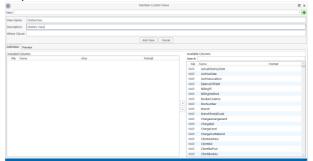
 Click to the Maintain Tab and select Custom Views
 Kenhouse Case Manage

۲							Keyhouse Case Manag	gement (CN - C
	Home	Case Rep	oorts Partne	rs Phone L	og Maintain	Setup H	lelp	
	j	.	•	2			200	
De	partments	Work types	Fee Earners	Handlers	Time Write-Off	Other Code	es Case Diary Import	Custom Views

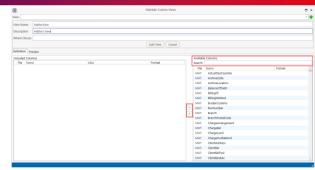
• The following dialog box appears



- Click on the New Button to create a view
- Enter a Field Name and Description for the View. Note the Field Name does not have a space.
- Where there information needs to be limited, the 'Where Clause' can be use. Please contact Keyhouse to do this.



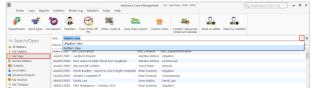
- Click Add View
- To add fields, click to the Search box and the arrow to add to the view



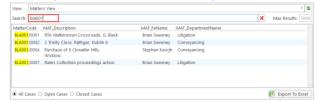
• Continue to add all required fields

8			Maintain Custom V	iens.	
View					
view Nam	e: MattersView				
Descriptio	m: Matters View				
Where Cla	ausac				
			Add View C	ancel	
Definition	Preview				
Included				Available Columns	
File	Name	Alias	Format	Search: department	
MAT:	Description	Description	0:200	File Name	Format
MAT:	FeName	FeName	@1550	File Prefix RUDY: JUDY: JUDY	
MAT:	DepartmentName	DepartmentName		Ubr. Josho	
				×	
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- Click Update View and click the X to close.
- Log Out and Log back in.
- On the Search/Open screen click on My View
- Select the required view from the drop down list



- Click the Refresh Button to see the details
- To limit the view, enter a search criteria
- Click Export to Excel to create a report



- Save the report with the desired name and location.
- Enable the content.

	A	в	c	D	E	F	G	н	1
1	MatterCod •	MAT_Code *	MAT_Description	MAT_Rech *	MAT_StatuteLimi	MAT_Stat *	MAT_WTyj *	UDF_DateofIssueSummor	UDF_u.judge.amou 💌
2	AAA001/0001	AAA001/0001	Landlord Dispute				ACT		
			New Lease 44 Main Street Dun Laoghaire				LEA		
4	AAA001/0003	AAA001/0003	Slip and fall incident				GEN		
5									

Modify the report as required

Creating Workflows

IMPORTING MULTIPLE
DOCUMENT TYPES

When importing documents into workflows from existing workflows, the system will now show all documents of a type regardless of the version of the software used to create it e.g. doc and docx.

	ndows (C:) > Keyhouse Training > keyhouse >	Standrad Documents	> Property sale	võ	Search Property sale	P
Drganise + New folde	r				10 · 0	0
Quotes for Existi	Name	Date modified	Type	Size		
Software	perty sale Action Flow.doc	20/09/2013 12:52	Microsoft Word 9	45.8	19	
software	Property sale Action Flow.doc	07/01/2014 12-14	Microsoft Word 9	45 8		
What's New	PSL01A Engagement Letter to Client Hou	16/10/2013 11:47	Microsoft Word 9	47 8		
Contraction of the second	PSL01B Initial Letter to Client House Sale	16/09/2013 09:13	Microsoft Word 9	41.8		
ConeDrive	PSL01C Initial Letter to Client House Sale	16/09/2013 09:31	Microsoft Word 9	50 K	B	
This PC	PSL01D Letter of Engagement.DOC	16/09/2013 09:13	Microsoft Word 9	57 K	8	
3D Objects	PSL01E Estimate re Sale.DOC	16/09/2013 09:13	Microsoft Word 9	34 8	B	
Desktop	PSL01F Letter of Authority to take up Dee	16/09/2013 09:13	Microsoft Word 9	29 8	B	
	PSL01G Client Questionnaire House Sale	16/09/2013 09:13	Microsoft Word 9	61 8	B	
Documents	PSL01H Client Questionnaire Sale by LPR	16/09/2013 09:13	Microsoft Word 9	.60 K	8	
🕹 Downloads	PSL011 Letter to Lender requesting Title.D	15/10/2013 15:05	Microsoft Word 9	32 K	B	
Music	R PSL02A Letter Reminding Client to return	16/09/2013 09:13	Microsoft Word 9	24 8	8	
E Pictures	PSL04A Letter reminding Lender to send	15/10/2013 15:05	Microsoft Word 9	31 8	B	
Videos	SL05A Contract for Sale.DOC	03/03/2015 21:24	Microsoft Word 9	48 8	B	
Windows (C:)	R PSL05B Special Conditions Death on the	16/09/2013 09:13	Microsoft Word 9	28 K	8	
×	PSI NSR Special Conditions DOC	18/09/2013 09-13	Microsoft Word 9	52 K	(B	
File na	me:			0	Word Documents (".doc;".doc	x)



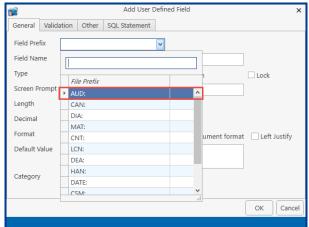
As with User Defined Fields for coding documents, it now possible to add Associate User Defined Fields. This is done on the Document Assist Screen or at the Associate Type level from either the Search/Open screen or from the Associate Screen on the Case. These are set at an Associate Level and not at a Case Level.

Document Assist

• Open the Document Assist on the Setup Tab.

	l		Document Assist	- ×			
÷	į	• 3	Ҝ 🛤 🏺 🛉 🗌 Show all fields	≽			
Select type							
Fi	rst		\checkmark				
	Inc	lud	e in Document Name				
5	Sea	rch					
	Do	cur	ment Fields				
			AUD: - Associate User Defined Fields				
-	<u> </u>		CAN: - Case Associates				
_	ĺ.		CNT: - Client Details				
_	ĺ.		CSM: - Other Case Details				
_	ĺ.		DATE: - Important Dates & Times				
-	Ľ		DEA: - Debt Costin Ledger				
_	Ľ	_	DIA: - Case Diary				
-	Ľ		HAN: - Fee Earner/Handlers Details				
-			LCL: - Other Client Details				
_							
_			LCN: - Client. Contact (Surnames Etc)				
_	2		MAT: - Case/Matter Details				
	₽.		UDF: - User Defined/Other Information				

- Click on the New Button <table-cell-rows>
- Click on the Field Prefix box and select AUD from the list.



• Enter the remaining information. Please note that if the fields are to be always visible, click the Common box.

1	,				Change l	Jser Def	fined Field		х
	General	Valida	ation	Other	SQL Stateme	nt			
	Field Prefix		AUD:			$\overline{}$			
	Field Name		Facility						
	Туре		Text 🔽 Common				Common	Lock	
	Screen P	rompt	Facili	ty					
	Length					128 🗘			
	Decimal					0			
	Format		@s12	28			Fix document format	: 🗌 Left Ju	ustify
	Default Value								
	Category				•	×			
								ОК	Cancel
		~ ~ ~							

Click OK. •

From Search/Open Screen

- Click on the Search/Open Screen and select Associates.
- Select the Associate Type and right click.

	Associate Type		×
Add Case Associa	te Type		
Code *	DEBTOR		
Description	Debtor		
Parent Category	Please select parent category		~
insert Change	🗙 脊 🛊 🦊 🛃 Delete Top Up Down Bottom		
Search			
Sequence	Description		
			^
			~
		Ok Cano	el
Select the I	nsert Button		
	Add User Defined Field		

S			Add User D	Defined Field	×	
General	General Validatio		Other	SQL Statement		
Field Pret	fix	AUD:			~	
Field Nar	ne	Enter	the field	name		
Туре		Text			Common Lock	
Screen Pr	rompt	Enter	the scrre	n prompt		
Length				0		
Decimal				0	0	
Format					Fix document format Left Justify	
Default V	alue					
Category				v	x	
					OK	cel

- Enter the details and make the field Common if required.
- Click OK

- This will automatically add the UDF field to all • Associates in the List.
- To check the details, open a Case Associate and • click to the Extra Details Tab.

-		ĸ			
Insert		lete			
Grou	ιp	Detail		Value	
>		Facility			

The information can now be added. •

From Client/Case

- Open the Case and select Associates. •
- Repeat from Step 2 of the From Search/Open Screen

Creating New Associate Type

- Right click on Associate Type and select Add to create an Associate Type
- Enter the Code and Description •

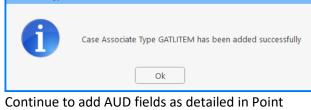
	Associate Type	×
Add Case Associa	ate Type	
Code *	GATLITEM	
Description	Guardian At Litem	
Parent Category	Please select parent category	~
	Delete Top Up Down Bottom	
Sequence	Description	
		*
	Ok	Cancel

- Click Insert to add AUD Fields
- The following message appears •

•

12

Proceedr	
•	Before you can create new System Fields, the new Case Associate Type values you have entered must be saved. Before proceeding, please make sure that you have entered the new code and its description correctly. Proceed Cancel
The f	ollowing Dialog Box appears
Associ	iate Type



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015 KEYD-5641 ADDITIONAL CODING FUNCTIONALITY

With the old Document Generator codes ending in #@& or #@r would require the users to select the associates to be used. With the new Document Generator these code will automatically select all associates e.g. [CAN:Name.Vendors#@&].

However, in some cases not all associates will be required. The codes can be modified to give users the choice of associates by adding a ?. The codes would then appear as #*&? Or #@r? e.g. [CAN:Name.Vendors#@&?]