Keyhouse
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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

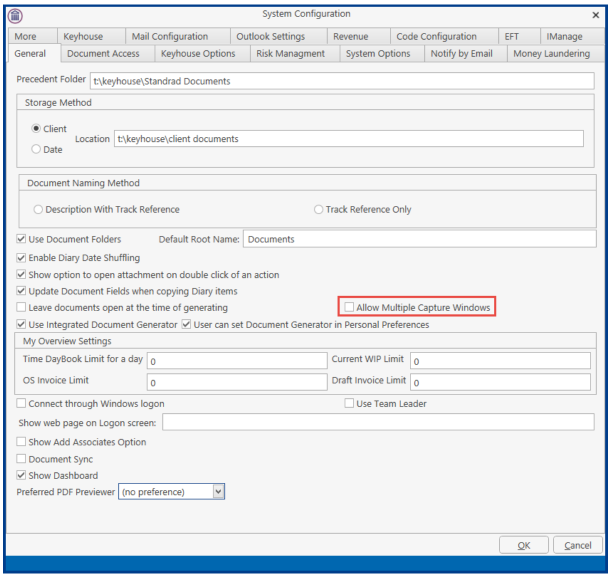
System Options

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.

001 KEYD-5333 MULTIPLE CAPTURE WINDOWS

By default, only 1 capture window will open even if the user tries to open it multiple times. An 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

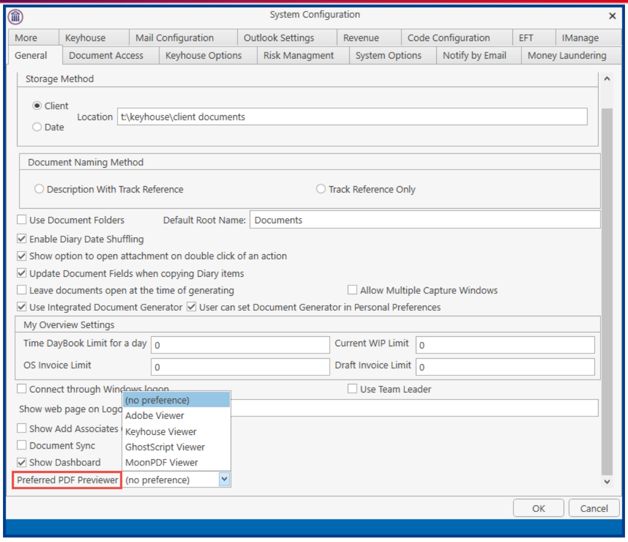


- Tick the Allow Multiple Capture Windows.
- Click OK

002 KEYD-5442 SET SITE WIDE PDF VIEWER

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

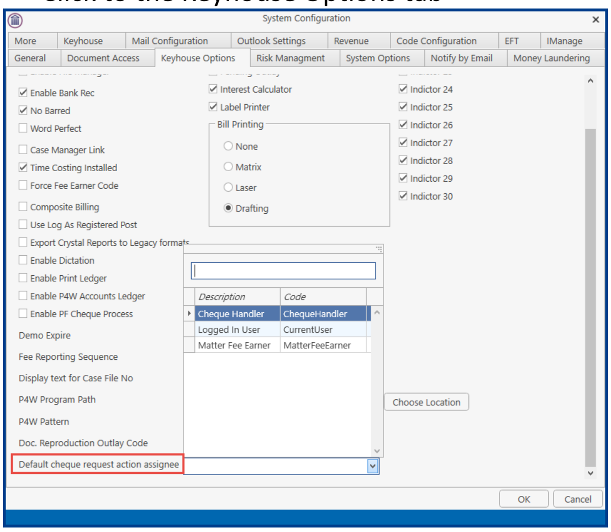


- Click Preferred PDF Previewer and select the required option.
- Click OK

003 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



- Click on Default cheque request action assignee and choose the required option.

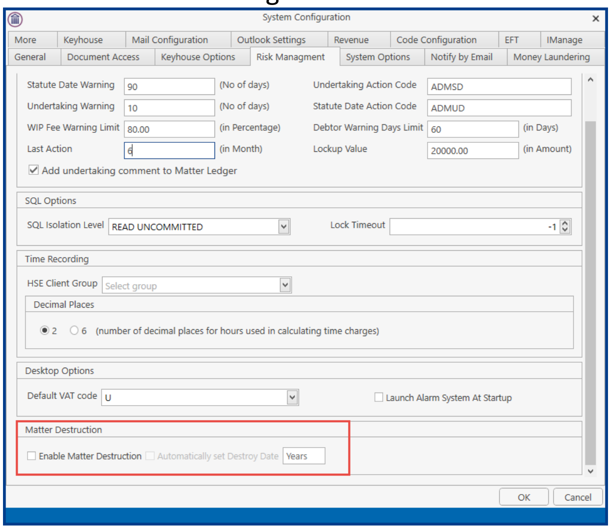
Cheque Handler: Defaults to the matter fee earner but enables the user to change to a different user.
Logged in user: Defaults to the person requesting the cheque on the system
Matter Fee Earner: Defaults to the matter fee earner.

- Click OK

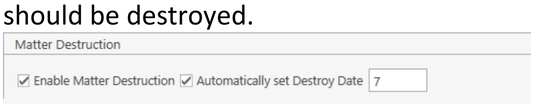
004 KEYD-5259 AUTOMATICALLY SET DESTROY DATE

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



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

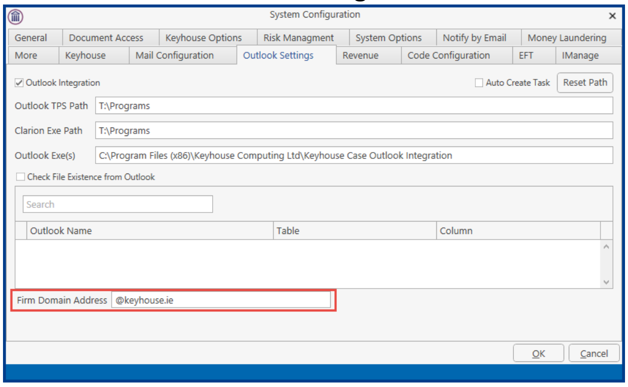


- Click OK to apply the change

005 KEYD-5544 SET FIRM DOMAIN ADDRESS

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



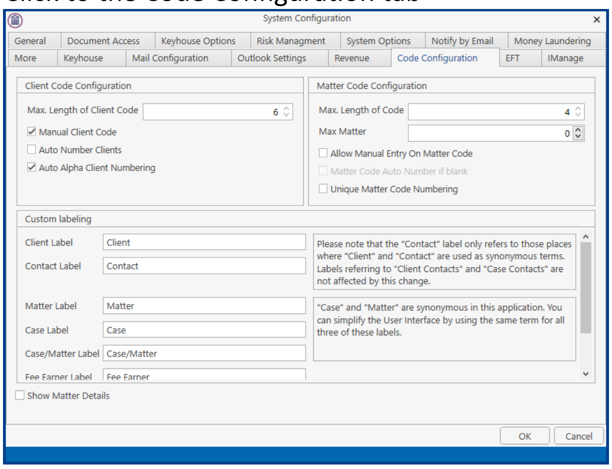
- Enter the domain name in the Firm Domain Address box.
- Click OK

Note: Multiple domains can be added using a comma.

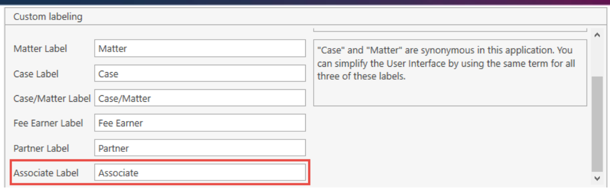
006 KEYD-5411 CUSTOM LABELS - ASSOCIATES

In 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



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



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

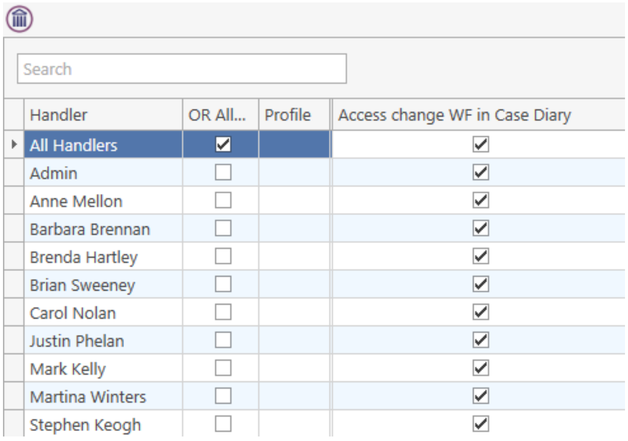
Permissions

007 RESTRICT WORKFLOW ACCESS IN CASE DIARY

KEYD-5349

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.

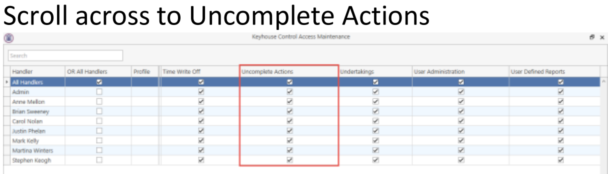


008 PREVENT UNCOMPLETION OF ACTIONS

KEYD-5559

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

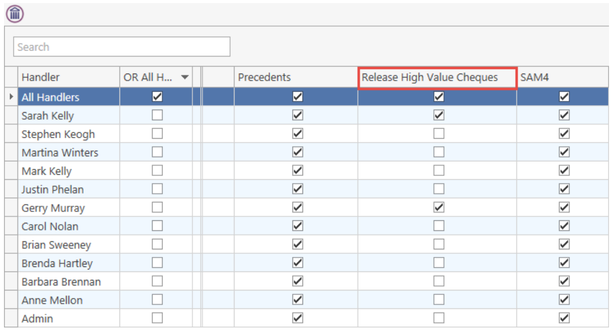


- Untick the box to remove access from the users.

009 RELEASE HIGH VALUE CHEQUES – SAM4 ONLY

KEYD-5444

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



Maintain

010 NEW USER AUTOMATICALLY IMPORTED TO USER LIST

KEYD-5282

Up 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.

011 RETIRE DOCUMENT CLASSES

KEYD-5634

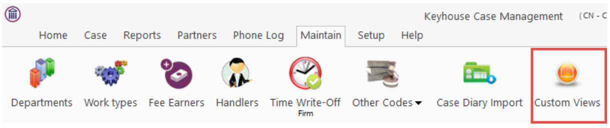
It was possible to delete Document Classes as this could cause problems with existing documents, it is now only possible to retire the document class.

012 Create Custom Views

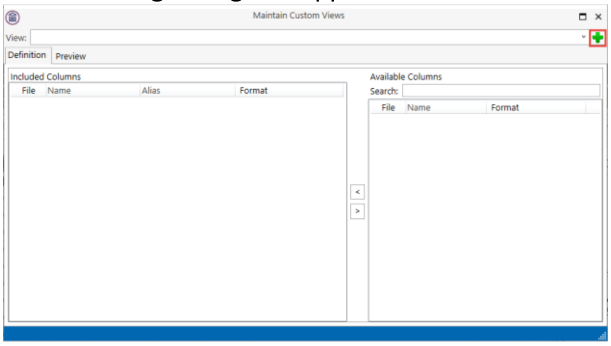
KEYD-5766

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.

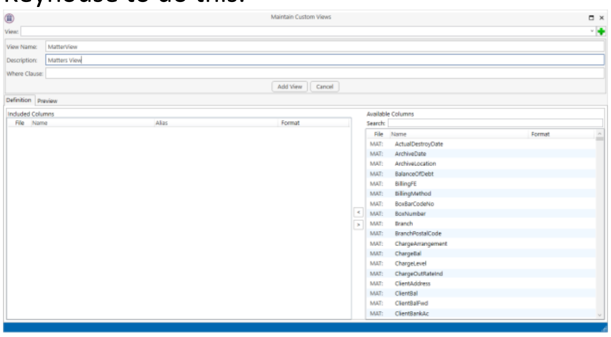
- Click to the Maintain Tab and select Custom Views



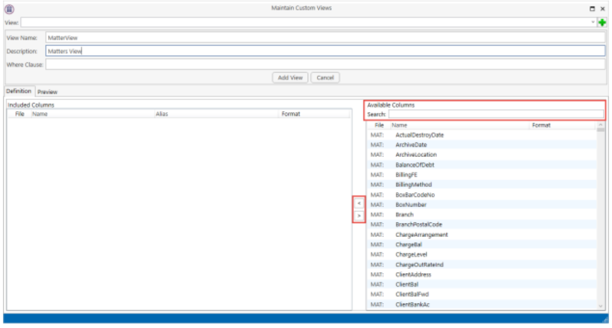
- The following dialog box appears



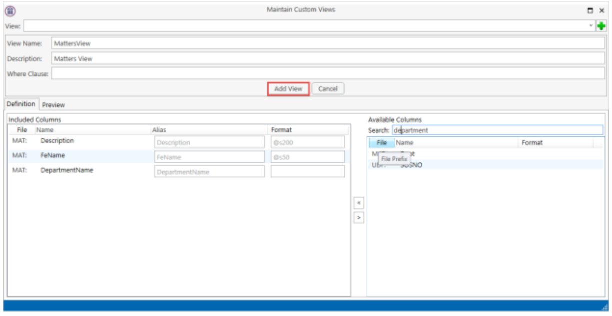
- Click on the New Button to create a view
- Enter a Field Name and Description for the View. Note the Field Name does not have a space.
- Where there information needs to be limited, the 'Where Clause' can be use. Please contact Keyhouse to do this.



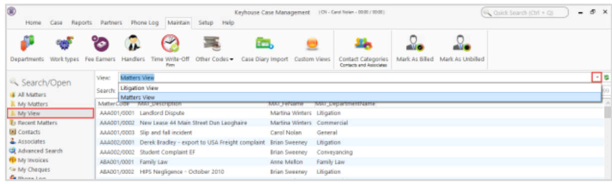
- Click Add View
- To add fields, click to the Search box and the arrow to add to the view



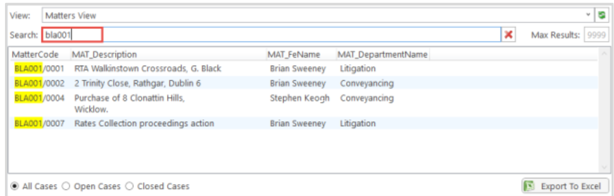
- Continue to add all required fields



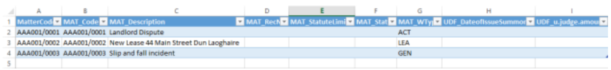
- Click Update View and click the X to close.
- Log Out and Log back in.
- On the Search/Open screen click on My View
- Select the required view from the drop down list



- 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.

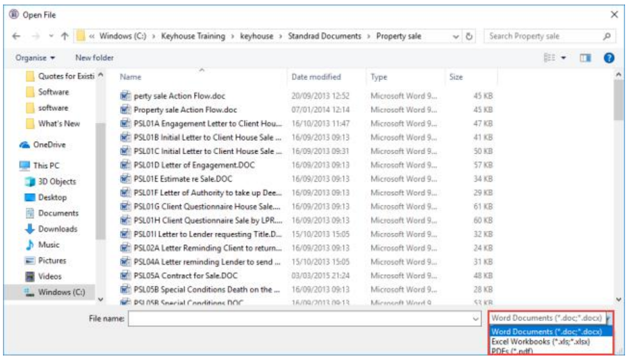


- Modify the report as required

Creating Workflows

013 KEYD-5520 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.



014 KEYD-5645 AUD FIELDS FOR CASE ASSOCIATES

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.

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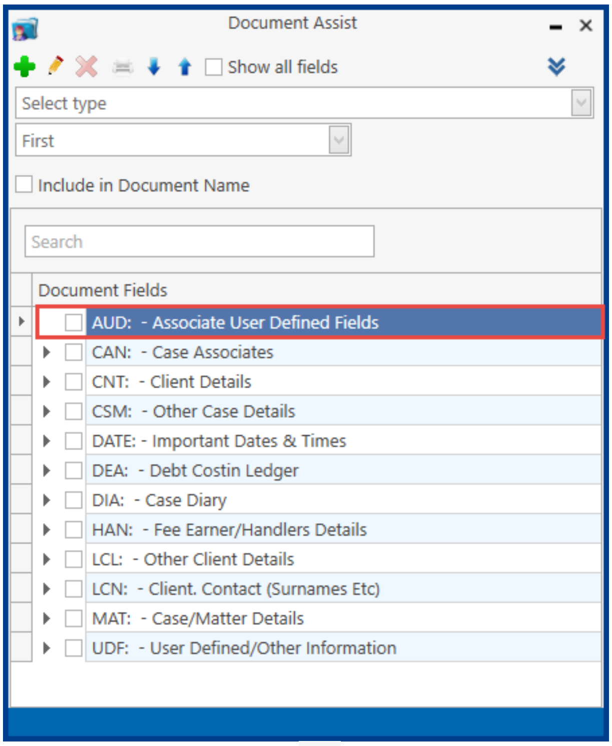
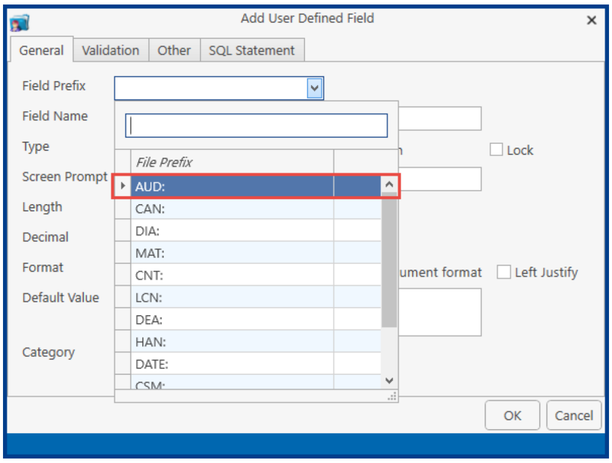
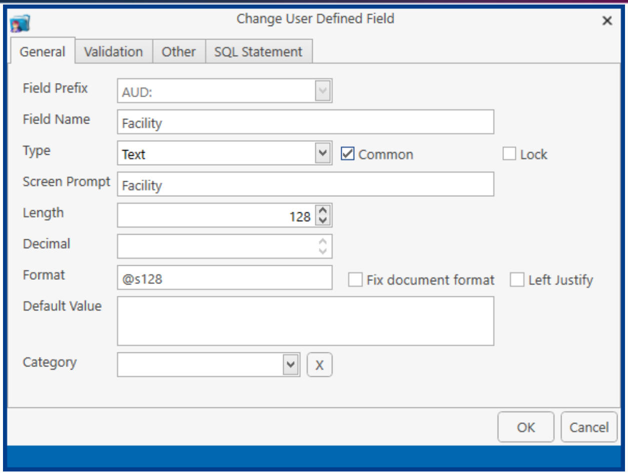


- Click on the New Button .
- Click on the Field Prefix box and select AUD from the list.



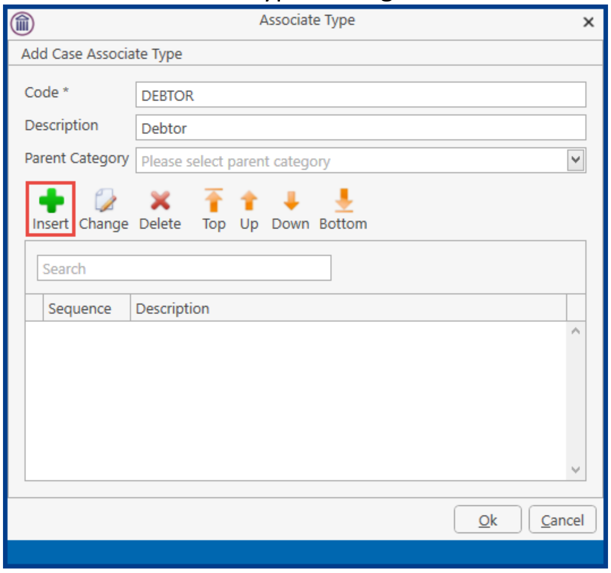
- Enter the remaining information. Please note that if the fields are to be always visible, click the Common box.



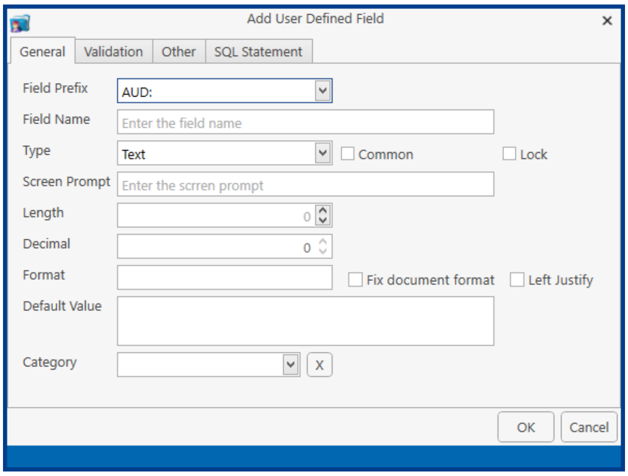
- Click OK.

From Search/Open Screen

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

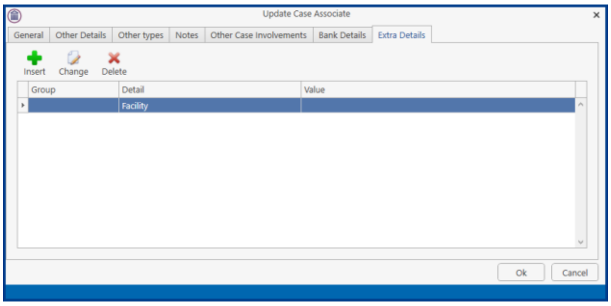


- Select the Insert Button



- 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.



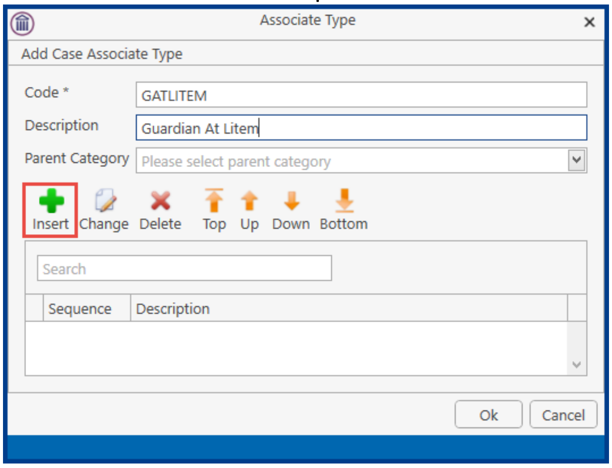
- The information can now be added.

From Client/Case

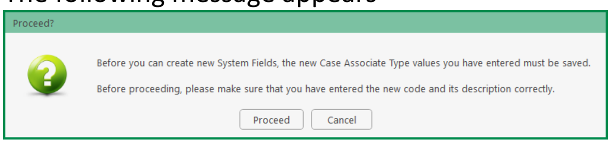
- Open the Case and select Associates.
- Repeat from Step 2 of the From Search/Open Screen

Creating New Associate Type

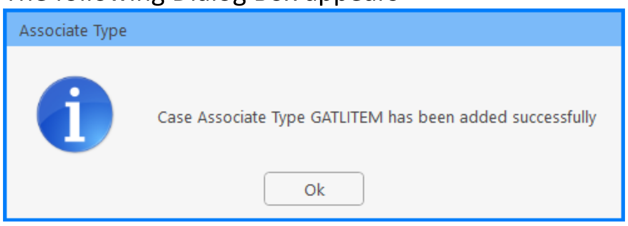
- Right click on Associate Type and select Add to create an Associate Type
- Enter the Code and Description



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



- The following Dialog Box appears



- Continue to add AUD fields as detailed in Point 12

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#@&?]