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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.

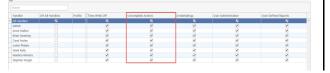
Untick the box to remove permission.

| (| 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.

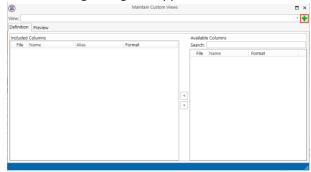


Although user can modify the standard Search Views provided by Keyhouse, not all information is available in the view. Custom views can be created using fields from the Current Case and Extra Case Details fields. These view, in turn, could be used for reporting purposes by exporting the data to Excel.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

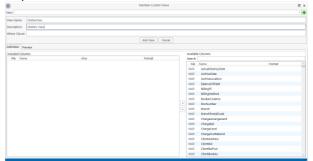
 Click to the Maintain Tab and select Custom Views
 Kenhouse Case Manage

| 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 |

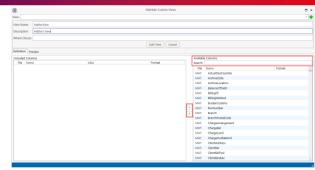
• The following dialog box appears



- 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.



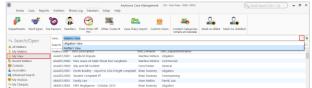
- Click Add View
- To add fields, click to the Search box and the arrow to add to the view



• 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) |



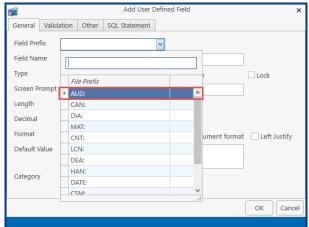
As with User Defined Fields for coding documents, it now possible to add Associate User Defined Fields. This is done on the Document Assist Screen or at the Associate Type level from either the Search/Open screen or from the Associate Screen on the Case. These are set at an Associate Level and not at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

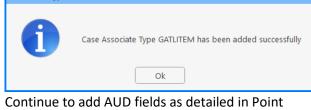
| | Associate Type | × |
|------------------|-------------------------------|--------|
| Add Case Associa | ate Type | |
| Code * | GATLITEM | |
| Description | Guardian At Litem | |
| Parent Category | Please select parent category | ~ |
| | Delete Top Up Down Bottom | |
| Sequence | Description | |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



6 | Page

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#@&?]