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What's New in Keyhouse Administration

Version 5.8.1.1

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	Allow Users to modify Due Dates for Actions they do not own
	003	Set Minimum Number of Years for Destruction
	004	Set Fee Types for Estimated Fees
	005	Option to Change Branch Label
	006	Certain Debt Fields can be visible on Case Diary
Permissions	007	Restrict Access to the Permissions Tab on Current Client Details
	008	Restrict Access to My Invoices
	009	Restrict Access the Debt and Reserve Ledger
Creating Workflows	010	Precedent Code Tidy Up
	011	‘All Associates’ Code for Documents Coding – New Document Generator Only
	012	Option to select Associates with codes ending @& and @R – New Document Generator Only
	013	Doc Assist Codes For Linked Associates
	014	Add Titles for PopUP Paragraghs
	016	Access to Test Doc Assist
Outlook Add In	016	Remove Track Reference in Document Names

System Options

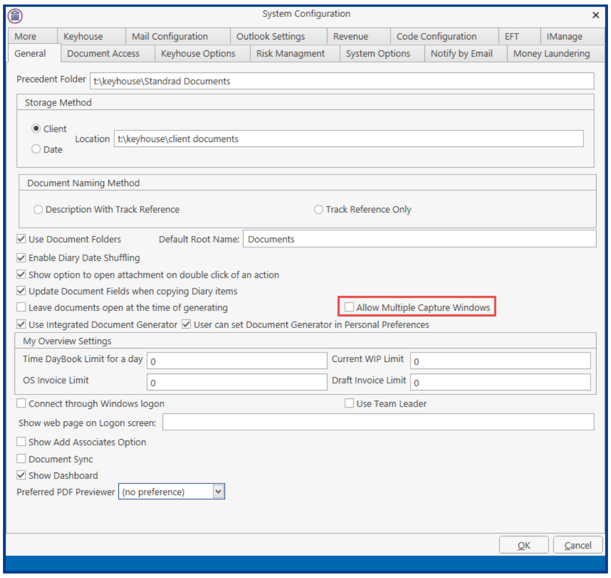
PLEASE NOTE: When changes are made to the System Options, they are system wide changes and users must log out of Keyhouse and log back in before they will take effect.

001 MULTIPLE CAPTURE WINDOWS

KEYD-5333

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

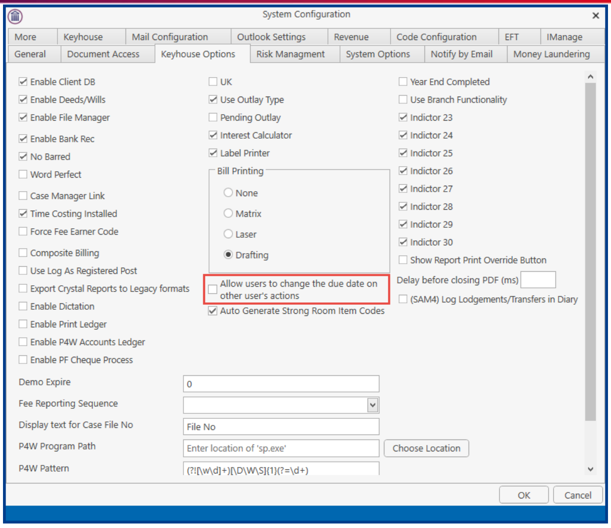


- Tick the Allow Multiple Capture Windows.
- Click OK

002 ALLOW USERS TO MODIFY DUE DATES FOR ACTIONS THEY DO NOT OWN

KEYD-5892

A new option has been added to the Permissions window to allow users to modify due dates for actions they do not own.

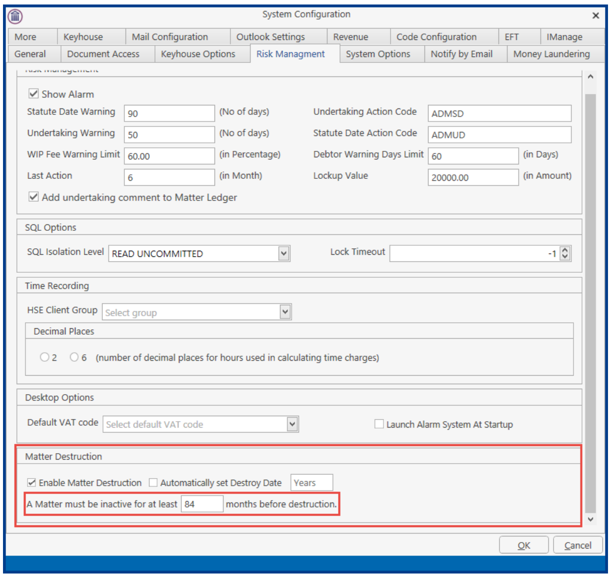


003 SET MINIMUM NUMBER OF YEARS FOR DISTRUCTION

KEYD-5842

An option has been added to enable users to determine the period of inactivity for destroying and purging files.

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



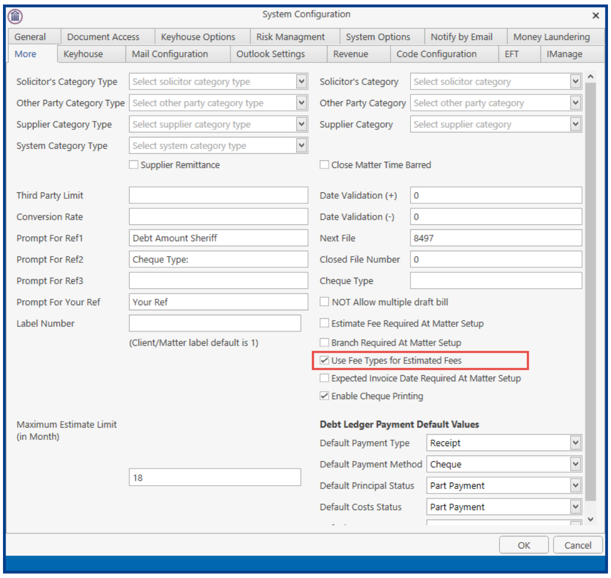
- Set the inactivity period.
- Click OK

004 KEYD-6312

Set Fee Types for Estimated Fees

It is now possible to state the type of fees being applied to a matter e.g. Fixed Fee, Billable Hours. This must be activated in the System Options.

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



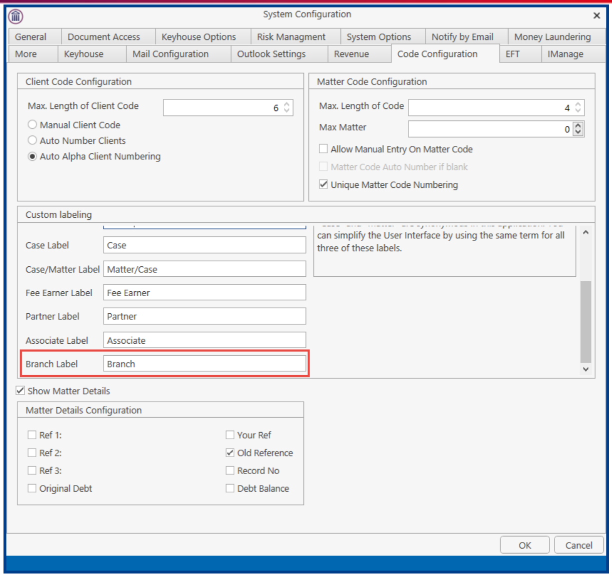
- Tick the Use Fee Types for Estimated Fees
- Click OK

005 KEYD-5807

Option to Change Branch Label

As with other field names, the Branch name can now be changed.

- Go to Setup, select Administration then System Options.
- On the Code Configuration tab
- Under the Custom Labelling section, scroll down to find branch.



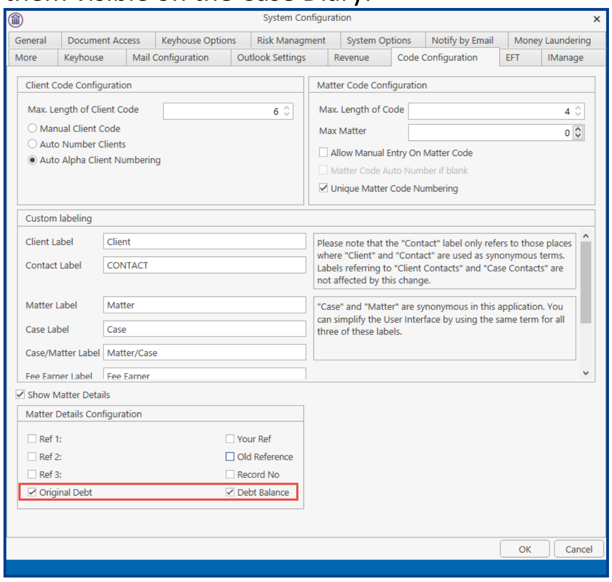
- Enter the new label and click OK.

006 KEYD-5807

Certain Debt Fields can be Visible on Case Diary

To give users greater visibility on certain information relating to the debt on a matter, this can be visible on the Case Diary.

- Go to Setup, select Administration then System Options.
- On the Code Configuration tab
- At the bottom of the screen, tick the 'Show Matter Details' box. This give access to the Matter Details Configuration Options.
- Tick Original Debt and Debt Balance to make them visible on the Case Diary.



- Click OK

Permissions

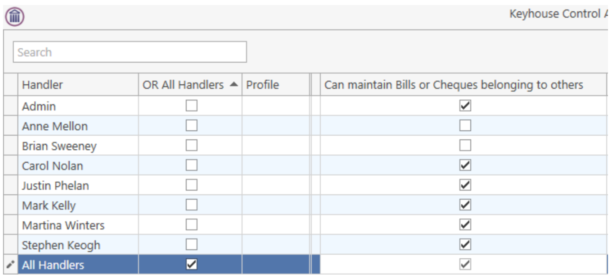
007 KEYD-6102 Restrict Access to the Permissions Tab on Current Client Details

The ability to lock down a user's ability to add and change permissions in the Current Client Details has been added to the Change Matter Security Permission option.

008 KEYD-5857 Restrict Access to My Invoices

The ability for users to change the due date on tasks where they are not the owners has been added to Permissions.

- Click to Setup and then click on User Setup.
- Select Handler Control Access
- Scroll across to 'Can maintain Bills and Cheques belonging to others'
- Untick for users who should not be able to see invoices created by other users.



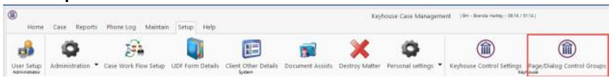
Handler	OR All Handlers	Profile	Can maintain Bills or Cheques belonging to others
Admin	☐		☑
Anne Mellon	☐		☐
Brian Sweeney	☐		☐
Carol Nolan	☐		☑
Justin Phelan	☐		☑
Mark Kelly	☐		☑
Martina Winters	☐		☑
Stephen Keogh	☐		☑
All Handlers	☑		☑

009 KEYD- Restrict Access the Debt and Reserve Ledgers

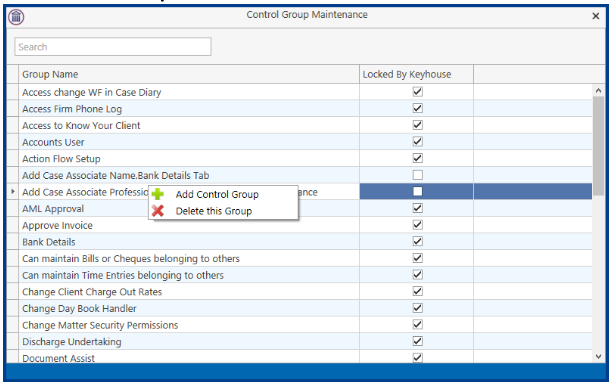
As the Debt and Reserve Ledgers are not widely used, we have added an option to hide them on the Case Diary.

The option is not set as standard on the Handler Control Access screen.

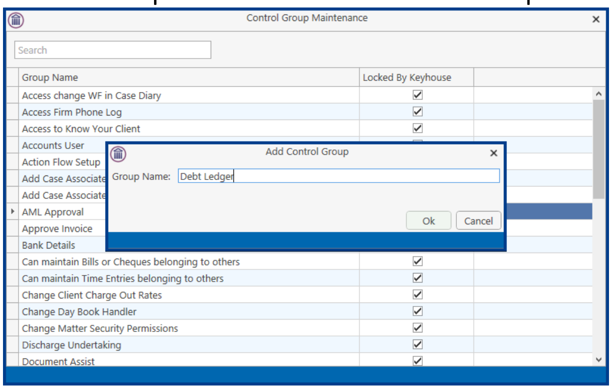
- Click the Setup Tab and click Page/Dialog Control Groups on the Ribbon.



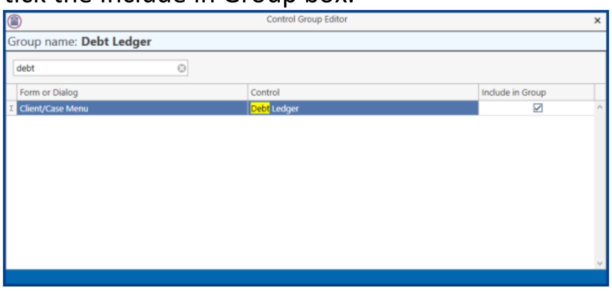
- Right click on the Group Names and select Add Control Group.



- Enter the Control Group Name e.g. Debt Ledger. **Note**: If you do not use either option, then they can both be put into the same Control Group.

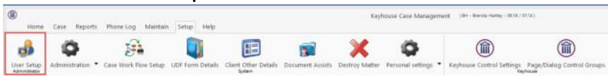


- Click OK
- Double Click on the new Debt Ledger Control Group.
- Use the Search Box to find the Debt Ledger and tick the Include in Group box.

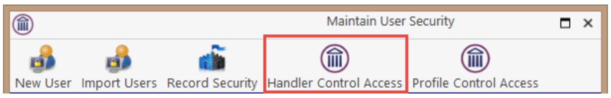


- If only using one control group, find the Reserve Ledger and add it to the control group.
- If using two control groups, create a Reserve Ledger Control Group and add the Reserve Ledger.
- Close the Dialog Boxes.

- Go to User Setup



- Select Handler Control Access.



- Scroll across and find the new group/s.
- If locking the option down for every member of staff, untick the All Handlers Option.
- If lock down for specific members of staff, just untick the option for those users.

Creating Workflows

010 PRECEDENT CODE TIDY UP

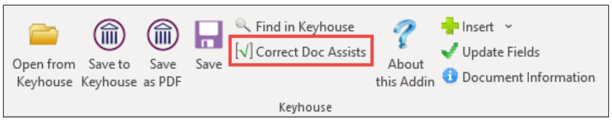
KEYD-6457

Applies to the New Document Generator Only.

The structure of MS Word and how it handles certain characters in the background of the program may cause coded documents not to generate correctly. An option has been added to the Word Addin that will resolve this problem. This should be applied to all new documents and any documents not generating correctly.

Note: The Addin must be 5.8.1.3 or above

- Create and code the document in the normal way.
- Click the 'Correct Doc Assists' option in the Keyhouse Group of Icons on the Home Ribbon



- Save and close the document in the normal way.

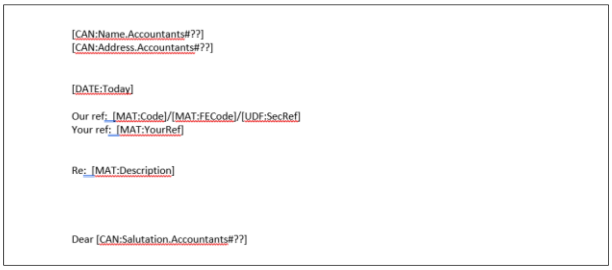
011 ALL ASSOCIATES CODE FOR DOCUMENTS CODING

KEYD-5645

Applies to the New Document Generator Only

Up until now it was necessary to create a document for each Associate Type e.g. Letter to Solicitor, Letter to Barrister. A new code has been added that will pull in the list of associates on the matter and allow the user to choose.

- Create the document to be coded in the normal way
- In the Doc Assist, find the code to be used.
- Choose any Associate Type from the list and change First to Ask the User
- Add the code to the document.


[CAN:Name.Accountants#??]
[CAN:Address.Accountants#??]

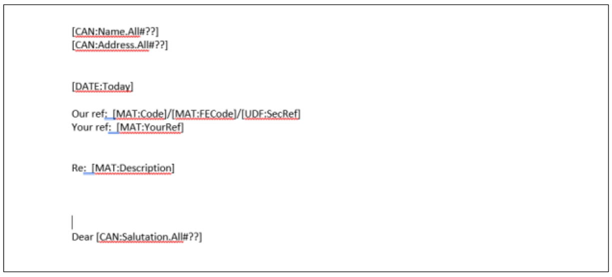
[DATE:Today]

Our ref: [MAT:Code]/[MAT:FECode]/[UDF:SecRef]
Your ref: [MAT:YourRef]

Re: [MAT:Description]

Dear [CAN:Salutation.Accountants#??]

- Manually change the Associate Type to All


[CAN:Name.All#??]
[CAN:Address.All#??]

[DATE:Today]

Our ref: [MAT:Code]/[MAT:FECode]/[UDF:SecRef]
Your ref: [MAT:YourRef]

Re: [MAT:Description]

Dear [CAN:Salutation.All#??]

- **Note**: If the code does not generate, copy it to Notepad and then copy it back to the document.

012 OPTION TO SELECT ASSOCIATES WITH CODES ENDING @& AND @R

KEYD-5645

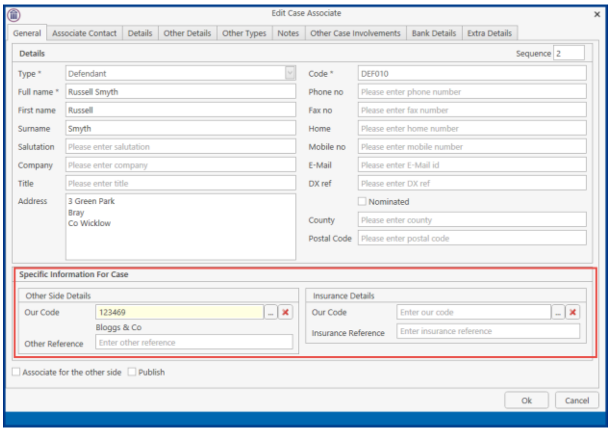
Applies to the New Document Generator Only.

When using codes that end in @& or @R, to give users the option to choose from a list the code must now have a '?' at the end e.g. [CAN:Name.Defendant#@%?]. If all the associates are always selected, then the code does not need to be modified.

013 DOC ASSIST CODES FOR LINKED ASSOCIATES

KEYD-5619

Users can link associates once they have been added to a case e.g. link solicitors to plaintiff/defendants. There are 2 separate fields that can be used. This link can be coded into documents.



Applies to the New Document Generator Only

The code to add the name of the linked associate for the column on the left is [SYS:f.GetCANInfo(CAN:SOLCODE.XXXX#01,'name')]

The code for the column on the right is [SYS:f.GetCANInfo(CAN:INSCODE.XXXX#01,'name')]

with XXXX representing the Associate Type.

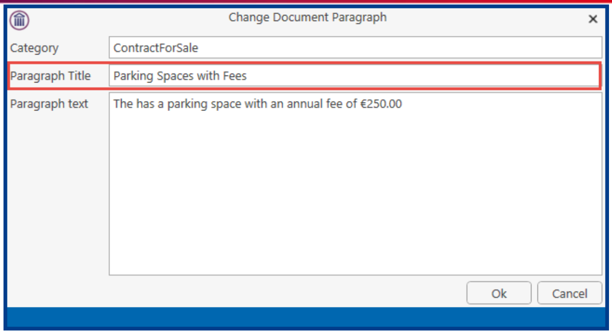
To ensure the codes return the required information, users must be advised the correct link for each field.

014 ADD TITLES FOR POPUP PARAGRAPHS

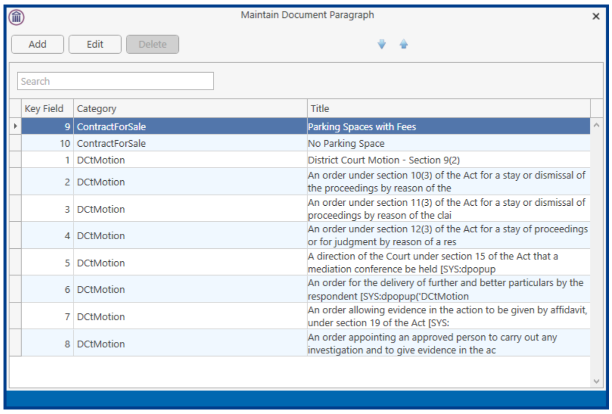
KEYD-5871

To make it easier for users to select PopUp paragraphs, an option has been added to allow for a title to be added to the Popup.

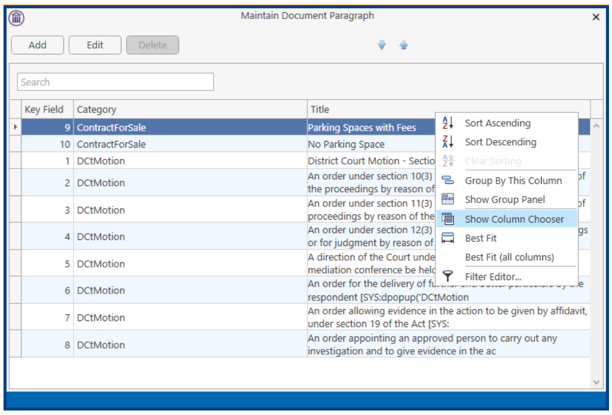
- Click to the Maintain Ribbon
- Click Other Codes and select PopUp Paragraphs
- Enter the Category, Paragraph Title and Paragraph Text.



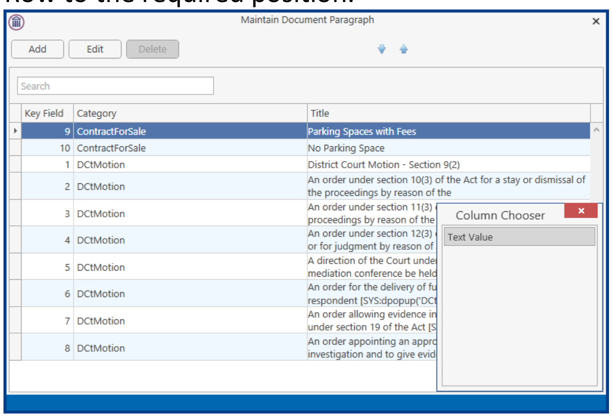
- Click OK to save.
- Add the PopUp to the document.
- If a title has not been added, then the standard text will be visible.



- To add the Paragraph Text Field to the Grid, Right click on Header Row
- Select Show Column Chooser



- Click on Paragraph Text and drag it to the Header Row to the required position.



015 KEYD-5057 ACCESS TO TEST DOC ASSIST

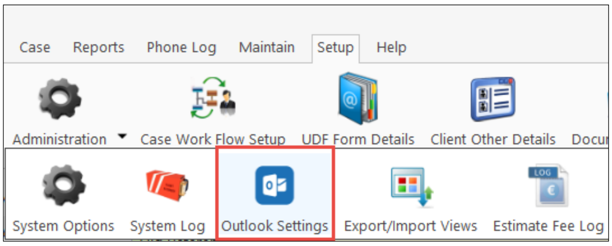
As the person coding documents may not be a System Supervisor, we have changed who can access the Test Doc Assist. Anyone who has access to the Case Workflow Setup and the Doc Assist can now access the Test Doc Assist.

Outlook Add In

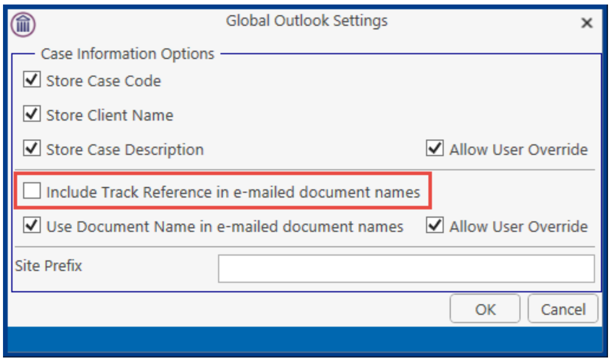
016 KEYD-6424 REMOVE TRACK REFERENCE IN EMAIL DOCUMENT NAMES

A global setting has been added to turn off track references on document names when emailing. These refences can cause confusion for the recipients as they don't understand their relevance.

- On the Settings Tab, click Administration.
- Select Outlook Settings



- Untick Include Track Reference in email Document names.



- Click OK.

Note: Users can add the tracking reference to individual documents if required.