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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.



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.



- Tick the Allow Multiple Capture Windows.
- Click OK



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

٢					System Configu	iration					×
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										ОК	Cancel



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

					System Config	uration				
More	Keyhouse	Mail	Configuration	Ou	tlook Settings	Revenue	Code C	onfiguration	EFT	IManage
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- Set the inactivity period.
- Click OK

004SET FEE TYPES FOR**ESTIMATED FEES**

t 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

General Document Access Keyhouse Options Nakt Managment System Options Notify bye mail Monego More Keyhouse Mall Configuration Outlook Settings Revenue Code Configuration EFT Solicitor Category Type Select solicitor category type Image: Solicitor Category Select solicitor category					ion	n Configu	Syster					
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- Tick the Use Fee Types for Estimated Fees
- Click OK



A s 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.

General	Docume	t Access	Keyhouse Optio	ns Risk Manag	ment	System C	Intions	Notify by Email	Mone	/ Launde	orin
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	Matter Detai										
Matter	Details Con	iguration									
Ref				Your Ref							
Ref :				Old Reference Record No							
	a: ainal Debt			Debt Balance							

• Enter the new label and click OK.

OO6CERTAIN DEBT FIELDSKEYD-5807CAN BE VISIBLE ON CASEDIARY

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.

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2 | Page

Permissions

007 KEVD-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.

OO8 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.

				Keyhouse Control A
	Search			
_	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			
1	All Handlers	✓		



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.
 - Home Care Report Renor Og Mandan Indro. Help Laring Administration - Care Uno Reuro Equity Carl Care Datability Care Data
- Right click on the Group Names and select Add Control Group.

Control Group N	/aintenance	
Search		
Group Name	Locked By Keyhouse	
Access change WF in Case Diary	×	
Access Firm Phone Log		
Access to Know Your Client	V	
Accounts User		
Action Flow Setup	V	
Add Case Associate Name.Bank Details Tab		
Add Case Associate Professio 🛖 Add Control Group	· 🗌	
AML Approval X Delete this Group		
Approve Invoice		
Bank Details		
Can maintain Bills or Cheques belonging to others	\checkmark	
Can maintain Time Entries belonging to others		
Change Client Charge Out Rates		
Change Day Book Handler		
Change Matter Security Permissions		
Discharge Undertaking		
Document Assist	~	

• 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.

Control Gr	oup Maintenance	×
Search		
Group Name	Locked By Keyhouse	
Access change WF in Case Diary		·
Access Firm Phone Log	\checkmark	
Access to Know Your Client		
Accounts User	ontrol Group	×
Action Flow Setup	ondororoop	^
Add Case Associate Group Name: Debt Ledger		
Add Case Associate		
AML Approval		
Approve Invoice	Ok Can	cei
Bank Details		
Can maintain Bills or Cheques belonging to others	\checkmark	
Can maintain Time Entries belonging to others		
Change Client Charge Out Rates		
Change Day Book Handler		
Change Matter Security Permissions		
Discharge Undertaking	\checkmark	

- 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.



- 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



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

Copen from Save to Save Save Save Save Keyhouse as PDF Keyhouse Keyhouse as PDF Keyhouse Keyhouse as PDF Keyhouse Keyhou

• Save and close the document in the normal way.



Applies to the New Document Generator Only

U p 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 <u>[MAT:Code]/[MAT:FECode]/[UDF:SecRef]</u> Your ref <u>[MAT:YourRef]</u>
Re: [MAT:Description]
Dear [<u>CAN-Salutation Accountants</u> #??]

• Manually change the Associate Type to All

[CAN:Name.All#??] [CAN:Address.All#??]
[DATE:Today]
Our ref; <u>[MAT:Code]/[MAT:FECode]/[UDF:SecRef]</u> Your ref; <u>[MAT:YourRef]</u>
Re: [MAT:Description]
 Dear <u>[CAN:Salutation.All</u> #??]

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



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 KEYD-5619 DOC ASSIST CODES FOR LINKED ASSOCIATES

U sers 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.

General	Associate Co	ntact	Details	Other Details	Other Types	Notes	Other Case I	nvolvement	ts Bank Details	Extra Details		
Details											Sequence 2	
Type *	Defenda	nt					Code *	DEF010				
Full name	* Russell S	myth					Phone no	Please en	ter phone numbe			
First nam	e Russell						Fax no	Please en	ter fax number			
Surname	Smyth						Home	Please en	ter home number			
Salutation	Please er	nter salu	itation				Mobile no	Please en	ter mobile numbe	r		
Company	Please er	nter con	npany				E-Mail	Please en	ter E-Mail id			
Title	Please er	nter title					DX ref	Please en	ter DX ref			
Address	3 Green	Park						Nomina	ated			
	Bray Co Wick	ow					County	Please en	ter county			
							Postal Code	Please en	ter postal code			
Specific I	nformation P	or Case	1									
Other S	ide Details						Insurance D	etails				
Our Cor		123469				_ X	Our Code		Enter our code			X
		loggs 8					Insurance Re	ference	Enter insurance	eference		
Other R	eference	Enter ot	her refer	ence								
Associat	e for the oth	er side	Publis	sh								

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.



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.

Add	Edit Delete	
Search		
Key Field	Category	Title
9	ContractForSale	Parking Spaces with Fees
10	ContractForSale	No Parking Space
1	DCtMotion	District Court Motion - Section 9(2)
2	DCtMotion	An order under section 10(3) of the Act for a stay or dismissal of the proceedings by reason of the
3	DCtMotion	An order under section 11(3) of the Act for a stay or dismissal of proceedings by reason of the clai
4	DCtMotion	An order under section 12(3) of the Act for a stay of proceeding or for judgment by reason of a res
5	DCtMotion	A direction of the Court under section 15 of the Act that a mediation conference be held [SYS:dpopup
6	DCtMotion	An order for the delivery of further and better particulars by the respondent [SYS:dpopup('DCtMotion
7	DCtMotion	An order allowing evidence in the action to be given by affidavit under section 19 of the Act [SYS:
8	DCtMotion	An order appointing an approved person to carry out any investigation and to give evidence in the ac

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

Ad	ld] [Edit Delete	¥ 🔶			
Sear	ch					
Key	Field	Category	Title			
F.	9	ContractForSale	Parking Spaces with Fees	ĝ↓	Sort Ascending	
	10	ContractForSale	No Parking Space	Z↓	Sort Descending	
	1	DCtMotion	District Court Motion - Sectio	2¥		
	2	DCtMotion	the proceedings by reason of		Group By This Column	2
	3	DCtMotion	An order under section (1)		Show Group Panel Show Column Chooser	-
	4	DCtMotion	An order under costion 12(2)		Best Fit	9
	5	DCtMotion	A direction of the Court unde mediation conference be held	Ÿ	Best Fit (all columns)	
	6	DCtMotion	An order for the delivery of fu- respondent [SYS:dpopup('DCtN	·····	Filter Editor	
	7	DCtMotion		the action to be given by affidavi		
	8	DCtMotion	An order appointing an approv investigation and to give evider			

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

Search					
Key Field	Category	Title			
9	ContractForSale	Parking Spaces with Fees			
10	ContractForSale	No Parking Space	of the Act for a stay or dismissal of		
1	DCtMotion	District Court Motion - Section 9(2)			
2	DCtMotion	An order under section 10(3) of the Act the proceedings by reason of the			
3	DCtMotion	proceedings by reason of the	mn Chooser		
4	DCtMotion	An order under section 12(3) or for judgment by reason of	lue		
5	DCtMotion	A direction of the Court under mediation conference be held			
6	DCtMotion	An order for the delivery of fu respondent [SYS:dpopup('DCt			
7	DCtMotion	An order allowing evidence in under section 19 of the Act [S			
8	DCtMotion	An order appointing an appro investigation and to give evid			

O15
KEYD-5057ACCESS 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 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



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