



Keyhouse Computing Ltd.  
IMI Business Campus,  
Sandyford Road, Dublin 16.

Call +353 1 2902222  
Email [info@keyhouse.ie](mailto:info@keyhouse.ie)

# **WHAT'S NEW IN KEYHOUSE ADMINISTRATION**

Version 5.9.1.1

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:

<b>Area</b>	<b>Item Code</b>	<b>Description</b>
<b>Maintain Tab</b> <b>System Options</b>	001	Search Feature added to Other Codes
	002	Allow Unoptimised Search
	003	MS Office Always save as a New Version
	004	Offline Generation of Brief Option
	005	Open Documents and Dictations Locally
	006	Additional Estimate Fee Fields
	007	Search Option added to System Options
	008	DocuSign
	009	Transact Integration
	010	Remove Track Reference from Emails
<b>Case Workflow Setup</b>	011	Correct Doc Assist
	012	Allow for Multiple ?? codes for Multiple Associate Types
	013	Apply Macros to Workflow Documents
	014	Tool Tips for Document Assist Codes

# Maintain Tab

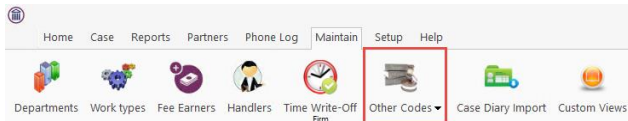
**001**

KEYD-6601

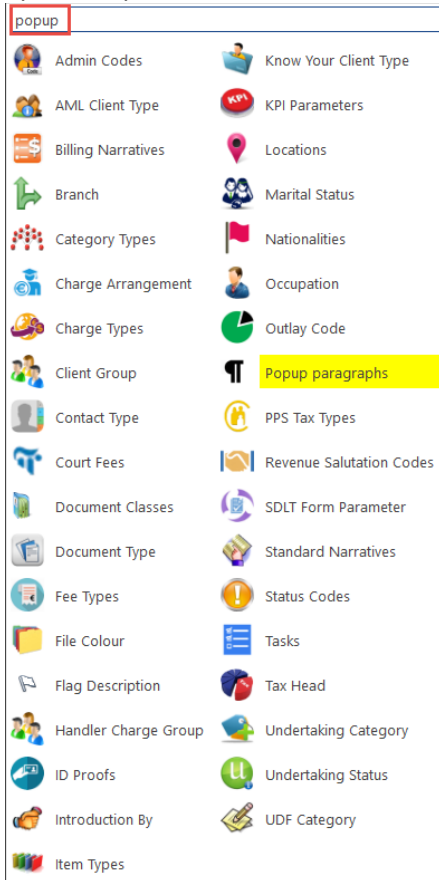
## SEARCH FEATURE ADDED TO OTHER CODES

A search option has been added to the Other Code option on the Maintain Tab. The codes have also been put into alphabetical order. This will make it easier to review options and search for the required field.

- Go to the Maintain Tab and select Other Codes



- In the Search box enter a key word to locate the option required.



- Click on the highlighted entry to make changes.

# System Options

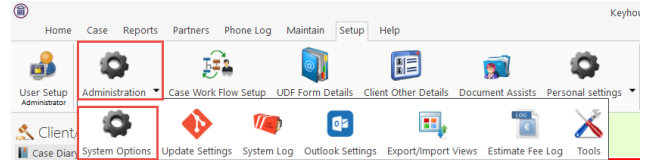
**002**

KEYD-6995

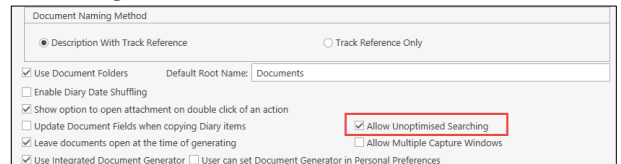
## ALLOW UNOPTIMISED SEARCHING

A standard search ignores noise words such as 'and', 'the' and 'of' etc. However, with an optimised search, they noise words are used. This will cause the search to be slower and will impact the performance of the system. The Unoptimised search feature it must be activated on by the System Administrator.

- Go to the Setup and Administration, select System Options.



- On the General Tab, tick 'Allow Unoptimised Searching'



- Click Ok.
- Users will need to log out and in to have access to the feature.

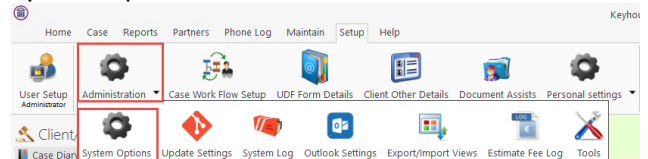
**003**

KEYD- 4

## MS OFFICE ALWAYS SAVE AS A NEW VERSION

It is now possible to save each change to a document as a new version automatically.

- Go to the Setup and Administration, select System Options.



- On the Document Access Tab, tick MS Office Always Save as a New Version.

System Configuration

Enter Search Term

Keyhouse | Mail Configuration | Outlook Settings | Revenue | Code Configuration | EFT | IManage | API Settings | Transact

General | Document Access | Keyhouse Options | Risk Management | System Options | Notify by Email | Money Laundering | More

Use Active Directory Folder Security on all document folders  Log Document Previewing

Username:   
Password:

Use Active Directory Folder Security on Precedent folders

Username:   
Password:

Use Checkout functionality

MS Office Always Save as New Version

Save Replaced Files as New Version

Users can submit Briefs for offline generation

Allow opening documents through the Clipboard (list allowed extensions below, separated by commas)

Use Azure Cloud Storage

Account Name:   
Account Key:

Containers: Templates:

Client Documents:  Client Document Versions:

Brief Document Mirrors:  Briefs:

OK Cancel

## 004 OFFLINE GENERATION OF BRIEF OPTION

KEY-6647

Briefs can now be submitted for generation from the user's PC, leaving the users free to continue working on their computer. This service must be installed on a PC/Server prior to activating this option. To activate:

- Go to the Setup and Administration, select System Options.
- Click to the Document Access Tab
- Select Users can submit briefs for offline generation.

System Configuration

Enter Search Term

More | Keyhouse | Mail Configuration | Outlook Settings | Revenue | Code Configuration | EFT | IManage

General | Document Access | Keyhouse Options | Risk Management | System Options | Notify by Email | Money Laundering

Use Active Directory Folder Security on all document folders

Username:   
Password:

Use Active Directory Folder Security on Precedent folders

Username:   
Password:

Use Checkout functionality

MS Office Always Save as New Version

Save Replaced Files as New Version

Users can submit Briefs for offline generation

Use Azure Cloud Storage

Account Name:   
Account Key:

Containers: Templates:

Client Documents:  Client Document Versions:

Brief Document Mirrors:  Briefs:

OK Cancel

- Click OK

## 005

Dev Ops  
7527

## OPEN DOCUMENTS AND DICTATIONS LOCALLY

For people using remote desktop applications or a Citrix environment, there is an option to enable them to open documents and dictations locally. This feature must be activated in conjunction with Keyhouse Support in relation to dictations only.

- Go to the Setup and Administration, select System Options.
- Click to the Document Access Tab

System Configuration

Enter Search Term

Keyhouse | Mail Configuration | Outlook Settings | Revenue | Code Configuration | EFT | IManage | API Settings | Transact

General | Document Access | Keyhouse Options | Risk Management | System Options | Notify by Email | Money Laundering | More

Use Active Directory Folder Security on all document folders  Log Document Previewing

Username:   
Password:

Use Active Directory Folder Security on Precedent folders

Username:   
Password:

Use Checkout functionality

MS Office Always Save as New Version

Save Replaced Files as New Version

Users can submit Briefs for offline generation

Allow opening documents through the Clipboard (list allowed extensions below, separated by commas)

Use Azure Cloud Storage

Account Name:   
Account Key:

Containers: Templates:

Client Documents:  Client Document Versions:

Brief Document Mirrors:  Briefs:

OK Cancel

- Tick the option to Allow opening documents through the Clipboard.
- In the box underneath, enter the file extension for the types of documents that can be opened locally.
- For dictations, ensure wav is included.
- Click OK to save.

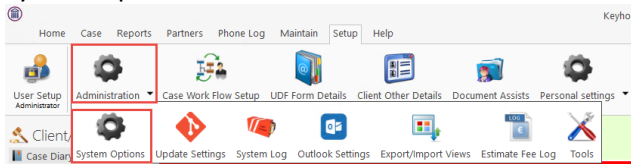
## 006

KP-37

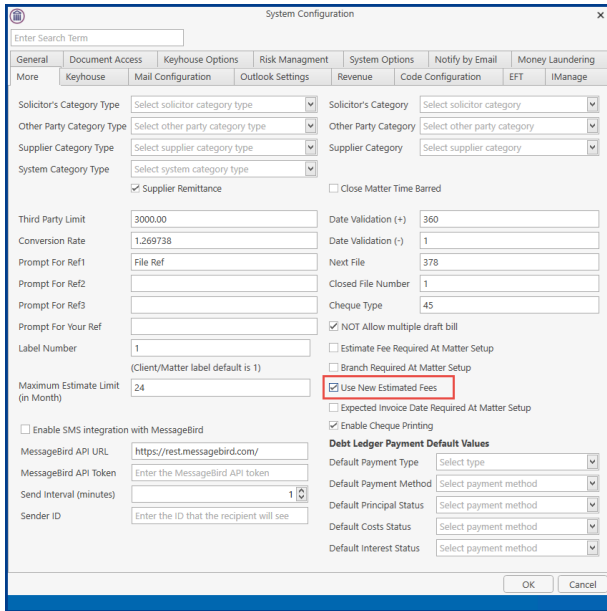
## ADDITIONAL ESTIMATE FEE FIELDS

New options have been added to enable additional information to be stored in relation to the estimate of fees. The information is stored in the Current Case Details. However, for these options to be used, it must be turned on by the System Administrator.

- Go to the Setup and Administration, select System Options.



- Click to the More Tab



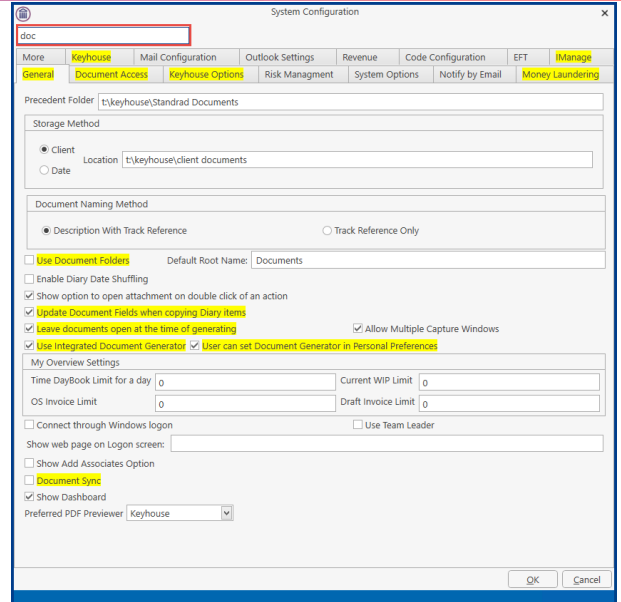
- Tick the box for Use New Estimated Fees
- Click OK

## 007 SEARCH OPTION ADDED TO SYSTEM OPTIONS

KEY-5512

A search option has been added to the System Options to enable users to find settings more easily.

- Go to the Setup and Administration, select System Options.
- In the search box at the top of the screen, enter the search criteria.

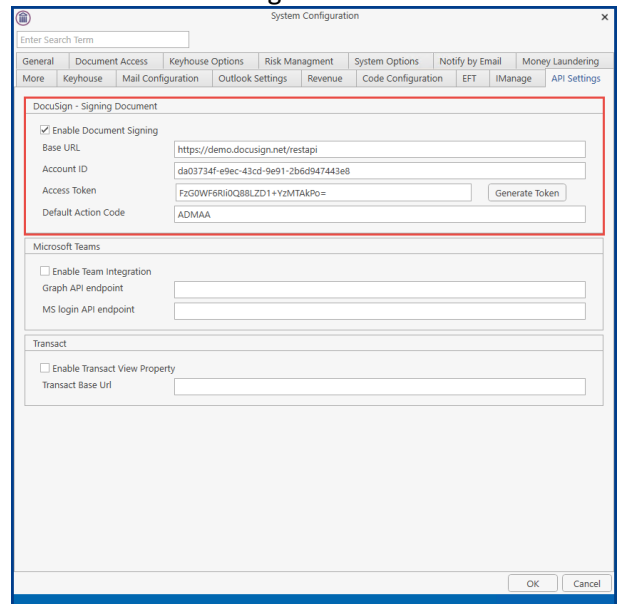


- Any tab or field that contains the search criteria will be highlighted.

## 008 DOCUSIGN

A new module has been added to Keyhouse to enable users to use Digital Signatures for documents. This feature must be activated in conjunction with Keyhouse Support.

- Go to the Setup and Administration, select System Options.
- Click to the API Settings Tab

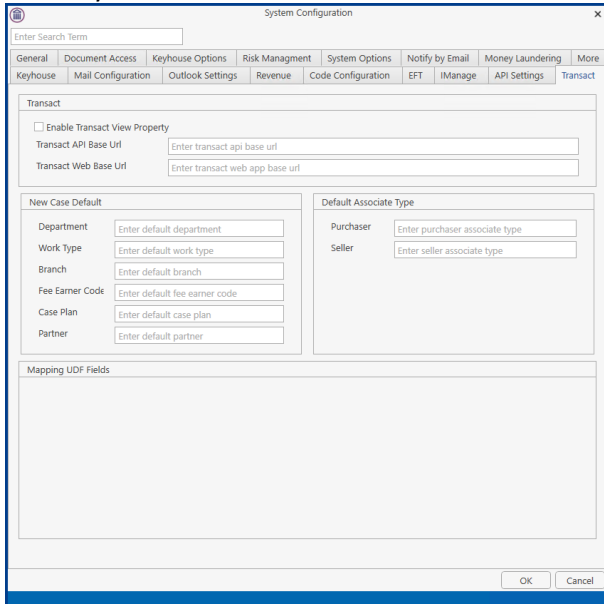


- Tick 'Enable Document Signing' and enter the information supplied by Keyhouse.
- Click OK.

009

## TRANSACT.IE INTEGRATION

Keyhouse has introduced full integration between Keyhouse Case Management and Transact.ie, the digital conveyancing platform. Please see contact Keyhouse for further information.



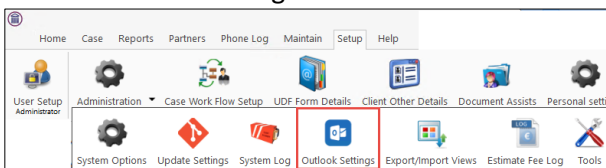
010

KEYD-6424

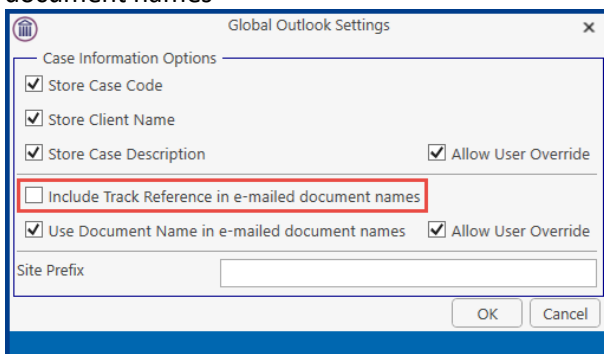
## REMOVE TRACK REFERENCE FROM EMAILS

The tracking reference for document can now be removed when sending emails.

- Click to Setup and select Administration
- Click on Outlook Settings



- Untick 'Include Track Reference in e-mailed document names'



- Click OK.

## Case Workflow Setup

011

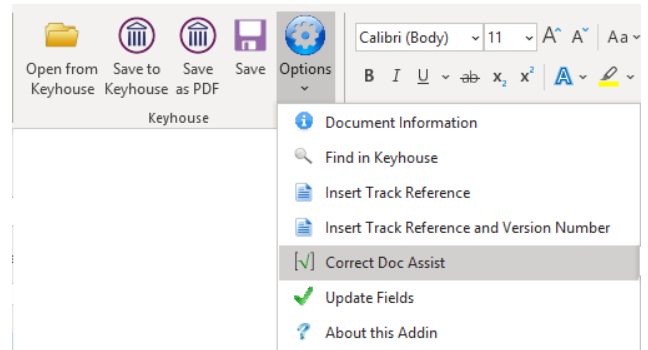
KEY-6457

## CORRECT DOC ASSIST

New Document Generator Only

Due to the way Microsoft manage documents in the background, sometimes a code may not generate correctly. To resolve this, the 'Correct Doc Assist' option has been added to the Word Addin.

- Create and code the document in the normal way.
- Before saving the document, click on Option on the Home Ribbon and select 'Correct Doc Assist'.



- Save and close the document.

012

Dev Ops  
11916

## ALLOW FOR MULTIPLE #?? CODES FOR MULTIPLE ASSOCIATE TYPES

This facility will enable the user to pick a different associate type when generating a letter e.g. letter to a solicitor allowing the user to select the appropriate defendant from a list of defendants. However, where there is more than one of each associate type, each letter will have to be created in a separate action.

[MAT.Code][MAT.FcCode][UDF.SecRef]  
 [CAN.SolRef.Solicitors#??]  
 [DATE.Today]

[CAN.LegalName.Solicitors#??]  
 Solicitors  
 [CAN.Address.Solicitors#??]  
 [CAN.DXRef.Solicitors#??]

Re: **Our Client: [CNT.Name]**  
**Your Client: [CAN.Name.Defendant#??]**

Dear Sirs,

Yours faithfully

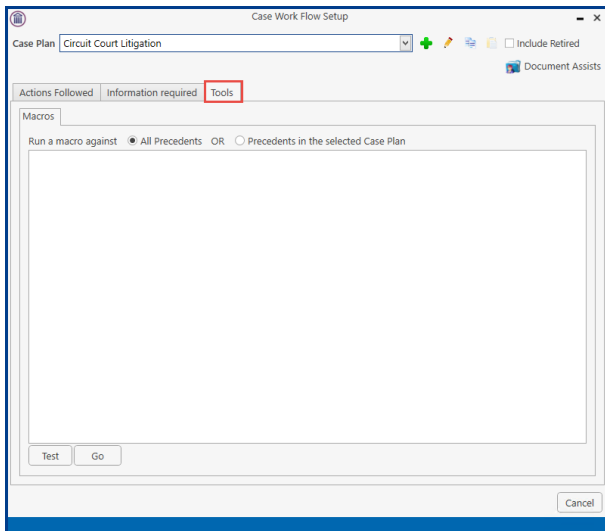
[DIA.CompanyName]

## 013 APPLY MACROS TO WORKFLOW DOCUMENTS

KEYD -7758

Global changes can now be applied to documents in individual workflows or to all workflow documents. This is done using Macros and in conjunction with Keyhouse.

- Go to the Setup Tab and select Case Work Flow Setup.
- Select a workflow to be changed and click to the Tools tab.



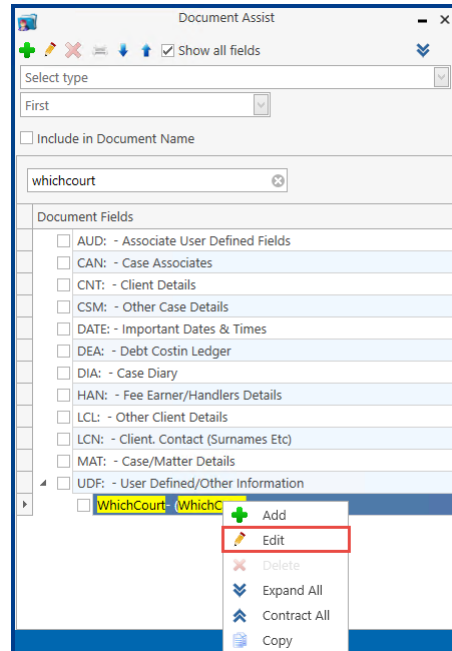
- Chose the option to run the macro on all document or just in the specified workflow.
- Enter the macro.
- To test the results, click Test.
- Click Go execute the macro.

## 014 TOOL TIPS FOR DOCUMENT ASSIST CODES

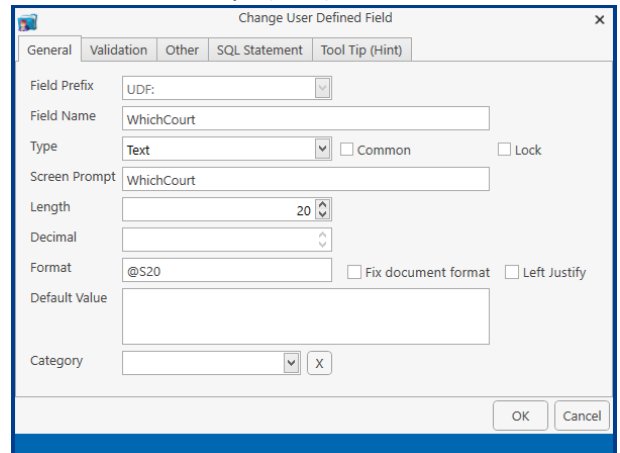
Dev Ops

Tool Tips can now be added to Doc Assist Code to help users when adding information to a document.

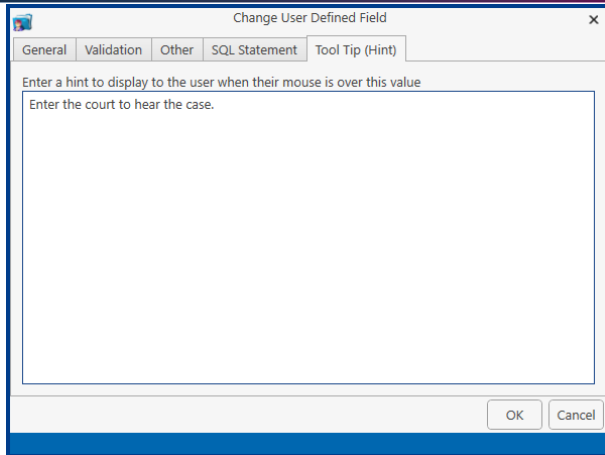
- Open the Doc Assist and search for the UDF field.
- Right click on the field and select Edit.



- Click to the Tool Tips (Hint) tab.



- Enter the tip the user will see on this field.



- Click OK to save and close.