

WHAT'S NEW IN KEYHOUSE ADMINISTRATION

Version 5.9.2.65

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
Maintain Tab	001	Fada can be used in People's Names
	002	Option to Retire Popup Codes
System Option	003	Allow Sorting by Synopsis
	004	Allow Sorting by Document Name
	005	Document Checkout Facility
	006	Post Time with Default Narratives
	007	Custom Label for Post Code
	008	Check for Draft Bills when closing files
	009	Prevent Users deleting entries in Phone Log
Case Workflow Setup	010	Conditional Follow up Actions
Document Assist	011	Tool Tips added for Extra Case Details
	012	Indicator for missing Data in Documents
Help	013	Create Keyhouse Shortcut with updating System
	014	Check Addins are installed when opening Keyhouse
	015	Update Addins from Help Menu
	016	Prevent User Updating Keyhouse
	017	View Program Version Information

Maintain Tab

001 FADA CAN BE USE IN PEOPLE'S NAMES

KEYD-6601

A Fada can be used when setting users up on the system using standard keyboard functionality.

002 OPTION TO RETIRE POPUP CODES

KEYD-13371

An option to retire unwanted Popup Paragraphs has been added.

- Click to the Maintain Tab and select Other Codes.
- Search for Popup Paragraphs and open the option.
- Search for or select the paragraph to be retired
- Click Retire.

Key Field	Category	Title	
208	AccidentCircs	Slip	N
209	AccidentCircs	Falling Object	N
210	AccidentCircs	Trip	N
108	AGRI	First Legal Mortgage	N
109	AGRI	Dwelling House	N
110	AGRI	Equitable Deposit	N
111	AGRI	Mortgage Protection	N
112	AGRI	Shares	N
113	AGRI	ACCBANK	N
114	AGRI	Single Farm Payment	N
115	AGRI	Mandate of Grants	N
116	AGRI	Net Proceeds	N
117	AGRI	Share Portfolio	N
118	AGRI	Extension	N
119	AGRI	Guarantee & Indemnity	N
120	AGRI	Site Mortgage	N

- The paragraph will no longer be visible.

SETUP

System Options

003 ALLOW SORTING BY SYNOPSIS

Dev Ops
13315

To enable users to sort actions in the Case Diary, the Allow Sorting by Synopsis option has been added. Please note that this will significantly increase the

size of your database. It is also recommended that this feature is not turned on during working hours and it will impact the performance of the system while it is being installed.

- Click to the Setup Screen and select Administration.
- Click System Options.
- On the General Tab, tick Allow Sorting by Synopsis.

- The following warning will appear.

- Click Yes to continue or No to stop the process.
- Click OK or Cancel to close the window.

004 ALLOW SORTING BY DOCUMENT NAME

Dev Ops
12822

To enable users to sort documents in the Document Manager a new option has been added to the General Tab.

- Click Setup Tab and select Administration.
- Click System Options.

- On the General Tab, tick Allow sorting by document name.

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

Precedent Folder: t:\keyhouse\Standrad Documents

Storage Method: Client (selected), Location: t:\keyhouse\client documents

Document Naming Method: Description With Track Reference (selected), Track Reference Only (unselected)

Use Document Folders Default Root Name: Documents

Department based Document Classes

Enable Diary Date Shuffling Allow sorting by synopsis in diary Allow sorting by document name

Show option to open attachment on double click of an action Allow Unoptimized Searching

Leave documents open at the time of generating Allow Multiple Capture Windows

Use Integrated Document Generator User can set Document Generator in Personal Preferences

Use Integrated Billing User can set Billing in Personal Preferences

My Overview Settings:

Time DayBook Limit for a day: 0 Current WIP Limit: 0

OS Invoice Limit: 0 Draft Invoice Limit: 0

Connect through Windows logon Use Team Leader

Show web page on Logon screen:

Show Add Associates Option

Document Sync

Show Dashboard

Preferred PDF Previewer: Keyhouse

OK Cancel

- Click OK to save.

005 DOCUMENT CHECKOUT FACILITY

Dev Ops

A Document Checkout facility has been added to Keyhouse. To enable this feature to be used, it must be activated on the in the System Options.

- Click Setup Tab and select Administration.
- Click System Options.
- On the Document Tab, tick Use Checkout functionality.

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: templates

Client Documents: clientdocuments Client Document Versions: clientdocumentversions

Brief Document Mirrors: briefmirrors Briefs: briefs

OK Cancel

- Click OK to save.

006 POST TIME WITH DEFAULT NARRATIVES

Dev Ops 13862

A default task can be set for users when it is not necessary to have detailed time entries for clients. To facilitate the quick posting of these entries, a system option has been added to enable the posting of all entries in the Time Ledger without the need of reviewing these entries.

- Click the Setup Tab and select Administration.
- Click System Options.
- On the Keyhouse Options Tab, tick Auto Default Time Tasks.

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

Enable Client DB UK Year End Completed

Enable Deeds/Wills Use Outlay Type Use Branch Functionality

Enable File Manager Pending Outlay Indictor 23

Enable Bank Rec Interest Calculator Indictor 24

No Barred Label Printer Indictor 25

Word Perfect Bill Printing Indictor 26

Case Manager Link None Indictor 27

Time Costing Installed Matrix Indictor 28

Force Fee Earner Code Laser Indictor 29

Composite Billing Drafting Indictor 30

Use Log As Registered Post Show Report Print Override Button

Export Crystal Reports to Legacy formats Allow users to change the due date on other user's actions Delay before closing PDF (ms)

Enable Dictation Auto Generate Strong Room Item Codes (SAM4) Log Lodgements/Transfers in Diary

Enable Print Ledger Auto Default Task Time Use the same data provider as the application for reports

Enable P4W Accounts Ledger

Enable PF Cheque Process

Demo Expire: 0

Fee Reporting Sequence: [Dropdown]

Display text for Case File No: File No

P4W Program Path: Enter location of 'sp.exe' Choose Location

P4W Pattern: (?[!@#\$%^&*]D\W\S|1)?=d+

Doc. Reproduction Outlay Code: Outlay code used to determine billed document

Default cheque request action assignee: [Dropdown]

OK Cancel

- Click OK to save changes.
- A default time task must be entered on the Handler Screen for this to work.

007 CUSTOM LABEL FOR POST CODE

Dev Ops 12851

The Post Code field name can now be changed.

- Click the Setup Tab and select Administration.
- Click System Options and select the Code Configuration Tab.
- Under Custom Labelling, scroll down to Post Code Label.

- Enter the required name.

- Click OK to Save.

008 CHECK FOR DRAFT BILLS WHEN CLOSING FILES

Dev Ops
13009

To ensure cases are not closed when Draft Bills have been marked as complete without being issued, a Check Draft Bill option has been added

- Click the Setup Tab and select Administration.
- Click System Options.
- Tick Check Bill.

- Click OK to save.

009 PREVENT USERS DELETING ENTRIES IN THE PHONE LOG

Dev Ops
11873

A new control to prevent users from deleting entries in the Phone Log has been added to the permissions screen.

- Click on the Setup Tab and then User Setup.
- Select Handler Control Access.
- Scroll across to Delete Phone Log.

Handler	OR All Handlers	Profile	Matter Security Permissions	Delete Phone Log	Discharge Undertaking	Document Access
All Handlers	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admin	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anne Mellon	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Brian Sweeney	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Carol Nolan	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Justin Phelan	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mark Kelly	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Martina Winters	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Stephen Keogh	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Untick the box to prevent users from deleting phone log records.
 - Click on the X to close the window.
- NOTE:** Users will need to log out and log back in to activate this feature.

Workflows

010 CONDITIONAL FOLLOW UP ACTIONS

Dev Ops
7508

When setting up follow up actions, a condition can be added to determine the next action. This only applies when the action is set to be automatically processed.

- Create the follow up action and set the time parameters.
- Tick Action is Conditional.

- Choose from a Client Code, Matter Code, Other Case Details Code or UDF Code

- Choose the field from the dropdown list.

- Choose the operator.

- Enter the condition.

- In the above example the action will only appear in the Case Diary if the UDF field has been populated with Yes in the Extra Case Details.

Document Assist

011

Dev Ops
12189

TOOL TIPS ADDED FOR EXTRA CASE DETAILS

Tool tips can be added to UDFs to make it easier for users to understand the information required.

- Create the UDF in the normal way or edit an existing UDF.
- Click to the Tool Tips Tab and enter the information needed.

- Click OK to save

012

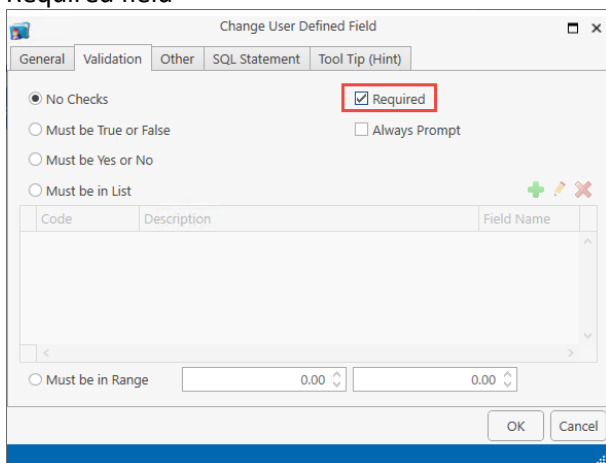
Dev Ops
12802

INDICATOR FOR MISSING DATA IN DOCUMENTS

Client and matter information is not always entered when matters are set up and UDF fields can be left blank at the time of document generation. This can lead to information being omitted from documents

when they are generated. Now when System field information is missing ??? will appear in the document when generated. However to ensure that UDF fields e.g. date of accident are populated, the field must be set as a Required field. The user must then enter the information before proceeding further with the generation of the document. To make a field a required field:

- Open the Document Assist and search for the Field required.
- Right click on the field and select Edit.
- Click to the Validation Tab and tick the Required field



- Click OK to save the change.

HELP

UPDATING KEYHOUSE

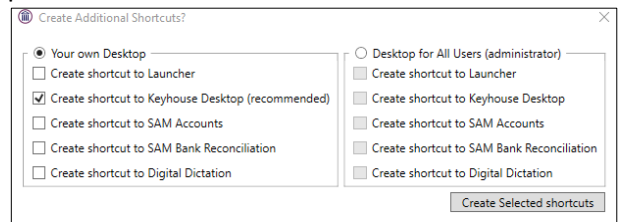
013 CREATE KEYHOUSE SHORTCUT WHEN UPDATING SYSTEM

Dev Ops
13352

When updating Keyhouse, shortcuts can be created for different programs as part of the update process. This can be done on a user by user basis or as the System Administrator for all users.

- When creating shortcuts for individual users, select from the options on the left side of the dialog box.
- When setting shortcuts for all users, choose from the right side of the box.

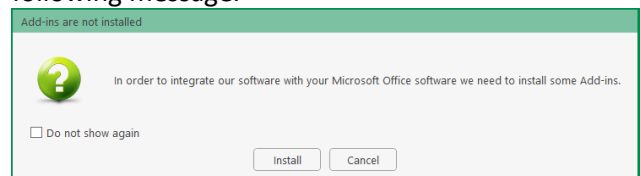
- Click Create Selected shortcuts to finalise the process.



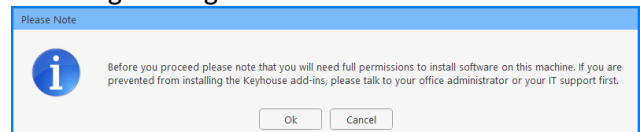
014 CHECK ADDINS ARE INSTALLED WHEN OPENING KEYHOUSE

Dev Ops
13557

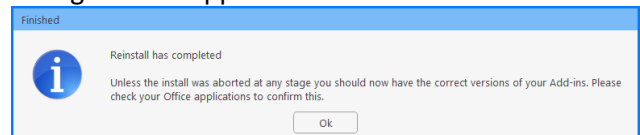
Once Keyhouse has been updated, when the user opens the program, the system will check that the Addins are installed. If not, the user will get the following message.



They can then click Install and will receive the following message.



Once the Addin has been installed the following dialog box will appear



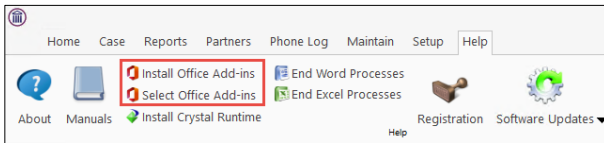
The process will then need to be repeated for the additional Addins.

015 UPDATE ADDINS FROM HELP MENU

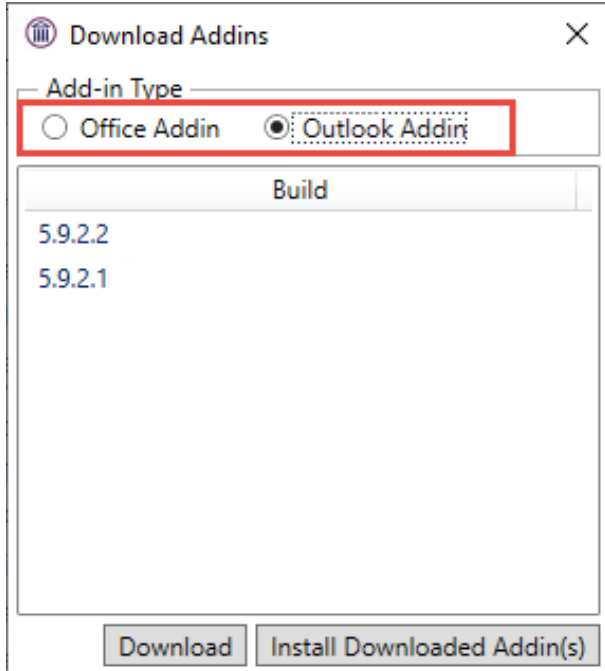
Dev Ops
12551

With users having the ability to update the system as new builds are released, an option to update Addins has been added.

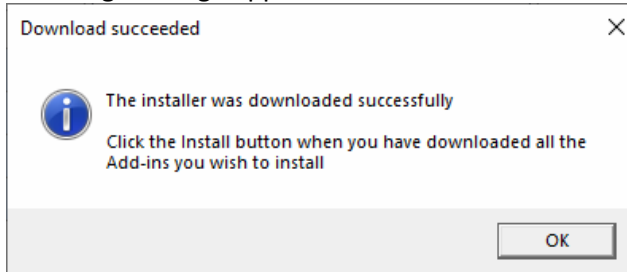
- On the Help Menu, click Select Office Add-ins



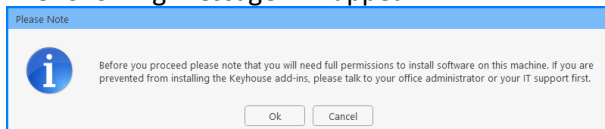
- Choose the Install Office Add-ins



- Select the required version and click Download
- Then select Install Downloaded Addin(s)
- Once the Addin(s) has been downloaded the following message appears

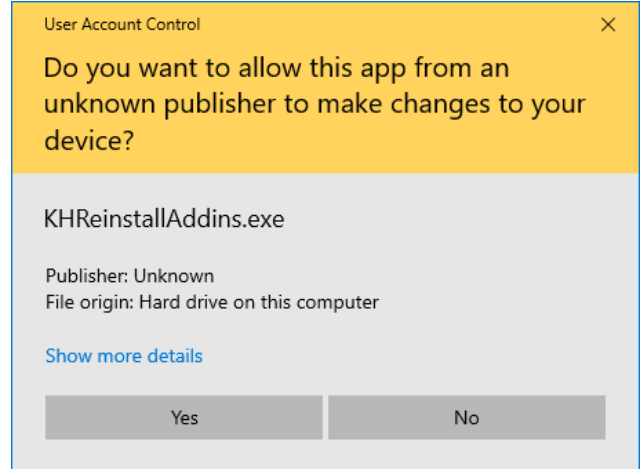


- Click OK
- Ensure all MS Office programs are closed before proceeding
- To install the addin, click Install downloaded addin(s) or alternatively, close the window and click Install Office Add-ins from the Ribbon.
- The following message will appear.

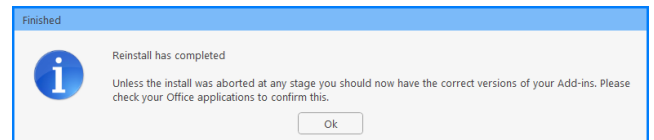


- If you have permission to install software, click Yes.

- Click Yes on the following dialog box



- The following message appears once the install is finished.



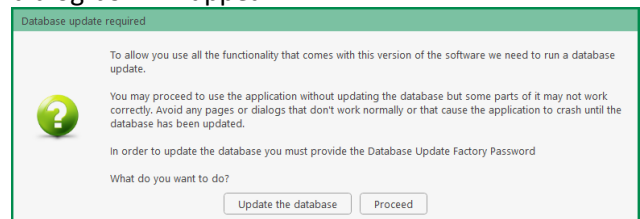
- Reopen MS Office programs and continue as normal.

016

Dev Ops
13554

PREVENT USERS UPDATING KEYHOUSE

To ensure the controlled rollout of updates of the Keyhouse system by Keyhouse, the System Administrator or IT personnel, a password has been added to the Update feature. Should a user try to update the system, before they log in the following dialog box will appear.



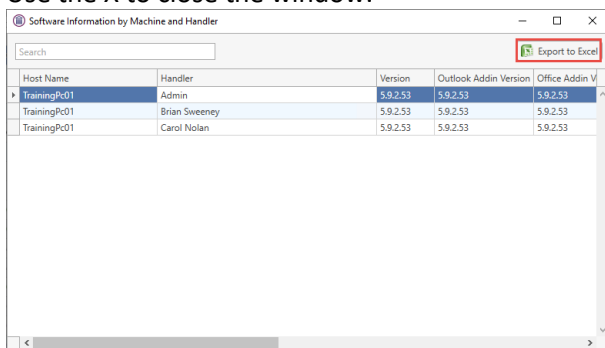
If the user clicks Update the database, they will be prompted to enter a password. As they will not have the password, the system will not run the update. When the user clicks cancel, the system will open the current database.

If a System Supervisor and IT personnel wishes to update the system, please contact Keyhouse and a member of Support will enter the password on your behalf.

VIEW PROGRAM VERSION INFORMATION

This new feature will enable Supervisors and IT personnel to view the versions of the KHLauncher, Keyhouse, Addins and MS Office programs running on Users machines.

- Click to the Help Tab and select Machine Info
- Search for the required user.
- Use the Export to Excel to create a report on all user machines.
- Use the X to close the window.



The screenshot shows a window titled "Software Information by Machine and Handler". It contains a search bar at the top left and an "Export to Excel" button at the top right. Below the search bar is a table with the following data:

Host Name	Handler	Version	Outlook Addin Version	Office Addin V
TrainingPc01	Admin	5.9.2.53	5.9.2.53	5.9.2.53
TrainingPc01	Brian Sweeney	5.9.2.53	5.9.2.53	5.9.2.53
TrainingPc01	Carol Nolan	5.9.2.53	5.9.2.53	5.9.2.53