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WHAT'S NEW IN KEYHOUSE

END USER INTERFACE

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	Code	Description
Search Screens	001	Case Status visible on Recent Matters Search Grid
	002	Custom Views
Current Client Details	003	Re-sequence Case Associates
Current Case Details	004	Increased Field Size for REF1, REF2 and REF3
	005	Default Destroy Date
Case Diary	006	Increased Tooltip Duration on Workflow
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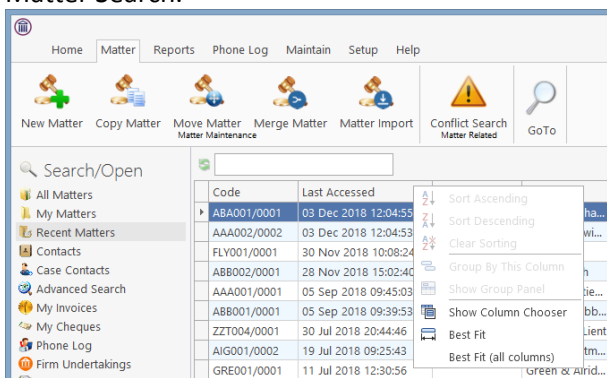
Search Screen

001
KEYD-4993

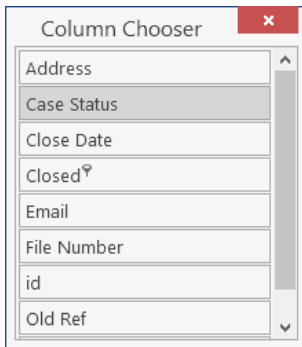
CASE STATUS VISIBLE ON RECENT MATTERS SEARCH GRID

The Case Status for matter is now searchable on the Recent Matters Screen.

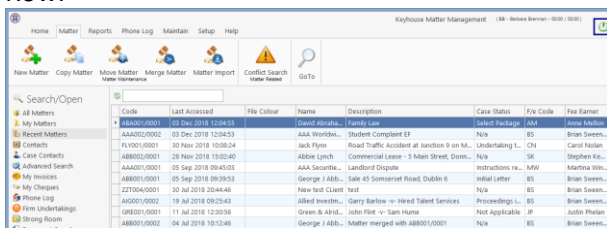
- Right click on the Header Row on the Recent Matter Search.



- Click on Show Column Chooser
- Select Case Status from the list



- Drag and drop it into position on the Header Row.



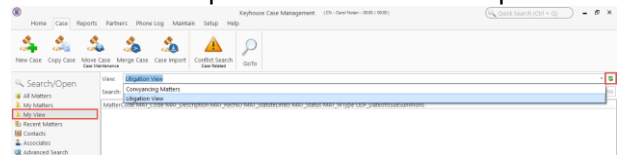
- Enter the search criteria to proceed.

002
KEYD-5766

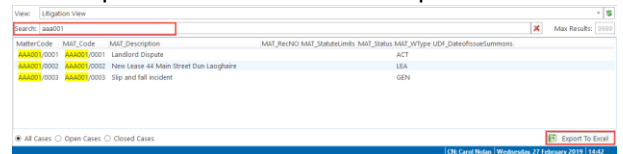
CUSTOM VIEWS

Custom View may be created by the System Supervisor. They are visible on the Search Open Screen. The information contained on these views can be exported to Excel for reporting purposes.

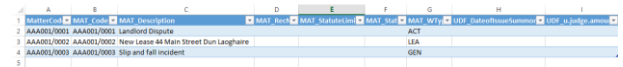
- On the Search/Open screen click on My View
- Select the required view from the drop down list



- 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.
- Modify the report as required



Current Client Details

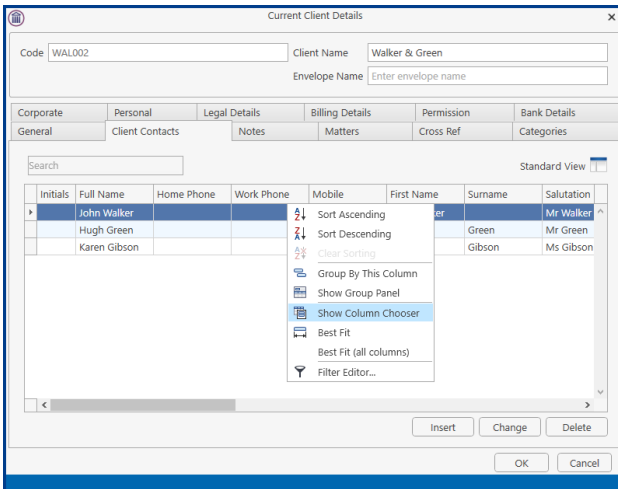
003
KEYD-5600

RESEQUENCE CLIENT CONTACTS

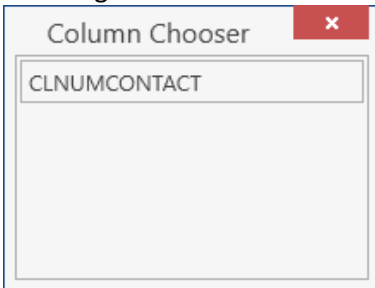
When client contacts are added to a matter, they are assigned a sequence number. The last contact entered will have the highest sequence number. It may, on occasion, be necessary to reorder the contacts and sequence numbers.

- Open the Current Client Details and click to the Client Contacts Tab

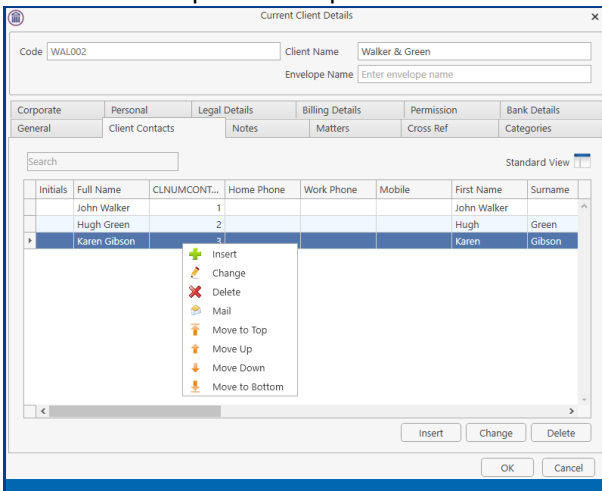
- Right click on the Header Row and select Show Column Chooser from the list.



- From the Chooser List, select CLNUMCONTACT and drag to the Header Row.



- Right click on the Contact to be resequenced
- Use the Move options to reposition the contact



- Click OK to confirm.

Current Case Details

004
KEYD-5242

INCREASED FIELD SIZE FOR REF1, REF2 AND REF3

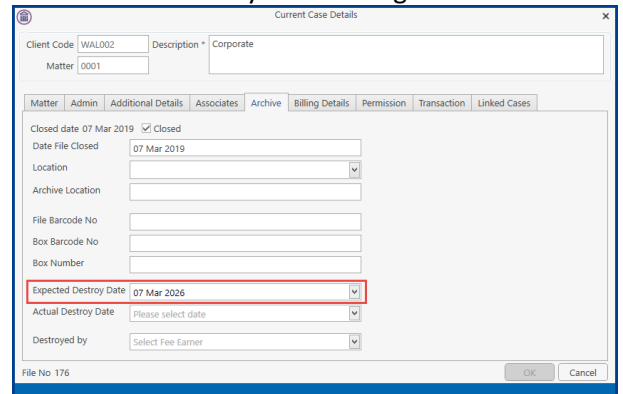
The field size for the above has been increased to 100 characters.

005
KEYD-5259

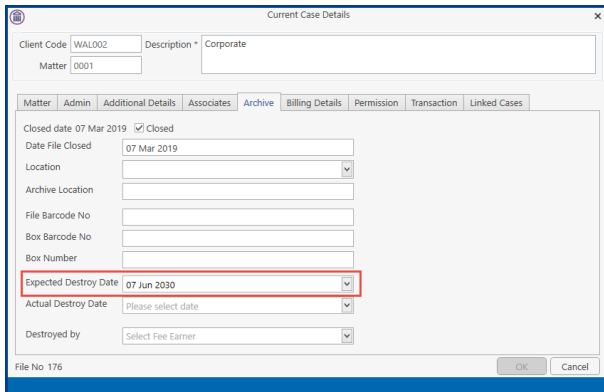
DEFAULT DESTROY DATE

When closing a matter, the destroy date can be populated automatically for a specified period of time. This feature must be activated by the System Administrator before it can be used. Please note that the period for destruction will standard across all matter types.

- Close the file in the normal way without entering a destroy date.
- The system will automatically enter the destroy date based on the system setting



- This can be overwritten by entering a date in the Expected Destroy Date before ticking the Closed box as the retention period for files varies from matter to matter.

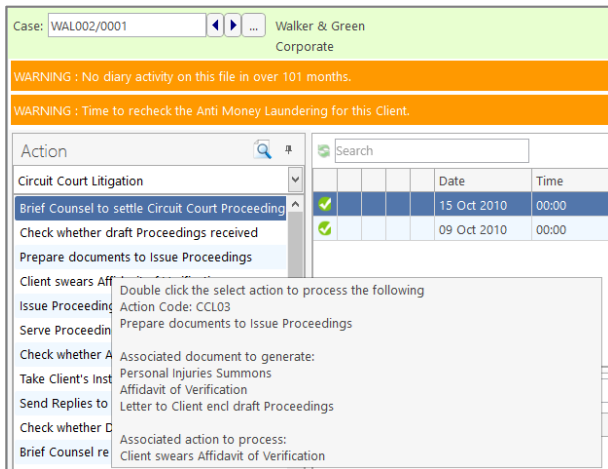


Case Diary

006
KEYD-5793

INCREASED TOOLTIP DURATION ON WORKFLOW

When using the tooltip on the Workflow, it will now remain visible for longer.

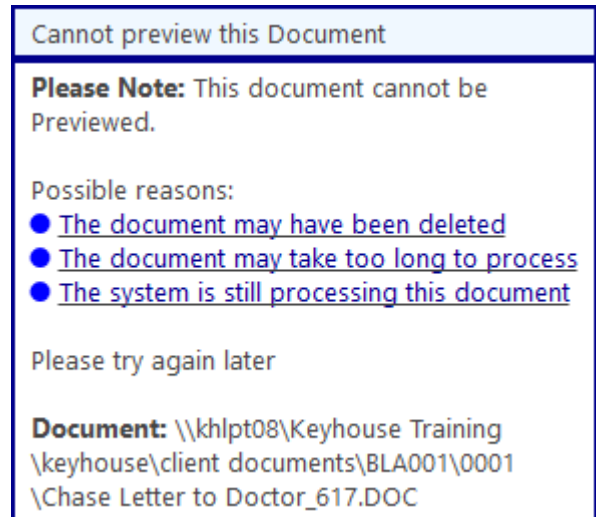


007
KEYD-5494

TIME OUT WARNING ON LARGE DOCUMENTS

When trying to preview large documents that the system is struggling to display, the

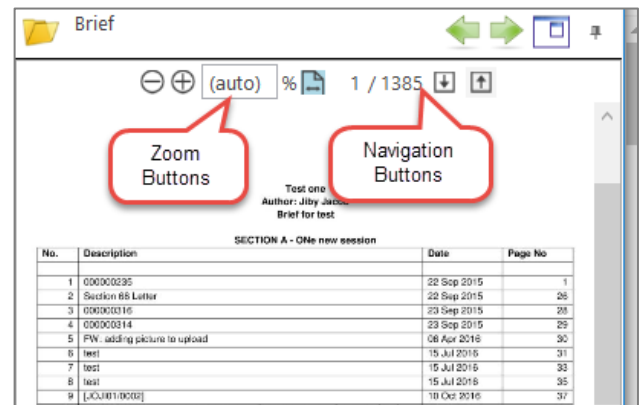
warning message has been changed. The warning will appear in the Preview Pane.



008
KEYD-5441

NEW PDF PREVIEW CONTROLS

When previewing PDF documents in the Case Diary, Document Manager or Scan Capture, additional controls have been added to improve the Previewer

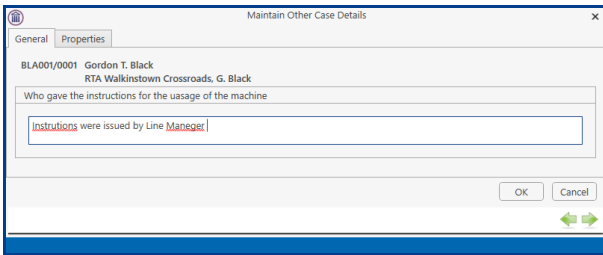


Extra Case Details

009
KEYD-531

SPELL CHECK FOR EXTRA CASE DETAIL

With text Extra Case Details Fields where the field size is greater than 50 characters, a spell checker has been added.



010
KEYD-5405

CASE IMPORT – UDF DEFAULTS VALUES

If a UDF field has a default value, the value will now be added to the matters as they are imported to the system.

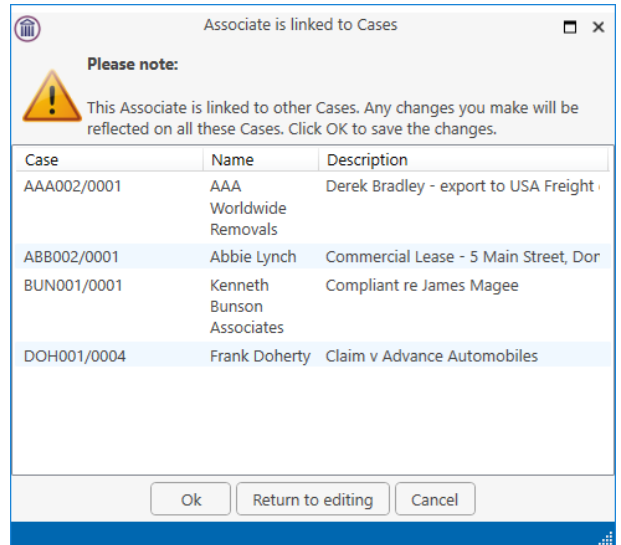
Associates

011
KEYD-5508

WARNING RE MODIFYING CASE ASSOCIATES

When an associate is linked to more than one matter, changes made to the associate may impact on all other matters linked to the associate. A warning will appear when a change has been made to an associate when it is linked to more than one matter. It will also automatically log the change and who made it.

- Open a Matter and click to the Associate Screen.
- Open the Associate, make the change and click OK
- The following dialog box will appear



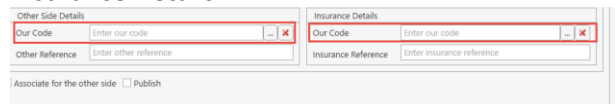
- Click OK to save the change
- Click Return to editing to make further changes and click Cancel to leave without applying the change.

012
KEYD-5619

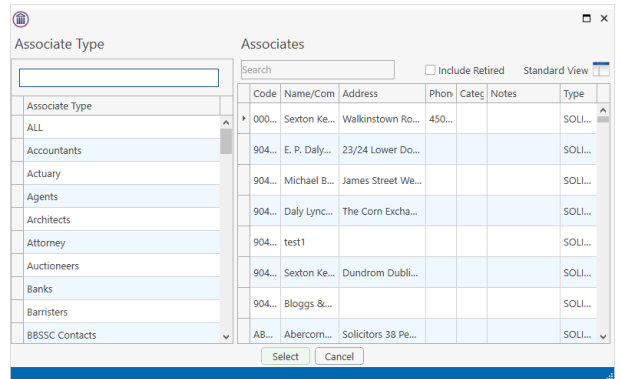
LINK CASE ASSOCIATES

Where a link between associates exist, this link can now be set up in Keyhouse. There are 2 fields where the information can be stored.

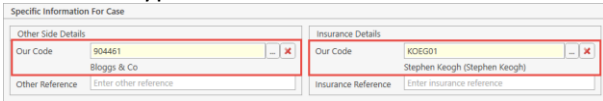
- Open the Matter and select Associates
- Open the Associate to be linked e.g. Defendant.
- In the Specific Information for Case section, click on Our Code on the Other Side Details and/or Insurance Details.



- Click on the Browse Button to go to the Associates List.



- Select the Type and the Associate



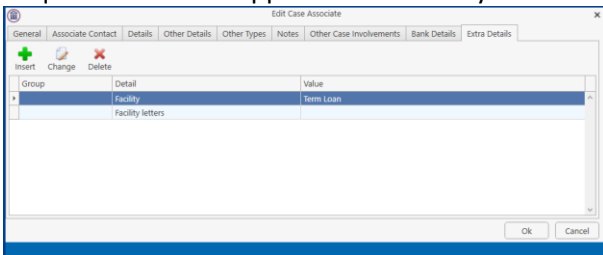
- Click OK to close.

013 EXTRA DETAILS FOR ASSOCIATES (AUD)

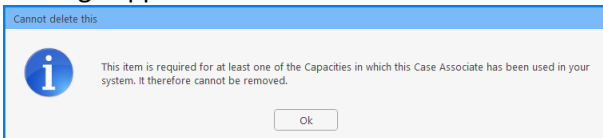
KEYD-5645

Until now it was only possible to have extra details for matters. Extra details can now be added for associates. These fields will be set up by the System Administrator and are located on the Extra Details screen. If the AUD has been set at the Associate Level, it will appear automatically on the matter and cannot be deleted.

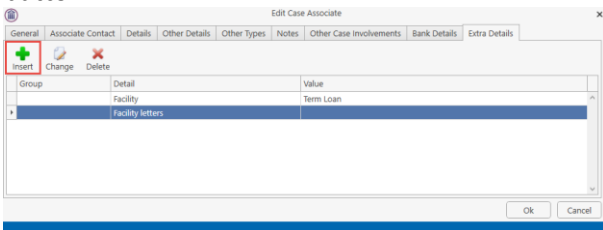
- Open the Associate on the Case
- Click to the Extra Details Tab
- Required fields will appear automatically



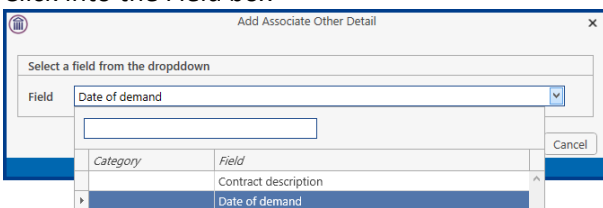
- If the user tries to delete the field, the following message appears.



- To Add Additional fields, click on the Insert button

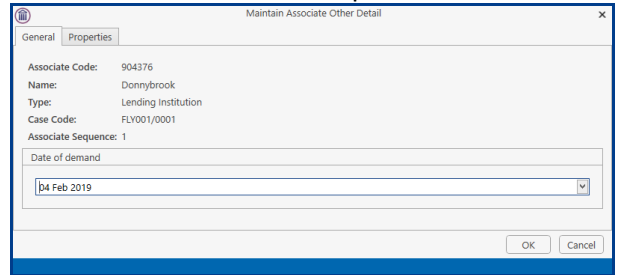


- Click the Insert Button
- Click into the Field box

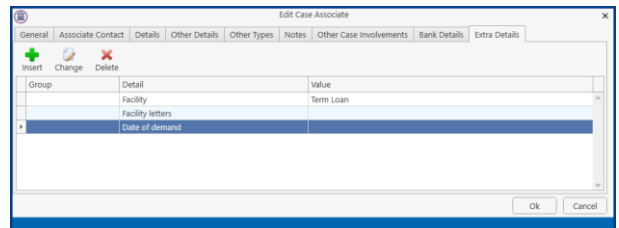


- Select from the fields available and click OK

- Double click on the field to open



- Enter the information and click OK



- Click OK.

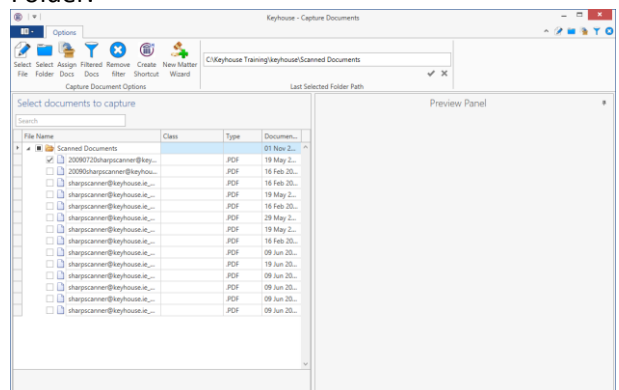
Scan Capture

014 CONVERT TO PDF

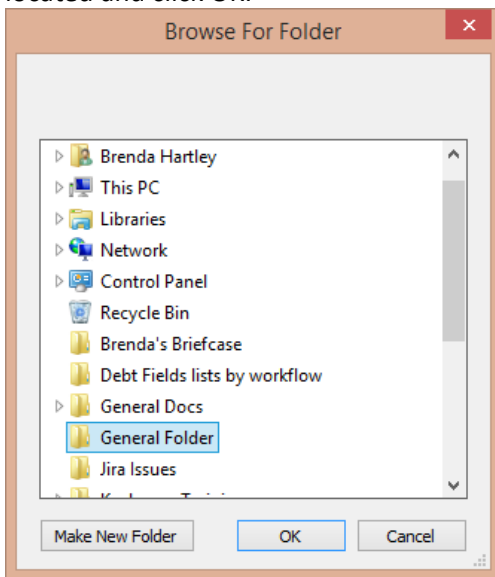
KEYD-5288

When using the Capture option to add existing documents to a matter, there is now an option to Convert to PDF rather than assigning it in in Word or Excel format.

- Open the Capture window and click on Select Folder.

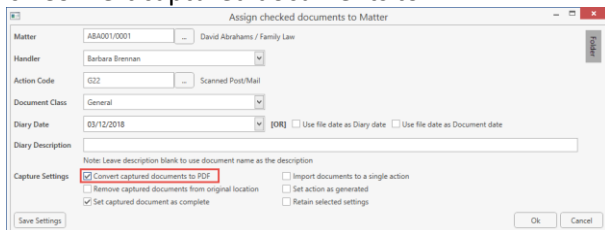


- Navigate to the folder where the documents are located and click OK.



- Tick the documents to be assigned to the matter and click Assign Docs.
- Set the fields, ensuring you change the Action Code to reflect that the documents are not Scanned post.

- Tick Convert captured documents to PDF



- Click OK.

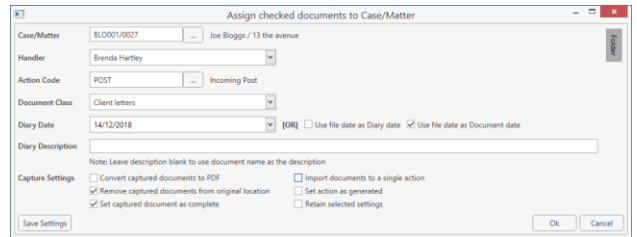
015 NEW DATE STRUCTURE FOR CAPTURING DOCUMENTS

KEYD-5368

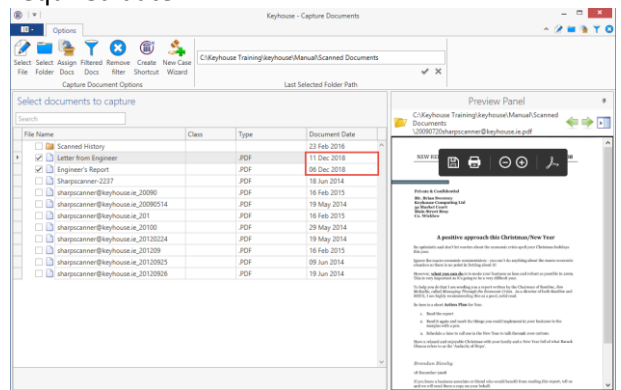
Currently documents can either be saved in using the File Date (date scanned) or the date can be set manually to reflect the date on the document. A third option has been added to use the file date as the document date. This will allow the users to set the date of the document and record the date the document was scanned to the system.

- Open the Capture window.
- Select the document to be capture and rename it.
- Tick the box to indicate the document to be imported and then Assign Docs.

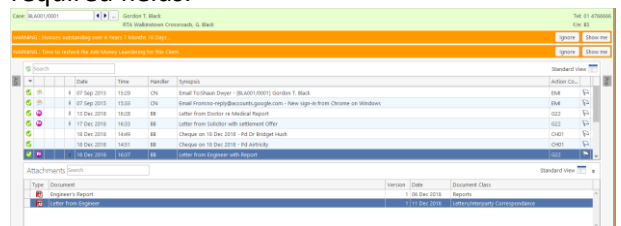
- Remove the tick from the Use file date as the Diary Date.
- Tick use the File Date as the Document Date.



- Check all other settings and click OK
- If importing more than one document to a single action where the dates of the documents differ, change the date of the document to the required date



- Click Assign Docs
- Set the Diary Date to the date the documents were received and complete all the other required fields.



- The Diary date has the received date, while the documents have the document date.

Account Ledger

016 RUNNING BALANCES ON ACCOUNT LEDGER

KEYD-5736

Running balances can be added to the Account Ledger for the individual accounts.

- Open a Matter and navigate to the Account Ledger.
- On the Header Row, right click and select Show All Fields

- Select the field and drag to the Header Row

- Repeat until all the required fields are on the Header Row.
- Save the View in the normal way

017
KEYD-530

OUTLAY CODES VISIBLE ON ACCOUNT LEDGER

When Outlay codes are used when creating cheque requisitions, they can now be seen on the Account Ledger.

- Open the Account Ledger
- Right click on the Header Row and select Show Column Chooser.

- Select Outlay Code and drag to the Header Row.
- Select Outlay and drag to the Header Row

- The new fields can be positioned as required by the user.

018
KEYD-5385

ADD NARRATIVES TO CHEQUE REQUISITIONS

When creating a cheque requisition, additional information can be added to the Narrative box.

- Create the Cheque Requisition and add the Bank, Payee and Value.
- Click to the Narrative box
- Use the Narrative buttons to add additional information either before or after the existing narrative or type the additional information

- Finalise the requisition in the normal way

019
KEYD-5541

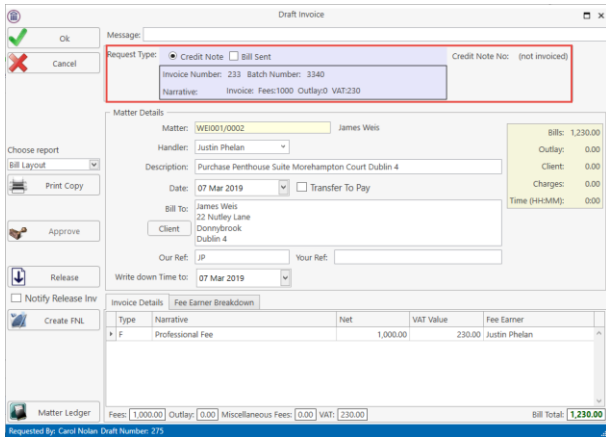
CHEQUE REQUISITIONS CAN USE LOGGED IN HANDLER DETAILS

When creating a Cheque Requisition it is now possible to have the Logged In Handler's ID appear in the Handler Field on the Case Diary rather than the Fee Earner ID. This option must be activated by the System Administrator.

020
KEYD-5369

INVOICE DETAILS VISIBLE WHEN CREATING CREDIT NOTES

When creating a credit note, the Invoice details will be visible on the Credit Note Screen.



Time Ledger

021
KEYD-5647

CUMULATIVE CHARGE

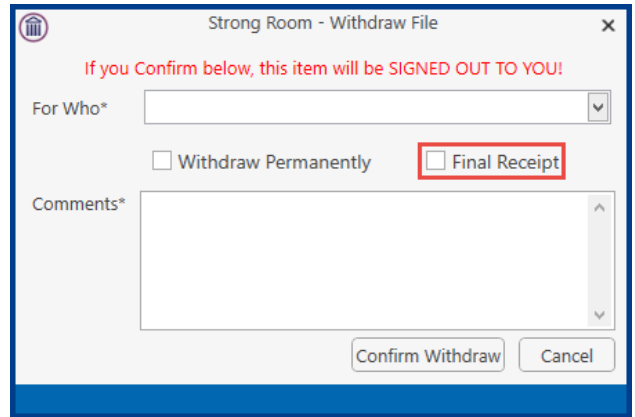
The column Running Balance has been changed to Cumulative Charge.

Strong Room

022
KEYD-5576

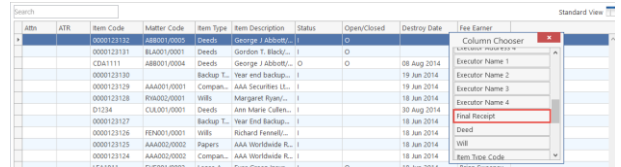
FINAL RECEIPT BOX

When withdrawing items from the Strong Room, a Final Receipt date can be set.

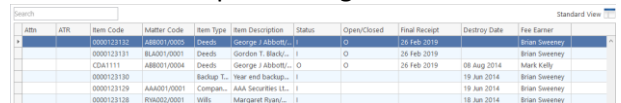


This date can be added to the Strong Room Grid on the Search/Open window.

- On the Header Row, right click and select Show All Fields



- Select Final Receipt and drag to the Header Row.



- Save the view to keep the column visible.

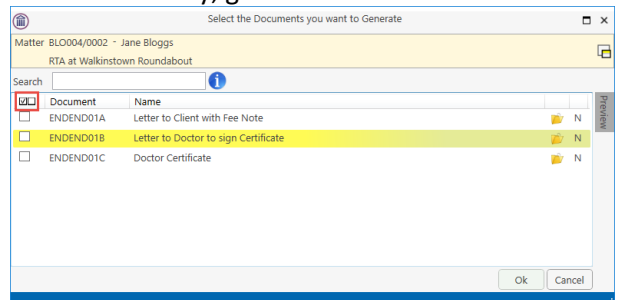
Document Generation

023
KEYD-5726

SELECT ALL DOCUMENTS OPTION

When using the new Document Generator, It is now possible to select all documents in an action for generation rather than having to select each one individually

- In the Case Diary, generate the action.

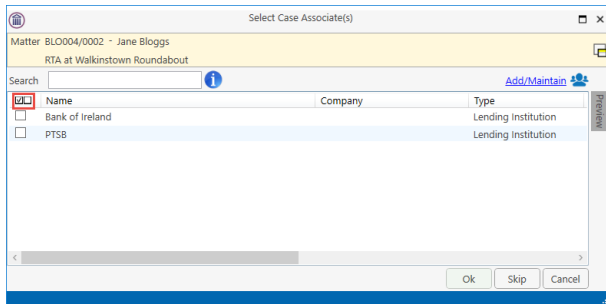


- Click on the box containing the tick to select all documents in the list.
- Click on the blank box to deselect all the associates

024 SELECT ALL ASSOCIATES OPTION KEYD-5726

When generating documents through the new Document Generator, the user can now select all associates rather than selecting each individually.

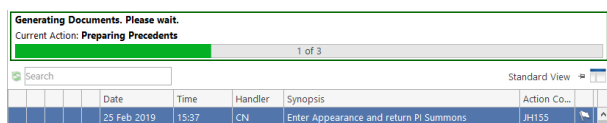
- In the Case Diary, generate the action.
- Select the required document/documents and click OK.



- Click on the box containing the tick to select all associates in the list.
- Click on the blank box to deselect all the associates

025 PROGRESS BAR KEYD-5667

A Progress Bar will appear at the top of the Case Diary when generating documents in the New Document Generator.

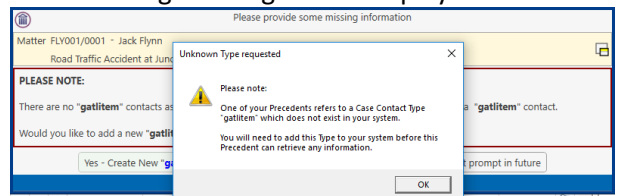


026
KEYD-5743

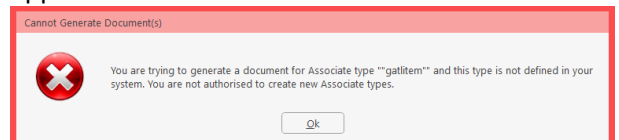
WARNINGS WHEN ASSOCIATE TYPE NOT AVAILABLE

Occasionally a letter may be set up where the Associate Type does not exist. If this occurs a warning is generated for the user.

- Create the document in the normal way
- The following warning will be displayed



- Click OK
- If you have permission to create New Associate Types, the create Associate Type dialog box will appear.
- Create the Associate Type and continue to generate the document as normal.
- If you do not have permission to create Associate Types, the following warning will appear

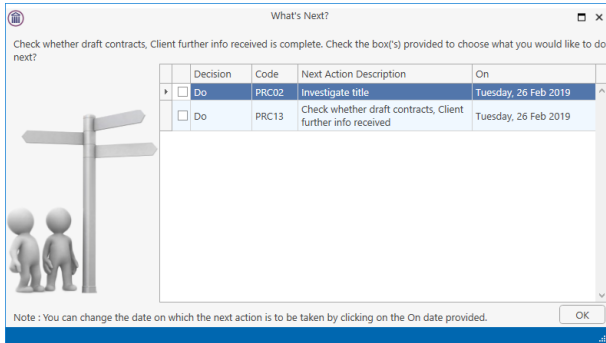


- Click OK and the document will generate without the Associate details.

027
KEYD-5759

COLUMN WIDTH FOR FOLLOW ON ACTION INCREASED

The description of follow on actions is now displayed in full.

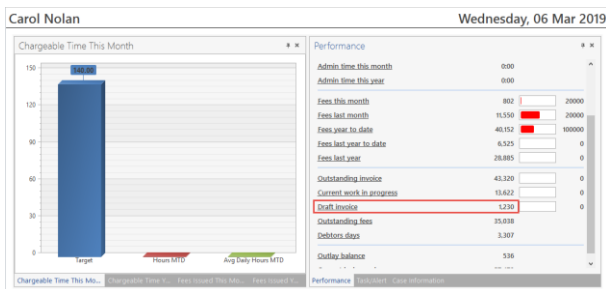


My Overview

028
KEYD-5563

DRAFT INVOICE DRILL DOWN

When a Fee Earner clicks on the Draft Invoice option on My Overview, all invoices in the draft stage of the process will be visible



- Click on the Hyperlink

Code	Description	Date	Total	Fees	Outlay	Misc Outlay	VAT
WE001/0001	Sale 22 Nutley Lane...	06 Mar 2019	1,230.00	1,000.00	0.00	0.00	230.00

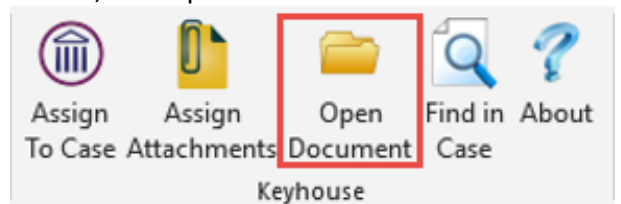
Outlook

029
KEYD-5473

OPEN CASE DOCUMENTS FROM OUTLOOK

It is now possible to open case documents in Keyhouse from Outlook.

- In the Keyhouse group of options on the Home Ribbon, click Open Document



- Select the matter from the Search List and click OK.

Code	Name	File Colour	Description	
FLV001/0001	Jack Flynn		Road Traffic Accident at Junction 9 on M50	10 Rose Lanes St
BLA001/0001	Gordon T. Black		RTA Wallinstown Crossroads, Co. Black	23 Ellis Park Rathf
1AR001/0001	George Tarrant		Purchase 45 Darnsdales Green, Dun Laoghaire	45 Newpark Aven
WOM002/0001	Womack Hotels		Service Agreements	22 Ballybarn Roa
AB001/0002	George J Abbott		Purchase 7 Church Street, Rathgar, Dublin 6	60 Somerset Roa
BLA001/0007	Gordon T. Black		Rates Collection proceedings action	23 Ellis Park Rathf
BLA001/0004	Gordon T. Black		Purchase of 8 Conatten Hills, Wicklow.	23 Ellis Park Rathf
BLA001/0002	Gordon T. Black		2 Trinity Close, Rathgar, Dublin 6	23 Ellis Park Rathf
WED001/0001	James Weiss		Sale 22 Nutley Lane Domybrook Dublin 4	22 Nutley Lane D
NEE001/0002	John Paul Neelan		Purchase 23 Green Lane, Blackrock Co Dublin	Stradbrook Road
EVE001/0003	Ever Green Insurance Corporation		Sale of Ravensdale Estate, Wicklow. Co. Wicklow	Ever Green Hous
RSA001/0001	James Ryan		Purchase 8 Monstown Avenue, Co. Dublin	77 Dench Street, I
REG001/0003	Andrew Regis Construction Ltd		Sale 19 Green Court, Bray, Co. Wicklow	54 Flintstone Hou
LYN001/0002	Roger Lynch		Purchase 4 Main Street	90 Crumlin Road,

- Select the document to be opened, by searching or clicking directly on it. A preview is also available.

Document	Class	Date
Letter to Client	Client Letters	12 Dec 2018 00:00:00
Letter from State Solicitor confir	Letters/Interparte Correspon	15 Jun 2018 15:34:45
Draft Pleadings from Counsel	Pleadings	15 Jun 2018 15:33:54
Letter to Barrister end Medical R	Correspondance	15 Jun 2018 00:00:00
Letter to Barrister requesting Opi	Correspondance	15 Jun 2018 00:00:00
Letter to Client re Reply from Barr	Client Letters	15 Jun 2018 00:00:00
Letter to Barack Obama re defen	Client Letters	15 Jun 2018 00:00:00
Verifying affidavit of Leo Varadka	Correspondance	15 Jun 2018 00:00:00
Trump to Chief State Solr	Correspondance	15 Jun 2018 00:00:00
Statement of Claim	Motion papers	15 Jun 2018 00:00:00
Report of Dr Phil Philpott	Medical Reports	15 Jun 2018 00:00:00
Personal Injuries Summons, 14	Court Documents	15 Jun 2018 00:00:00
Order of Mrs Justice Michelle Ob	Court Documents	15 Jun 2018 00:00:00
Order of Master Barack Obama	Court Documents	15 Jun 2018 00:00:00

- Click Open.

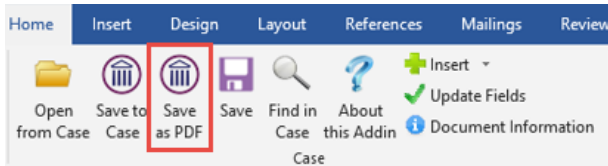
Word

031
KEYD-5288

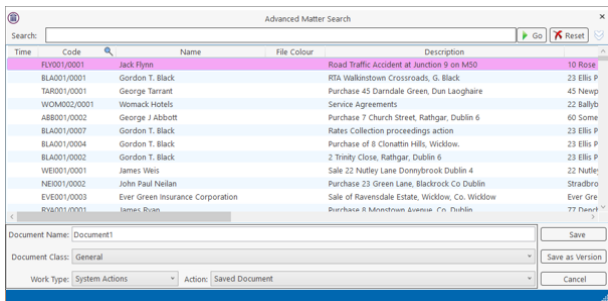
SAVE AS PDF

Occasionally it may be necessary to save a Word document to a case as a PDF. Rather than having to save it as a PDF outside the system and then capture it in, this can now be done directly from Word.

- Open the document to be saved to Keyhouse.
- In the Keyhouse group on the Home Ribbon select Save as PDF.



- Click Save as PDF.
- Select the case, change the name of the document, if required and set the document classification.



- Click Save to save it to Keyhouse.

Personal Settings

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VIEW TO REVERT TO DEFAULT

Rather than having to choose to have your screen default back to your default view when changing views, the system will do it automatically going forward. If you would like to keep the selected view as you move from matter to matter then Pin the view

1. Open the Case Diary for example
2. Click on the pin



3. This will hold the selected view as you move from matter to matter.
4. To keep it returning back to your default view, ensure the pin is no set.