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WHAT'S NEW IN KEYHOUSE
END USER INTERFACE
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	Code	Description
Client and Matter Set UP	001	Fee Types for Estimated Fees
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Client and Matter Set Up

001
KEYD-6312

FEE TYPES FOR ESTIMATED FEES

It is now possible to say the type of fees being charged to a client. This feature must be activated by the System Administrator before the functionality is visible on the matter. The fee types must also be set up to allow the user to choose the fee type to be applied to a matter.

- Create a new matter in the normal way.
- On the Ref and Estimate Fee Tab select the required Fee Type from the dropdown list.

The screenshot shows the 'New Matter/Case' form with the 'Ref. and Estimate Fee' tab selected. The 'Fee Type' dropdown menu is highlighted with a red box, and 'Fixed Fee' is selected. Other fields include 'Old Reference', 'Your Ref', 'REF 3', 'File Colour', 'Fee Amount' (0.00), 'Expected Bill Date', and 'Outlay Budget' (0.00).

- Continue to set up the new matter.
- The information can be viewed and amended on the Admin tab on the Current Case Detail Screen.

The screenshot shows the 'Current Case Details' form with the 'Admin' tab selected. The 'Fee Type' dropdown menu is highlighted with a red box, and 'Fixed Fee' is selected. Other fields include 'Client Code' (BLO001), 'Matter' (0019), 'Value to Client', 'Fee Amount' (1200.00), 'Started Date' (09 Jan 2017), 'Exp. Bill Date' (31 May 2020), and 'Statute Date'.

002
KEYD-5873

ADDITIONAL LINES ON CONFLICT SEARCH

Additional lines have been added to the Conflict Search. It is possible to add up to 15 lines.

003
KEYD-5912

PRINT OPTION FOR CONFLICT SEARCH

A Print option has been added to the Conflict Search. This can be used without the need for saving the search to the matter.

- Run the Conflict Search as normal.

The screenshot shows the 'Conflict of Interest Search' window. The 'Output Results to PDF' button is highlighted with a red box. The window displays search results for 'Case: CAH001/0005 - Accounts, Case Management & Digital Dictation'.

- Click the Output Results to PDF.

The screenshot shows a 'Save As' dialog box. The file name is 'Conflict Search for Joe Bloggs' and the file type is 'PDF (pdf) (*.pdf)'. The 'Save' button is highlighted with a red box.

- Choose the storage location, enter the name and click Save.
- Print in the normal way.

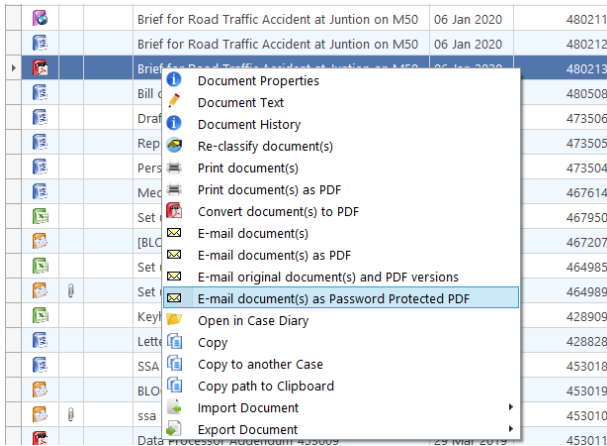
Case Diary and Document Manager

004
KEYD-5839

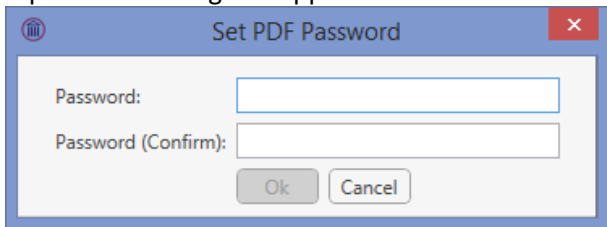
SEND A DOCUMENT AS A SECURED PDF

The ability to send a password protected PDF has been added to both the Document Manager and Case Diary.

- Select the PDF document to be sent from the Document Manager or Case Diary.
- Right Click on the document and select Email Document(s) as Password Protected PDF



- A password dialog box appears.



- Enter the 3-character password and confirm.
- Click OK
- An email will be created with the document attached.
- Send as normal.
- The Receiver will then enter the password to open the document.

005 DOCUMENT TEXT

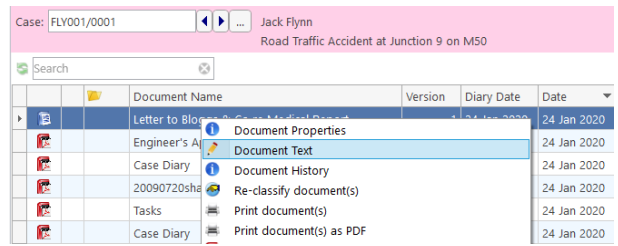
KEYD-6049

Document Search procedure has been changed. It now automatically searches by both the document name and the text. This can be restricted to just search by the document name as needed.

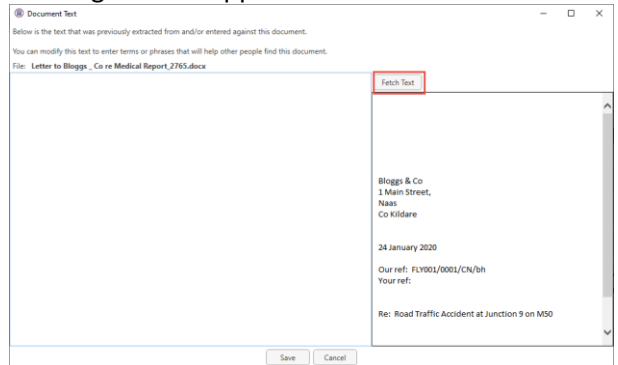
To facilitate this change and improve the search based on text, users can add document text to each document. This can be done using the right click menu in both the Case Diary and the Document Manager or as part of the Scan Capture.

Using Right Click Option

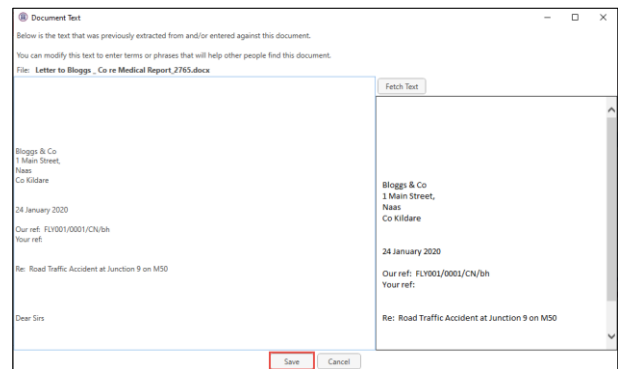
- Select the document into which the text is to be added.
- Right click and select Document Text.



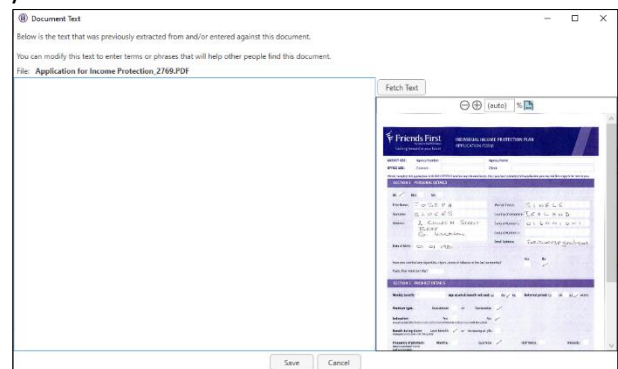
- A dialog box will appear



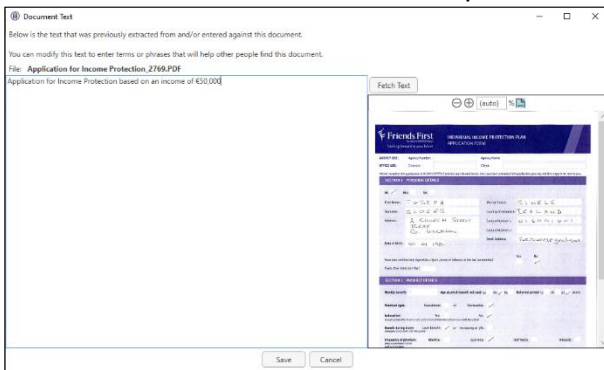
- To add the content of the document click Fetch Text button. Alternatively, enter key words into the white area.



- Click Save.
- If the document is a scanned PDF document, the system may not be able to read the text when you click Fetch Text.



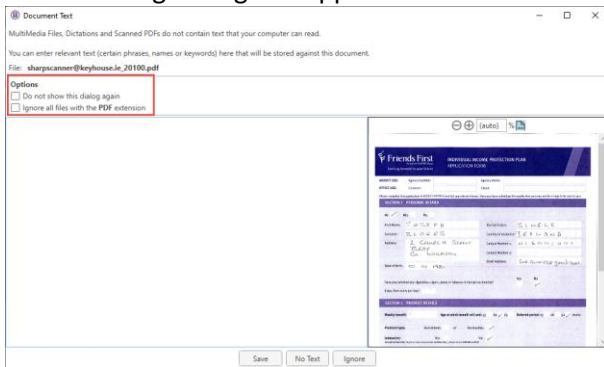
- Click in the white area and add text that will enable the document to be found easily.



- Click Save.

From Scan Capture

- Open the Scan Capture in the normal way.
- Enter the required information and click Assign Docs and click OK.
- The following Dialog box appears



- If you do not want this Dialog box again, tick 'Do not show this dialog again'.
- Click 'Ignore all files with the PDF extension' if you want to be able to use this option on files with other file extensions e.g. jpeg or docx.
- Click Save to save any change you have made.
- Click No Text to save any options you have selected
- Click Ignore to close the Dialog Box.

006 DOCUMENT SEARCH

KEYD-5845

The document search has been redesigned to improve performance. There is no longer a 'Search Text' option as it has been incorporated into the search.

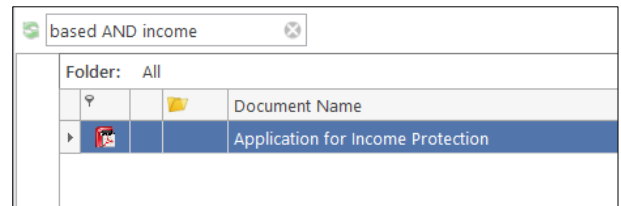
Please note that you will not be able to search text using 'Noise Words' i.e. words that appear in almost

every piece of text such as on, and, it etc. To search for keywords in a document use 'AND' or 'OR'. AND will return only documents that contain all the keywords.

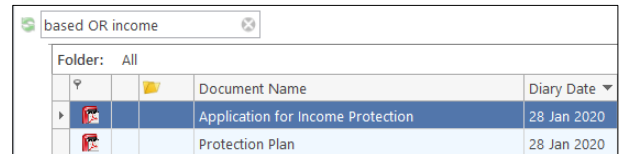
OR will return documents that contain any of the keywords.

- Using the Document Manager or the Document Search, enter keywords in the search box separated by AND or OR.

based AND income – will return a document that contains both these words.



based OR income – will return any document that contains either of these words.



007 FILTERING ON CASE DIARY AND DOCUMENT MANAGER

KEYD-5845

Filtering in both the Case Diary and Document Manager has been improved. It is now possible to filter for more than one item in a list e.g. multiple document classes or handlers.

Text Filters

- Click on the Pin on the column to be filtered.
- Tick the items to be filtered.
- Click OK
- To remove the filter, right click on the Pin and select 'Clear Filter'.
- To clear all filters applied to the matter, click 'Clear all Filters'.

Note: When filtering using the Team Column, the user will only see entries for the Team they are a member of.

Date Filters

- Click on the Pin on the Date column to be filtered.
- The following Dialog box will appear.

- Use the Quick picks if they suit the date range.
- Use Single Date to locate all document on that date.
- When using the From/To Date, set the From date in the Single Date and enter the To Date in the From/To Date column.

- To remove the filter, right click on the Pin and select 'Clear Filter'.

008
KEYD-6066

IMMEDIATE UPDATE OF WINDOW WHEN COMPLETE OPTION IS UNTICKED

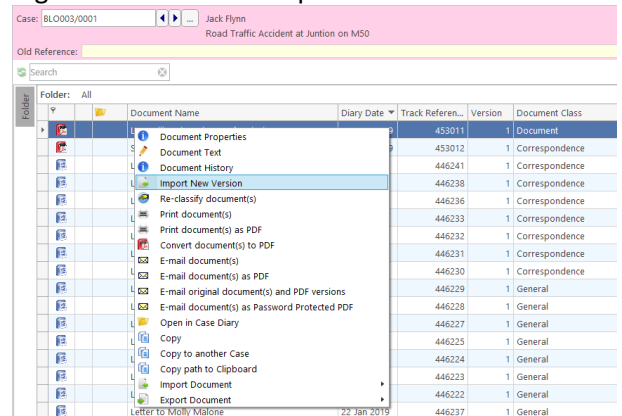
In previous versions of the software to make certain changes to a completed action e.g. Completion Date, the user had to first uncomplete the action, save it and then open it again to make the change. Now, once you uncomplete an action/task you can make the change immediately without having to save and reopen the action/task.

009
KEYD-6417

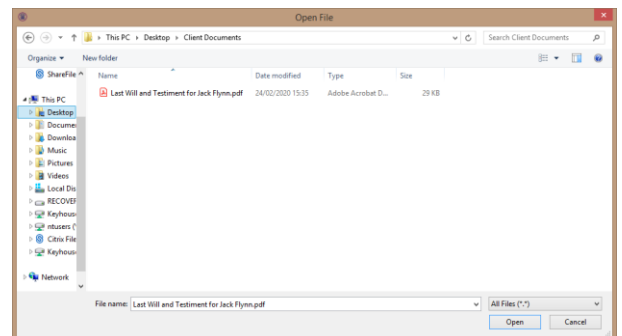
IMPORT NEW VERSION OF A DOCUMENT

Until now it was not possible to create a new version of a PDF document. With this new feature, a new version of an existing document can be added using the Import New Document Feature. This can be done in the Case Diary, Document Manager, Strong Room and Undertakings.

- Locate the document on Keyhouse in any of the above locations.
- Right click and select Import new Document.



- Locate the document, select and click Open.



- A new version of the document has been created. Older versions will be visible using Document History.

Version	Created on	Created by	Comments
2	24 Feb 2020	Brenda Hartley	Modified by BH
1	29 Mar 2019	Danna Gehlin	

010
KEYD-6417

CERTAIN DEBT FIELDS CAN BE VISIBLE ON CASE DIARY

To make it easier for users to access information, it is now possible to add the certain debt fields to the Case Diary. This must be done by the System Administrator.

Associates

011
KEYD-5845

ASSOCIATE WARNING – LIMITED TO GENERIC INFORMATION

If information on an associate is changed, the warning message now only appears when generic information is changed e.g. Address. However, adding a reference will not trigger the warning.

- Open the associate and make the changes
- Click OK.
- If the information affects generic information, the following warning will appear.

Case	Name	Description
BLO003/0001	Jack Flynn	Road Traffic Accident at Juntion on M5
ZZ0001/0007	Joe Kent	Sale of 3 Rose Lawns, Castleknock, Du

- Click OK to save the changes.
- Click Return to editing the review the changes.
- Click Cancel to clear the changes.

012
KEYD-5619

LINK ASSOCIATES TO OTHER ASSOCIATES

Where there are links between associates e.g. defendant to solicitor, it is possible to create a link between them. This is done once the associates have been added to the matter.

- Add the associates in the normal way.
- Open a linked Associate e.g. Defendant

Type	Name/Company	Address	Phone	Solicitors	Email	Case Code	Mobile	Assigned Co.	Assigned Co.	Retired
Defendant	Simon Shaw	12 Main Street Dublin				FLV001/001				N
Defendant	Niamh Wilson	66 Raibz Drive Dundrum				FLV001/001				N
Solicitors	Bloggs & Co	1 Main Street, Naas	045-563 4...		info@blog...	FLV001/001				N
Solicitors	M. Mallone & A.L.	Moore Street Dublin 2			info@mail...	FLV001/001				N

- Click on the browse button in the bottom left of the screen.

- Search for the associate to be linked and click Select.

- The link will appear on the associate.

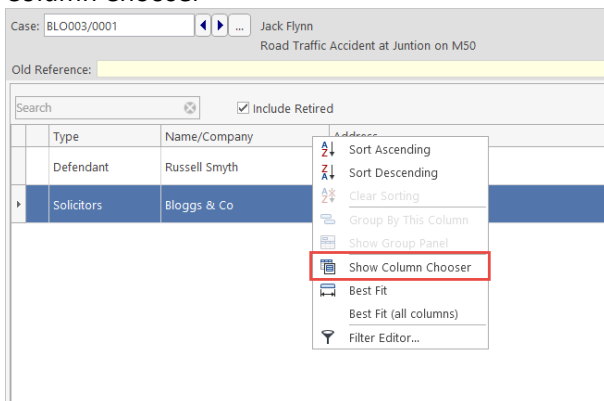
- The link can be removed by clicking on the red X
- If required a link can be set up going in the other direction e.g. Solicitor to Defendant.
- If one Associate is linked to two Associates, the second associate can be linked in the same way using the Our Code under the Insurance Details on the right side of the screen.

013 ADD LINKED ASSOCIATES DETAILS TO GRID

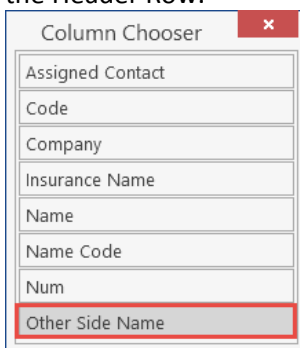
KEYD-6065

In addition to linking associates, the link can be made visible on the grid on the Associate Screen.

- Click to the Case Associates Screen
- Right click on the Header Row and select Show Column Chooser



- Select Other Side Name and drag into position on the Header Row.



- It is now easy to see the connected between associates.

Case: BLO003/0001 Jack Flynn
Road Traffic Accident at Juntion on M50

Old Reference: []

Search [] Include Retired

Type	Other Side Name	Name/Company	Address
Defendant	Bloggs & Co	Russell Smyth	3 Green Park Kells
Solicitors	Russell Smyth	Bloggs & Co	3 High Street Kells

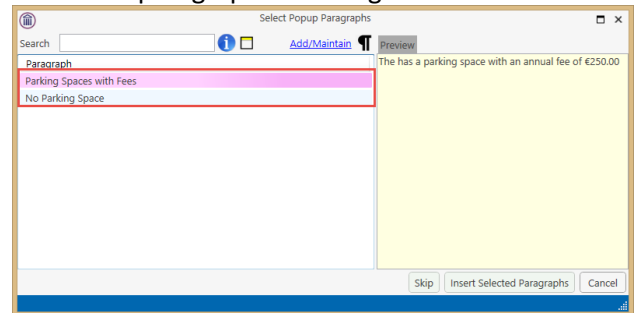
Document Generation

014 USING POPUP PARAGRAPHS

KEYD-5871

A title can now be added to popup paragraphs. If they are used, they will be visible when you generate letters containing the paragraphs.

- Create the document in the normal way.
- The PopUp paragraph appears automatically
- The Title will appear on the left. Click on the title to see the paragraph on the right.



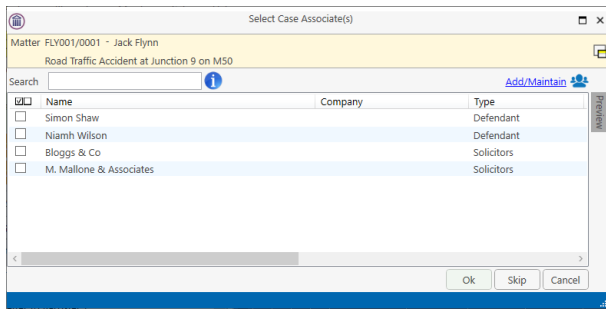
015 CREATE A LETTER FOR ALL ASSOCIATES

KEYD-5645

Applies to the New Document Generator Only.

Until now a letter had to be created for each Associate Type. An option has been added to enable letters to be coded to allow the user to choose the Associate as part of the document generation.

- Select the document in the normal way and generate.
- A list of associates will appear.
- Choose the required Associate and complete the generation process in the normal way.



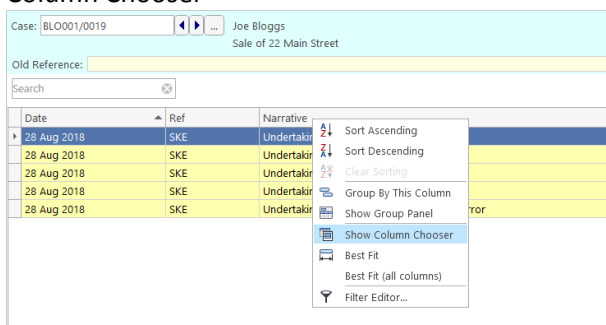
Accounts Ledger

016 PAYEE FIELD CAN BE ADDED TO SCREEN

KEYD-6304

The Payee can now be added to the Account Ledger Grid.

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



- Select Payee from the list of options and drag to the header row.
- The View must be saved to keep Payee in the view.

Brief Builder

017 REDESIGNED BRIEF BUILDER

KEYD-6248

The Brief Builder has been redesigned making it easier and faster to use. Please see the Keyhouse End User Manual 5.8.1.1 for more information.

Strong Room

018 WITHDRAW FILE – HANDLER LIST AVAILABLE

KEYD-5880

Up until now you could only withdraw a file for a Fee Earner. This has now been changed so all Handlers are now visible on the list.

Add Ins

019 SECONDARY EMAIL ADDRESS APPEARING ON SELECT ASSOCIATE BUTTON

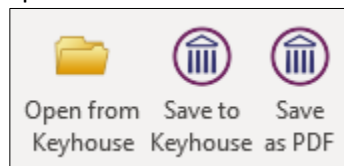
KEYD-4573

The Secondary email can now be selected from the Select Associates Button on all emails linked to a matter.

020 OPENING FROM AND SAVING TO KEYHOUSE

KEYD-6076

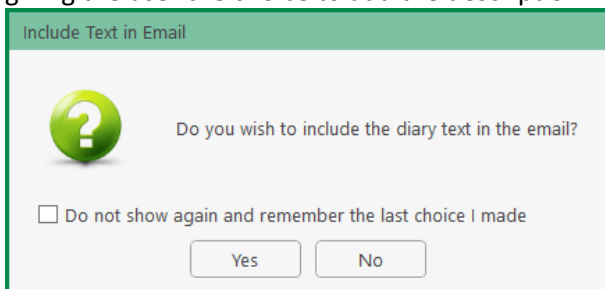
The Save to Case and the Open from Case buttons in both Work have been changed to Save to Keyhouse and Open from Keyhouse. There is also an option to save a document as a PDF.



021
KEYD-5888

EMAILING ATTACHMENTS

When emailing a document from the Case Diary, the description of the action appeared in the email message. Now an option box will appear giving the user the choice to add the description.



022
KEYD-3174

ADDING APPOINTMENTS TO AN OUTLOOK CALENDAR AND KEYHOUSE

Specific types of appointment including Court Dates can now be added to any Outlook Calendar for users and they will also be visible in the Case Diary for the correct handlers.

- Create an Appointment in Outlook and enter the information.
- Click Assign to Case
- Highlight the Case
- To assign the appointment as a Court Date in with the correct handler in Keyhouse, in the bottom right of the screen, click on the drop-down arrow.
- Select the Option Assign for Handler and Type
- Select the handler if it needs to be changed
- Select the Action Type. The choice you make can be set as a default if required.
- Click OK.

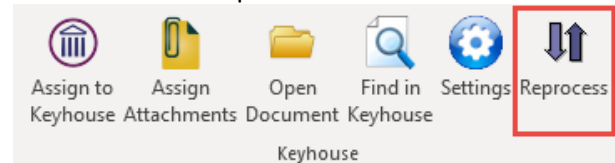
The Appointment will be on the Case Diary for the client with the correct handler and appointment type. This, in turn, will appear in the handler's task list.

023
KEYD-6400

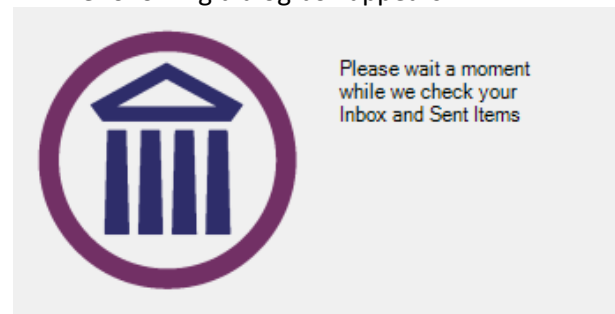
REPROCESS OPTION IN OUTLOOK

The option to reprocess sent emails allows users to ensure that all sent emails are assigned to the case. The option appears in the Keyhouse Group of options in Outlook.

- Click on the Preprocess button.



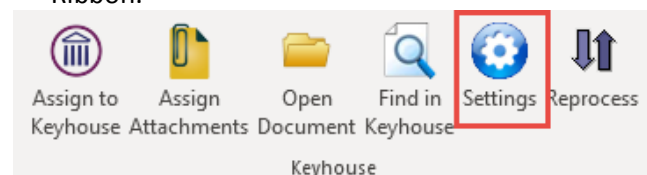
- The following dialog box appears



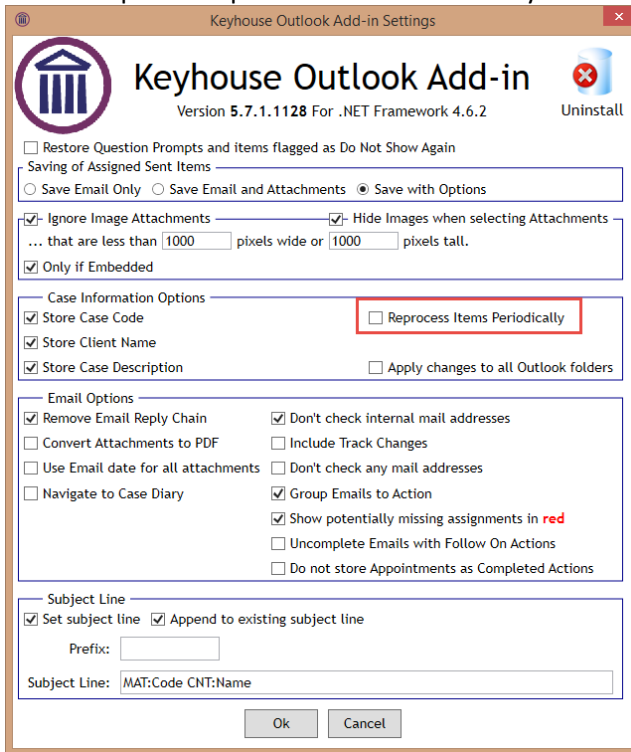
- Once dialog box closes, continue to use the system as normal.

In addition, this can be set to automatically happen periodically.

- In Outlook, click on the Setting Button on the Ribbon.



- Tick the option Preprocess Items Periodically



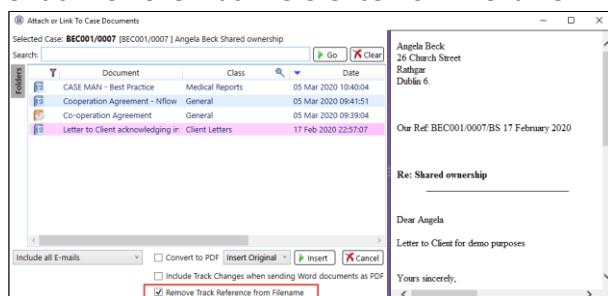
- Click OK.

024
KEYD-6424

REMOVE/ADD TRACK REFERENCE IN EMAIL DOCUMENT NAMES

The Tracking Reference can be removed from email document names at a company level by the System Administrator. Occasionally users may need to include the reference when sending a document by email and this can be done on a document by document basis.

- Create a new email and once a case has been assigned, click Select Attachment.
- Select the document/s to be sent.
- Untick Remove Track Reference from Filename



- Complete the email in the normal way and send.