What's New in Keyhouse

End User Interface

Version 5.4.3.1

Keyhouse, IMI Business Campus
Sandyford Road
Dublin 16
Tel: 01 290 2222 www.keyhouse.ie

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:

Undertakings	• Documents can be added • More features on the Right Click Menu
Strong Room	• Documents can be added • Create a Contact • Additional columns Fields for Strong Room Grid • Account Trust Receipt Option for Deeds • More features on the Right Click Menu • Returning Items to the Strong Room
Case Associates	• Option to Retire Case Associates • Prevent Duplicate Associates • Merge Case Associates
Time Recording	• Additional Column Fields for Time Ledger Grid
Personal Preferences	• Set screens to keep current view when moving between matters • Show Closing Prompt • Scan Capture Rename used in original location
Case	• Document Folders • Client Warning moved • Case Warnings with Fee Earners, Departments etc. are retired • Height Adjustment for the Attachment Section • Copy, Cut & Paste for Case Diary Attachments • Compare with Litéra
Know Your Client	• A review of all the tabs

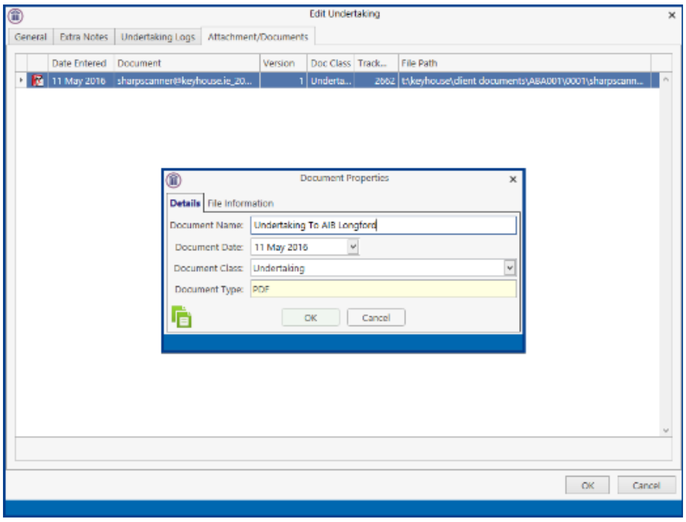
UNDERTAKINGS

001 ADD ATTACHMENT/ DOCUMENT

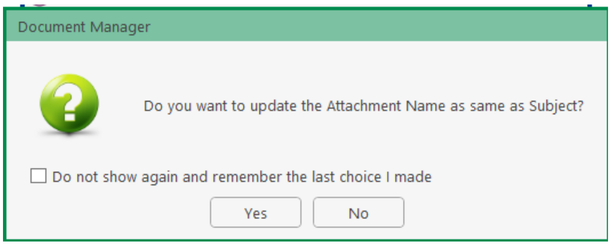
KEYD-3422

When you create an Undertaking you have the ability to attach a copy of the Undertaking document. The document can be scanned in making it easier to find.

- Scan the document to your computer
- Create the entry as normal and click OK.
- Edit the Entry. Then click to the Attachment/ Document Tab.
- Right click and select Add and then attachment.
- Navigate to the file location and select.
- Select the Document Class to be used
- To rename the document, right click and select Edit, rename the document and click OK.



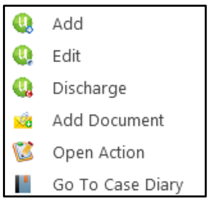
Click Yes to change name of the action in the Case Diary



002 RIGHT CLICK MENU

KEYD-3385

There is additional functionality on the Right Click Menu on the Firm Undertakings screen on the Search/Open screen.



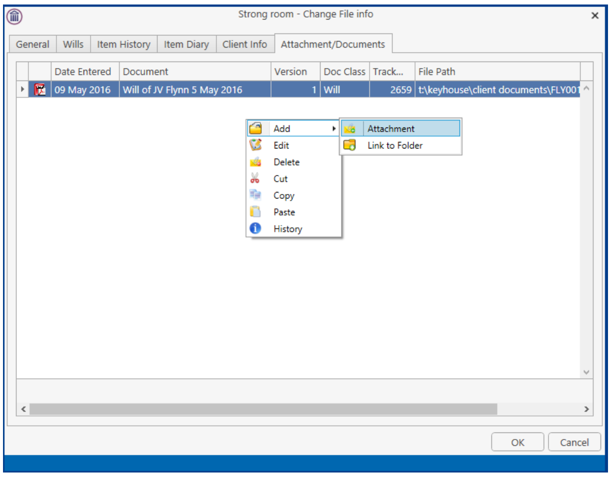
Strong Room

003 Add Attachment/ Document

KEYD-2666

When you create an entry in the Strong Room you can attach a copy of the document.

- Create the entry as normal and click OK.
- Edit the Entry. Then click to the Attachment/ Document Tab.
- Right click and select Add and then attachment.
- Navigate to the file location and select.

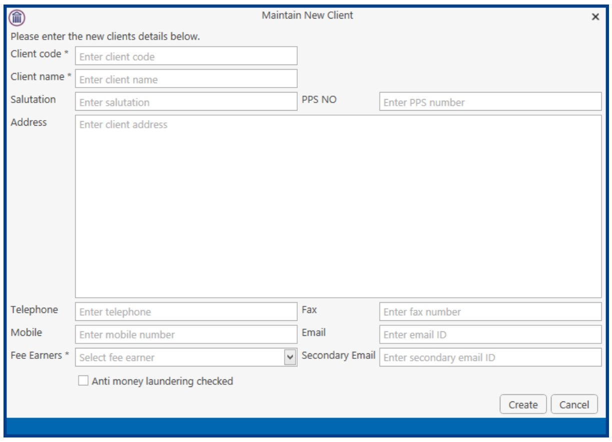


004 Create a Contact

KEYD-3308

You can create a Client Contact in the Strong Room in relation to items where you do not have a matter. This contact can then be used to create a matter at a future date.

- Go to Search Open
- Add a New File
- Click on the Browse Button beside Client
- Click on New Client. The following Dialog Box will appear.



- Enter details and click Create

005 Additional Column Fields for Strong Room Grid

KEYD-3015
KEYD-3664
KEYD-2775

Additional fields have been added to the Strong Room grid to enable easier searching for records.

- Right click on a Column Header
- Select Show Column Chooser

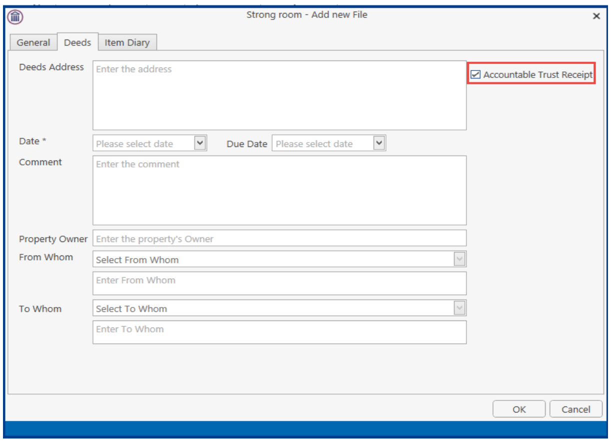
- Select the required column and drag to the Colum Header Row.
- To keep the Column Header, create a new view.

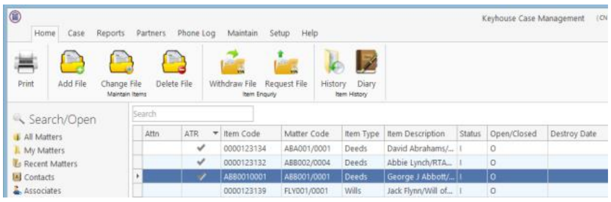
006 ACCOUNTABLE TRUST RECEIPT

KEYD-2976

It is now possible to record that deeds have been received on Accountable Trust Receipt. The ATR option can be added to the Strong Room Grid and users giving users visibility of ATR Deeds.

- Create the Strong Room entry as normal
- Click on the Deeds Tab
- Tick the Accountable Trust Receipt Box
- Enter all relevant information and click OK.

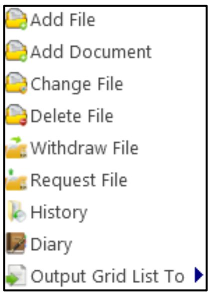




007 RIGHT CLICK MENU

IF-196

You can use the Right Click Menu when working in the Strong Room. We have added all the functionality to this menu.



008 RETURNING ITEMS TO STRONG ROOM

KEYD-3180
KEYD-3417

When returning items to the Strong Room, we have given you the option to decide the location rather than putting it to the old location

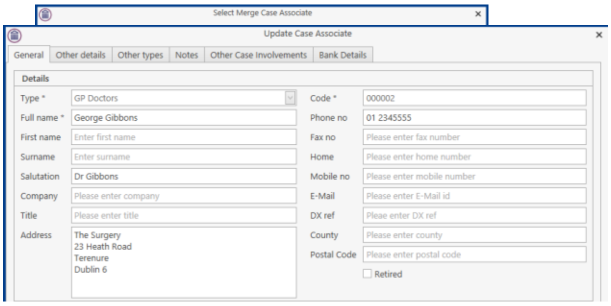
Case Associates

009 Retire Case Associates

KEYD-3132
KEYD-3390

An option to retire case associates, if they are no longer in use or if a duplicate has been set up, has been added to the Associates screen.

- Open the associate to be retired
- Click the Retired Box

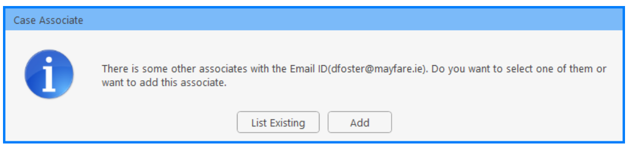


- Click OK

010 Prevent Duplicate Associates

KEYD-3384

If a user tries to set up a new associate that already exists, when the email is entered, the system will recognise the email and give a warning message when you click OK.



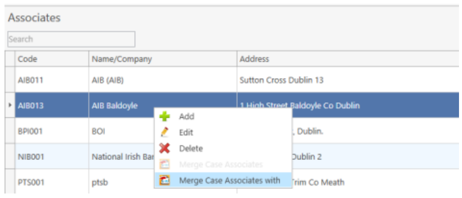
Click List Existing will give you a list of all associates connected to the email address.

011 Merge Case Associates

KEYD-3383

When an Associate has been set up more than once, we have made it possible to merge associates within Associate Types. All the matters will be linked to the merged associate. It is no longer necessary to remove the associate from matters to remove duplication.

- Select the Associate to be merged and right click.
- Select the Associate to be merged to and click Select.
- All matters have been moved to the merged matter.



TIME RECORDING

012 ADDITIONAL COLUMN FIELDS FOR TIME LEDGER GRID

IF-220

Additional fields have been added to the Time Ledger Grid making it easier to search for information.

- Right click on a Column Header
- Select Show Column Chooser

- Select the required column and drag to the Colum Header Row.
- To keep the Column Header, create a new view.

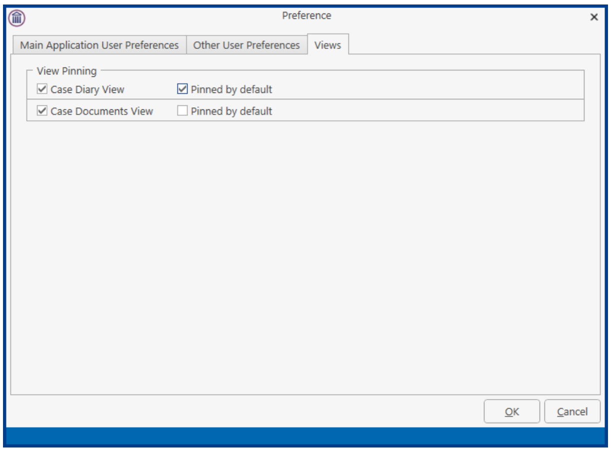
Personal Preferences

013 Set Screens to Keep Current View When Moving Between Matters

KEYD-3025

If you have changed the view on the Case Diary or Document Manager you can set your preference to keep this view as you move between matters rather than it returning to your default view.

- Go to the Set Up Tab and select Personal Settings.
- Click on Preferences and select the view Tab
- To keep the select view as you move to a new matter, tick the Pinned by default and click OK.

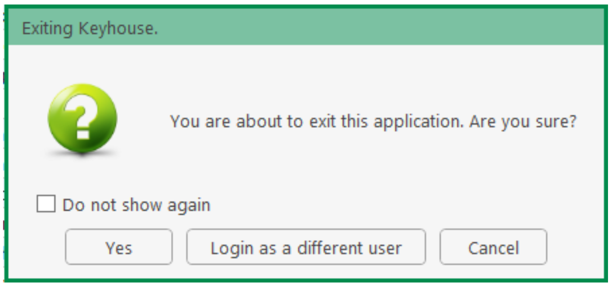


014 Show Closing Prompt

KEYD-2895

A prompt can be set to ask if you want to close the application or log on as a different user.

- Go to the Set Up Tab and select Personal Settings.
- Click on Preferences
- Tick Show application closing prompt and click OK.

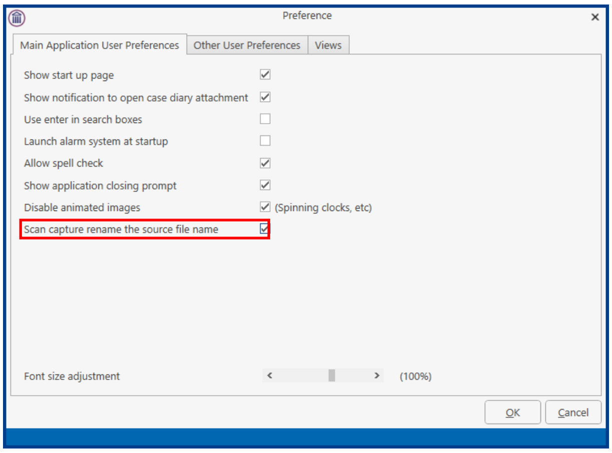


015 Scan Capture Rename

KEYD-3180
KEYD-2417

When you name a document in Scan Capture, the option to have the name appear in the original scan location is now available.

- Go to the Set Up Tab and select Personal Settings.
- Click on Preferences

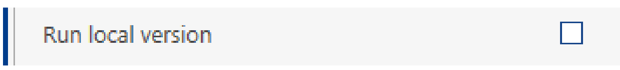


- Tick Scan capture rename the source file name and click OK.

016 Run Local Version

KEYD-3500

Available on Personal Preferences but please do not use without contacting Keyhouse.



CASE

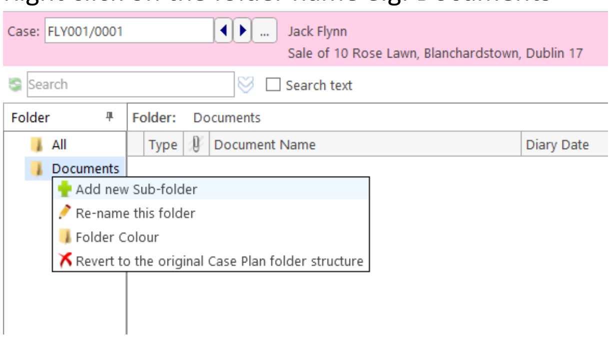
017 DOCUMENT FOLDERS

KEYD-3564
KEYD-2549

A new document folder structure can be set up in the Document Manager for each matter. It must be activated on the Admin Screen. The folder structure may be designed as part of the workflow and altered on case by case basis or it can be created directly in a matter. It can be based on the nature of the document, not just their classification. The folder structure will then be available for use in Scan Capture, Word and Outlook which will allow you to add documents and emails to appropriate folders when saving them to Keyhouse.

- Go to the Document Manager

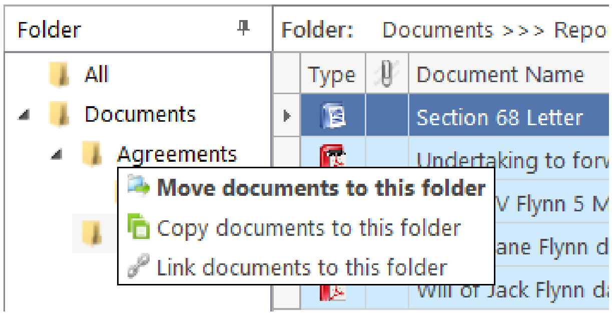
- Click on Folder on the left side of the screen and pin.
- Right click on the folder name e.g. Documents



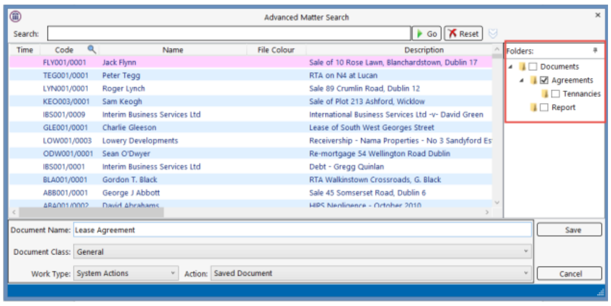
- Click Add new Sub-Folder and enter name.
- Sub-Folders can be created within Sub-Folders
- Documents can then be moved into a folder by clicking and dragging to the folder.
- To copy into more than one folder right click on documents and drag to the appropriate folder.
- Select the required option.

Using the Document Folder Structure with Word

- Open the document in Word and select Save to Case



- Select the Matter by highlighting it and the Folder Structure will appear on the right side of the screen
- Enter the Document Name
- Tick the appropriate Folder
- Click Save

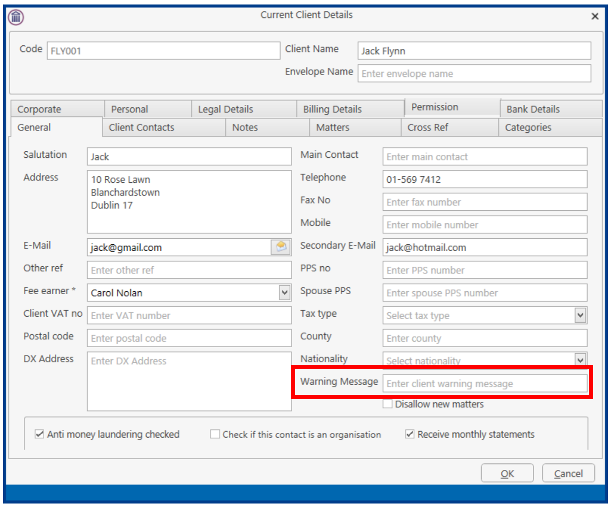


The folder structure can be accessed in Scan Capture and MS Outlook.

018 CLIENT WARNING

KEYD-3090

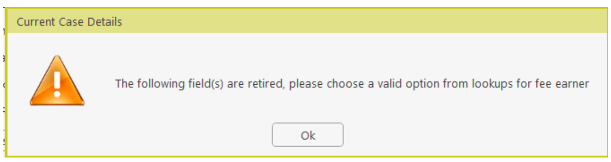
Client Warning has been moved from the Corporate Tab to the General Tab on the Current Client Details Screen. Any information entered here will be seen across all matters for the Client.



019 CASE WARNINGS WHEN FEE EARNER, DEPARTMENT ETC. ARE RETIRED

KEYD-3562
KEYD-3433

When a Fee Earner is retired the system will trigger a warning when the matter is accessed to warn the user that there is no fee earner for the client/matter, no department or no workflow.

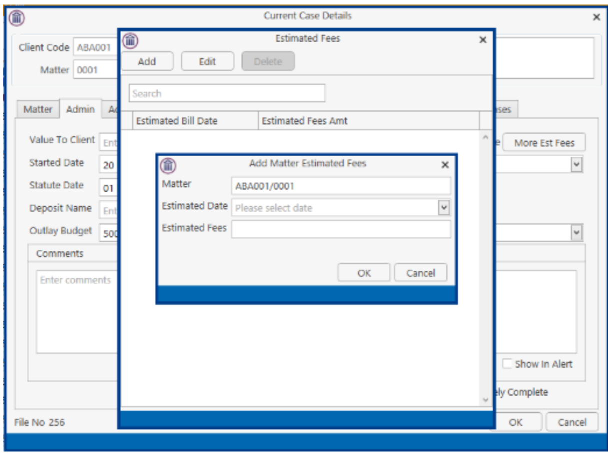


020 MORE EST FEES

KEYD-3475

Allow user to record the estimated Invoice dates and Fees over the course of a matter. It will trigger warnings when an invoice is due and also allow for better cash flow visibility.

- Open Current Case Details

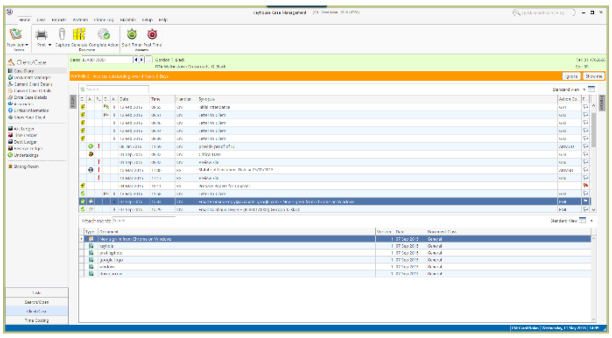


- Go to the Admin Tab and click on More Ext Fees
- Click Add and enter information
- Continue until all entries are completed
- Click OK when finished.

021 HEIGHT ADJUSTMENT FOR THE ATTACHMENT SECTION

KEYD-3134

We have added an option to adjust the height of the Attachment section on the Case Diary to enble you to see more documents without the need to scroll up and down as frequently.



022 COPY, CUT & PASTE FOR CASE DIARY ATTACHMENTS

KEYD-3463

The option to cut a case diary attachment and paste it to a different case diary action has been added. If a document has been added to the wrong action, rather than deleting it from the action and then re-attaching it to the correct action, copy and paste could be used.

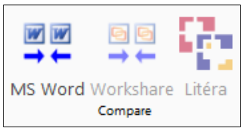
- Select the Case Diary Action and select the document
- Right click and cut
- Go to the Attachment section of the new Diary Action and paste the document.
- Rename the document if required and the click OK.

023 COMPARE WITH LITÉRA

KEYD-3176
KEYD-2889

Comparison of documents now allows for the use of Litéra.

- Go to the Document Manager
- Select the required documents and click on Litéra



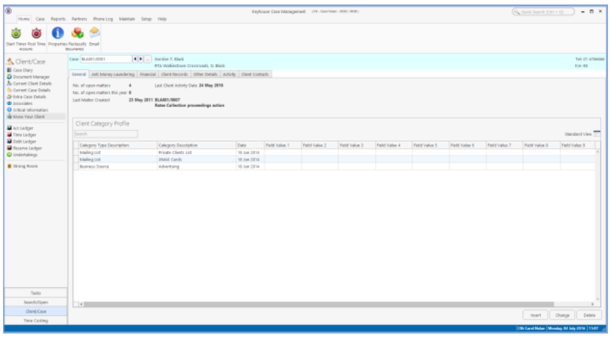
Know Your Client

Know Your Client has been enhanced to make it easier to locate information across multiple matters. It is a one stop shop for information about all the matters for a client.

024 General

KEYD-2695

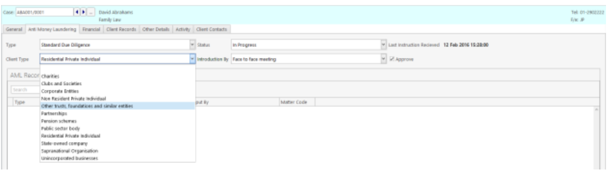
The General Tab pulls all the profile information from each matter to a central location. Information can also be added here, making it available on all matters.



025 Anti-Money Laundering

KEYD-2696
KEYD-3038
KEYD-3499

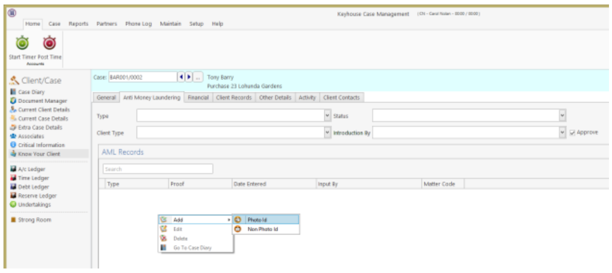
The Anti Money Laundering Screen allows you to record information received in relation to AML to comply with the Central Bank and the Law Society. The drop down fields are pre-populated with the Law Society Guidelines.



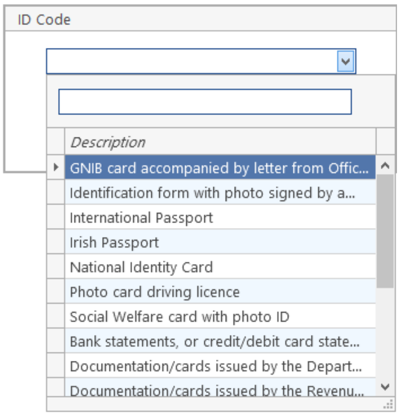
Documents can be added to this screen making them easy to locate, view and available on all matters.

To add document to the screen:

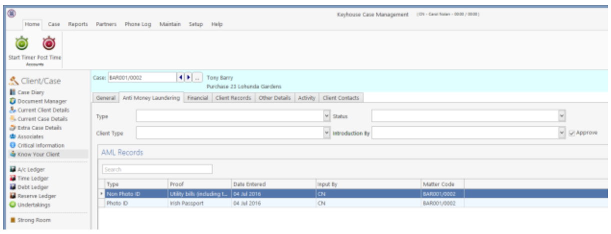
- Right click in the white area and select Add



- Select Photo ID or Non Photo ID
- Locate the document in the file location
- Select from the list to describe the type of document received e.g. Copy of Passport.



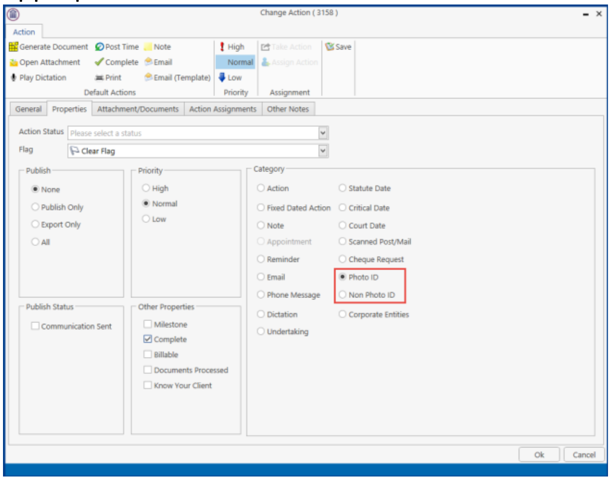
- Repeat until all documents have been added.



Documents already assigned to a matter can be added to the Know Your Client screen.

- Locate the document in the Case Diary
- Open the Action
- Click to the Properties Tab

- Tick the Photo ID or Non Photo ID option as appropriate

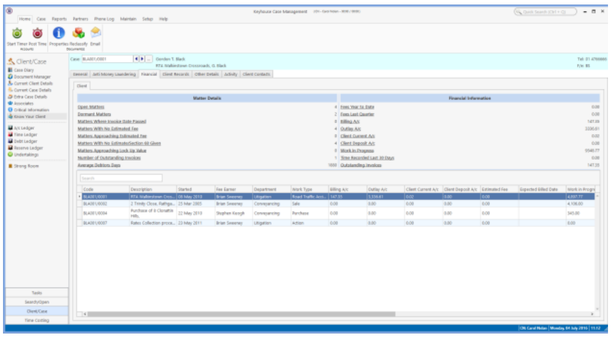


- Click OK.

026 FINANCIAL

KEYD-2764
KEYD-3526

The Financial Tab gives an overview of the financial situation in relation to the client. This ensures you have a full picture rather than a picture of each matter separately.

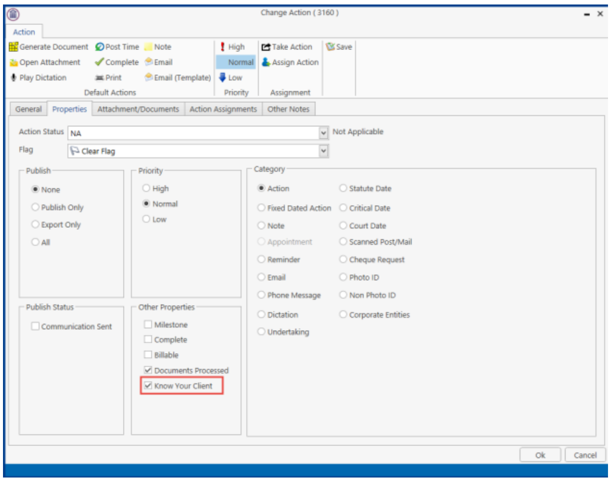


027 CLIENT RECORDS

KEYD-3616

Client Records ensures that documents visible on specific matters can be made available on all matters. This will negate the need to assign a document to more than one matter e.g. Service Agreement. By selecting the document on any matter, the system will take you to the document in the matter.

- Assign the document to a matter
- Right click on the action and Edit
- Click to the Properties Tab
- Tick the Know Your Client Box



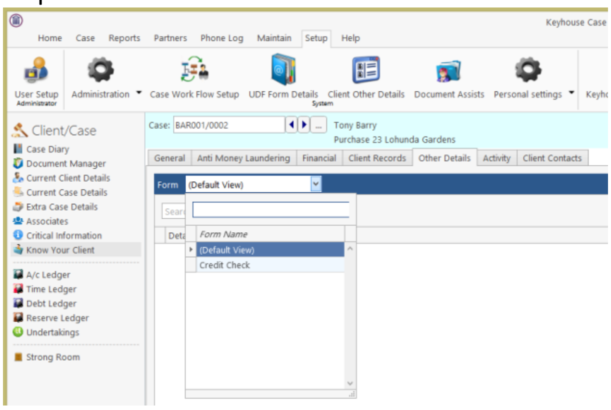
- The document is now visible on all matters on the Client Records screen of KYC.

028 OTHER DETAILS

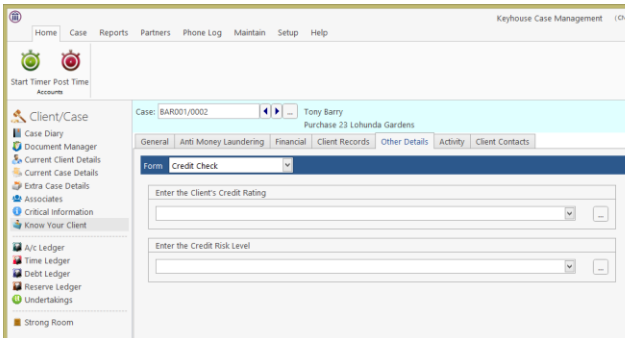
KEYD-2699
KEYD-2911

Other Details allows you to use forms to hold information about the client and ensure it is visible on all matters e.g. the risk the client poses for the firm.

- Click to the Other Details Tab
- Click on the down arrow by Form to select the required Form



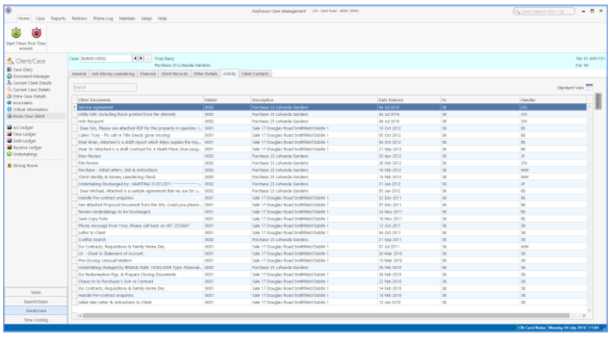
- Enter the information required



029 ACTIVITY

KEYD-2697

The Activity Tab shows correspondence on all matters. It shows the last 400 documents over all matters. This will enable the user to get a quick overview of what is happening on any matter.



Client Contacts are now available on the Know Your Client Screen, giving a quick, easily accessed location for viewing and adding information.