WHAT'S NEW IN KEYHOUSE
END USER INTERFACE
VERSION 5.4.6.1

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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:

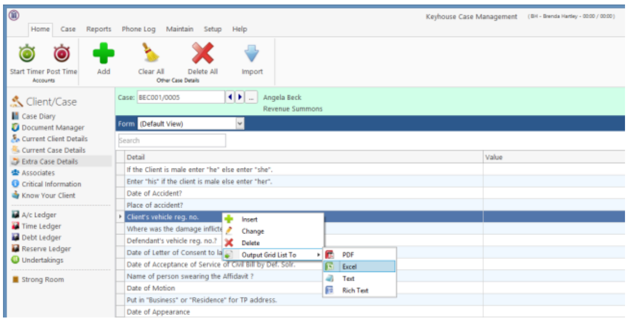
Print Options	Print the Extra Case Details
	Print Option for Cheques Requisitions
Strong Room	Item Description Field
Folder Structure	Changes to the View
Dictation	Dictation Icon on the Home Ribbon
Brief Builder	View Last Updated Date
Billing	Permits Multiple Billing Layouts
Personal Settings	Restore 'Do Not Ask Again'
Case Diary	Filter Outstanding Items Only
	Can no longer amend date of completed action

Print Options

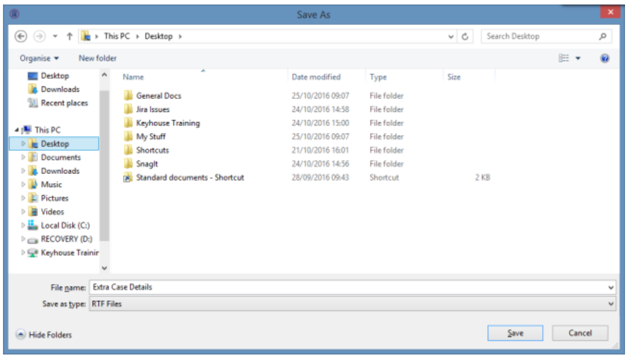
001 KEYD-3583 Print Extra Case Details Screen

It is now possible to print the Extra Case Details screen.

- Click on the Extra Case Details tab on the left side of the screen
- Right click on any field



- Select 'Output Grid List To' and select preferred program.

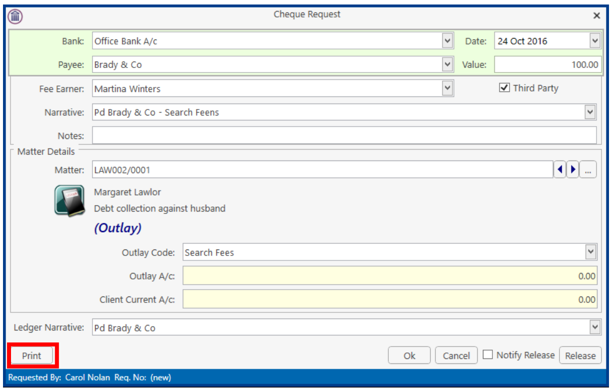


- Choose the location to save the document, enter a file name and click Save

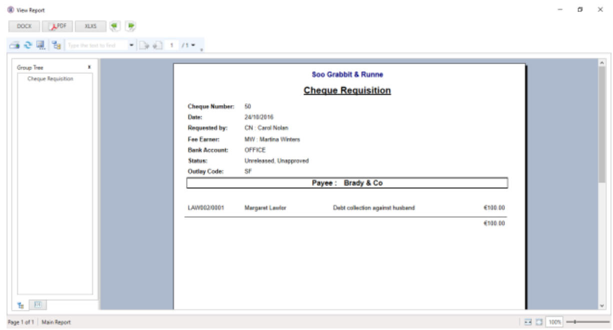
002 KEYD-3700 Print Option for Cheque Requisitions

There is additional functionality in relation to Cheque Requisitions.

- On the cheque Requisition Screen Click the Print Button



- This will generate a report



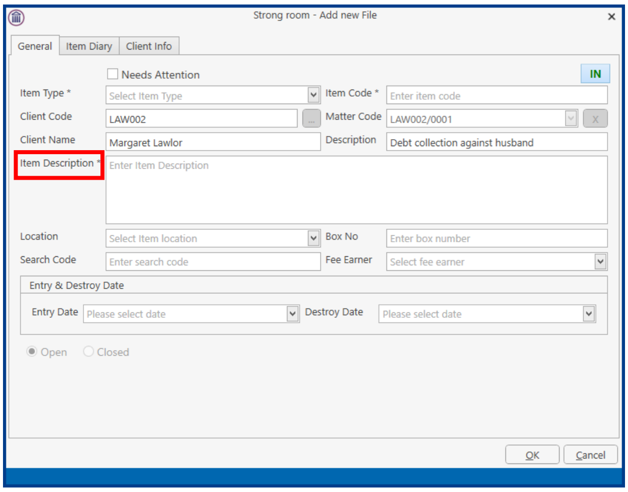
- This can also be done after the cheque has been released to the Accounts Department

Strong Room

003 Item Description

KEYD-3684

To remove confusion when adding items to the Strong Room. There is a differentiation between the Matter Description and the Item Description. The description for the item being entered into the Strong Room now states 'Item Description'.

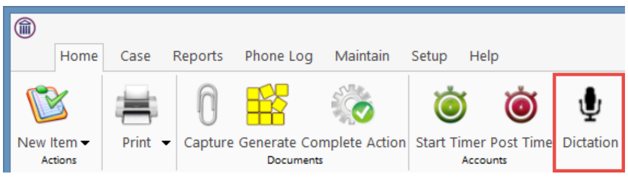


Dictation

004 Dictation Icon

KEYD-4088

A Dictation Icon has been added to the Home Ribbon to make dictating easier. To see this icon, it must be activated by your System Administrator.



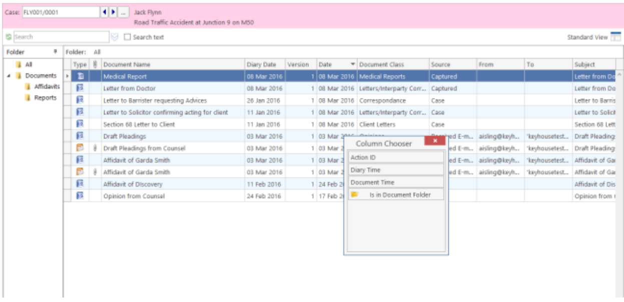
Folder Structure

005 View Change

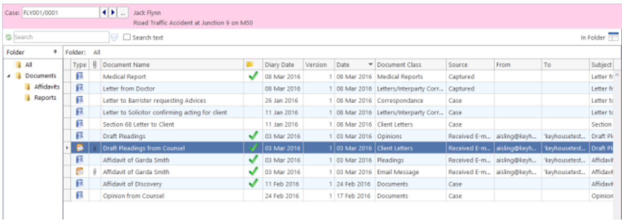
KEYD-3741

To make it easier to see documents not associated with a folder, there is now the option to add a new column, 'Is in Document Folder', to the Grid.

- Go to the Document Manager
- Right click on the Header Row and select 'Show Column Chooser'



- Click on 'Is in Document Folder', drag and place it on the Header Row.



- The documents associated with a folder have a green tick beside them.
- To retain this view for further use, save the view in the normal way.

Brief Builder

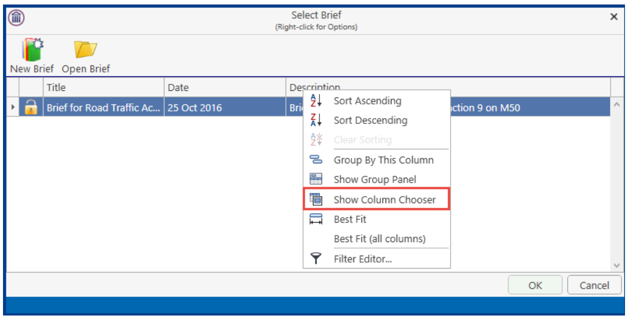
006 View Last Updated

KEYD-3702

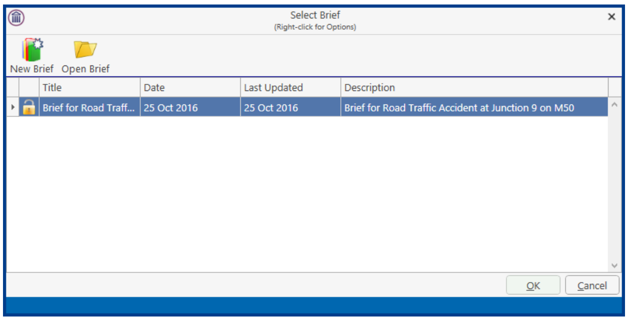
As users need to know if a brief it up to date with all the relevant documents, an option to see the last time it was updated has been added.

- In the Document Manager click Compile Brief

- Right click on the Header Row and select ‘Show Column Chooser’



- Click ‘Last Updated’ and drag to the Header Row and place in the required location



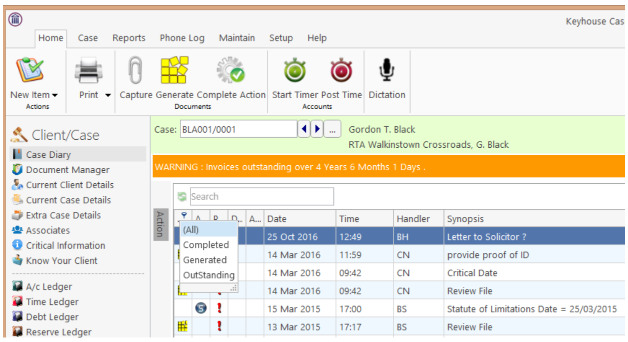
Case Diary

007 Multiple Invoice Layouts

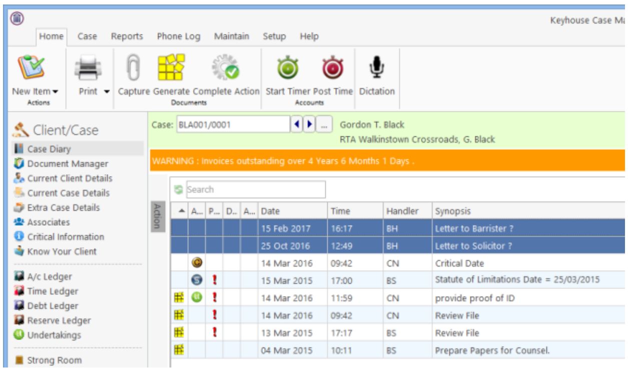
KEYD-4136

It is now possible to filter the Case Diary to see Outstanding Items only.

- Click in the Header Row of the first column and click on the Pin



- Select Outstanding items to see all items yet to be started or completed.

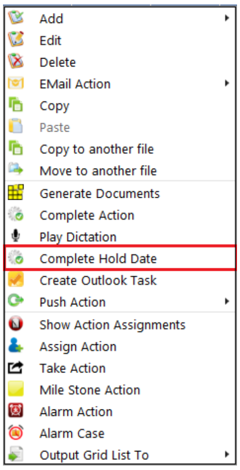


- Click on Generated to see all items started but not finished.
- Click on Completed to see all items completed
- Remember to remove the filter when finished
- Alternatively create a new view showing the filtered view.

008 Completed Action Dates

It is no longer possible to amend the date of a completed action. You must amend the date before completion(if necessary) and use the Complete Hold Date option.

- For the action to hold the date specified on completion, you must right click on the action and select Complete Hold Date instead of Complete Action.



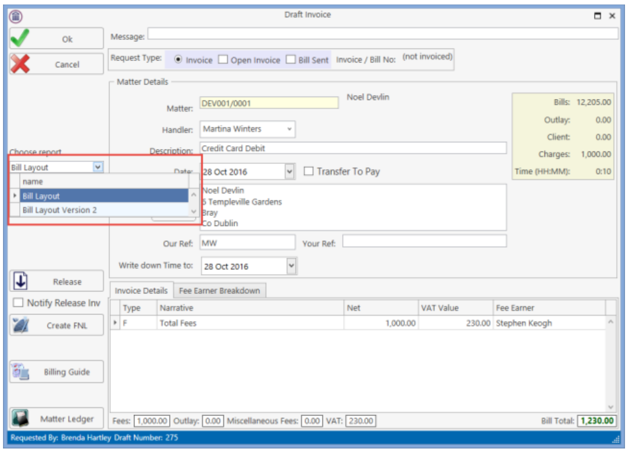
Billing

009 Multiple Invoice Layouts

KEYD-4136

Sometimes it is necessary to have more than one billing layout. For example, the Conveyancing Department may need a different layout than the Litigation Department.

- Create the invoice as normal
- Click on the down arrow beside Billing Layout and choose the required one



- Process the invoice as normal

Personal Settings

009 Restore 'Do Not Ask Again

KEYD-4149

From time to time a user may need to reactivate a dialog box to allow users to restore options.

- Click to the Setup Tab
- Select Personal Settings and then click Preferences.
- Click 'Restore 'Do Not Ask Again' prompts and click OK.