

# 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**



t 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

۲		Keyhouse Case Management (BH - Brends Harley - 0000 / 0000)
Home Case Reports Phone	Log Maintain Setup Help	
Start Timer Post Time Accourts	Sear All Delete All Import	
🔨 Client/Case Case: 8	IEC001/0005 Angela Beck	
	Revenue Summons	
Case Diary Comment Manager Form	Default View)	
Sourcent Client Details		
Current Case Details		
Extra Case Details Detail		Value
	Client is male enter "he" else enter "she".	
	r "his" if the client is male else enter "her".	
	of Accident?	
	e of accident?	
	t's vehicle reg. no. Hesent re was the damage inflicte / Change	
The second s		
	ndant's vehicle reg. no.2 💥 Delete of Letter of Consent to la 😜 Output Grid List To 🔹 👘 PDF	
Undertakings Date	of Acceptance of Service of Civil Bill by Del. Solr.	
	e of person swearing the Affidavit ?	
	of Motion	
Put in	n "Business" or "Residence" for TP address.	
Date	of Appearance	

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

		Save As			
€ 🤄 י ↑ 🖡	► This PC ➤ Desktop ➤			v 🖒 Search Desktop	
Organise 👻 🛛 N	ew folder				i⊞ •
E Desktop	^ Name ^	Date modified	Туре	Size	
Downloads	General Docs	25/10/2016 09:07	File folder		
Recent place	Jira Issues	24/10/2016 14:58	File folder		
1 This PC	Keyhouse Training	24/10/2016 15:00	File folder		
Desktop	My Stuff	25/10/2016 09:07	File folder		
Documents	Shortcuts	21/10/2016 16:01	File folder		
Downloads	Snaglt	24/10/2016 14:56	File folder		
Music	Standard documents - Shortcut	28/09/2016 09:43	Shortcut	2 KB	
Pictures					
Videos					
🖻 🊢 Local Disk (C					
RECOVERY (I					
E Keyhouse Tr	inir				
	¥				
File name	Extra Case Details				

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

#### **OO2 PRINT OPTION FOR CHEQUE REQUISITIONS**

here is additional functionality in relation to Cheque Requisitions.

• On the cheque Requisition Screen Click the Print Button

٢		Cheq	ue Request				;
Bank:	Office Bank A/c			<b>v</b>	Date:	24 Oct 2016	
Payee:	Brady & Co			~	Value:		100.0
Fee Earner:	Martina Winters			~		Third Party	
Narrative:	Pd Brady & Co - Sea	ch Feens					~
Notes:							
Matter Details							
Matter:	LAW002/0001					•	•
	Margaret Lawlor Debt collection again	it husband					
	(Outlay)						
	Outlay Code:	Search Fees					~
	Outlay A/c:						0.00
	Client Current A/c:						0.00
Ledger Narrative:	Pd Brady & Co						[
Print				Ok Ca	ncel	Notify Release	Release
equested By: Carol	Nolan Reg. No: (new)						

• This will generate a report



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



### STRONG ROOM



#### **ITEM DESCRIPTION**

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'.

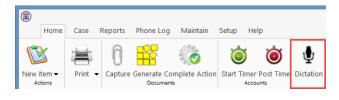
)		Strong room -	Add new File		
General Item D	Diary Client Info				
	Needs Attention				IN
Item Type *	Select Item Type	~	Item Code *	Enter item code	
Client Code	LAW002		Matter Code	LAW002/0001	⊻ x
Client Name	Margaret Lawlor		Description	Debt collection against husband	
Item Description	Enter Item Description				
	1				
Location	Select Item location	Y	Box No	Enter box number	
Search Code	Enter search code		Fee Earner	Select fee earner	Y
Entry & Destro	y Date				
Entry Date	lease select date	V Des	stroy Date	Please select date	¥
					•

#### DICTATION



## **DICTATION ICON**

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**



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'

		Al										
IA 🖡	Type	8		Diary Date		Date	<ul> <li>Document Class</li> </ul>	Source		From	То	Subject
Documents	• B		Medical Report	08 Mar 2016	1	08 Mar 2	116 Medical Reports		red			Letter from D
Affidavits	E		Letter from Doctor	08 Mar 2016	1	08 Mar 21	116 Letters/Interparty Corr	Captu	ed			Letter from D
Reports	R		Letter to Barrister requesting Advices	26 Jan 2016	1	08 Mar 2	116 Correspondance	Case				Letter to Barri
	E		Letter to Solicitor confirming acting for client	11 Jan 2016	1	08 Mar 2	116 Letters/Interparty Corr	Case				Letter to Solic
	E.		Section 60 Letter to Client	11 Jan 2016	1	08 Mar 2	116 Client Letters	Case				Section 68 Let
	E		Draft Pleadings	03 Mar 2016	1	03 Mar 2	and Calaises	200	ed E-m.,	aisling@keyh	'keyhousetest	Draft Pleading
	<b>1</b>	ŧ	Draft Pleadings from Counsel	03 Mar 2016	1	03 Mar 2	Column Chooser			aisling@keyh	'keyhousetest	Draft Pleading
	18		Affidavit of Garda Smith	03 Mar 2016	1	03 Mar 2	Action ID		ed E-m	aisling@keyh	'keyhousetest	Affidavit of Ga
	5	ŧ	Affidavit of Garda Smith	03 Mar 2016	1	03 Mar 2	Diary Time		ed E-m.,	aisling@keyh	'ksyhousetest	Affidavit of Ga
	18		Affidavit of Discovery	11 Feb 2016	1	24 Feb 2	Document Time					Affidavit of Di
	12		Opinion from Counsel	24 Feb 2016	1	17 Feb 2	Is in Document Folde	r				Opinion from
	R		Affidavit of Discovery	11 Feb 2016	1	24 Feb 2	Document Time Is in Document Folde					Affic

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

Search			Search text								in	Folder
older +	der:											
📕 All		Ø	Document Name		Diary Date	Version	Date 👻	Document Class	Source	From	То	Subject
Documents	6		Medical Report	<ul> <li>Image: A second s</li></ul>	08 Mar 2016	1	08 Mar 2016	Medical Reports	Captured			Letter f
👃 Affidavits	ß		Letter from Doctor		08 Mar 2016	1	08 Mar 2016	Letters/Interparty Corr	Captured			Letter f
Reports	12		Letter to Barrister requesting Advices		26 Jan 2016	1	08 Mar 2016	Correspondance	Case			Letter t
	6		Letter to Solicitor confirming acting for client		11 Jan 2016	,	08 Mar 2016	Letters/Interparty Corr	Case			Letter t
	6		Section 68 Letter to Client		11 Jan 2016	1	08 Mar 2016	Client Letters	Case			Section
	8		Draft Pleadings		03 Mar 2016		03 Mar 2016	Opinions	Received E-m.,	alsing@keyh	'keyhousetest	Draft P
		ł.	Draft Pleadings from Counsel	1	03 Mar 2016	1	03 Mar 2016	Client Letters	Received E-m	aising@keyh	'keyhousetest	Draft P
	£1.		Affidavit of Garda Smith	~	03 Mar 2016	1	03 Mar 2016	Pleadings	Received E-m.,	aisling@keyh	'keyhousetest	Affida
	5	ŧ	Affidavit of Garda Smith	~	03 Mar 2016	1	03 Mar 2016	Email Message	Received E-m.,	aising@keyh	'keyhousetest	Affidav
	R		Affidavit of Discovery		11 Feb 2016	1	24 Feb 2016	Documents	Case			Affida
	£1.		Opinion from Counsel		24 Feb 2016		17 Feb 2016	Documents	Case			Opinio

- 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**

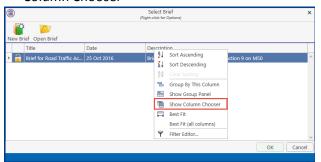


A susers need to know if a brief it up to date with all the relevant documents, an option to see the last time it was updated has been added.

• 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

٦			Select Briel (Right-click for Op		×
Î	ř 📂				
New	Brief Open Brief				
	Title	Date	Last Updated	Description	
> 🔒	Brief for Road Traff	25 Oct 2016	25 Oct 2016	Brief for Road Traffic Accident at Junction 9 on M50	^
				QK Cance	Ť.
					<u> </u>

### **CASE DIARY**



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

<b>(</b>						Keyhouse Ca
Home Case Repo	orts Pi	hone Log Maintain	Setup Help			
New Item • Print • Ca	D Fure Ge	nerate Complete Actio	n Start Timer Po		1 Victation	
🔇 Client/Case	Ca	se: BLA001/0001	••		on T. Black Valkinstown Cro	ssroads, G. Black
Case Diary		ARNING : Invoices outst	tanding over 4 V	ears 6 Mo	oths 1 Davs	
Current Client Details	-					
Current Case Details		Search				
Extra Case Details	Action	* A P D, A	Date	Time	Handler	Synopsis
Associates	ion	(All)		12:49	BН	Letter to Solicitor ?
Critical Information Know Your Client		Completed Generated	14 Mar 2016	11:59	CN	provide proof of ID
Know Your Client		OutStanding	14 Mar 2016	09:42	CN	Critical Date
📱 A/c Ledger			14 Mar 2016	09:42	CN	Review File
🖬 Time Ledger		<u>9</u> 1	15 Mar 2015	17:00	BS	Statute of Limitations Date = 25/03/2015
Debt Ledger		<b>#</b>	13 Mar 2015	17:17	BS	Review File
🕼 Reserve Ledger						

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

Home C	ase I	Reports	Pho	one I	.og	M	ainta	in	Setup Help				Keyhouse Case M
1		n	F	8		22	Ö		Ö	Ö	÷		
New Item  P Actions	rint -	Capture			e Con ments		te A	ctior	Start Timer Po Account		Dictation	n	
Client/Ca	se		Case	: BL	A001	/000	01		••		don T. Bl		ssroads. G. Black
📕 Case Diary													ssiloads, G. black
🖉 Document Ma			WAR	RNIN	iG : In	ivoid	es c	utst	anding over 4 Y	ears 6 M	Ionths 1 (	Days .	
Surrent Client				-	Searc	-h							
Surrent Case I Extra Case De	o c comp		1921	-									
Extra Case De Associates	tails		Actio	. *	A	P	D	A	Date	Time	H	andler	Synopsis
Associates Critical Inform			S										Letter to Barrister ?
Chucai Inform													
A Know Tour Ci	ent				٢				14 Mar 2016	09:42	c	N	Critical Date
📓 A/c Ledger					0	1			15 Mar 2015	17:00	В	s	Statute of Limitations Date = 25/03/2015
🙀 Time Ledger				#	0	1			14 Mar 2016	11:59	c	N	provide proof of ID
Debt Ledger				=		i			14 Mar 2016	09:42	c	N	Review File
Reserve Ledge Undertakings	er			Ħ		i			13 Mar 2015	17:17	B		Review File
- ondertakings				<b>B</b>		-			04 Mar 2015	10:11	B		Prepare Papers for Counsel.

- 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.

1	Add	٠
2	Edit	
8	Delete	
1	EMail Action	٠
Ð.	Сору	
	Paste	
Ð,	Copy to another file	
<b>i a</b>	Move to another file	
	Generate Documents	
10	Complete Action	
٩	Play Dictation	
10	Complete Hold Date	
<b>%</b>	Create Outlook Task	
G	Push Action	٠
N	Show Action Assignments	
٠	Assign Action	
Ľ.	Take Action	
	Mile Stone Action	
۲	Alarm Action	
۱	Alarm Case	
	Output Grid List To	٠

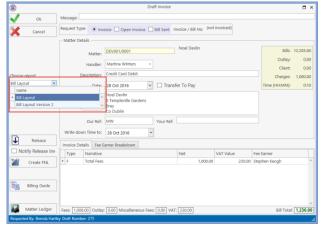


#### BILLING



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**



**RESTORE 'DO NOT ASK AGAIN** 

rom 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.

<b>Î</b>				Prefe	rence					×
Main Application User Preferences	Other User Pr	eferenc	es	Views						
Show start up page							Restore "I	Do not show	again" pron	npts
Show notification to open case diar	y attachment									
Use enter in search boxes		$\checkmark$								
Launch alarm system at startup										
Allow spell check		$\checkmark$								
Show application closing prompt		$\checkmark$								
Disable animated images		. (9	Spinni	ing cloc	ks, etc)					
Scan capture rename the source file	e name									
Run local version										
Completed action ignore what's ne	xt prompt									
Use Integrated Document Generato	or	$\checkmark$								
Font size adjustment		<			>	(100%)				
								0	K Ca	ancel

