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Keyhouse MS Office Add In Modules System Overview





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Keyhouse Outlook Email Module System Overview

Chapter 1: Using the Keyhouse Outlook Email Module.

Overview

The Keyhouse Outlook Module is designed to allow users to manage their emails, both incoming and outgoing for all cases from within Outlook.

Emails can be directly assigned from your Inbox to a case by clicking on the button "Assign to Case" which appears in your Outlook toolbar. Email attachments can also be saved independently to a case by clicking on the "Assign Attachments" button.

Likewise, when you are sending a new email from Outlook there is a button on your toolbar which will allow you to *"Select the Case"* that it relates to. You will also be able to select any associated parties connected to a case and attach documents from the case.

Before you Start

Before using the Keyhouse Add-in, you need to check your settings. This can be done by clicking the About Button in the Keyhouse Group on the Outlook Home Ribbon. Making changes at this level will apply to all emails. It is advisable that the Outlook Add-in version number correspondents with the Keyhouse version number. The Keyhouse Version number is located on the Help Tab on the About Button. See Appendix 1 for information on how to install the correct Add-In.

About the Keyhouse Outlook Add-in
Keyhouse Outlook Add-in Version: 5.5.2.1045 Uninstall
Restore Question Prompts and items flagged as Do Not Show Again Automatically Save Sent Items Save Email Only Save Email and Attachments Save with Options Save unassigned Sent Items also
✓ Ignore Image Attachments ✓ Inde Images when selecting Attachments ✓ Inde Image attachments ✓ Inde Image attachments ✓ Inde Image attachments ✓ Inde Image attachments
Case Information Options ✓ Store Case Code ✓ Store Client Name ✓ Store Case Description
Email Options Email Options Convert Attachments to PDF Include Track Changes Use Email date for all attachments Don't check any mail addresses Navigate to Case Diary Use Draft Folder Maintenance Show potentially missing assignments in red
☐ Hold on Assignment when busy Subject Line ✓ Set subject line Prefix: Subject Line: Subject Line: ^[MAT:Code] & '' & CNT:Name^
Ok Cancel

Automatically Save Sent Items

Save Email Only:	Will only save the email and not the attachment.
Save Email and Attachment:	Will save the email and the attachment which may result in the attachment appearing more than once in Document Manager.
Save with Options:	Will give you options to choose what to save to the case when saving sent emails and attachments (see <u>Save With</u> <u>Options</u> for further details).

Save unassigned Sent Items also: Prompts to save unassigned emails once they have been sent.

Ignore Image Attachments

By setting this it will automatically stop embedded images from being saved to Keyhouse. A setting of 1000 pixels should be sufficient for this to happen. Ensure Only if Embedded is ticked to prevent other image files being blocked.

Case Information Options

Allow the user to select the information that is stored in Outlook. If changes are made then tick To apply to all other Outlook folders, to apply the changes to all Outlook Folders.

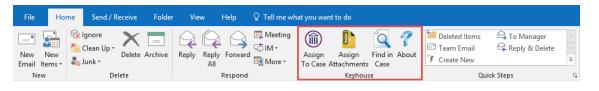
Email Option

Remove Email Reply Chain:	Will stop the email chain from being assigned to the case. It is possible, by exception, to assign the chain of an email to a case from the email. See Save with Option (pg. 13)
Convert Attachments to PDF:	Automatically converts all attachments to PDF
Use Email date for all attachments:	All attachment will have the same date as the email.
Navigate to Case Diary:	Takes the user to the email in the case diary.
Use Draft Folder Maintenance:	This will keep the draft emails folder empty provided it is empty before this option is set.
Hold on Assignment when busy:	When using a Keyhouse mobile application, having this option ticked will delay the syncing of Outlook to Keyhouse until PC is idle.
Don't check internal mail Addresses:	The system will ignore any inhouse email address selected.
Include Track Changes:	If track changes were used on then the attachment, it will show the track changes on the document once it is attached to the email.

Don't check any mail address:	Not recommended – it will allow emails to be sent without checking they are for an addressee associated with the case.
Group Emails to Action:	When using a precedent email with an attachment, it will keep the email and the attachment in the same action.
Show potentially missing assignments in Red:	When you open an email again the system checks to see if it is in Keyhouse. If it is not then it adds the detail at the top of the email in Red.
Subject Line	
Set subject Line:	By ticking this box information in the Subject Line Box will automatically appear in the subject line of all emails. The subject line is set by Keyhouse Support.
Append to existing subject line Prefix:	This will allow additional information to automatically be add to the subject line. The additional information will appear at the start of the subject line.

Assigning existing E-mail to Case

1. In Outlook, you will find a new Group on the Home Ribbon called Keyhouse as shown below.





Used when assigning an email to the Case Diary.

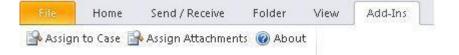
Used when assigning the attachment(s) of an email only to the Case Diary.



7 About Takes you directly to the case file in Keyhouse when the email has been assigned to a case.

Allow you to change your setting and also displays the Keyhouse version.

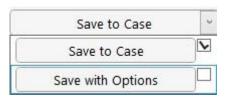
Other earlier Outlook versions will have an Add-Ins tab. In these versions the Assign buttons will be listed in this tab.



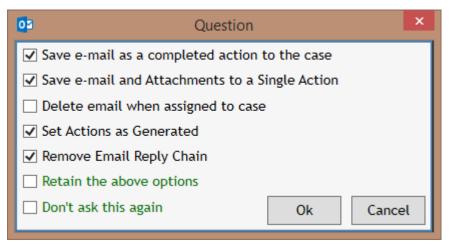
- 2. From your Inbox, highlight the mail you wish to assign you can hold the Ctrl key down if you are assigning more than one mail to the same matter.
- 3. Click on the 'Assign to Case' or 'Assign Attachments' buttons and your Recent Matter list will open, as below:

(Ac	lvanced Matter Search	□ ×
Search:				🕨 🖌 🖌 🖌 🖌 🖌
Code 🔍	Name	File Colour	Description	Clien ^
KEO003/0001	Sam Keogh		Sale of Plot 213 Ashford, Wicklow	Main Street Bray
FLY001/0001	Jack Flynn		Road Traffic Accident at Junction 9 on M50	10 Rose Lawns Blancha
BEC001/0005	Angela Beck		Revenue Summons	26 Church Street Rathc
EVE001/0010	Ever Green Insurance Corporation		Company restructure	Ever Green House, Doi
WOM002/0001	Womack Hotels		Service Agreements	22 Ballybarn Road Swc
SLE001/0001	Slevin & Co		Lease Warehouse premises	Smithfield Industrial Es
QUI001/0006	Alan Quinn		Injunction	45 Herbert Park, Donn
LOW001/0003	Lowery Developments		Receivership - Nama Properties - No 3 Sandyford Estate	12 Main Street Ennis C
LOW001/0002	Lowery Developments		Receivership - Nama Properties No 2 Sandyford Estate	12 Main Street Ennis C
LOW001/0001	Lowery Developments		Receivership - Nama Properties 1 Sandyford Estate	12 Main Street Ennis C
IBS001/0019	Interim Business Services Ltd		Fitzsimmons Property Management plc	Grange House Baggot
FEN001/0001	Richard Fennell		Drunk Driving Arrest 19th December 2009	Roslyn Torquay Road I
EVE001/0001	Ever Green Insurance Corporation		RTA - Richards -v- Quinlan	Ever Green House, Doi
DOH001/0004	Frank Doherty		Claim v Advance Automobiles	23 Green Street Drimn
DEM001/0002	John Demoman		RTA - Donnybrook Crossroads	23 Fleet Street Milltow 🗸
<				>
			Save with Options	Cancel
			Save with Options	Cancel

- 4. If the Matter is not listed in your recent matter list, click into the Search box and enter the case name or code and click Go.
- 5. Select the case you wish to assign the email into.
- 6. At this point you can Save to Case or Save with Option by click on the down arrow beside Save to Case

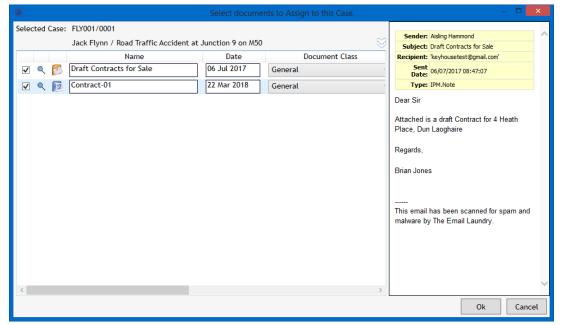


7. If the Save to Case option is selected, the following dialog box will appear giving you several options:



a. Save e-mail as a completed action to the case – the mail will save as a completed action in the selected Case Diary; if deselect, the mail will save as an uncompleted action on your Case Diary/Task List. If ticked it will override the option to Set Action as Generated.

- b. Save e-mail and Attachment to a Single Action this will ensure the email and the attachments are saved as one action rather than as multiple actions, making it easier to find the attachment.
- *c.* Delete *e*-mail when assigned to case the original mail will be deleted from your Outlook Inbox while saving a copy of the mail into the selected Case Diary.
- *d.* Set Actions as Generated the email will come in as an action to be completed at a future date.
- e. Remove e-mail reply chain when this option is selected only the current email is saved. It will not save any previous e-mails in the chain.
- f. Retain the above options the system will save the above options for all future e-mails.
- g. Don't ask this again Your selected options will be saved for future emails you assign to Case and this pop-up message will no longer appear.
- *h.* Tick the options per your choice & OK to save.
- 8. If the Save with Options is selected, the following dialog box appears



9. From this screen, you can choose to save the email, the image, the attachment or all.

10. If the document name or the classification are incorrect, change them by typing into the boxes.

	Select docur	nents to Assign to this Case		_ 🗆 🗙
Selected Case: FLY001/0001 Jack Flynn / Road Traffic Accident	at Junction 9 on M	50	8	Sender: Aisling Hammond
Jack Frynn / Road Franc Accident Name ✓ € Contracts for Sale - Draft ✓ € E Contract for Sale - Draft	Date 06 Jul 2017 07 Jul 2017	Document Class Email Message Agreements		Subject: Draft Contracts for Sale Recipient: keyhousetest@gmail.com' Set Date: 06/07/2017 08:47:07 Type: IPM.Note Dear Sir Attached is a draft Contract for 4 Heath Place, Dun Laoghaire Regards, Brian Jones This email has been scanned for spam and malware by The Email Laundry.
<			>	Ok Cancel

11. By clicking on the Double Arrow, the Save to Case options are available.

	Select docur	nents to Assign to this Case	- 🗆 🗙
Selected Case: FLY001/0001 Jack Flynn / Road Traffic Accident a	at Junction 9 on M	50 😒	THE INCORPORATED LAW A SOCIETY OF
Diary Date 22 March 2018 II IV OR Use Email Date			IRELANDPRIVATE
Diary Description (leave blank to use the Document	t Name instead) ☑	Import into Completed Action(s) Import to a Single Action Delete e-mail after processing	GENERAL CONDITIONS OF SALE (1995 EDITION)
		Set Action(s) as Generated Remove Email Reply Chain	
		Apply Email Date to all Attachments Retain these options	
Name	Date 06 Jul 2017	Document Class	
		Email Message v	PARTICULARS
	7 Jul 2017	Agreements v	
			and
			CONDITIONS OF SALE
<		>	< <u>></u>
			Ok Cancel

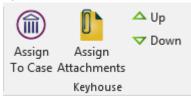
- a. Import into Completed Action(s) the attachment will save as a completed action in the selected Case Diary; if deselect, the action will save as an uncompleted action on your Case Diary/Task List. If ticked it will override the option to Set Action as Generated.
- b. Import to a Single Action this will ensure the email and the attachments are saved as one action rather than as two separate actions, making it easier to find the attachment.
- c. Delete e-mail when assigned to case the original mail will be deleted from your Outlook Inbox while saving a copy of the mail into the selected Case Diary.
- *d.* Set Actions as Generated the email will come in as an action to be completed at a future date.

- e. Remove e-mail reply chain when this option is selected only the current email is saved. It will not save any previous e-mails in the chain.
- f. Apply Email Date to all Attachments this will put the email date on all documents.
- g. Retain the above options the system will save the above options for all future emails.
- 12. Once the e-mail is attached, it is possible to see the Case Reference in your Outlook by setting your Field Headings.

📰 5 -					Inbox - keyhousetest@c
File Home Send / Receive	Folder View Help Q Tell me wha	t you want to do			
Image: Second system Image: Second system New New Email Items +	Archive Reply Reply Forward Mine +	Assign Assign Fi To Case Attachments C	ind in About		G To Manager ^ G Reply & Delete ↓ ₹
New Delete	Respond	Keyhouse		Quick	Steps 5
▲ Favorites 《	Inbox				
Inbox 127	! □ 🖳 🕘 FROM	CASEREFERENCE S	SUBJECT		
	Martina Winters	HAR001/0001 F	Freehold Transfe	er for review	
✓ keyhousetest@gmail.com	Dear James Please review and amer	nd accordingly. If you have	ve any issues ple	ase call me at the office.	Brian.
4 Inbox 127	🗣 🎚 Martina Winters	HA0001/0001 C	Copy Land Folio		
	Dear Sirs, Please see attached PDF	for the property in questio	on. If you have a	any questions please do	not hesitate to call. Regar
Deleted Items	Brian Sweeney	HOU001/0001	Draft Contracts f	for Sale	
Drafts	Dear Sir Attached is a draft Contrac		Laoghaire Regar	rds, Brian Jones	
Junk Email	Aisling Hammond	BEC001/0005	Draft Pleadings f	from Counsel	
Sent Items	Dear Sir, For your approval and ple				
	Aisling Hammond	HAR001/0001 D	Draft Contracts f	for Sale	
	Dear Sir Attached is a draft Contrac	t for 4 Heath Place, Dur Li	Laoghaire Regar	rds, Brian Jones	

Assigning an E-mail Attachment

1. Occasionally you may want to save the attachment only and this is usually done from the open email.





The Assign to Case button will be used when assigning an email and the attachment into the Case Diary.



The Assign to Attachment button will be used to assign the attachment to the case without attaching the e-mail



The Up and Down buttons will allow you to move through the chain of emails. You can then attach any document attached to e-mails without attaching the emails.

2. Assign to Case will assign the email and the attachment to the case and it will behave in the same way as the Assign to Case on the Home Ribbon.

3. To assign the attachment only, click on Assign Assignment and your Recent Matter list will open.

1		Advance	ed Matter Search	
earch:				🕨 Go 🏋 Reset
Code	Name	File Colour	Description	
FLY001/0001	Jack Flynn		Road Traffic Accident at Junction 9 on M50	10 Rose Lawns Bl
ABB002/0004	Abbie Lynch		Injunction	14 The Mews Dub
ABB002/0001	Abbie Lynch		Commercial Lease - 5 Main Street, Donnybrook.	14 The Mews Dub
SLE001/0001	Slevin & Co		Lease Warehouse premises	Smithfield Industr
BLA001/0001	Gordon T. Black		RTA Walkinstown Crossroads, G. Black	23 Ellis Park Rath
ABB002/0002	Abbie Lynch		Share Holding Agreement	14 The Mews Dub
ABB002/0003	Abbie Lynch		Power Of Attorney	14 The Mews Du
AAA001/0003	AAA Securities Ltd		Slip and fall incident	44 Main Street Du
WOM002/0001	Womack Hotels		Service Agreements	22 Ballybarn Road
LOW001/0002	Lowery Developments		Receivership - Nama Properties No 2 Sandyford Estate	12 Main Street Er
HAR001/0001	Brenda Hartley		Purchase of site at Horn Head, Dunfanaghy, Co Donegal	IMI Campus Sand
BLA001/0004	Gordon T. Black		Purchase of 8 Clonattin Hills, Wicklow.	23 Ellis Park Rath
BLA001/0002	Gordon T. Black		2 Trinity Close, Rathgar, Dublin 6	23 Ellis Park Rath
KEO003/0001	Sam Keogh		Sale of Plot 213 Ashford, Wicklow	Main Street Bray
BEC001/0005	Angela Beck		Revenue Summons	26 Church Street
c				>

- 4. If the Matter you want to assign the email to is not listed in your recent matter list, just click into the Search box and enter the case name or code and click Go.
- 5. Select the case you wish to assign the email to.
- 6. The following screen will appear, giving you several options.

	Select documents to Assign to this Case		– 🗆 🗙
Selected Case: FLY001/0001 Jack Flynn / Road Traffic Accident a	at Junction 9 on M50	THE INCORPORA SOCIETY	
Name	Date Document Class	IRELANDPRI	
🗌 🔍 👩 Draft Contracts for Sale	06 Jul 2017 General	~	
	07 Jul 2017 Agreements	GENERAL CONDI SALE (1995 ED	
		PARTICULA	RS
		and	
		CONDITIONS OF	i SALE 🗸 🗸
<		> <	>
		O	k Cancel

7. As we chose to only assign the attachment, the email is not ticked. If you need to assign the email, tick the box. Rename and classify the attachments here.

Note: Embedded image in the email e.g., company logos, Twitter, LinkedIn should not be ticked as it has been set to block them. However, occasionally an image may be ticked if it is larger than is specified on the About screen.

Sending new E-mails from Outlook

1. When you open a new email in Outlook, you will see a new area incorporated into the email header.

चित्रे रे ↑	ψ =		Until	tled - Message (HTML)		Ŧ	-		×
File Message	Insert Options	Format Text	Review He	lp 🛛 🖓 Tell me what yo	u want to do				
Paste	× A [*]		Address Check Book Names Names	Attach Attach Signature File * Item * *	 Follow Up * High Importance Low Importance Tags 5 	Select Attachments Keyhouse	Select Associates		~
No Case se	elected <u>Cli</u>	ok to select Case	Select Attachm	ent Select Associates	<u>Clear</u>		K	eyhoι	ise
Image: Send Image: Top://image: Top://image									

2. Some older Outlook versions will have an Add-Ins tab – click into this tab so see the Keyhouse buttons.

Select Case	Select Case	Select the case that the email is associated with.
Select Attachments	Select Attachment	Allows you to select a case attachment(s) to be sent with the mail
Select Associates	Select Associates	Lists the email addresses of the current client & case associates.

- 3. Open a new mail in Outlook.
- If you want to send this new mail via Keyhouse, choose 'Select Case' This will open your Recent Matter list - use the Search box to find the relevant Case the email is to be assigned to.
- 5. The case details will appear on the e-mail.



6. To attach a Case Diary Document to the email, click the 'Select Attachment' button

۲				Attach or L	in	ik To Case Document	ts	_ = =
Sele Sear	_	Case	: FLY001/0001 [FLY001/0001] Jac	k Flynn Road Traffic Accident	at	Junction 9 on M50	ar	FLY001/0001/CN/AM
lers		T	Document	Class 🔍		▼ Date	^	31 May 2017
Folders	1		FW: [FLY001/0001] Jack Flynn	General		15 May 2018 15:38:50		51 May 2017
	2		[FLY001/0001] Jack Flynn	General		15 May 2018 15:34:45		Frank Edwards
	E		Letter to Client	Client Letters		15 May 2018 15:25:08		The Law Library,
	1		Invitation to link Document Folde	General		14 May 2018 15:34:25		Dublin 8.
	2		Invitation to link Document Folde	General		14 May 2018 15:04:26		
	(T		Jack Flynn vs Axa Insurance	Brief to Counsel		03 May 2018 15:13:52		
	6		Jack Flynn vs Axa Insurance	Brief to Counsel		03 May 2018 15:13:45		
	N.		Letter to Barrister encl Medical R	Correspondance		06 Mar 2018 00:00:00		
	1 ST		Letter to Barrister encl Medical R	Correspondance		06 Jul 2017 10:08:00		
	1 ST		Letter to Barrister requesting Opi	Correspondance		06 Jul 2017 10:08:00		
	1		Letter to M Obama re reply from	Client Letters		06 Jul 2017 10:08:00		Re: Our client: Jack Flynn Road Traffic Accident at Junction 9 on M50
			Letter to Barack Obama re defen	Client Letters	1	06 Jul 2017 10:08:00	\sim	Road Traine Accident at Junction 9 on M150
	<				_	>		
Inc	ude a	all E-	mails Y Conv	ert to PDF Insert Original 🗠	-	🕨 Insert 🛛 🏋 Cance	el	
			Inclu	de Track Ch Insert Original	6	Word documents as P	DF	Dear Frank,
			 Rem	ove Track Re Shared link	aı	me		< >

7. The documents will be listed in Date created descending order. Select the required document to be sent.

NOTE: The Dropdown defaults to attach the original copy of the document to the email. However, if you want to insert a link to a document to be sent to a member of staff, set the option to Network Link. If the document is to be sent via Citrix ShareFile, click Shared Link

- 8. It is also possible to search for a word or words in a document. A preview of the document will appear on the right side of the screen.
- 9. You can choose to search specific types of files, by right clicking over the Type column and choosing a type listed, e.g. Word Document.
- 10. Documents can be converted to PDF by ticking the Convert to PDF box before clicking on Insert.
- 11. It is also possible to include/exclude emails from the list of documents to be attached. Choose the drop-down arrow beside Include all E-mails to choose.

Include all E-mails	v
Include all E-mails	
Exclude Outgoing E-mails	
Exclude all E-mails	

12. If you would like to view the actual client document folder for more search/sort options, click on the look up button beside this option. Select your document & choose Insert

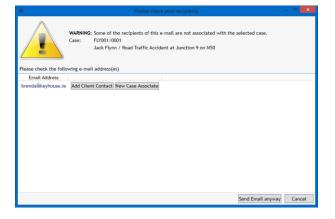
NOTE: If you have more than one document to attach, then hold the Ctrl key down and select the desired documents. To attach a document but not a case document, use the standard Outlook insert file options.

13. If you are sending the mail to a Client and\or Case Associate, you can click the 'Select Associates' button.

14. This will open a window as below, listing the case associates with their email addresses.

		Select Case Associates		- • ×
earch:				Search Clea
Туре	Full Name	Name	Email	Code
Barristers	Frank Edwards BL	Frank Edwards	f.edwards@lawlibrary.ie	EDW001
Client		Jack Flynn	jack@gmail.com	FLY001
TO				Σ
сс				Σ
BCC				Σ
			Ok	Cancel

- 15. Highlight the associate you wish to email and click on To/Cc/Bcc and ok when all names added.
- 16. To remove email addresses from the To/Cc/Bcc fields click on the \square button.
- 17. Click OK to return to the email with the selected addresses or click Cancel to return to the email without any selected addresses.
- 18. Please note: these email addresses must be previously entered against each client and/or case associate.
- 19. If you are not sending the mail to a case contact, you can type or select the address as normal going through the Outlook contacts section.
- 20. If the email address is not connected to the matter then the following box will appear:



- 21. It acts as a warning to ensure emails are not sent to the wrong people. The email can be sent using the Send Email anyway option however, you will continue to receive the warning each time you try to send an email to that person.
- 22. If the recipient in a client contact, click Add Client Contact.
- 23. The following dialog box appears

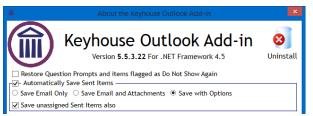
1	Other Contact Details	- 🗆 🗙
General Contact Categories		
Initial(s)	Marital Status	v
Title	PPS Number	
Full Name	Home Phone	
First Name	Work Phone	
Surname	Fax Number	
Salutation	Mobile	
Address	Email Address	brenda@keyhouse.ie
County	Date of Birth	Select a date 15
Postal Code	Date of Death	Select a date 15
	Marriage Date	Select a date 15
	Occupation	
	Ok Cancel	

- 24. Add the relevant information and click OK. The email will send automatically
- 25. See <u>Add an Associate through Outlook</u> on how to Add an associate.

Save Sent Email Options

When saving a sent email, there are three options:

- Save Email Only
- Save Email and Attachment
- Save with Options



These options are set from the About Button in Outlook.

Save Email Only

When this option is chosen, only the email is saved back to the case. The user cannot modify the email details without going to Keyhouse.

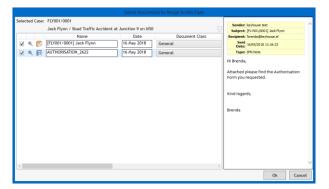
Save Email and Attachments

When this option is chosen both the email and the attachment are saved back to the case. This may result in the duplication of documents as documents already in the case get assigned in again.

Save with Options

With this option the user gets to choose what is assigned to the case.

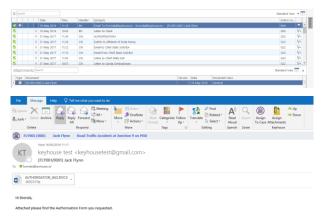
1. Once the email is sent the following dialog box appears.



- 2. To prevent the duplication of the attachment, untick the box to the left of the document name.
- 3. Click OK to save to the case.
- 4. If the user clicks cancel, the following dialog box appears

	Keyhouse Outlook Integration
\land	Please Note:
	Your system is set to Automatically Save Sent Items and Save With Options.
	You have chosen to cancel out of the selection. Nothing will be saved to Keyhouse.
	As a reminder we will show the Keyhouse information in red when you re-open this e-mail in your Sent Items.
When yo	w have read and understood this message you can check this box to stop it appearing in future
	Yes, I wish to Cancel Return to Selection

- 5. If the user clicks Yes, I wish to Cancel, the email will not be assigned to the case. If Return to Selection is click, the user is returned to the screen in Step 1.
- 6. To check if an attachment was sent with an email, open the email in Keyhouse



Sending a new E-mail from Keyhouse via Outlook

1. From the **Case Diary Window** open the matter you want to assign the email to – as below:

Home Case Repor	ts Phone Log Maint	tain Setup Help	p		Keyhouse Case Management (CH - Geur Inan - 800 / 600)	- 0
witem - Actions	ure Generate Complete A	Action Start Timer F				
Client/Case	Case: TJF001/0001	4 1		ng debt to P		01-564
Case Diary			Outstands	ig debt to P	TSB Bank. F/e:	MIC
Document Manager	Search				My Diary V	
Current Client Details	20 Junior		-	and the second second		1C 17
Current Case Details	ction #	Date 06 Jul 2015	Time 09:58	Handler	Symopsis Description Conflict Search Conflict Search	
Other Case Details		06 Jul 2015	11:14	COM	Contract search Contract search Draft Bill No: 286	P
Associates	501	06 Jul 2015	10:23	MK	Drant eili Urart eili Noi: 280 Pass on Deeds once House is sold. Undertaking Discharged by Carol Nolan Date: 06 Jul 2015 Description : ······	
Critical Information	001	06 Jul 2015	09:59	AM	Pass on Deeds once House is solo. Underlading discharged by Cartor Notan Date: do dir 2015 Description ;	P
A/c Ledger		06 Jul 2015	09:59	CN	Prise - Branch Manager Called to say a payment was Initial Attendance Initial Attendance	P
Time Ledger	e	06 Jul 2015	09:57	CN CN	Inclai Attendance Initial Attendance Initial Attendance Incoming Documents	P
Debt Ledger	S	06 Jul 2015	09:57	CN	Letter to Lending institution confirmating appointment Letter to Lending institution confirmating appointment	P
Reserve Ledger	e	06 Jul 2015	09:57	CN	Verter to Certaing instruction community appointment Memo requesting information Memo requesting information	P
Undertakings	e	06 Jul 2015	09:55	CN	Photocopying Photocopying	P
	6 1	06 Jul 2015	09:55	CN	Photocopying Photocopying Review File Revi	P
Strong Room	6	06 Jul 2015	09:52	CN	Letter to Client confirming fees Letter to Client confirming fees	P
	5 5	06 Jul 2015	09:49	CN	Letter to Client comming rees Phone Call Spoke with solicitors for the Building Society to try and arrange a payment pl	
	Attachment					
	Type Docu				Version Date Document Class	- 1
Tasks	Confi				1 06 M/2015 Conflict Search	
Search/Open						
Client/Case						

2. Click on the **New Item** button located on the Home Ribbon. The following options appear.



3. Click on Email and a new email window opens – as below:

. 5 0	↑ ↓ ₹		[FLY001/0001]] Jack Flynn - Message (HT	ML)	Æ	—		×
File Messa	ge Insert Opt	tions Format Text	Review He	lp 🛛 🖓 Tell me what you	want to do				
Paste S B			Address Check Book Names Names	Attach Attach Signature File * Item * *	 Follow Up * High Importance Low Importance Tags 5 	Select Attachments Keyhouse	Select Associates		~
Jack F	· · · · · · · · · · · · · · · · · · ·	Select a different Case	Select Attachme	ent <u>Select Associates</u>	<u>Clear</u>		K	eyhoi	use
To Send <u>B</u> cc									
S <u>u</u> bject	[FLY001/0001] Jack	k Flynn							

- 4. The Case Reference, client and matter description will automatically appear in the email.
- 5. You can now Select Attachments and Associates as per the previous section.

Send a generated letter in an Email

An existing document can be attached directly to an email.

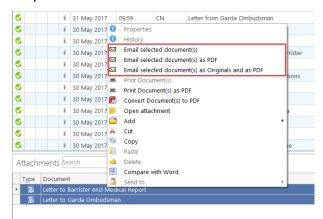
1. Click on the document to be emailed from the Document Manager and click Email from the ribbon. Note: Multiple documents can be selected for the email.



- 2. Click on the Email Icon on the Home Ribbon to generate the email. The email will open with the case information prepopulated.
- 3. Alternatively, use the right click option to add the documents to the email. This will allow you to convert the documents to PDF.

Fo	older:	All						
	Туре	Ŋ	Document	t Nar	ne	Diary Date	Ver	sion
Þ			Letter to 合			16 Mar 2010		1
			Lottor to	0	Document History			1
			Letter to	@	Re-classify document(s) Print document(s)			1
			Letter to	Ξ.	Print document(s) as PDF			1
			Letter to	F	Convert document(s) to PDF			1
			Letter to		E-mail document(s)			1
			Letter to	\sim	E-mail document(s) as PDF			1
			Trump to	\bowtie	E-mail original document(s) and PD	F versions		1
			Letter to		Open in Case Diary			1
			1 alter a to	í í	Copy			1
			Letter fro	4	Copy to another Case Import Document		•	1
			Letter fro		Export Document			1
			Letter from	n an	Garda Siochana	31 May 2017		1

4. If you are using the Case Diary, use the Right Click to select the document from the Attachment section. Using this method, you can only add multiple documents to the email if they are in the same action.



5. Complete the email and send.

Case Diary View

Viewing Emails:

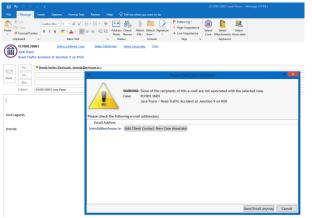
When you assign an email from outlook, the Email will be listed as an action in the Case Diary screen with the actual email & any documents listed in the Document Pane.

Home Case Report	ts Phone Lo	ig Mai	intain Setup Hel	p		Keyhouse Case Manag	iment (Or - Carol N	san - 0000 / 0000)	(%, Quick Search (Chf + Q)	- 0
witem • Print • Captr	ure Generate		e Action Start Timer							
Client/Case	Case: T			TJ Fox	nding debt to	PTSB Bank.				e: MK
Case Diary Document Manager	10									_
Current Client Details									My Diary	View
Current Case Details	cton #	-	Date	Time	Handler	Synopsis	Email From	Email To	Description	P
Other Case Details		a	06 Jul 2015	09:58	COM	Conflict Search Email To:Brenda Hartley - Outgoing E			Conflict Search Afafadfdftysd	10
ssociates	G		13 Jul 2015 06 Jul 2015	12:35	CN CN	Email To:Brenda Hartley - Oulgoing E Draft Bill Draft Bill No: 286	training@keyhou		Afafadiditixisd Draft Bill Draft Bill No: 206	P
ritical Information			06 Jul 2015	10:23	MK	Pass on Deeds once House is sold.			Undertaking Discharged by Carol Nolan Date: 06 Jul 2015 Description :	P
V/c Ledger	1.00	5	06 Jul 2015	09:59	AM	Pass on Deeds once House is sold. PTSB - Branch Manager			Caller: PTSB - Branch Manager Branch Manager called to say a payment was received.	P
ime Ledger	6	•	06 Jul 2015	09:59	CN	Initial Attendance			Caller: P158 - Branch Wanager Branch Wanager called to say a payment was received. Initial Attendance	P
lebt Ledger	6		06 Jul 2015	09:57	CN	Incoming Documents			Incoming Documents	P
eserve Ledger	C		06 Jul 2015	09:57	CN	Letter to Lending Institution confirmati			Letter to Lending Institution confirmating appointment	P
Indertakings	0		06 Jul 2015	09:57	CN	Memo requesting information			Memo requesting information	9
	C		06 Jul 2015	09:55	CN	Photocopying			Photocopying	P
trong Room	G	1	06 Jul 2015	09:52	CN	Review File			Beview File	P
	6		06 Jul 2015	09:51	CN	Letter to Client confirming fees			Letter to Client confirming fees	G
		2	06 Jul 2015	09:49	CN.	Phone Call			Spoke with solicitors for the Building Society to try and arrange a payment plan. This came to nothi	P
			28 Jan 2015	15:05	CN	Email Totraining TT. training - test	melinda@keyho		Regards, Melinda Senior Project Manager Phone: Web: Address 353-1-2902222 www.keyhouse.ie	
		0	28 Jan 2015	15:00		Email Totraining TT: training - old em				
	Atta	chmer	nts							
	Ty	pe Do	cument 9						Version Date Document Class	
Tasks			tgoing Email with an .	Attachment					1 13 Jul 2015 General	
Search/Open	3	Atte	endance for introduct	tory Meeting	2634				1 06 Jul 2015 General	
Client/Case										
Time Costing										

Add an Associate through Outlook

You may have to send an email to a new Associate not already in your Keyhouse System. Rather than having to go back and add the details, it can be done as you are sending the email.

- 1. Create the email as normal and add the Associate's email address.
- 2. When you are ready to send the mail click Send and a warning message will appear.



3. Click on New Case Associate

		Pleas	e chec	k your recipients	1		- • ×
	,)1 / Road Traffi		e-mail are not as		selected case.	
Email Address		,	_				
brenda@keyhouse.le	Add Client Contact)	E-mail Addr Add Prof Name: Forename: Address: E-mail:	ess: br	enda@keyhouse. I a@keyhouse.ie OK	le Type:	•	
						Send Email anyway	Cancel

- 4. If the recipient is not connected with an associate already on the database, complete the fields above.
- 5. If the recipient relates to an associate already assigned to the matter, tick the Add Professional box and add the relevant associate from the list and add the details.

WAR							
Case		ess: brenda@keyhouse.	ie				
	Add Profe	essional					
	Search:						Linked to Car
Please check the following	Code		Name	Тур	e	Name	
Email Address	904467	Soo Grabbit & Rune	,	Solicito		abbit & Rune	Main Street
brenda@keyhouse.ie Ad	KOEG01	Stephen Keogh		Barriste	rs Stephe	n Keogh	2 Main Stree
	K						
	< Name:		Type:				
			Type:				
	Name:						

6. If the recipient is related to an associated yet to be assigned to the matter, untick Linked to Case.

č		ss: brenda@keyhouse.ie ssional			
	Search:				Linked to Ca
Please check the followi	Code	Name	Type	Name	
Email Address	GOOD02	A & L Goodbody,	Solicitors	A & L Goodbody,	Internation
brenda@keyhouse.ie	MCCA11	A McCann & Co	Solicitors	A McCann & Co	36 A York R
	NOO002	A Noone-Faull & Assoc.	Solicitors	A Noone-Faull & Assoc.	6 The Ceda
	OREI09	A. B. O'Reilly Dolan & Co.,	Solicitors	A. B. O'Reilly Dolan & Co.,	Market Stre
	CUR001	A. Curneen & Son	Solicitors	A. Curneen & Son	3 Deansgra
	SMY001	A. F. Smyth & Co.	Solicitors	A. F. Smyth & Co.	21 Clare St
	OBR008	A. J. O'Brien & Co.	Solicitors	A. J. O'Brien & Co.	Ballyanty I
	KEE001	A. Keegan & Co.	Solicitors	A. Keegan & Co.	Solicitors 9
	SMI001	A. M. Smith & Co.	Solicitors	A. M. Smith & Co.	20 Farnhan
	OR0001	A. P. Murrough O'Rourke	Solicitors	A. P. Murrough O'Rourke	3 Arran Qu
	DIA002	A. T. Diamond & Co.	Solicitors	A. T. Diamond & Co.	217 Clonta
	FORD01	A.C. Forde & Co.,	Solicitors	A.C. Forde & Co.,	14 Lansdov
	<				>
	Name:	Type:			
	Forename:	Surname:			
	Address:				

- 7. Select the associate then add the recipient details and click OK.
- 8. The Associate will be added to the case and the email sent.
- 9. To see the entry return to Keyhouse and open the Case Associates Screen.

10. Click on Associate to see the new entry.

monie case reports	Partners Pho	ine Log Maintain Setup Help	Keyho	use Case Management	(CN - Carol Nolan	00:04 / 07:26)				Quick Search (Cl	trl + Q)	- 0	
Associates													
Client/Case Case Diary	Case: FLY001/00		ic Accident at Junction 9 on M50								Tel: 0 F/e: 0	01-564 CN	
case Diary Document Manager Current Client Details	Sarch Zindude Retired Standard View												
Current Case Details	Type	Name/Company	Address	Phone	Solicitors Ref	Email	Case Code	Mobile	Assigned Contact Na	Assigned Contact Ph	Retired		
Extra Case Details Associates	Barrister	s Frank Edwards (Frank Edwar.	The Law Library, Dublin 8.	01-8788888		f.edwards@la	awlib FLY001/0001	087-7666666			N		
Critical Information Know Your Client	Solicitor	E. P. Daly & Co	23/24 Lower Dorset Street Dublin 1				FLY001/0001				N		
V/c Ledger	Solicitor		Solicitors Rođen Place										
Reserve Ledger Undertakings													
Reserve Ledger Undertakings													
Reserve Ledger Indertakings	Contact Det	aik				Main Contacts De	etails (if applicable)						
teserve Ledger Indertakings	Contact Det	alis Abern & McDonnell					etails (if applicable) ry Murray					1	
Reserve Ledger Indertakings						Name Gerr							
teserve Ledger Indertakings	Name	Ahern & McDonnell				Name Gerr							
teserve Ledger Indertakings	Name Company	Ahem & McDonnell Ahem & McDonnell Solicitors Roden Place				Name Gerr							
Reserve Ledger Undertakings	Name Company Address	Ahem & McDonnell Ahem & McDonnell Solicitors Rođen Place Dundalk				Name Gerr Address Phone Mobile							
	Name Company Address Phone	Ahem & McDonnell Ahem & McDonnell Solicitors Rođen Place Dundalk				Name Gerr Address Phone Mobile	ny Murray						

11. Click on Associate Contact to add additional information for the new Contact.

							Edit Cas	e Associate			2	×
General	Associate C	Contact	Details	Other deta	ails	Other Types	Notes	Other Case Involvements	Bank Details	Sequence	2	
Search				- Pew	🧪 Edit	X Delete	📡 Assign	(Unassign				
Relation	nship Na	ime		Phone		Email		Address				
•	Ge	rry Murra	ау			gerry@keyl	house.ie				^	
												L
												L
												L
											~	
Assign Co	ontact											
Name	Gerry Murr	ray										
Title												
Phone												
Fax												
Mobile												
Email	gerry@key	house in										
CIIIdll	geny@key	nouselle										
										Ok	Cancel	J

Chapter 2: Using Word Add-In

The Keyhouse Word Module is designed to allow users to manage their documents using MS Word whether they are generated in Keyhouse or in Word and then saved to Keyhouse.

It will also enable you to open existing documents through Keyhouse and edit them and then save them back to Keyhouse as:

An update to an existing Document

A new version

A new document to the matter or another matter.

Create a document using Word

- 1. Open MS Word in the normal way and create your document.
- 2. You will have a new Group called Case on your Home Ribbon. The add in options available may vary depending on the version of software being used.

Save to Find in About Case Case this Addin Document Information Case	Image: Case Image: Case
Open from Case Will allow	the user to open any document from any matter

Open from Case	without having to navigate to Keyhouse
Save to Case	Allows the user to assign the document to a case.
Save	Saves any changes made to a document
Find in Case	Allows the user to go to the assigned document in the Case Diary
About this Addin	Gives details about storage location settings and the Add-In Version
Insert	Allows the user to add a Tracking Reference and Version Number to a document
Update Fields	Will update the Version Number and Tracking Reference if they have not updated automatically as part of the Save process.
Document Information	Details information about the document including Classification, Version Number, Tracking Number and storage location.

3. Once the document is ready to be saved click Save to Case. This will open the following dialog box:

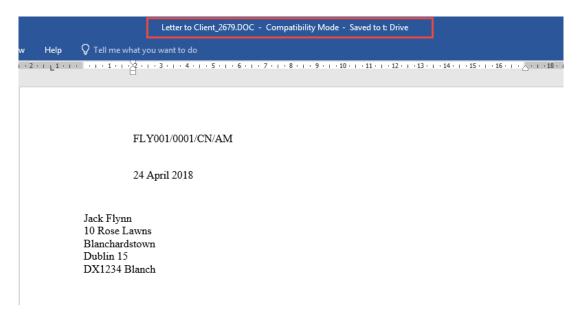
Ì			Advanced Matter Search	
Search:			🕨 Go 🕅	Reset
Time	Code	Name	File Colour Description	
	FLY001/0001	Jack Flynn	Road Traffic Accident at Junction 9 on M50	10 Rose
	AAA001/0002	AAA Securities Ltd	New Lease 44 Main Street Dun Laoghaire	44 Main
	WEI001/0001	James Weis	Sale 22 Nutley Lane Donnybrook Dublin 4	22 Nutle
	AAA001/0007	AAA Securities Ltd	Daisy May, 654321	44 Main
	ZHA001/0001	Chow Ming Zhang	Purchase & Planning application for Unit 6 Blackrock Shopping Cer	25 Willo
	DEM001/0002	John Demoman	RTA - Donnybrook Crossroads	23 Fleet
	BEC001/0006	Angela Beck	14 Windy Arbour, Surbiton, Surrey SU1 2WW	26 Chur
	FEN001/0001	Richard Fennell	Drunk Driving Arrest 19th December 2009	Roslyn 1
	CON001/0001	Paulette Considine	RTA - Main Street, Dundalk	2 Esker
	CLI001/0001	Bill Clinton	Unfair dismissal by State Department	Main St
	KEO003/0001	Sam Keogh	Sale of Plot 213 Ashford, Wicklow	Main St
	REC001/0005	Angela Reck	Revenue Summons	26 Chur
ocumen	nt Name: Docum	ent 2		Save
ocume	nt Class: Genera	al	* Save	as Versi
Wo	ork Type: System	Actions Y Action: Sa	ved Document v	Cancel

- 4. Select the matter to be used and enter a Document Name. Change the class by clicking on the down arrow to the right of the Document Class box. Change the Work Type and Action as needed.
- 5. Click OK to save.

Add Tracking and Version Numbers to Document

A tracking reference is a unique number given to every document in Keyhouse. It can then be used to locate any document on the system.

When a document is generated through Keyhouse, it automatically gets a tracking number. When it is created in Word it must be saved to Keyhouse before it gets a tracking reference.



- 1. To show the reference on the document, go to where you want the Tracking Reference to appear on the document.
- 2. On the Home Ribbon in the Case Group click on Insert



3. Select either Track Reference or Track Reference and Version Number.

later	
	2727.1

4. The version number will automatically update when using version control.

Opening and Editing a document from Keyhouse in MS Word (Version Control)

When you have several drafts of the same document, it is very easy to get confused in relation to the version to be amended. Using Version Control ensures that there is only 1 line in the Document Manager and Case Diary and all older versions are stacked behind the most current version. Only the most recent version is always the visible version.

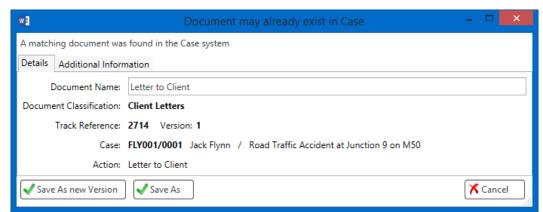
If the user is creating a document in Word, this must be save to the case before applying Version Control to it.

1. Select the Word Document from the Document Manager and double click to open or from the Attachment section of the Case Diary.

Witem • Print Export to P	DF Start Tim	er New Time Slip Start Blank Timer Properties Recla	ssify Email Ca		Shares		PDF Viewer	MS Word Wo	srkshare Litéra			
ci	se: FLY001/00	01 Jack Flynn										Tel: 01-56
Client/Case		Road Traffic Accident a	t Junction 9 on	M50								F/e: CN
Case Diary Document Manager	Search	Search text								Standard View	Letter to Client	
urrent Client Details	Test Fr	older: All										
urrent Case Details		Document Name	Diary Date	Date	Document Class	Version	Course	From	То	Subject	- FLY001/	0001/CN/
xtra Case Details	 1)pe 6 2 	Letter to Client	-		8 Client Letters		Case	Prom	10	Letter to Client		
ssociates ritical Information	6						Sent E-mail	keybourg tert	'keybourstert	Invitation to link Document Folders through our	15 May 2	018
now Your Client	6	Invitation to link Document Folders through our-	14 May 2018				Sent E-mail			Invitation to link Document Folders through our		
	C	Jack Flynn vs Axa insurance			8 Brief to Counsel		Captured	Kejmause testa	Rejilouselest.	Jack Flynn vs Axa Insurance	Jack Flynn	
/c Ledger	8	Jack Flynn vs Axa Insurance			8 Brief to Counsel		Captured			Jack Flynn vs Axa Insurance	10 Rose Lawns	
me Ledger ebt Ledger	12	Letter to Barrister encl Medical Report			8 Correspondance		Case			Letter to Garda Ombudsman	Blanchardstown	
eserve Ledger	12	Letter to Barrister encl Medical Report			Correspondance		Case			Letter to Barrister end Medical Report	Dublin 15	
ndertakings	62	Letter to Barrister requesting Opinion			Correspondance		Case			Letter to Barrister requesting Opinion		
trong Room	6	Letter to M Obama re reply from barrister			Client Letters		Case			Letter to M Obama re reply from barrister		
rong koom	R	Letter to Barack Obama re defence			Client Letters		Case			Letter to Barack Obama re defence		
	6	Trump to Chief State Solr			7 Correspondance	1	Captured			Trump to Chief State Solr	Re: Road Traffic Ace	ident at Junc
	62	Letter to Garda Commissioner			7 Correspondance		Captured			Letter to Garda Commissioner	9 on M50	
	6	Letter to Chief State Solr			7 Correspondance		Captured			Letter to Chief State Solr		
	R	Letter from Garda Ombudsman			7 Correspondance		Captured			Letter from Garda Ombudsman		
	12	Letter from Chief State Solicitor			7 Correspondance		Captured			Letter from Chief State Solicitor	Dear Mr Flynn	
	62	Letter from an Garda Siochana	31 May 2017	31 May 201	7 Correspondance	1	Captured			Letter from an Garda Siochana	Thank you for your lett	er of the last
	62	Exibits to Affidavit of Enda Kenny	31 May 2017			1	Captured			Exibits to Affidavit of Enda Kenny	week.	is of the last
	6	Email to Chief State Solicitor			7 Correspondance		Captured			Email to Chief State Solicitor		
	12	Email from Chief State Solicitor			7 Correspondance		Captured			Email from Chief State Solicitor	Yours sincerely.	
	6	AUTHORISATION	31 May 2017	31 May 201	7 Form Document	1	Captured			AUTHORISATION	rous anchiery,	
	62	Letter to Garda Ombudsman	31 May 2017	31 May 201	7 Correspondance	1	Captured			Letter to Garda Ombudsman	1	
	18	Verifying affidavit of Leo Varadkar	30 May 2017	30 May 201	7 Pleadings	1	Captured			Verifying affidavit of Leo Varadkar	1	
	R	Statement of Claim	30 May 2017	30 May 201	7 Court Documents	1	Captured			Statement of Claim		
	68	Report of Dr Phil Philpott	30 May 2017	30 May 201	7 Medical Reports	1	Captured			Report of Dr Phil Philpott	1	
Tasks	62	Personal Injuries Summons_14	30 May 2017	30 May 201	7 Court Documents	1	Captured			Personal Injuries Summons_14		
Search/Open	6	Order of Mrs Justice Michelle Obama	30 May 2017	30 May 201	7 Court Documents	1	Captured			Order of Mrs Justice Michelle Obama	1	
	6	Order of Master Barack Obama	30 May 2017	30 May 201	7 Court Documents	1	Captured			Order of Master Barack Obama	1	
Client/Case	62	Notice of Motion for Judgment in Default_14	20 May 2017	20.84.00	7 Motion papers		Captured			Notice of Motion for Judgment in Default_14		

2. Make the necessary changes and click Save to Case

3. The following dialog box will appear:



- 4. To save the document as a different document, click the Save As.
- 5. To save the document as a new version, click Save As new Version.
- 6. Modified by ... will be populated automatically but this can be amended as needed.

Document may already exist in Case	- • ×
A matching document was found in the Case system	
Details Additional Information	
Document Name: Letter to Client	
Document Classification: Client Letters	
Track Reference: 2714 Version: 1	
Case: FLY001/0001 Jack Flynn / Road Traffic Accident at Junction 9 on M50	
Action: Letter to Client	
Save As new Version Save As	Cancel
New Version Comment	
Modified by BH	
Save Save	

7. With Version Control you will always see the latest version of the document in the Document Manager and Case Diary. However, it may be necessary to click the Refresh Button to update the screens.

Туре	Û	Document Name	Diary Date	Date 💌	Document Class	Version	Source	From	То	Subject
1		Letter to Client	15 May 2018	15 May 2018	Client Letters	3	Case			Letter to Client

8. However, it is possible to revert to previous versions by selecting the document, then right click and select Document History.

Home Case Reports		Phone	e Loc	ı Maini	tain Setup Help				Key	house Case Ma	anagement	(CN - Carol No	lan - 00:00 / 00:00)
Print Properties Reclassify Document(s)	6	nail	Com	pile Brief	Use Adobe PDF Viewer	MS Word							
& Client/Case Case Diary Document Manager		ase:		001/0001		anding deb	t to F	TSB Bank.					
Social Current Client Details	F	Туре	1.10	Docum	ent Name		Di	ary Date	Version	Date 🔻	Document C	lacc	Source
🍝 Current Case Details	-	Type	. 0		ent2 2661 2662		100000	Jul 2015		13 Jul 2015	General	.1055	Case
🎒 Other Case Details	-		8	Outgoing Email.				Jul 2015		13 Jul 2015	General		Sent E-mail
😤 Associates	-	E	8		Outgoing Email with an Attachment			Jul 2015		13 Jul 2015	General		Sent E-mail
Critical Information	H			and the second se	etter to Londing Institution confirming oppoint				1		General	arty Corr	Case
······					Search 2639	g uppoint	0		t Properties				Sent E-mail
 A/c Ledger Time Ledger 	H				nce for Introductory Meeting_	2634	Document History Re-classify document(s)						Sent E-mail
Debt Ledger	H			Conflict		2054	1 1 1	Print docu	Contraction of the second s)		h	Case
Reserve Ledger	H				requesting information				cument(s)			1	Case
Undertakings	-								cument(s) as	PDF		arty Corr	Case
	-	Letter to Lending Institution confirmating appoin.						arty con	Case				
Strong Room	-				3			Open in C	ase Diary			eets	Case
	-				ince for Introductory Meeting		C	Сору				eets	
	H			(no sub			(i)		nother Case				Sent E-mail
			0	image0			Copy path to Clipboard					Sent E-mail	
		P	ų	(no sub			-	Import fro					Sent E-mail
		2		old em	ails		\$	Export Do	cument		,		Sent E-mail

9. The Document History Dialog Box will appear

0		[Document History							
Search										
Version	Created on	Created By	Comments							
3	15 May 2018	Brenda Hartley	Modified by BH	· · · · · · · · · · · · · · · · · · ·						
2	15 May 2018	Brenda Hartley	Modified by BH							
1	15 May 2018	Brenda Hartley								
1	15 May 2018	Brenda Hartiey								
				OK Cancel						
	Search Version 3 2	Search	Search Version Created on Created By 3 15 May 2018 Brenda Hartley 2 15 May 2018 Brenda Hartley	Search Version Created on Created By Comments 3 15 May 2018 Brenda Hartley Modified by BH 2 15 May 2018 Brenda Hartley Modified by BH						

10. To revert to a previous version, right click on the version required and select Revert to this Version

)	×					
Search							
	Version	Created on	Created B	By Comments			
	3	15 May 2018	Brenda Ha	artley	^		
×	2	15 May 2018	Brenda Ha	artley 🥱	Rever	t to this Version	
	1	15 May 2018	Brenda Ha	artley 🖂	E-mai	l document(s)	
					E-mai	l document(s) as PDF	
					E-mai	l original document(s) and PDF versions	
				_			~
							OK Cancel

11. This will create a new version

2	Search				
Τ	Version	Created on	Created By	Comments	
	4	15 May 2018	Brenda Hartley	Modified by BH	
	3	15 May 2018	Brenda Hartley	Modified by BH	
	2	15 May 2018	Brenda Hartley	Modified by BH	
	1	15 May 2018	Brenda Hartley		

12. To email a previous version, right click on the version and select the email option needed. Process the email in the normal way.

Search Version Created			
Version Created			
	d on Created By	Comments	
4 15 May	2018 Brenda Hartley	Modified by BH	
3 15 May	2018 Brenda Hartley	Modified by BH	
2 15 May	2018 Brenda Hartley	Modified by BH	
1 15 May	2018 Brenda Hartley		

- 13. To compare 2 versions for changes, select the document to be compared to and holding down the <CTRL> Key select to document to be compared.
- 14. Right click on the highlighted area and select Compare with Word

	Search					
	Version	Created on	Created By		Comments	
	4	15 May 2018	Brenda Hartley		Modified by BH	
ŀ	3	15 May 2018	Brenda Hartley		Modified by BH	
	2	15 May 2018	Brenda Hartl 🖂	E-mail d	ocument(s)	
	1	15 May 2018	Brenda Hartl 🖂	E-mail d	ocument(s) as PDF	
				E-mail o	riginal document(s) and PDF versions	
			**	Compare	e with Word	

15. To see the where the changes are in the document, set the Markup option to Simple Markup.

16. To see the actual changes in the document, ensure the Markup option is set to All Markups.

	- 🕐 🔹 Compare Result 3 (Compatibility Mode) - Word	? 🗉 – 🗗 X
Grammar Count -	PAGE LAVOIT RETERENCES MALINOS REVIEW VEW Face FOF Review Partie Language Comments Company Comments C	Sign i
Revisions • ×	Compared Document	X Original Document (Letter to Lending Institution confirming appointment_2637_V1.DDC - Brende) X
v BREVISIONS 0	TJF001/0001/MK/AM	TJF001/0001/MK/AM
Brenda Deleted 06 Brenda Inserted	06 <u>13</u> Judy 2015	06 July 2015
13 Brenda Deleted 21 Brenda Inserted 14	Educational Banking Society 13414 Main Street Bery Co Wickdow	Educational Building Society 21 Main Street Beay Co Weldow
Benda Inserted /A Benda Formatted Irish Benda Inserted Joe Bloggs Solicitor	Re: Our Cleents _ <u>11</u> Fox Premises - 134Kee Avnuue, Finglas, Dublin 11 Loan No 123456_ <u>A</u>	Re. Our Classis - 13 Fox Premies - 1 McKe Avenue, Finglas, Dublin 11 Loan No 12M56
Boenda Formatted Irish	Dear Sin, We would like to confirm that we are now acting on behalf of the above client in relation to his action with you.	Dear Sirs. We would like to confirm that we are now acting on behalf of the above client in relation -
	we would ake to confirm that we are now acting on behalf of the above client in felation to his action with you	Revised Document (Letter to Lending Institution confirming appointment_2637_V2.DDC - Brenda) ×
	Yours faithfully,	TJF001/0001/MK/AM
	Jor Bloggs Solutor	13 July 2015
		Educational Building Society 14 Main Storet Berg Co Wicklow
		Re: Our Clients - 13 Fox Premies - 1 McKee Avenue, Finglas, Dublin 11 Leon No 123456(A
		Dear Sirs,
1 WORDS DB INGUSH (UNITED KINGDOM		We would like to confirm that we are now acting on behalf of the above client in relation

17. Once changes have been view, close the window without saving.

NOTE: The comparison document is a new document and is not automatically saved to Keyhouse. The user can either save the document as a new version of the existing document or save it as a new document with a new tracking number.

Attaching a Incoming Draft of an Existing Document.

When a revised draft of a document is returned from the other side, it can be added as a version to the original document.

- 1. Open the email attachment in Word.
- 2. Before making any changes, select the Save to Case button on the Home Ribbon.

3. If it is a new incoming first draft, the system will ask the user to select a matter, name and classify the document.

Ì		Advanced Matter Search						
Search:					🕨 Go	🗙 Reset		
Time	Code	Name	File Colour	Description				
	FLY001/0001	Jack Flynn	R	oad Traffic Accident at Junction 9 on M50		10 Rose		
	DOH001/0004	Frank Doherty	C	laim v Advance Automobiles		23 Greer		
	FEN001/0001	Richard Fennell	D	runk Driving Arrest 19th December 2009		Roslyn Te		
	ABA001/0001	David Abrahams	Fa	amily Law		123 May		
	AAA001/0002	AAA Securities Ltd	N	ew Lease 44 Main Street Dun Laoghaire		44 Main		
	GRE002/0002	Roger Greene	P	ersonal Injury		33 Main		
	CAM001/0002	Tony & Marie Campbell	P	urchase 66 Archer Park Drive		66 Arche		
	IBS001/0019	Interim Business Services Ltd	Fi	tzsimmons Property Management plc		Grange F		
	ABB001/0001	George J Abbott	Si	ale 45 Somserset Road, Dublin 6		60 Some		
	BEC001/0003	Angela Beck	Si	ale of 3 Main Street, Bray.		26 Churc		
	KEO003/0001	Sam Keogh	Si	ale of Plot 213 Ashford, Wicklow		Main Str		
(MCG001/0001	Iulie McGuire	5	ale of 2 Clonard Village Wexford		12 Esker		
ocume	nt Name: Test Do	cument				Save		
Docume	ent Class: Genera	I			~ (Save as Versio		
	ork Type: System		~	Cancel				

- 4. Select Save.
- 5. If the document is to be saved as a version of an existing document, click Save to Case.
- 6. Click Save as Version, modify the Comment if needed, and click Save.

)			Docun	nent History	×
	Search					
	Version	Created on	Created By		Comments	
►	2	23 Oct 2015	Carol Nolan		Draft 2	^
	1	23 Oct 2015	Carol Nolan			
						~
				<u>O</u> K	Cancel	

7. To view the versions, right click on the document in the Case Diary or the Document Manager and select Document History

Comparing 2 Separate Documents in the Document Manager

If documents have been saved without using Version Control, it is still possible to compare them in Keyhouse.

- 1. In the Document Manager, select the document to be compared to and then holding down the <CRTL> key, select the document to be compared.
- 2. Right click and select Compare with Word.

5	Sear	ch			Search text						
	Туре	V	Document Name	2		Diary Date	Versio	n	Date 🔻	Document Class	Source
F	12		Sale Agreement			10 Nov 2015			19 Nov 2015	General	Case
			Letter to Client_2	•	Document History			1	17 Nov 2015	General	Case
	F		Letter to Client	<u> </u>	Re-classify document(s) Print document(s)			3	17 Nov 2015	Client Letters	Case
	(E		Letter to Doctor	$\overline{\sim}$	E-mail document(s)			1	17 Nov 2015	Letters/Interparty Corr	Case
	1		Letter from IMI	\bowtie	E-mail document(s) as PDF			1	16 Nov 2015	Client Letters	Captured
			Sale Agreement	\sim	E-mail original document(s) an	nd PDF versions		1	12 Nov 2015	Documents	Received E-m.
	1		Land Reg Folio_		Open in Case Diary			1	12 Nov 2015	Documents	Received E-m.
	1	0	Land Folio No 1	**	Compare with Word			1	12 Nov 2015	Email Message	Received E-m.
			Letter encl Proof	1	Сору			1	12 Nov 2015	Client Letters	Captured
	1		ESB Bill		Copy to another Case Paste			1	12 Nov 2015	Client Letters	Captured
			Application from	_	Import Document		,	1	12 Nov 2015	Client Letters	Captured
					Export Document		•				

- 3. The documents will open in MS Word.
- 4. The Comparison Document can be saved to the matter, if necessary, using the Save to Case Button.

Comparing 2 Documents with Track Changes

When Track Changes is used, the comparison works in a slightly different way.

- 1. Select the documents to be compared in the normal way and start the comparison.
- 2. A MS Word warning will open up behind the documents and Keyhouse. To see this warning, hold down the <Alt> key and click on the <Tab> Key, the following screen will appear.

0.0000000000000000000000000000000000000	findenting on an other th	Contractor and the second	
6			

- 3. The programs visible will depend on the programs open on the user's computer.
- 4. Click the <Tab> key until the following message is selected.



- 5. Click Yes. The comparison documents will open.
- 6. Continue as normal with the comparison.

Using 'Save As' Through Keyhouse

When a document already exists on a matter in Keyhouse, it can be used again in the same matter or saved to another matter. Please note if the document is being saved to another matter, any information related to the second matter will need to be updated e.g. name, address etc.

- 1. Open the document required
- 2. Click Save to Case

	ø Deviloper Help ♀Search	B Share
Xi Car Bit Coov	Times New Ro - 12 - A' A' Aa - & E - E - 7 - E E 1 1 ABbCcl Article L ABbCcl AaBbCcl A	P Find +
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Torrisk Parker from Case Case Case this Addin Cost Union Internation		Editing
	FLY001/0001/CN/	
	15 May 2018	
	🖬 Document may alreably exist in Case - 🖃 💌	
	A matching document was found in the Case system	
	Pressenting documents was bound at the case system Details Additional Homemation	
	Document Name: Letter to Client	
	Document Classification: Client Letters	
	Track Reference: 2714 Version: 4	
	Case: FLY001/0001 Jack Plynn / Road Traffic Accident at Junction 9 on M50	

- 3. Click Save As
- 4. Select the Client and change the Document Name

D			Advanced Matte	er Search	
Search:					🕨 Go 🕅 🛪 Reset
Time	Code	🔍 Name	File Colour	Description	
	FLY001/0001	Jack Flynn		Road Traffic Accident at Junction 9 on M50	10 Rose
	DOH001/0004	Frank Doherty		Claim v Advance Automobiles	23 Gree
	FEN001/0001	Richard Fennell		Drunk Driving Arrest 19th December 2009	Roslyn 1
	ABA001/0001	David Abrahams		Family Law	123 Ma
	AAA001/0002	AAA Securities Ltd		New Lease 44 Main Street Dun Laoghaire	44 Mair
	GRE002/0002	Roger Greene		Personal Injury	33 Mair
	CAM001/0002	Tony & Marie Campbell		Purchase 66 Archer Park Drive	66 Arch
	IBS001/0019	Interim Business Services Ltd		Fitzsimmons Property Management plc	Grange
	ABB001/0001	George J Abbott		Sale 45 Somserset Road, Dublin 6	60 Som
	BEC001/0003	Angela Beck		Sale of 3 Main Street, Bray.	26 Chur
	KEO003/0001	Sam Keogh		Sale of Plot 213 Ashford, Wicklow	Main St
	MCG001/0001	Iulie McGuire		Sale of 2 Clonard Village, Weyford	12 Eske >
ocumei	nt Name: Letter to	Client			Save
ocume	ent Class: General				Y Save as Versi
Work Type: System Actions Action: Saved Document				Cancel	

- 5. Click Save.
- 6. The document will can now be edited as required.

Appendix 1

Updating the Outlook Add-In

1. Go to the About Button in the Case Group on the Outlook Home Screen.

About the Keyhouse Outlook Add-in
Keyhouse Outlook Add-in Version 5.5.3.11 For .NET Framework 4.5
 ☐ Restore Question Prompts and items flagged as Do Not Show Again ☑ Automatically Save Sent Items ○ Save Email Only ○ Save Email and Attachments ③ Save with Options ☑ Save unassigned Sent Items also
Ignore Image Attachments Images when selecting Attachments that are less than 1000 pixels wide or 1000 pixels tall. Images only if Embedded Images when selecting Attachments
Case Information Options Case Code Store Client Name Store Case Description
Email Options
Construction C
Convert Attachments to PDF Include Track Changes
Use Email date for all attachments Don't check any mail addresses
 □ Navigate to Case Diary □ Use Draft Folder Maintenance □ Use Draft Folder Maintenance
Hold on Assignment when busy
Subject Line
✓ Set subject line ✓ Append to existing subject line
Prefix:
Subject Line: ^[MAT:Code] & '' & CNT:Name^
Ok Cancel

 Click on Uninstall and this will open the Command Prompt. Follow the instructions in the Command Prompt to finish the uninstall and this will close Outlook automatically. If you do not have permission to uninstall the add in, contact your System Administrator to install the new addin.

NOTE: Please save all draft emails before uninstalling

3. Go to the Keyhouse Icon on your desktop.

4. Right click and select Open File Location to navigate to the Keyhouse Mapped Drive. Below is an example of a mapped drive.

🔁 🖬 つ ペッ						
File Home Share View						^
Copy Patte shartcut	Delete Rename New Casy access	Properties	Select all Select none			
🐑 🐵 👻 🕆 퉬 דhis PC 🔸 Local Disk (C	:) > Keyhouse Training > keyhouse > Mi	inual > khframework			6 Search khframework	,p
* Fevourites	Name	Date modified	Туре	Size		
Desktop	adding	03/05/2018 10:54	File folder			
Downloads	Addies OLD		File folder			
Removable Disk (F)	ClarionComponentsSAM4	11/05/2018 09:37	File folder			
S Recent places	🎍 de	11/05/2018 09:37	File folder			
	DeploymentScripts	11/05/2018 09:37	File folder			
🐺 This PC	🎍 Design	11/05/2018 09:37	File folder			
📜 Desktop	🍑 en	11/05/2018 09:37	File folder			
Documents	🌲 es	11/05/2018 09:37	File folder			
Downloads	🍑 fr	11/05/2018 09:37	File folder			
Music	🍶 Images	11/05/2018 09:37	File folder			
Fictures	👗 R	11/05/2018 09:37	File folder			
Videos	🍑 ja	11/05/2018 09:37	File folder			
Local Disk (C:)	khframework_5.4.5.1014	27/10/2016 17:05	File folder			
RECOVERY (D:)	🍶 ko	11/05/2018 09:37	File folder			
Pevelopment (\\KHDATA2) (H:)	🍶 LabelTemplates	11/05/2018 09:37	File folder			
R NTUsers (\\KHDATA2) (N:)	🍑 Reindexer	11/05/2018 09:37	File folder			
😪 Keyhouse Training (\\BRENDA-HP) (T:)	🍶 ReportsCR	01/12/2016 12:44	File folder			
	鷆 ReportsExport	02/11/2016 10:22	File folder			
🗣 Network	🌲 ru	11/05/2018 09:37	File folder			
	WinDerPrograms	11/05/2018 09:37	File folder			
488 items 1 item selected						822

5. Open the Keyhouse Framework Folder and double click on Addins.

■ 2 ■ つぐ・				
File Home Share View				^
Copy Paste Copy Copy coth Copy	Deter Rename New Tabler	Copen Content Select all Select all Select all Select none History Open Select		
(e) (i) ≠ ↑ (i) > This PC > Local Disk (C)	:) > Keyhouse Training > keyhouse > Manual	I → khframework → addins	v 🖒 Search addins	Q,
	Name I Holdbardsghochsice I GodD'Starch Othice Othice Challow	Dete modified Type 11/05/2018 09:37 File folder 11/05/2018 09:37 File folder 11/05/2018 09:37 File folder 11/05/2018 09:37 File folder 05/01/2018 09:45 Windows Installer 05/01/2018 09:45 Windows Installer		
Local Disk (C) Local Disk (C) Development (UM-DATA2) (H) Charles (UM-DATA2) (H) Charles (UM-DATA2) (N) Charles (UM-DATA2) (N) Network Filters				

6. Open the Outlook Folder

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File Home Share Vi	ew								^ 6
Copy Paste Cut Baste Copy path	Mave Copy to *	Delete Rename	New item * New Casy access * New folder	Properties	Select all	ion			
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🚖 Favourites		Name	<u>^</u>	Date mod	ified Type		Size		
Eventes Downloads Removable Disk (F) Recent places This PC		👹 Keyhouse Ci	ise Outlook Integration.msi	15/05/201	8 13:38 Wind	ows installer	14,963 K	8	
Lesktop									
Documents									
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😪 NTUsers (\\KHDATA2) (N:) 😪 Keyhouse Training (\\BREN	DA-HP) (T:)								
👊 Network									
1 item									

- 7. Double click on the Keyhouse Case Outlook Integration.msi and follow the instructions given.
- 8. Once finished, open Outlook.
- 9. Check that the Assign to Case button is working.
- 10. If there is an issue close Outlook and go back to Windows Explorer and go to the C:\\ Drive (Windows (C:)

11. Select Program Files (x86)

🏯 I 📴 🛱 つ ペット								
File Home Share View								^ 🕑
Copy Paste Paste shortcut	Delete Rename	New item *	Properties	Select all Select none				
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🔆 Favourites	Name	*	Date modified	Туре	Size			^
E Desktop	🗼 CR10DevEn		24/10/2016 12:27	File folder				
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3 Recent places		f762c36e30d71c5	21/10/2016 16:49	File folder				
_	🎍 EFTBank		08/11/2017 17:42	File folder				
r This PC	🌲 inetpub		25/10/2016 10:30	File folder				
陆 Desktop	🌲 Intel		04/05/2015 13:13	File folder				
Documents	🎍 Keyhouse Tr		16/02/2018 12:36	File folder				
Downloads	KeyhousePT		12/01/2018 14:59	File folder				
Wusic 1	🌲 keytmp		03/04/2018 15:48	File folder				
Pictures	PerfLogs		22/08/2013 16:22	File folder				
Videos	鷆 Program File		08/02/2017 22:35	File folder				
Local Disk (C:)	🎉 Program File		15/05/2018 14:04	File folder				
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Pevelopment (\\KHDATA2) (Ht)	SQLEXPRAD	V_x64_ENU	07/11/2017 16:10	File folder				
R NTUsers (\\KHDATA2) (N:)	🍶 SWSetup		04/05/2015 23:06	File folder				_
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	TEMP		27/07/2017 14:32	File folder				
🙀 Network	🌲 Users		07/11/2017 16:25	File folder				
	Windows		22/03/2018 08:53	File folder				~
48 items 1 item selected								(811 Kal

12. Go to Keyhouse Computing Ltd and double click.

1 B B P C - 1							
File Home Share View							~ E
Copy Parts Copy P	Delete Rename New Tolder	Properties Corn	Select all Select none				
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👉 Enquites	Name	Oate modified	Type	Size			
Desktop	Cisco Systems	24/10/2016 11:53	File folder				
Desktop	Citra	11/07/2017 09-48	File folder				
Removable Disk (F)	Common Files	10/09/2017 08:59	File folder				
St. Recent places	Crystal Decisions	24/10/2016 12:28	File folder				
31 Recent places	Cyberlink	04/05/2015 13-38	File folder				
This PC	A Drepbox	12/11/2014 01:09	File folder				
Desktop	Le Evernote	04/05/2015 12:19	File folder				
Documents	a Google	24/10/2016 19:30	File folder				
Downloads	L Hewlett-Packard	04/05/2015 13:41	File folder				- 1
10 Music	🛓 HP	21/09/2017 17:11	File folder				
A Pictures	InstallShield Installation Information	19/05/2017 09:55	File folder				
H Videos	🗼 Intel	04/05/2015 12:03	File folder				
Local Disk (Ci)	🎍 Internet Explorer	10/05/2018 12:29	File folder				
RECOVERY (Dr)	🗼 Keyhouse Computing Ltd	15/05/2018 14:05	File folder				
Development (\\KHDATA2) (H)	MCT Corp	19/06/2017 09:55	File folder				
NTUsers (\\KHDATA2) (N)	Microsoft Analysis Services	24/10/2016 11:37	File folder				
Keyhouse Training (\\8RENDA-HP) (T:)	Microsoft ASP.NET	12/02/2018 09:59	File folder				
	Alicrosoft Office	14/05/2018 08:50	File tolder				
Network	📕 Microsoft OneDrive	21/10/2016 16:51	File folder				
10112101010	Microsoft SDKs	24/10/2016 11:31	File folder				
55 items 1 item selected							1000 = 1

13. Go to Keyhouse Case Outlook Integration

📓 📑 🖥 ໆ ຕ 🖌	Keyhouse Computing Ltd	- 🗆 💌
File Home Share View		^ (B)
Copy Paste shortout Cloboard	Correct Rename Nev Casy access Nev Casy access Nev Casy Correct Casy Correct Correcorrect Correct Correct Correct	
	Program Files (x85) > Keyhouse Computing Ltd	✓ C Search Keyhouse Computing ,P
 ☆ Favourites ■ Desktop ● Downloads ■ Removable Disk (F) 	Name Keyhouse Case Documents integration for Office 2010 or later Keyhouse Case Dutlook Integration	Date modified Type Size 15/05/2018 14.04 File folder 15/05/2018 14.05 File folder
🐮 Recent places 🗯 This PC 🙀 Desitop		
Documents Downloads Music Pictures		
Videos Local Disk (C) RECOVERY (D)		
Recorder (b) Development (\kHDATA2) (H) Q NTUsers (\kHDATA2) (N) Q Keyhouse Training (\BRENDA-HP) (T:)		
🗣 Network		
2 items 1 item selected	¢	

14. Locate the Install.bat file and double click.

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File Home Share View					^
iopy Paste Paste shortout	py Delete Rename New folder	ss • Properties	Select all Select none		
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🖻 💮 👻 🕆 🍑 > This PC → Local Disk	: (C:) > Program Files (x85) > Keyhouse Co	mputing Ltd > Keyhouse Cas	e Outlook Integration	v	Search Keyhouse Case Outloo ,P
👉 Excourites	Name	Date modified	Type	Size	
Desktop	AddinExpress.MSO.2005.dll	09/04/2018 14:31	Application extens	4,148 KB	
Downloads	AddinExpress.OL.2005.dll	09/04/2018 14:31	Application extens	2.061 KB	
Bemovable Disk (F)	advicader.dll	18/04/2018 15:40	Application extens	605 KR	
St. Recent places	advloader.dll.manifest	30/06/2016 15:03	MANIFEST File	1 KB	
_	advloader64.dll	18/04/2018 15:40	Application extens	714 KB	
S This PC	adsregistrator.ese	09/04/2018 13:29	Application	164 KB	
E Desktop	ApptOutNET.exe	18/04/2018 17:38	Application	35 KB	
Documents	ApptOutNET.exe.config	31/01/2018 11:01	CONFIG File	2 KB	
bownloads	BitMiracle.LibTiffKH.NET.dll	01/04/2014 15:58	Application extens	587 KB	
Music	ComponentLogon.dll	18/04/2018 15:23	Application extens	27 KB	
Pictures	🔿 dten600.dll	10/03/2015 18:27	Application extens	5,880 KB	
Videos	dtSearchNetApi4_kh.dll	21/04/2015 14:16	Application extens	582 KB	
Local Disk (C:)	🚳 Install.bat	17/05/2017 10:51	Windows Batch File	1 KB	
RECOVERY (D:)	Interop.dtengine.dll	18/04/2018 17:38	Application extens	59 KB	
Pevelopment (\\KHDATA2) (Ht)	Interop.OyezFrms.dll	30/01/2018 20:54	Application extens	14 KB	
R NTUsers (\\KHDATA2) (Nz)	Interop.Redemption.dll	08/10/2013 15:16	Application extens	1,053 KB	
😪 Keyhouse Training (\\BRENDA-HP) (T:)	KeyhouseData.dll	18/04/2018 15:18	Application extens	74 KB	
	🗟 KeyhouseOutlookAddin.dll	18/04/2018 17:38	Application extens	2,605 KB	
🙀 Network	KHButtons.dll	30/01/2018 20:44	Application extens	33 KB	
	KHClientContactMaintenance.dll	18/04/2018 15:29	Application extens	224 KB	

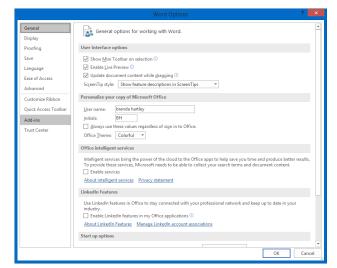
- 15. This opens a black window which will close itself.
- 16. Return to Outlook and check again.
- 17. If still unable to use the Add-in, contact Keyhouse Support.

Appendix 2

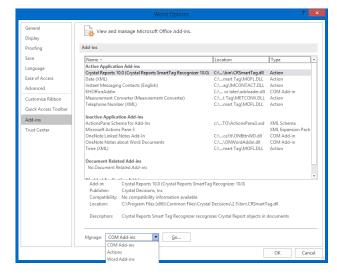
Enabling Add-Ins in Outlook

Occasionally the Keyhouse Add-In is disabled and needs to be enabled to allow emails to be assigned to Keyhouse.

1. In Outlook, go to the File Tab and select Options

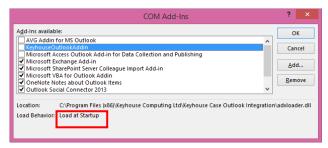


2. Select the Add-Ins option



- 3. At the bottom of the Screen, click on the down arrow beside Manage and select Disabled Items. Click Go.
- 4. Select the Keyhouse Add-In and click Enable.
- 5. If the Add-In is still not working, go to File and select Add-Ins.

6. Click Go beside Manage COM Add-ins.



- 7. Tick the box to the left of KeyhouseOutlookAddin and click OK.
- 8. Close Outlook and reopen.
- 9. If the problem persists repeat step 5 and 6.
- 10. If Load Behaviour says Unloaded, please email support@keyhouse.assist.com

Appendix 3

Updating the Word Add-In

Before you install the Word Add-In, the old one has to be removed.

- 1. Close all MS Programs open on the system (e.g. Word, Excel, PowerPoint).
- 2. Go to the Control Panel and go to Programs and Features.
- 3. Allow the program details to load.
- 4. Scroll and find Keyhouse Case Documents integration for Office 2007+ or Keyhouse Case Document integration for Office 2010 or later.

🔄 🌛 👻 🕆 🤖 Control 🛙	Panel → All Control Panel Items → Programs and Features					V C 3	Search Programs and Features	s)
Control Panel Home	Uninstall or change a program							
10 1 1 1 1 1 1 1 1	0 1 0							
View installed updates	To uninstall a program, select it from the list and then click Uninstall, C	hange or Repair.						
Turn Windows features on or off								
	Organise 🔻						≡ ▼	
	Name	Publisher	Installed On	Size	Version			
	Driver & Utility	Philips Speech Processing - Dict	19/01/2017	7.80 MB	2.3			
	Dropbox 25 GB	Dropbox, Inc.	12/11/2014	2.77 MB	0.9.0			
	Energy Star	Hewlett-Packard Company	04/05/2015	3.39 MB	1.0.9			
	Evernote v. 5.5.3	Evernote Corp.	04/05/2015	217 MB	5.5.3.4236			
	💿 Google Chrome	Google Inc.	24/10/2016		66.0.3359.170			
	GoTo Opener	LogMeln, Inc.	08/11/2017	276 KB	1.0.470			
	GoToAssist Expert 4.4.0.1599	LogMein, Inc.	15/05/2018		4.4.0.1599			
	CPL Ghostscript Lite 8.70		25/10/2016	12.8 MB				
	GPL Ghostscript Lite 9.14.17	Free Distribution	25/10/2016	28.9 MB				
	HP 3D DriveGuard	Hewlett-Packard Company	04/05/2015	1.63 MB	6.0.19.1			
	HP CoolSense	Hewlett-Packard Company	12/11/2014	10.9 MB	2.20.41			
	W HP Documentation	Hewlett-Packard	04/05/2015	294 MB	1.1.0.0			
	HP Registration Service	Hewlett-Packard	04/05/2015	30.1 MB	1.2.7745.4851			
	📴 HP SimplePass	Hewlett-Packard	12/11/2014	36.8 MB	8.01.11			
	HP Support Assistant	Hewlett-Packard Company	12/11/2014	64.9 MB	7.6.31.30			
	4 HP System Event Utility	Hewlett-Packard Company	12/11/2014	8.20 MB	1.2.9			
	4 HP Wireless Button Driver	Hewlett-Packard Company	04/05/2015	765 KB	1.1.2.1			
	😹 Intel(R) Management Engine Components	Intel Corporation	04/05/2015		10.0.28.1006			
	🞯 Intel(R) Update Manager	Intel Corporation	04/05/2015	25.7 MB	2.4.3			
	Intel [®] Graphics Driver	Intel Corporation	18/10/2016	74.2 MB	10.18.10.3960			
	🐼 Intel® Rapid Storage Technology	Intel Corporation	04/05/2015		13.2.0.1016			
	(iii) Keyhouse Case Documents integration for Office 2010 or later	Keyhouse Computing Ltd	15/05/2018	21.9 MB	5.5.3.22			
	Keyhouse Case Outlook Integration	Keyhouse Computing Ltd	15/05/2018	35.2 MB	5.5.3.11			
	Keyhouse OCX Install		19/01/2017					
	Microsoft .NET Framework 4 Multi-Targeting Pack	Microsoft Corporation	24/10/2016	83.4 MB	4.0.30319			
	Microsoft ASP.NET MVC 2	Microsoft Corporation	12/02/2018	850 KB	2.0.60926.0			
	Microsoft ASP.NET MVC 4 Runtime	Microsoft Corporation	24/10/2016	2.93 MB	4.0.40804.0			
	Microsoft Help Viewer 1.1	Microsoft Corporation	24/10/2016	3.97 MB	1.1.40219			
	Microsoft ODBC Driver 11 for SQL Server	Microsoft Corporation	21/09/2017	4.62 MB	12.2.5000.0			
	Microsoft ODBC Driver 13 for SQL Server	Microsoft Corporation	07/11/2017	8.31 MB	13.1.4001.0			
	Microsoft Office 365 - en-us	Microsoft Corporation	14/05/2018		16.0.9226.2126			
	Microsoft Office Access database engine 2007 (English)	Microsoft Corporation	14/02/2018	224 MB	12.0.6612.1000			
	Campa Microsoft OneDrive	Microsoft Corporation	01/05/2018	100 MB	18.065.0329.0002			

- 5. Click Uninstall and follow the instructions given. If you do not have permission to delete the program, contact your System Administrator to install the add in.
- 6. Once the Add-In has been uninstalled, close the Control Panel.
- 7. Go to Windows Explorer and go to the Keyhouse Mapped Drive. Below is an example of a mapped drive.

🔁 🖥 つ ペ +			khframework					×
File Home Share View								^ (
Copy path Paste shortcut	Delete Rename	New item *	Properties	Select all Select none				
Clipboard Org	anise	New	Open	Select				
🖻 🐵 👻 🕆 🕌 > This PC > Local Disk (Ci)	> Keyhouse Trainin	g > keyhouse > Man	ual > khframework			v ĉ	Search khframework	,p
* Fevourites	Name	*	Date modified	Туре	Size			
E Desktop	🎍 addins		03/05/2018 10:54	File folder				
Downloads	Addins OLD		25/10/2016 10:03	File folder				
Removable Disk (F)	ClarionComport	ientsSAM4	11/05/2018 09:37	File folder				
35 Recent places	🎍 de		11/05/2018 09:37	File folder				
	DeploymentScr	ipts	11/05/2018 09:37	File folder				
1 This PC	🎍 Design		11/05/2018 09:37	File folder				
🕌 Desktop	🌲 en		11/05/2018 09:37	File folder				
Documents	🍌 e		11/05/2018 09:37	File folder				
Downloads	🌲 fr		11/05/2018 09:37	File folder				
Music	🍌 Images		11/05/2018 09:37	File folder				
🕌 Pictures	🍓 R		11/05/2018 09:37	File folder				
🕌 Videos	🍶 ja		11/05/2018 09:37	File folder				
Local Disk (C:)	🌡 khframework_S	.4.5.1014	27/10/2016 17:05	File folder				
Ca RECOVERY (D:)	🌲 ko		11/05/2018 09:37	File folder				
Pevelopment (\\KHDATA2) (H:)	🎉 LabelTemplates		11/05/2018 09:37	File folder				
R NTUsers (\\KHDATA2) (Nt)	🌲 Reindexer		11/05/2018 09:37	File folder				
Reyhouse Training (\\BRENDA-HP) (T:)	ReportsCR		01/12/2016 12:44	File folder				
-	🎉 ReportsExport		02/11/2016 10:22	File folder				
🗣 Network	🔔 ru		11/05/2018 09:37	File folder				
	WinDevProgram	ns	11/05/2018 09:37	File folder				

8. Open the Keyhouse Framework Folder and double click on Addins.

ຍເ ⊵ ∎ກຕະເ				addins				- D ×
File Home Share View								^ 6
Paste shortcut	Mare Copy	Delete Rename	folder	Properties	Select all Select none			
Clipboard	Org	anise	New	Open	Select			
(e) → ↑ → This PC →	Local Disk (C:)	Keyhouse Trail	ning > keyhouse > Manu	al > khframework > i	addins	~	🖒 Search addins	q,
🚖 Fevourites		Name	<u>^</u>	Date modified	Type	Size		
Desktop		FileSharingSy	metanica	11/05/2018 09:37	File folder			
Downloads		LocalDTSean		11/05/2018 09:37	File folder			
Removable Disk (F)		Office		11/05/2018 09:37	File folder			
S Recent places		Outlook		11/05/2018 09:37	File folder			
			se Documents integration f.		Windows Installer	7.309 KB		
🎘 This PC			se Outlook Integration.msi	05/03/2018 09:45	Windows Installer	14.309 KB		
Desktop Documents Downloads Music Pictures Videos Local Disk (C)								
LOCAL DISK (C) RECOVERY (D) Development (\\KHDATA2) (I NTUsers (\\KHDATA2) (IX) Keyhouse Training (\\BREND								
🗣 Network								
6 items								(100)

9. Open the Office Folder

1 🖸 🖬 🤊 ୯ 🖬 👘						
File Home Share Vi	iew					^
Copy Paste Copy Copy path Paste Paste shortcut Clipboard	More Copy to * Copy Organise	New Item • New Tolder	Properties Open	Select all Select none		
	> Local Disk (C:) > Keyhouse Tra	ining > keyhouse > Man		addins > Office	✓ ♂ Search Office	Q.
* Envourites	Name	· ·		Date modified	Type Size	
Desktop Downloads Removable Disk (F) Recent places	👹 Keyhouse C	ase Documents integration 1	for Office 2010 or later.ms	ai 15/05/2018 13:38	Windows Installer 8,665 KB	
This PC						
Downloads						
Pictures						
Local Disk (C:) RECOVERY (D:) Development (\\KHDATA2)	(04)					
NTUsers (\\KHDATA2) (N:) Keyhouse Training (\\BREN						
🗣 Network						
litem						100

- 10. Double Click on the file and follow the prompts.
- 11. Once finished, open MS Word.
- 12. Check that the Save to Case is working.