

Keyhouse MS Office Add In Modules System Overview



KEYHOUSE OUTLOOK EMAIL MODULE SYSTEM OVERVIEW	2
CHAPTER 1: USING THE KEYHOUSE OUTLOOK EMAIL MODULE	2
OVERVIEW	2
BEFORE YOU START	2
ASSIGNING EXISTING E-MAIL TO CASE	4
ASSIGNING AN E-MAIL ATTACHMENT	8
SENDING NEW E-MAILS FROM OUTLOOK	10
SAVE SENT EMAIL OPTIONS	13
SENDING A NEW E-MAIL FROM KEYHOUSE VIA OUTLOOK	15
SEND A GENERATED LETTER IN AN EMAIL	16
CASE DIARY VIEW	17
ADD AN CONTACT THROUGH OUTLOOK	18
ASSOCIATE THROUGH OUTLOOK	19
CHAPTER 2: USING WORD ADD-IN	23
CREATE A DOCUMENT USING WORD	23
ADD TRACKING AND VERSION NUMBERS TO DOCUMENT	24
OPENING AND EDITING A DOCUMENT FROM KEYHOUSE IN MS WORD (VERSION CONTROL)	25
WORKING WITH INCOMING DRAFTS.	28
COMPARING 2 SEPARATE DOCUMENTS IN THE DOCUMENT MANAGER	29
COMPARING 2 DOCUMENTS WITH TRACK CHANGES (VERSIONS PRIOR TO 5.7.1.1)	30
USING 'SAVE AS' THROUGH KEYHOUSE	31
APPENDIX 1	32
UPDATING THE OUTLOOK ADD-IN	32
APPENDIX 2	35
ENABLING ADD-INS IN OUTLOOK	35
APPENDIX 3	37
UPDATING THE WORD ADD-IN	37

Keyhouse Outlook Email Module System Overview

Chapter 1: Using the Keyhouse Outlook Email Module

Overview

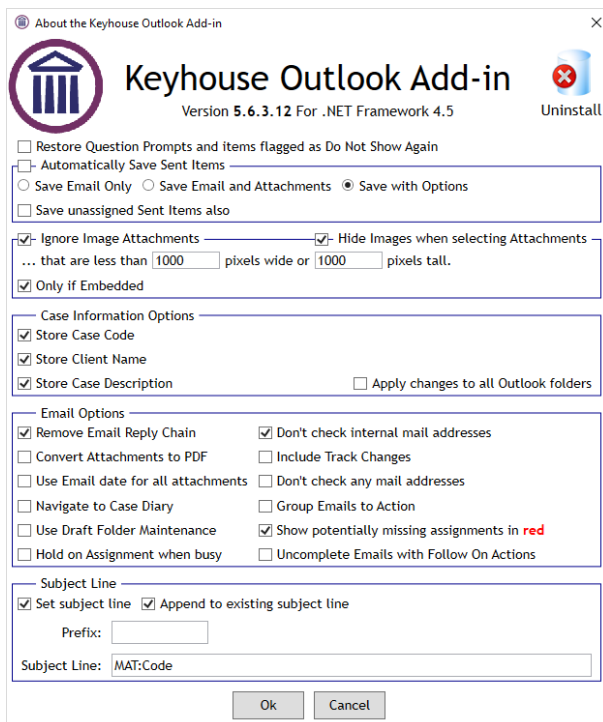
The Keyhouse Outlook Module is designed to allow users to manage their emails, both incoming and outgoing for all cases from within Outlook.

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 corresponds 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.



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 Save With Options 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.

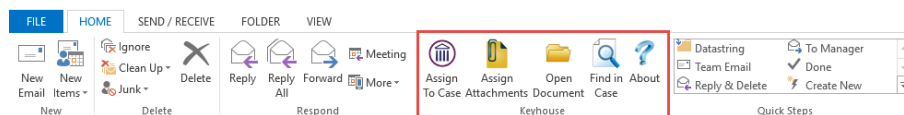
Don't check any mail address:	Not recommended – it will allow emails to be sent without checking they are for an addressee associated with the case.
Group Emails to Action:	When using a precedent email with an attachment, it will keep the email and the attachment in the same action.
Show potentially 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.
Uncomplete Emails with Follow On Actions	When an email is part of a workflow and there are follow on actions, ticking this box will ensure the emails is not marked as complete when it is sent.

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.
Prefix:	A standard Prefix could be set e.g. Your company name. This will appear at the start of the Subject Line in the email.
Subject Line	The standard fields for this are as follows although other fields may be used. MAT:Code – Will include the Matter Code CNT:Name – Will include the Client Name MAT:Description – Will include the matter description

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.



Takes you to the search screen in Keyhouse to find a matter and open a document without leaving Outlook.

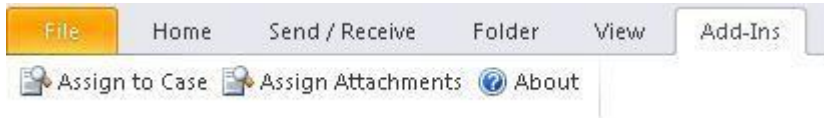


Takes you directly to the case file in Keyhouse when the email has been assigned to a case.

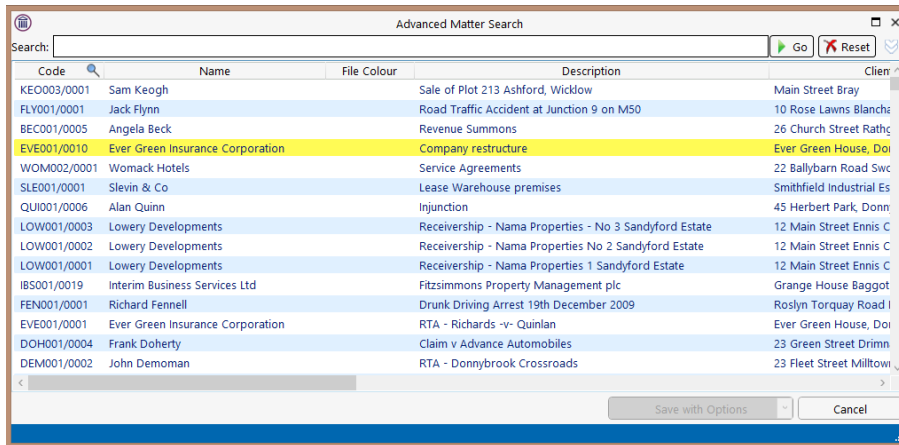


Allow you to change your setting and also displays the Keyhouse version.

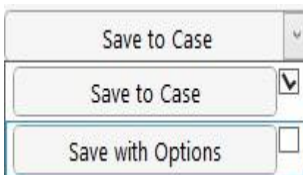
Other earlier Outlook versions will have an Add-Ins tab. In these versions the Assign buttons will be listed in this tab.



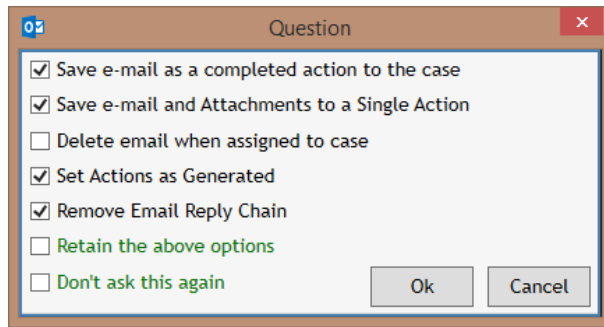
- From your Inbox, highlight the mail you wish to assign - you can hold the Ctrl key down if you are assigning more than one mail to the same matter.
- Click on the 'Assign to Case' or 'Assign Attachments' buttons and your Recent Matter list will open, as below:



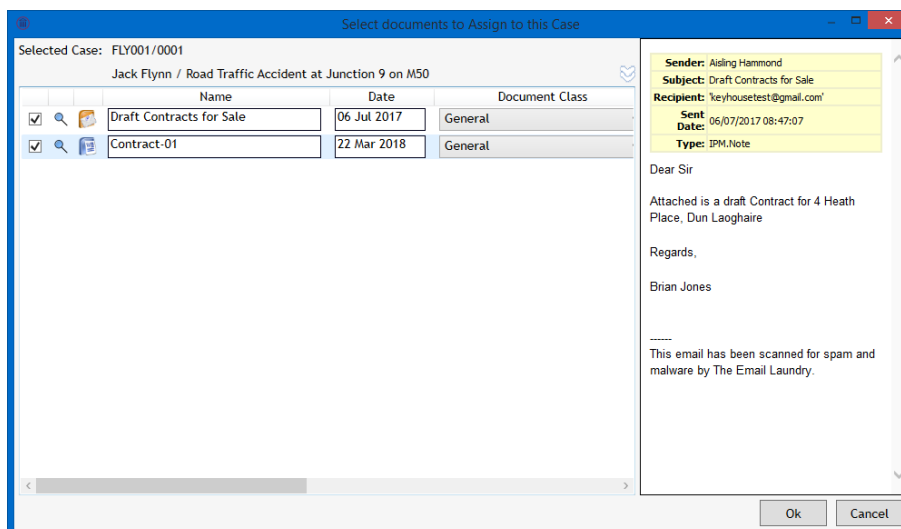
- If the Matter is not listed in your recent matter list, click into the Search box and enter the case name or code and click Go.
- Select the case you wish to assign the email into.
- At this point you can Save to Case or Save with Option by click on the down arrow beside Save to Case



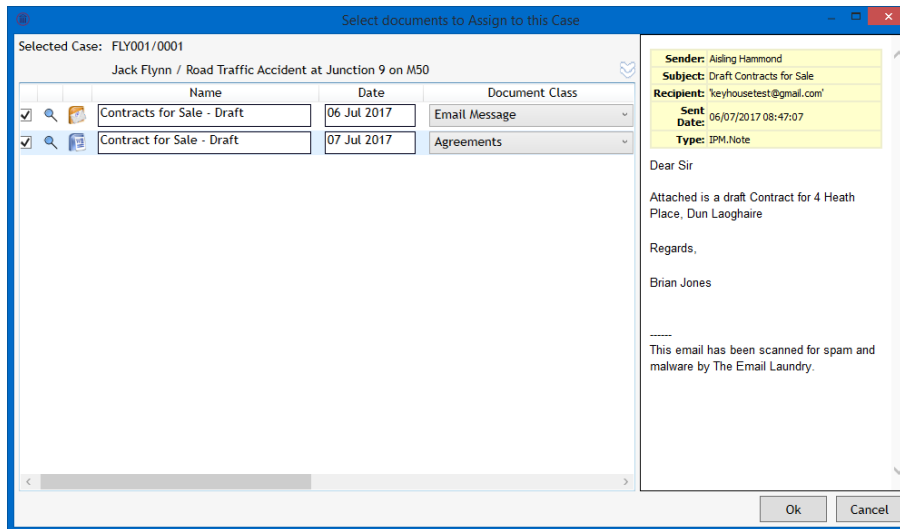
7. If the Save to Case option is selected, the following dialog box will appear giving you several options:



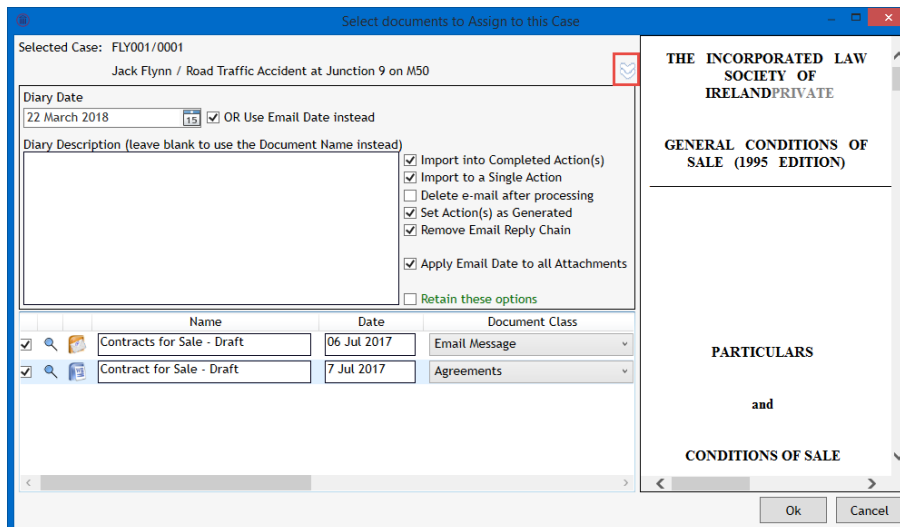
- Save e-mail as a completed action to the case* – the mail will save as a completed action in the selected Case Diary; if deselect, the mail will save as an uncompleted action on your Case Diary/Task List. If ticked it will override the option to *Set Action as Generated*.
 - Save e-mail and Attachment 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.
 - 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.
 - Set Actions as Generated* – the email will come in as an action to be completed at a future date.
 - 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.
 - Retain the above options* – the system will save the above options for all future e-mails.
 - 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.
 - 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. If the document name or the classification are incorrect, change them by typing into the boxes.



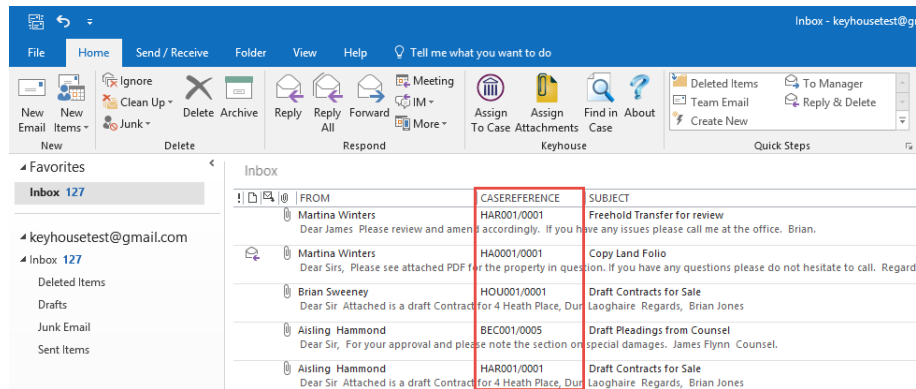
10. By clicking on the Double Arrow, the Save to Case options are available.



- a. Diary Description – Adding a diary description makes searching for emails easier in Keyhouse. The diary description could reflect the sender/receiver and the subject line e.g. Email from James Kelly with Lease Agreement.
- b. *Import into Completed Action(s)* – the attachment will save as a completed action in the selected Case Diary; if deselected, 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*.
- c. *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.
- d. *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.
- e. *Set Actions as Generated* – the email will come in as an action to be completed at a future date.
- f. *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. Occasionally it may be necessary to save in the chain of an email. Untick the box to save the chain for this email only.

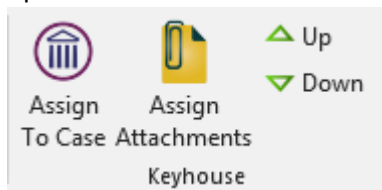
- g. Apply Email Date to all Attachments – this will put the email date on all documents.
- h. Retain the above options – the system will save the above options for all future emails.

11. Once the e-mail is attached, it is possible to see the Case Reference in your Outlook by setting your Field Headings.



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.



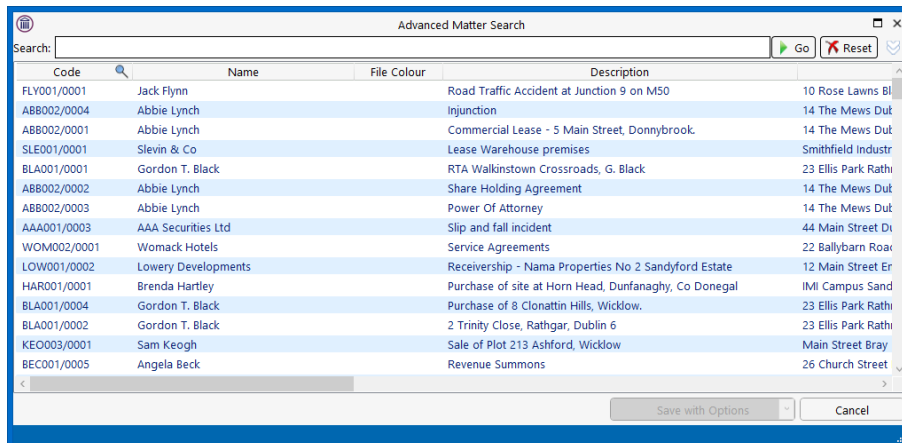
The Assign to Attachment button will be used to assign the attachment to the case without attaching the e-mail



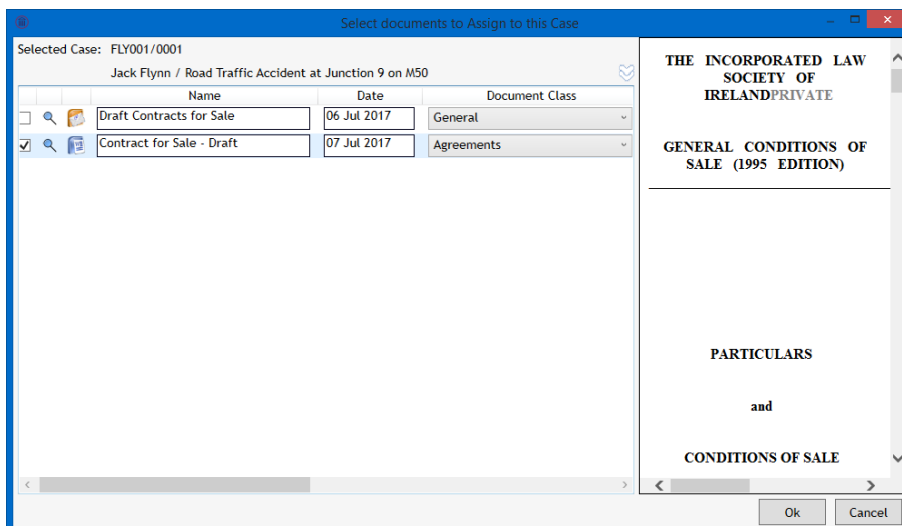
The Up and Down buttons will allow you to move through the chain of emails. You can then attach any document attached to e-mails without attaching the emails.

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.

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



- 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.
- Select the case you wish to assign the email to.
- The following screen will appear, giving you several options.

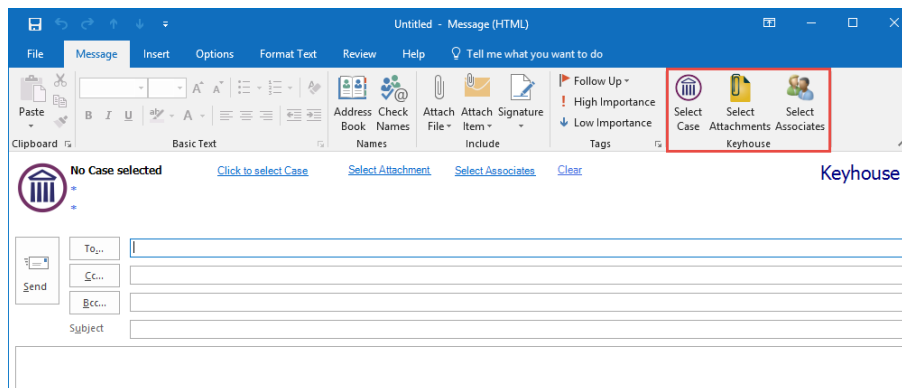


- As we chose to only assign the attachment, the email is not ticked. If you need to assign the email, tick the box. Rename and classify the attachments here.

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.



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



Select Case

Select the case that the email is associated with.



Select Attachment

Allows you to select a case attachment(s) to be sent with the mail



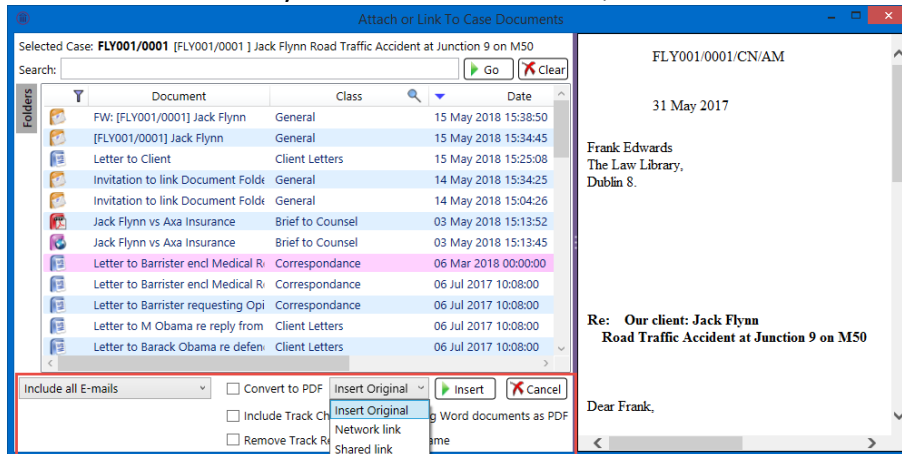
Select Associates

Lists the email addresses of the current client & case associates.

3. Open a new mail in Outlook.
4. 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.



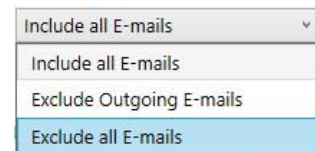
- To attach a Case Diary Document to the email, click the 'Select Attachment' button



- 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

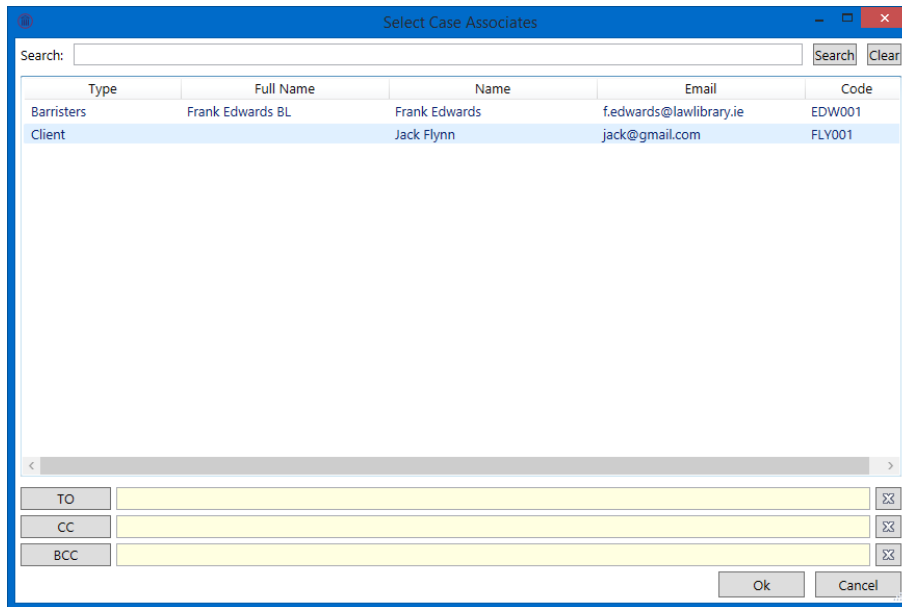
- It is also possible to search for a word or words in a document. A preview of the document will appear on the right side of the screen.
- You can choose to search specific types of files, by right clicking over the Type column and choosing a type listed, e.g. Word Document.
- Documents can be converted to PDF by ticking the Convert to PDF box before clicking on Insert.
- 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.
- 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




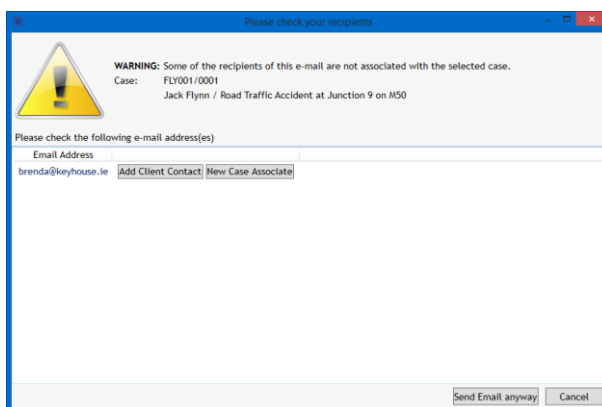
NOTE: If you have more than one document to attach, then hold the Ctrl key down and select the desired documents. To attach a document but not a case document, use the standard Outlook insert file options.

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

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



- Highlight the associate you wish to email and click on To/Cc/Bcc and ok when all names added.
- To remove email addresses from the To/Cc/Bcc fields click on the  button.
- Click OK to return to the email with the selected addresses or click Cancel to return to the email without any selected addresses.
- Please note: these email addresses must be previously entered against each client and/or case associate.
- 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.
- 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

24. Add the relevant information and click OK. The email will send automatically
25. See [Add an Associate through Outlook](#) 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.

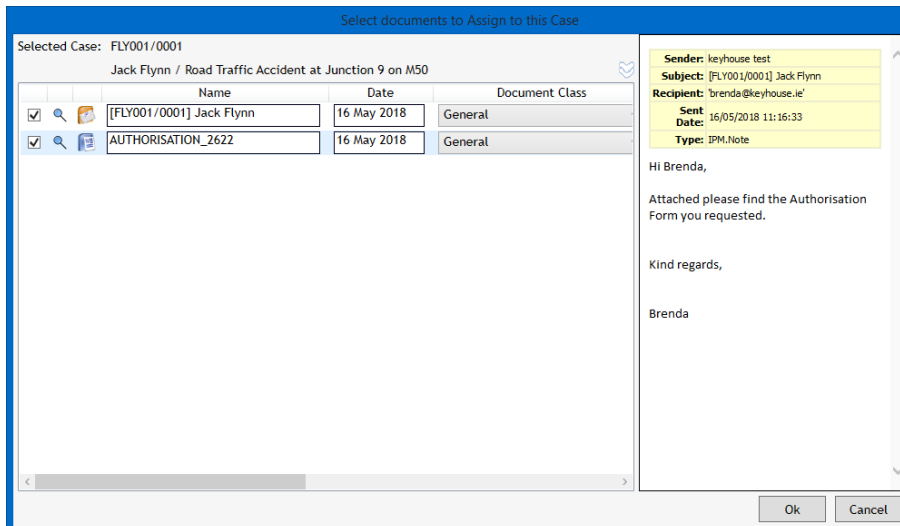
Save Email and Attachments

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.

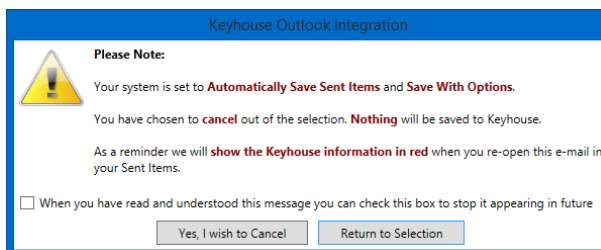
Save with Options

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

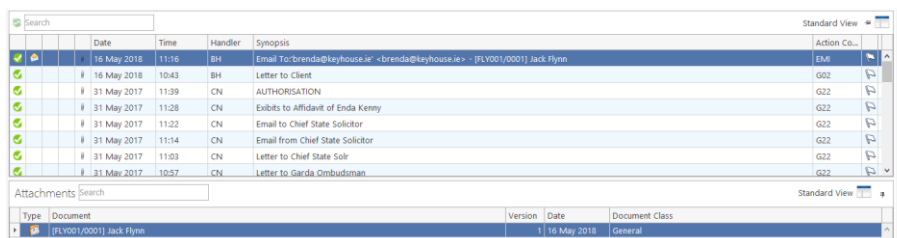
1. Once the email is sent the following dialog box appears.

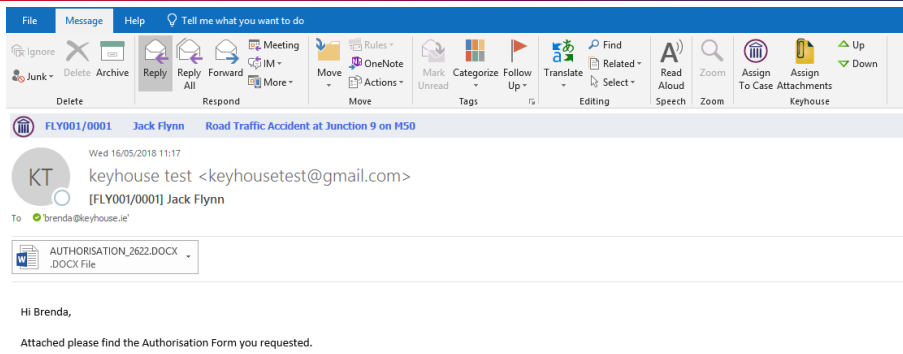


2. To prevent the duplication of the attachment, untick the box to the left of the document name.
3. Click OK to save to the case.
4. If the user clicks cancel, the following dialog box appears



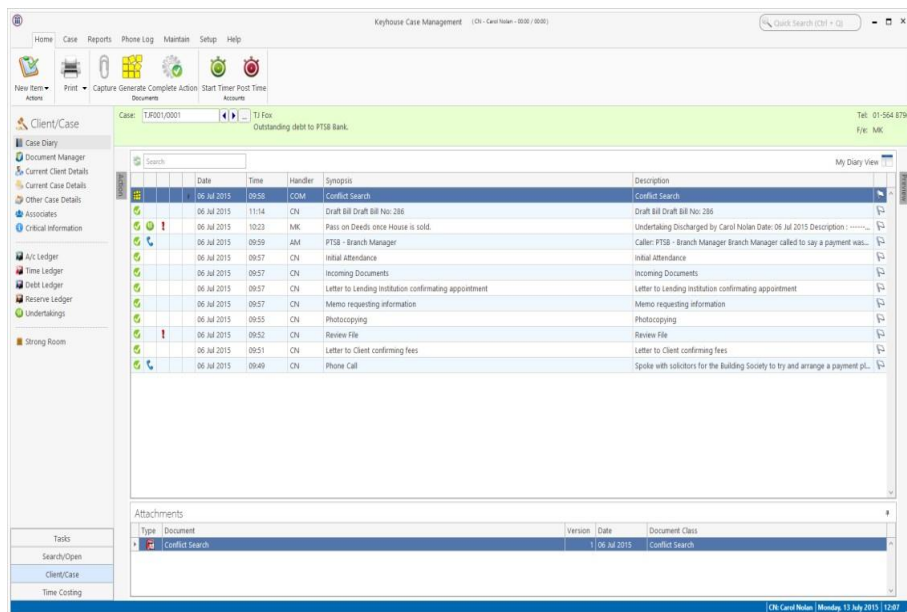
5. If the user clicks Yes, I wish to Cancel, the email will not be assigned to the case. If Return to Selection is click, the user is returned to the screen in Step 1.
6. To check if an attachment was sent with an email, open the email in Keyhouse



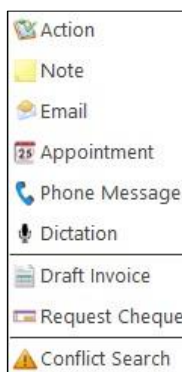


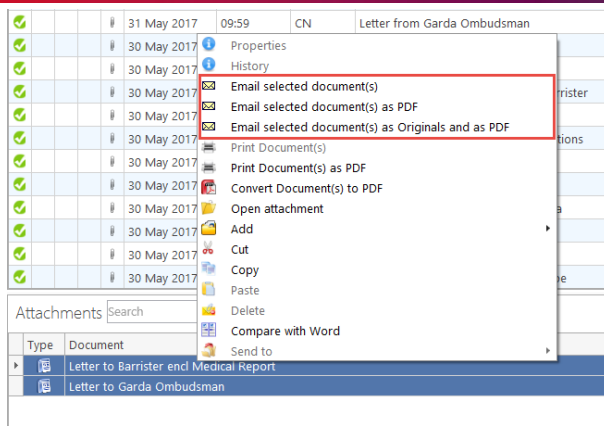
Sending a new E-mail from Keyhouse via Outlook

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



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





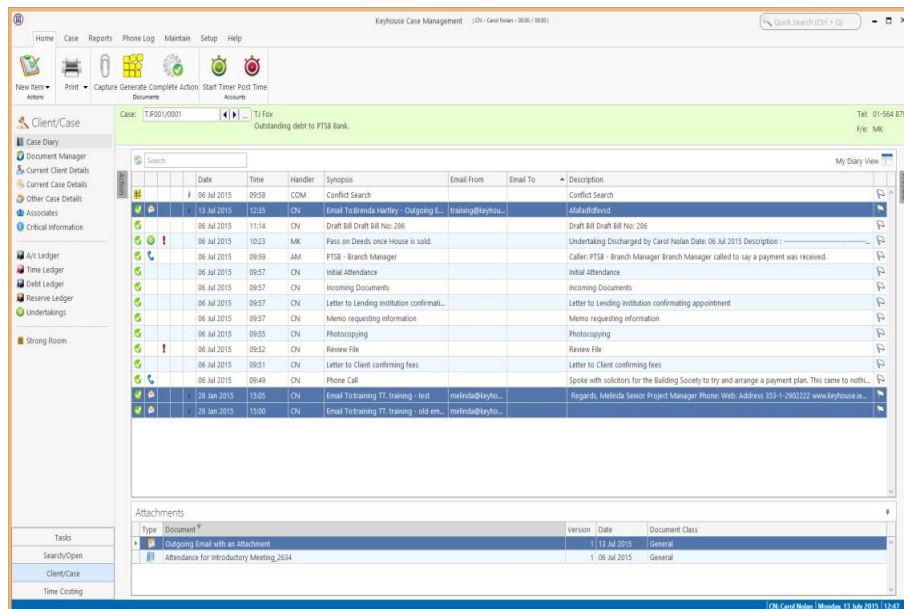
5. Complete the email and send.

NOTE: If the option is sent to always convert to PDF when sending attachments, there will only be the option to Email selected documents.

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.

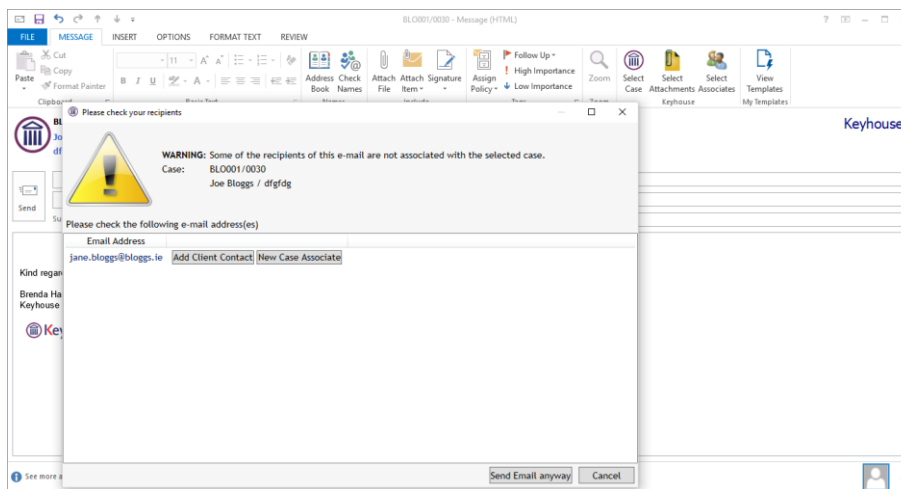


Alternatively, using the View Button, change the view to see Emails. This will filter the case diary so only email are visible.

		Date	Time	Handler	Description	Action Title	Action Co...	Work Flow	Match
✓		28 May 2018	12:52	SKE	Gerry Can I please have a copy of the lea...	Email	EMI	System Actions	
✓		28 May 2018	12:49	GMU	Gerry, I will contact you next week with an...	Email	EMI	System Actions	
✓		25 May 2018	17:07	MW	From: Gerry Murray Sent: Friday 25 May...	Email	EMI	System Actions	
✓		25 May 2018	17:00	GMU	Dear Gerry, Attached please find a copy o...	Email	EMI	System Actions	

Add an Contact through Outlook

As all the email address for your client may not have been added to the matter, when you try to send an email a warning message may appear.



1. Click Add Client Contact.
2. Enter the details on the screen e.g. name and email address and click OK.

3. The details will be added to the matter and there will be no further warnings when sending email to this recipient.

- The details will be visible on the Client Contacts tab on the Current Client Details in the matter.

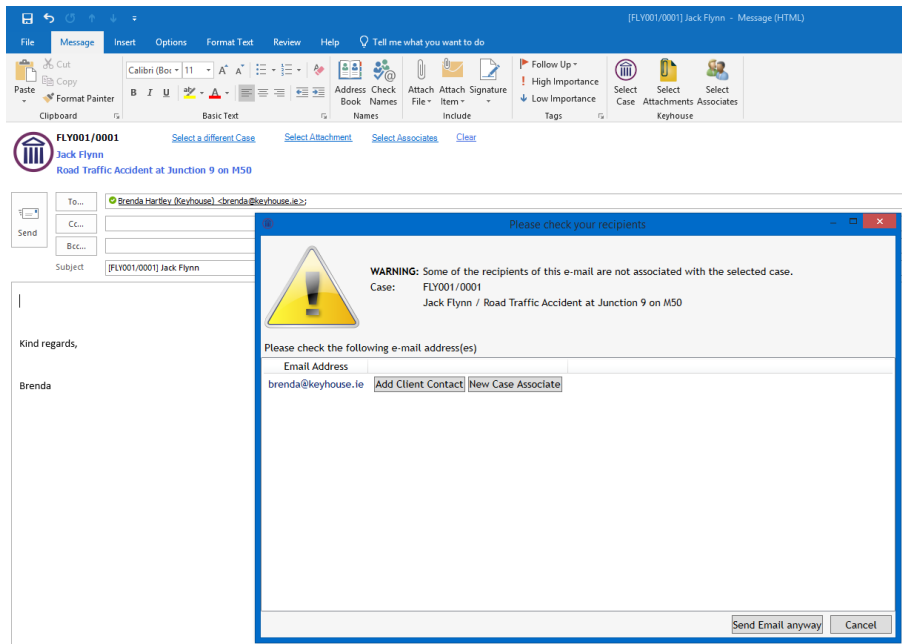
Initials	Full Name	Email Address	Occupation	First Name	Surname
TB	Tom Bloggs	tom.bloggs@bloggs.ie		Tom	Bloggs ^
	James Bloggs	james.bloggs@bloggs.ie		John James	Bloggs
	Jane Bloggs	jane.bloggs@bloggs.ie		Jane	Bloggs

Associate through Outlook

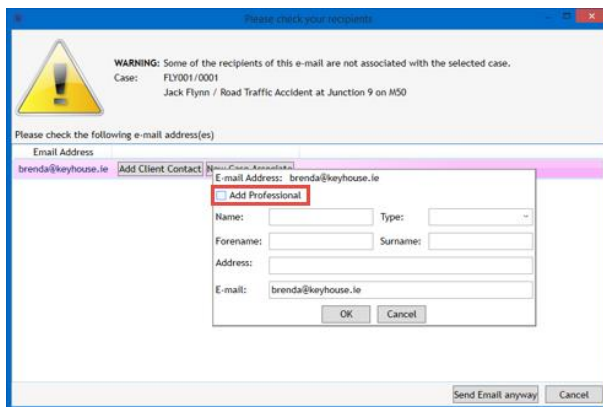
You may have to send an email to a new Associate not already in your Keyhouse System. Rather than having to go back and add the details, it can be done as you are sending the email.

- 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



4. Tick the Add Professional box to give the list of associates assigned to the case.

- If the recipient works for an associate already assigned to the case, add their details using the form below.

WAR! Please check your recipients

E-mail Address: brenda@keyhouse.ie

Add Professional

Search: Linked to Case

Code	Name	Type	Name	Address
904467	Soo Grabbit & Rune	Solicitors	Soo Grabbit & Rune	Main Street Ki
KOEG01	Stephen Keogh	Barristers	Stephen Keogh	2 Main Street

Please check the following:

Email Address: brenda@keyhouse.ie

Name: Type:

Forename: Surname:

Address:

E-mail: brenda@keyhouse.ie

OK Cancel

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

WAR! Please check your recipients

E-mail Address: brenda@keyhouse.ie

Add Professional

Search: Linked to Case

Code	Name	Type	Name	Address
GO0002	A B L Goodbody,	Solicitors	A B L Goodbody,	International
MCCA11	A McCann & Co	Solicitors	A McCann & Co	36 A York R
HO0002	A Noone-Faull & Assoc.	Solicitors	A Noone-Faull & Assoc.	6 The Ceda
ORE009	A. B. O'Reilly Dolan & Co.,	Solicitors	A. B. O'Reilly Dolan & Co.,	Market Ste
CLRD01	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.	Ballyanly In
KEE001	A. Keegan & Co.	Solicitors	A. Keegan & Co.	Solicitors 9
SMO001	A. M. Smith & Co.	Solicitors	A. M. Smith & Co.	20 Farnham
ORO001	A. P. Harrough O'Rourke	Solicitors	A. P. Harrough O'Rourke	3 Arnan Qa
DIAD002	A. T. Diamond & Co.	Solicitors	A. T. Diamond & Co.	217 Clonlar
FORD01	A.C. Forde & Co.,	Solicitors	A.C. Forde & Co.,	14 Lansdon

Please check the following:

Email Address: brenda@keyhouse.ie

Name: Type:

Forename: Surname:

Address:

E-mail: brenda@keyhouse.ie

OK Cancel

- Select the associate then add the recipient details and click OK.
- The Associate will be added to the case and the email sent.
- If, having checked, the associate is not on the system, untick the Add Professional box and enter the recipient details.

E-mail Address: brenda@keyhouse.com

Add Professional

Name: Type:

Forename: Surname:

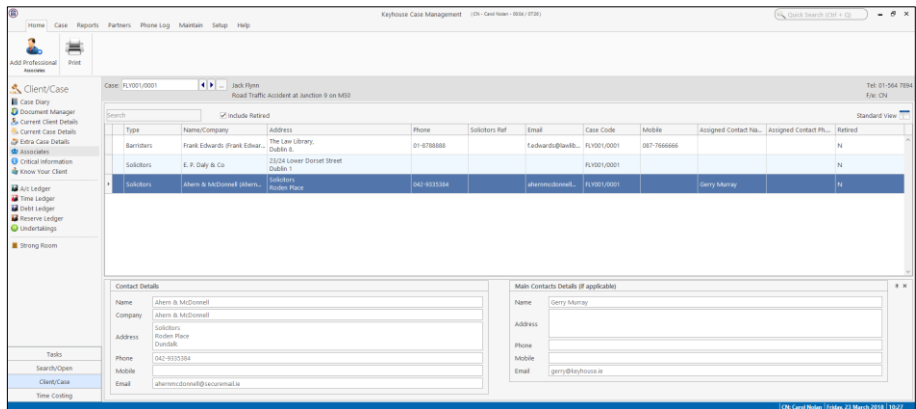
Address:

E-mail: brenda@keyhouse.com

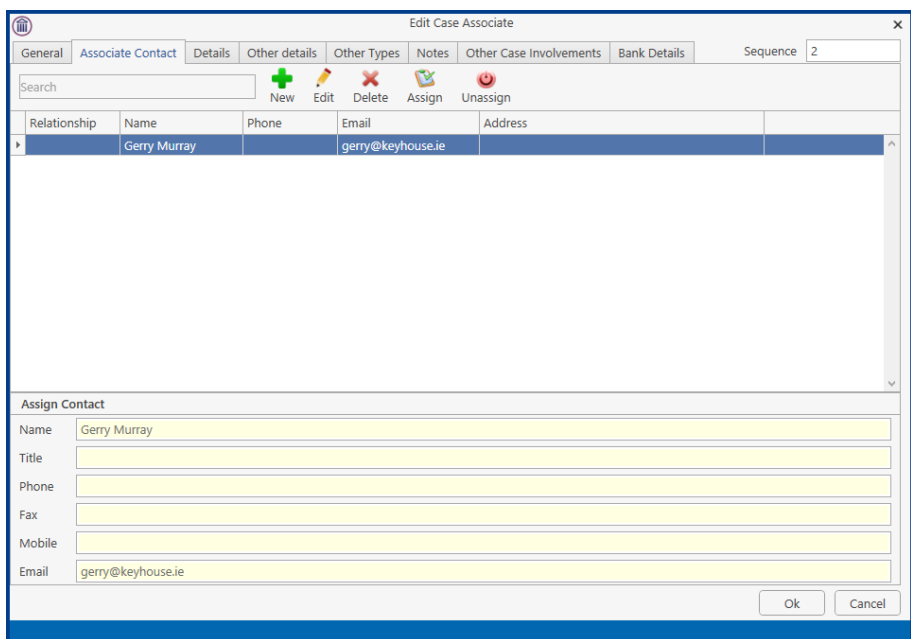
OK Cancel

- This will create the associate to the Associates and add it to the matter. The details may need to be reviewed and modified on the matter.
- To see the entry return to Keyhouse and open the Case Associates Screen.

12. In Keyhouse, click on Associate.



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



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:

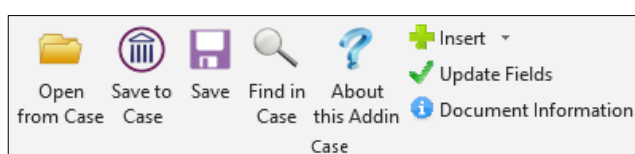
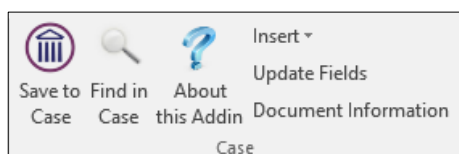
An update to an existing Document

A new version

A new document to the matter or another matter.

Create a document using Word

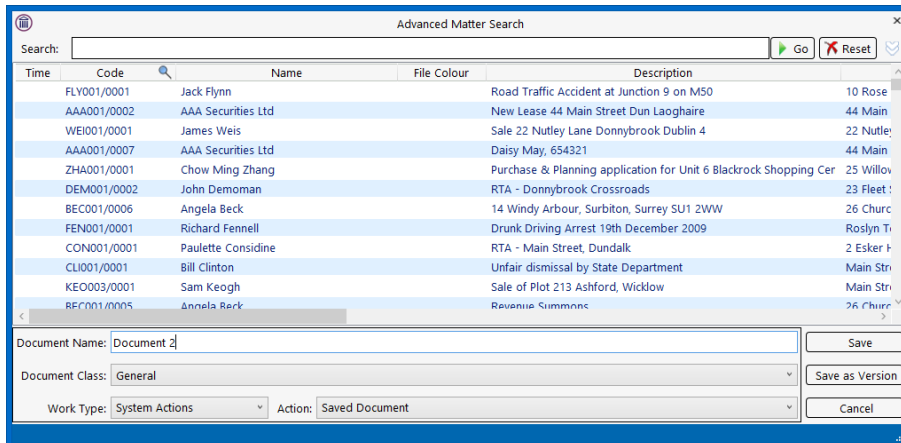
1. Open MS Word in the normal way and create your document.
2. You will have a new Group called Case on your Home Ribbon. The add in options available may vary depending on the version of software being used.



Open from Case	Will allow the user to open any document from any matter without having to navigate to Keyhouse
Save to Case	Allows the user to assign the document to a case.
Save as PDF	Allows the user to save a Word document to the case as a PDF
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:

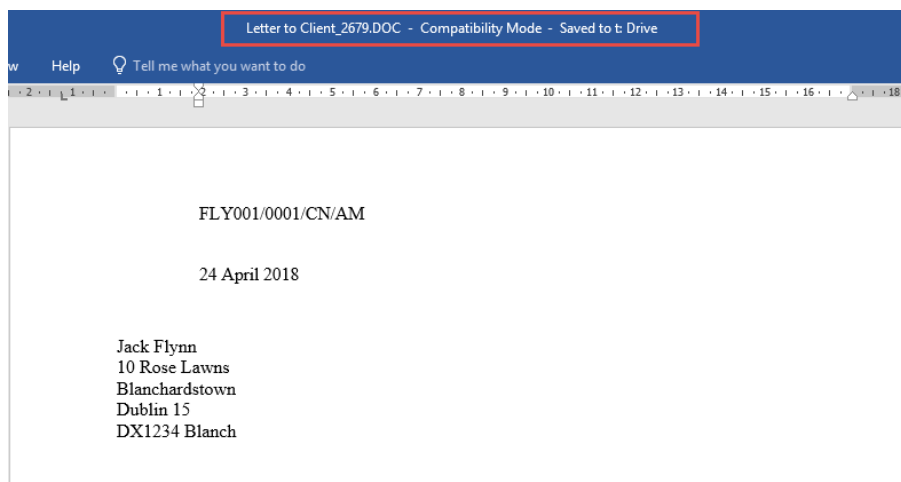


4. Select the matter to be used and enter a Document Name. Change the class by clicking on the down arrow to the right of the Document Class box. Change the Work Type and Action as needed.
5. Click OK to save.

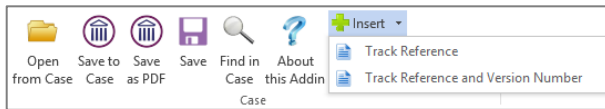
Add Tracking and Version Numbers to Document

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.



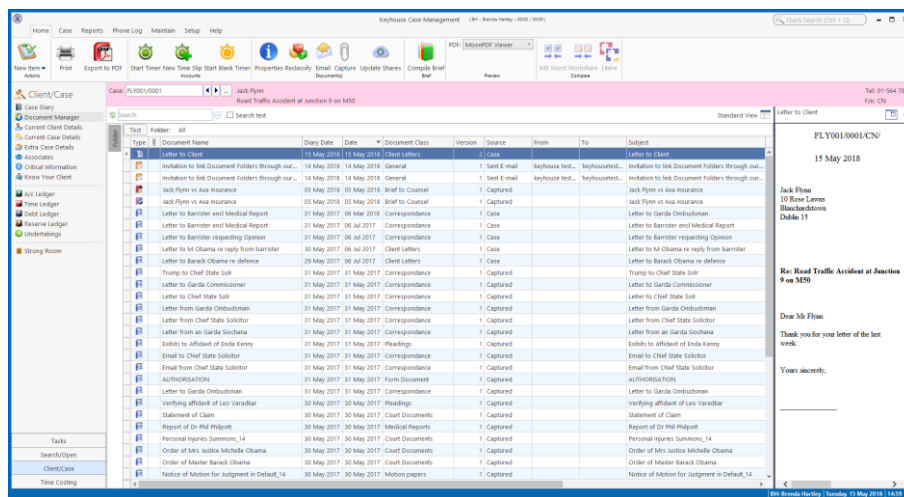
4. The version number will automatically update when using version control.

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. 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.

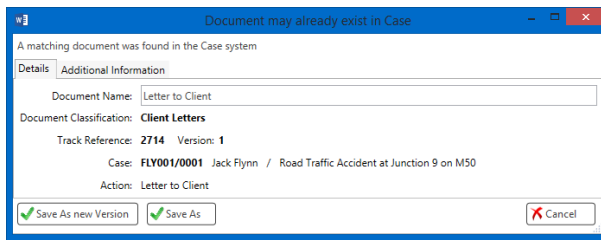
1. Select the Word Document from the Document Manager and double click to open or from the Attachment section of the Case Diary.



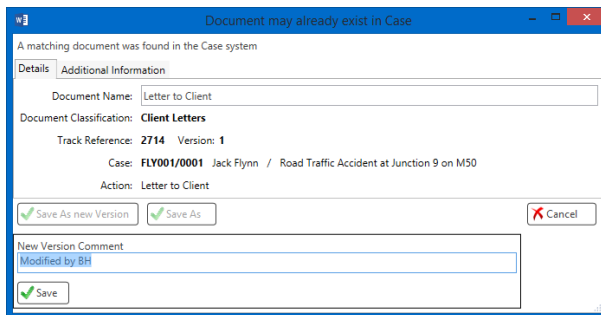
2. Make the necessary changes and click the Save to Case button



- The following dialog box will appear:



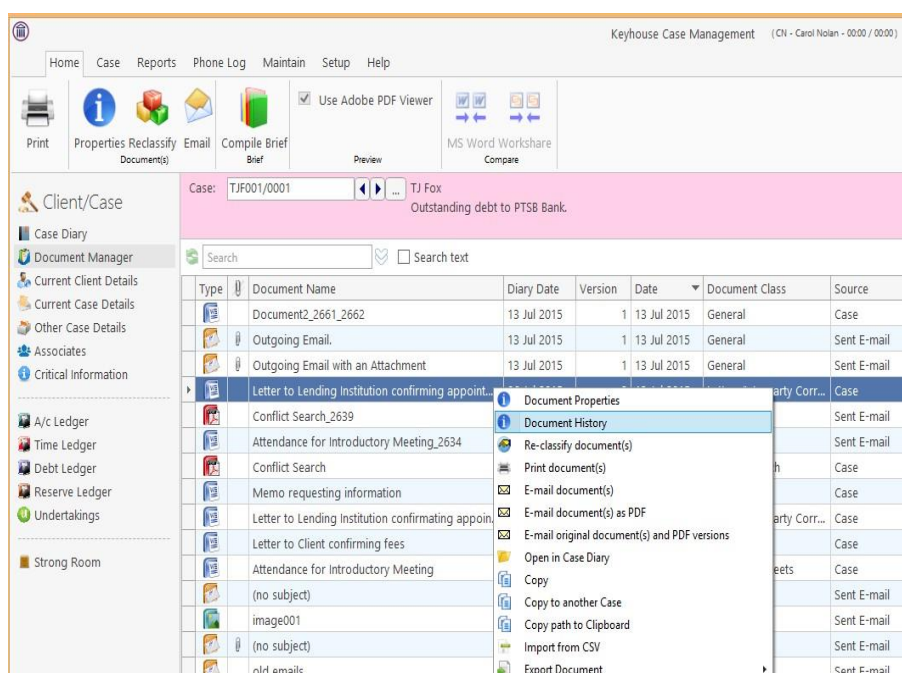
- To save the document as a new version, click Save As new Version. Save As will create another document.
- Modified by ... will be populated automatically but this can be amended as needed.



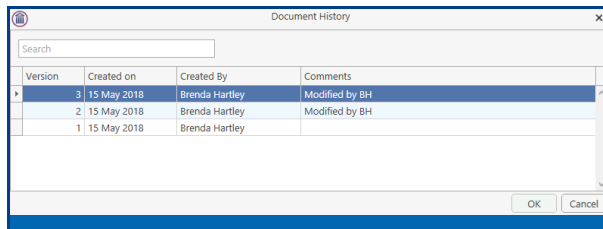
- With Version Control, you will always see the latest version of the document in the Document Manager and Case Diary. However, it may be necessary to click the Refresh Button to update the screens.

Folder:	All				
T...	Document Name	Diary Date	Date	Version	Document Class
	Lease Agreement	18 Apr 2019	18 Apr 2019	5	Document

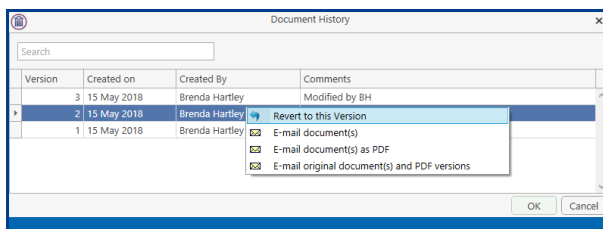
- It is possible to revert to previous versions by selecting the document, then right click and select Document History.



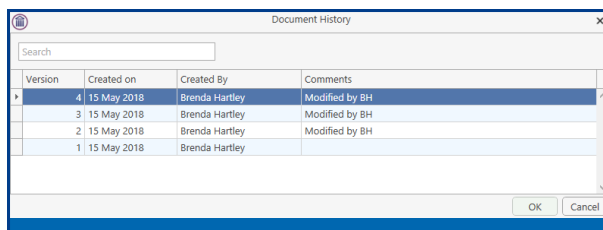
8. The Document History Dialog Box will appear



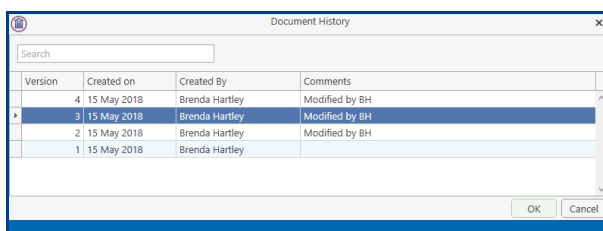
9. To revert to a previous version, right click on the version required and select Revert to this Version



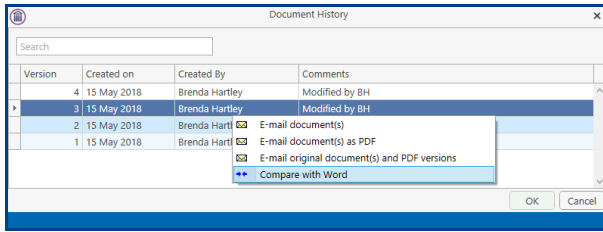
10. This will create a new version



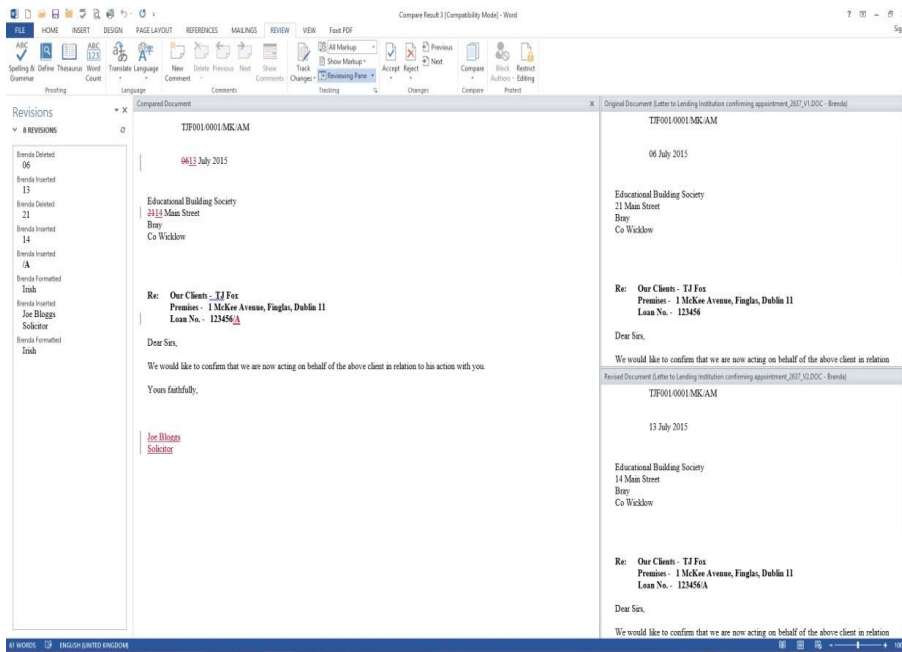
11. To email a previous version, right click on the version and select the email option needed. Process the email in the normal way.



12. 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.
13. Right click on the highlighted area and select Compare with Word



14. To see where the changes are in the document, set the Markup option to Simple Markup.
15. To see the actual changes in the document, ensure the Markup option is set to All Markups.



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

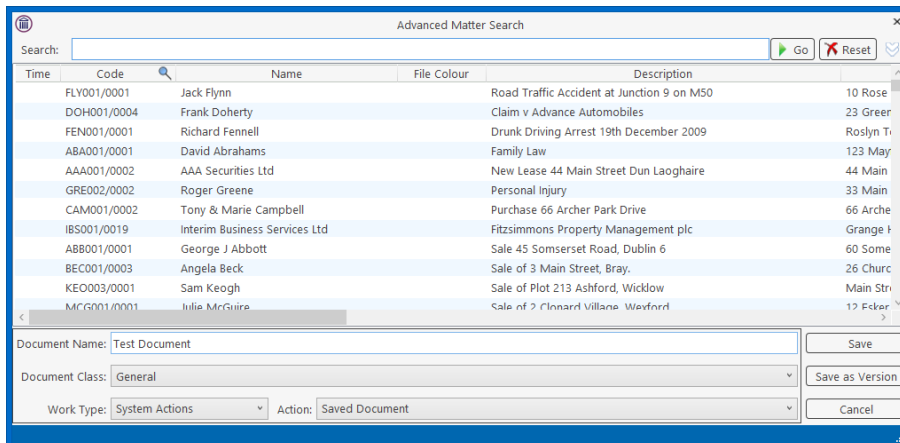
NOTE: The comparison document is a new document and is not automatically saved to Keyhouse. The user can either save the document as a new version of the existing document or save it as a new document with a **new** tracking number.

Working with Incoming Drafts.

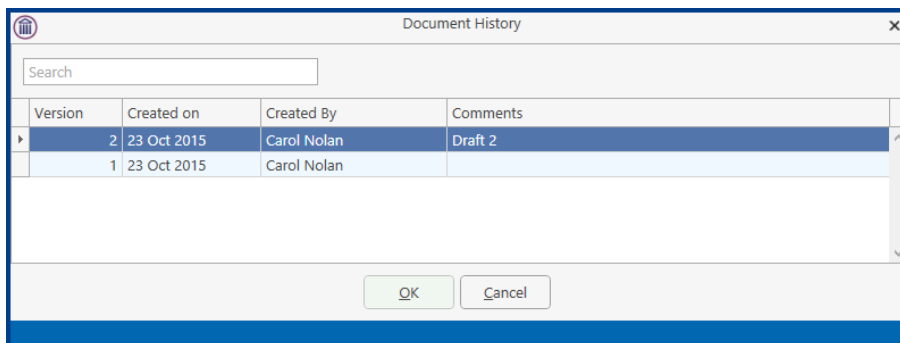
When the draft of a document comes in via email, regardless of whether it is the first draft or subsequent drafts, they can be added to the system and used for Version Control.

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

3. If the incoming document is a first draft, select the matter, name and classify the document and click Save.



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



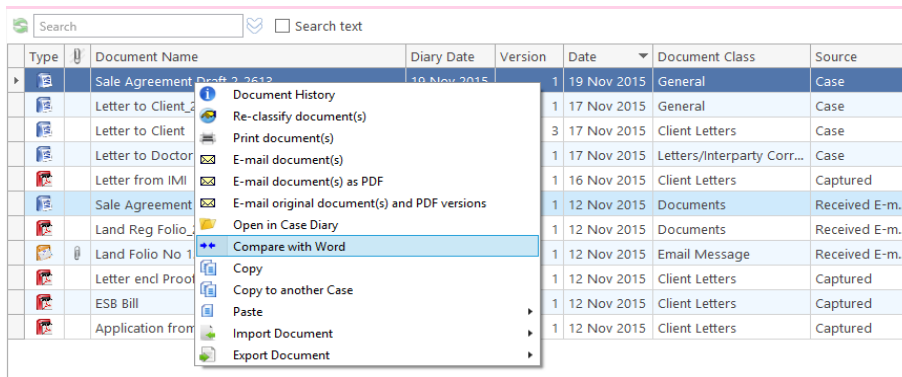
6. To view the versions, right click on the document in the Case Diary or the Document Manager and select Document History

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 <CTRL> key, select the document to be compared.

2. Right click and select Compare with Word.



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.

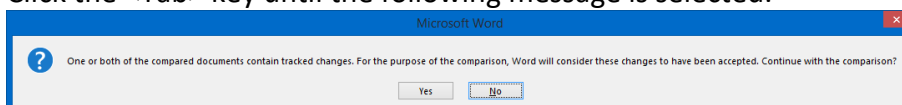
Comparing 2 Documents with Track Changes (Versions Prior to 5.7.1.1)

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.



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.

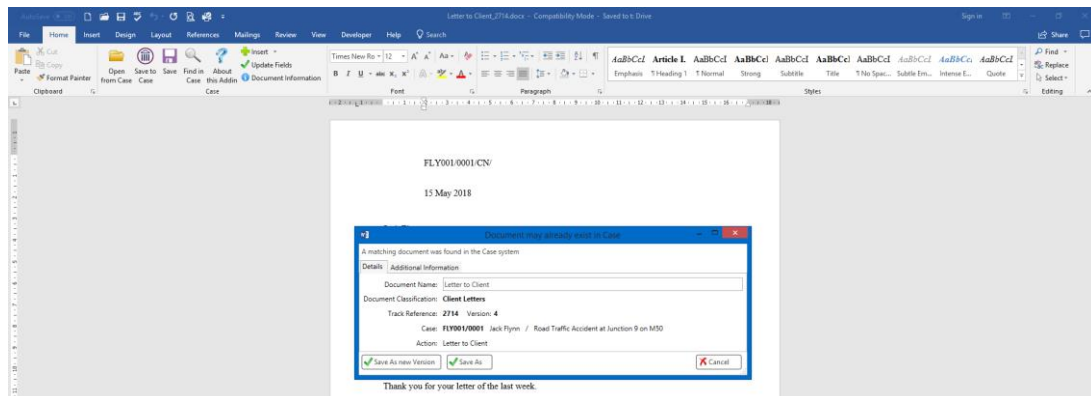


5. Click Yes. The comparison documents will open.
6. Continue as normal with the comparison.

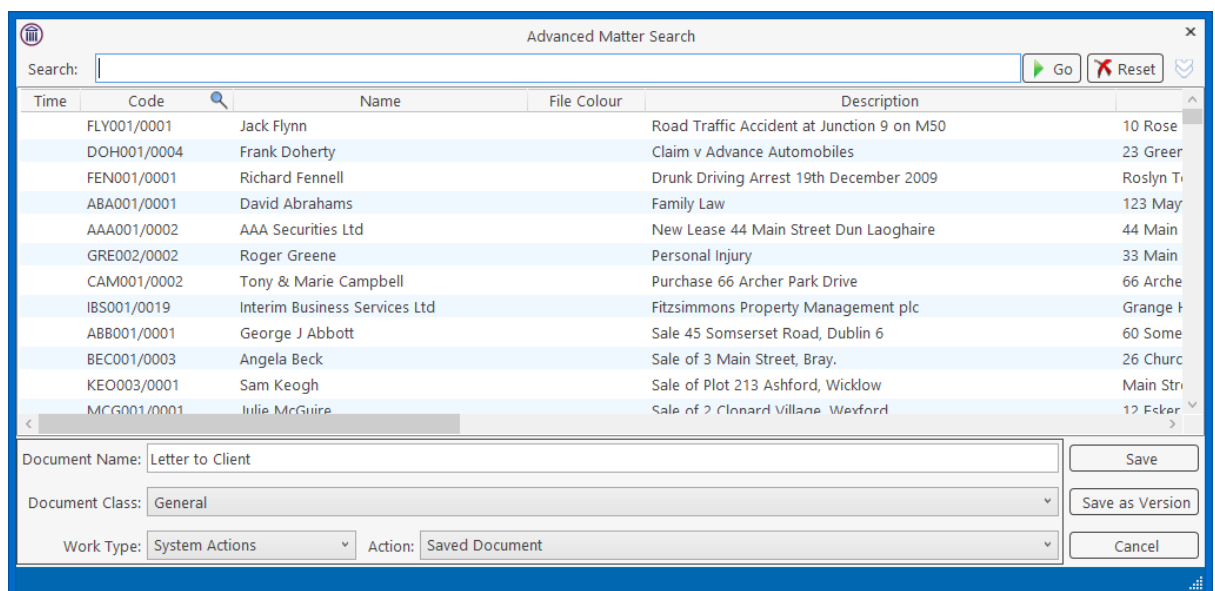
Using 'Save As' Through Keyhouse

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 as moving it from case to case does not update the case information.

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



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

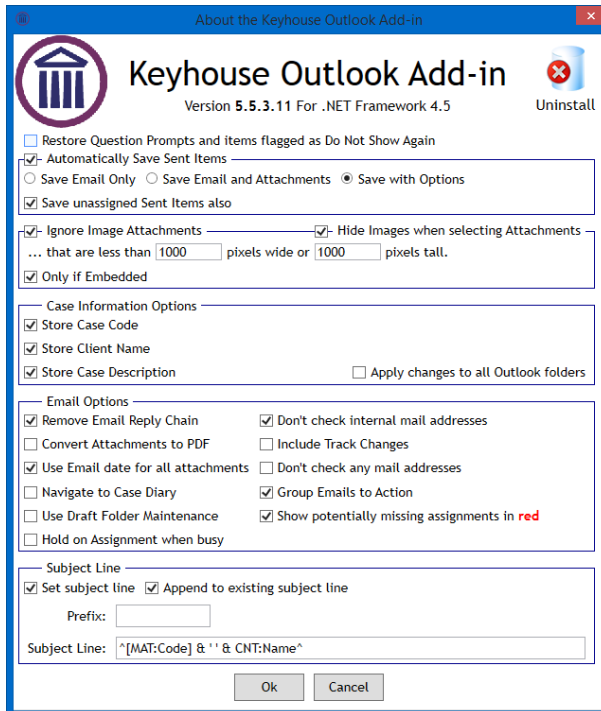


5. Click Save.
6. The document will now be edited as required.

Appendix 1

Updating the Outlook Add-In

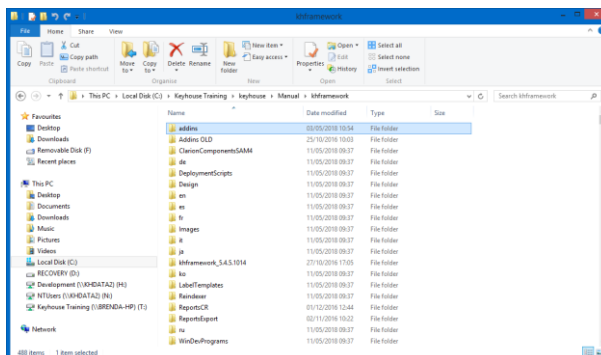
1. Go to the About Button in the Case Group on the Outlook Home Screen.



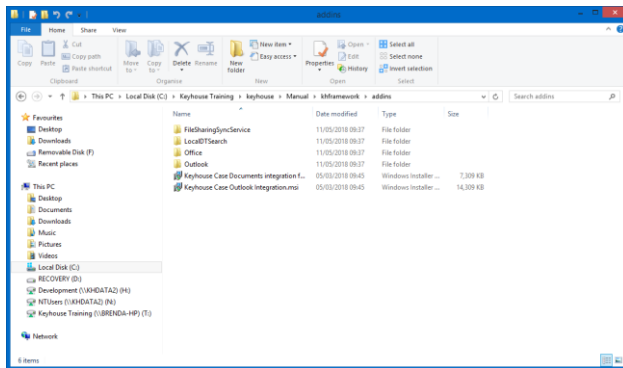
2. Click on Uninstall and this will open the Command Prompt. Follow the instructions in the Command Prompt to finish the uninstall and this will close Outlook automatically. If you do not have permission to uninstall the add in, contact your System Administrator to install the new Addin.

NOTE: Please save all draft emails before uninstalling the Addin

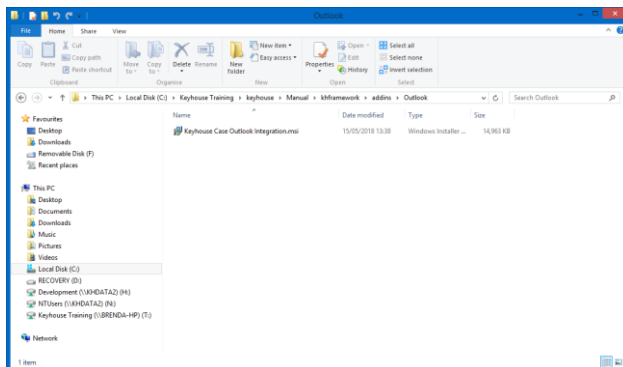
3. Go to the Keyhouse Icon on your desktop.
4. Right click and select Open File Location to navigate to the Keyhouse Mapped Drive. Below is an example of a mapped drive.



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

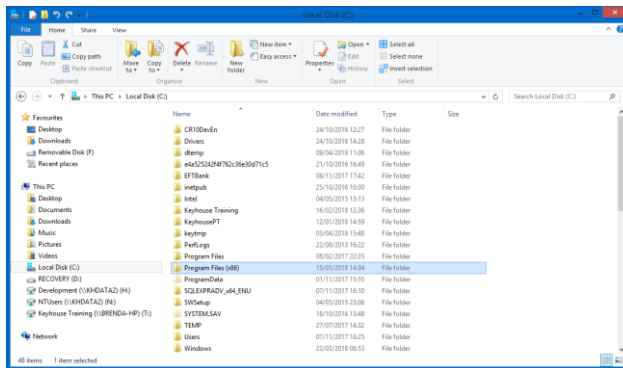


6. Open the Outlook Folder

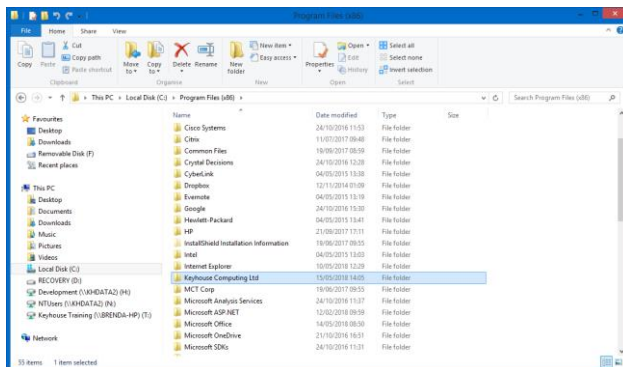


7. Double click on the Keyhouse Case Outlook Integration.msi and follow the instructions given.
8. Once finished, open Outlook.
9. Check that the Assign to Case button is working.
10. If there is an issue close Outlook and go back to Windows Explorer and go to the C:\\ Drive (Windows (C:))

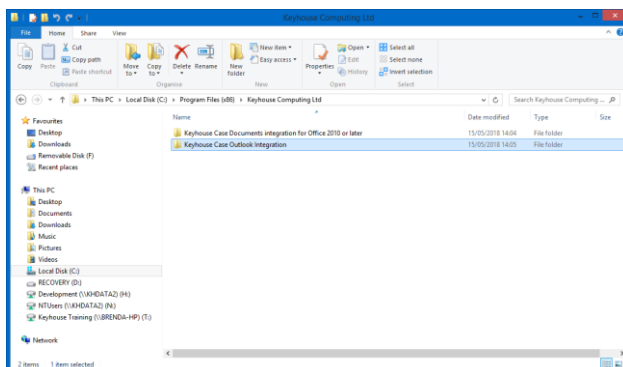
11. Select Program Files (x86)



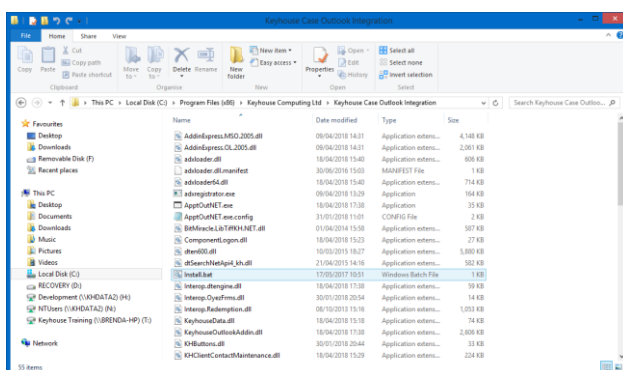
12. Go to Keyhouse Computing Ltd and double click.



13. Go to Keyhouse Case Outlook Integration



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



15. This opens a black window which will close itself.

16. Return to Outlook and check again.

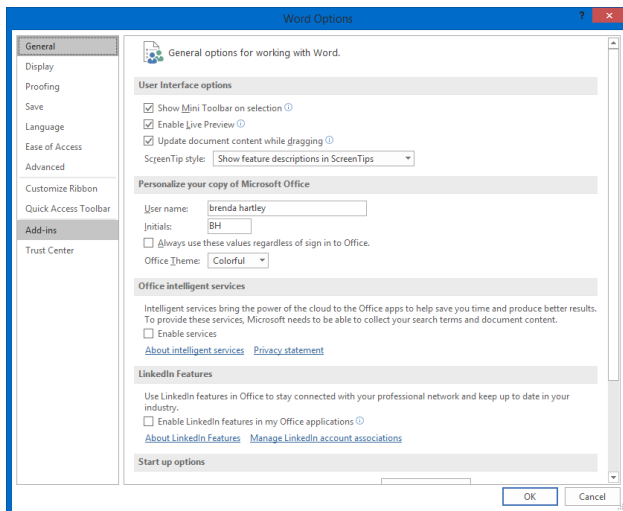
17. If still unable to use the Add-in, contact Keyhouse Support.

Appendix 2

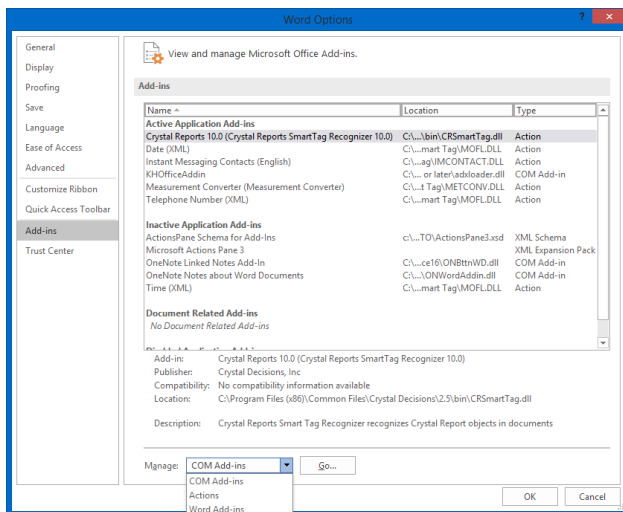
Enabling Add-Ins in Outlook

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

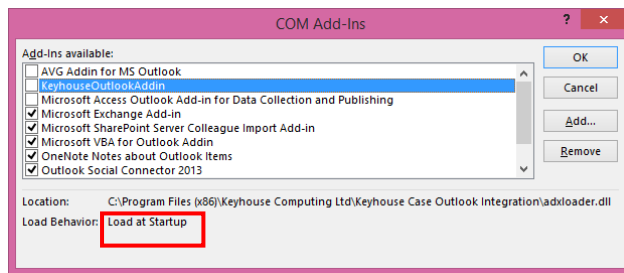


2. Select the Add-Ins option



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.



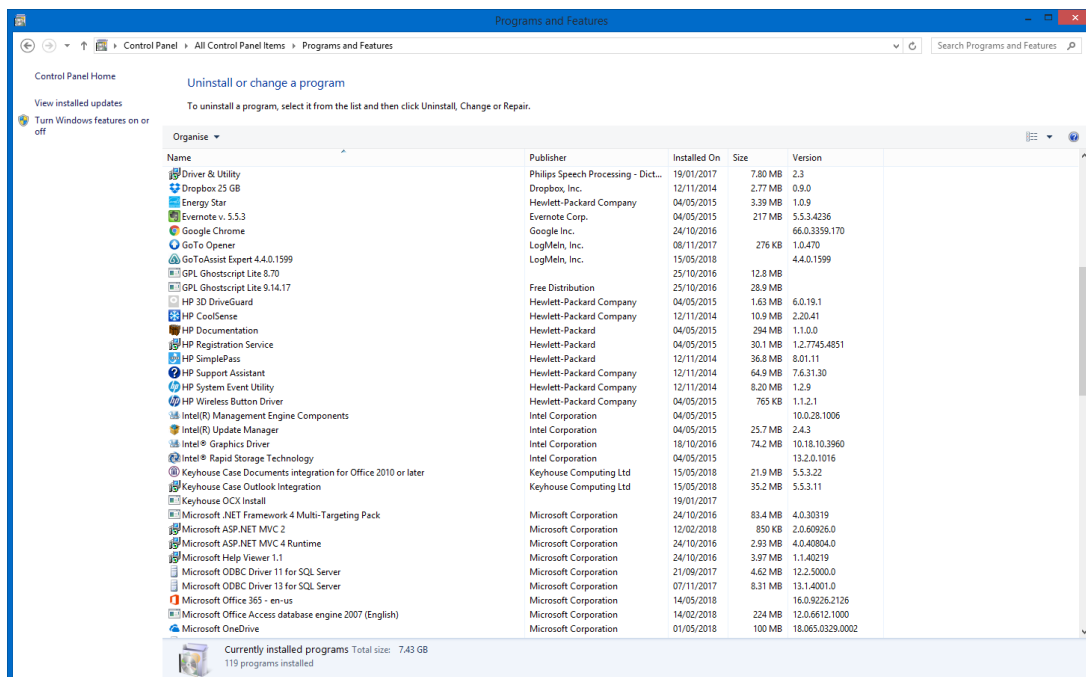
7. Tick the box to the left of KeyhouseOutlookAddin and click OK.
8. Close Outlook and reopen.
9. If the problem persists repeat step 5 and 6.
10. If Load Behaviour says Unloaded, please email support@keyhouse.assist.com

Appendix 3

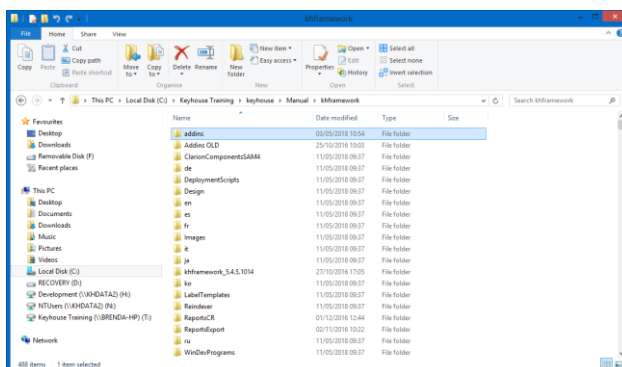
Updating the Word Add-In

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

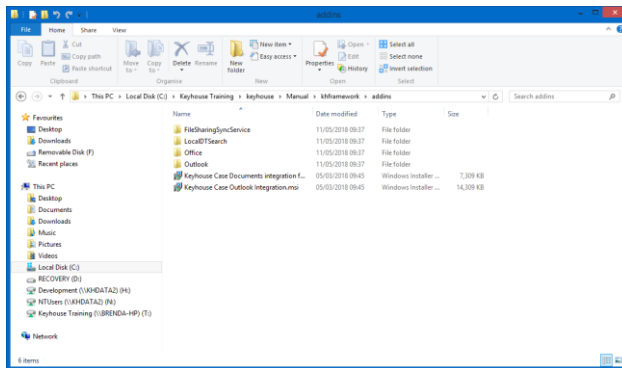
1. Close all MS Programs open on the system (e.g. Word, Excel, PowerPoint).
2. Go to the Control Panel and go to Programs and Features.
3. Allow the program details to load.
4. Scroll and find Keyhouse Case Documents integration for Office 2007+ or Keyhouse Case Document integration for Office 2010 or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



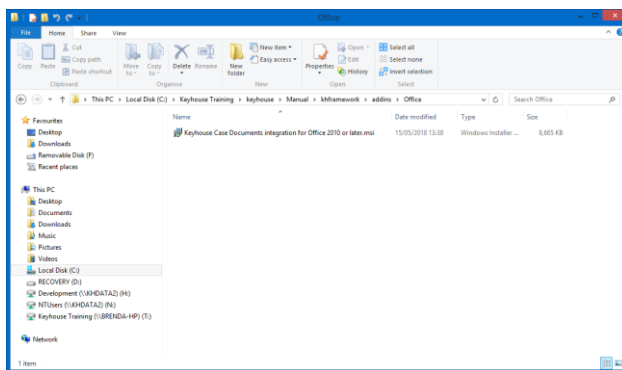
5. Click Uninstall and follow the instructions given. If you do not have permission to delete the program, contact your System Administrator to install the add in.
6. Once the Add-In has been uninstalled, close the Control Panel.
7. Go to Windows Explorer and go to the Keyhouse Mapped Drive. Below is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



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



9. Open the Office Folder



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.