

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 Keyhouse' which appears in your Outlook toolbar. Email attachments can also be saved independently to a case by clicking on the 'Assign Attachments' button.

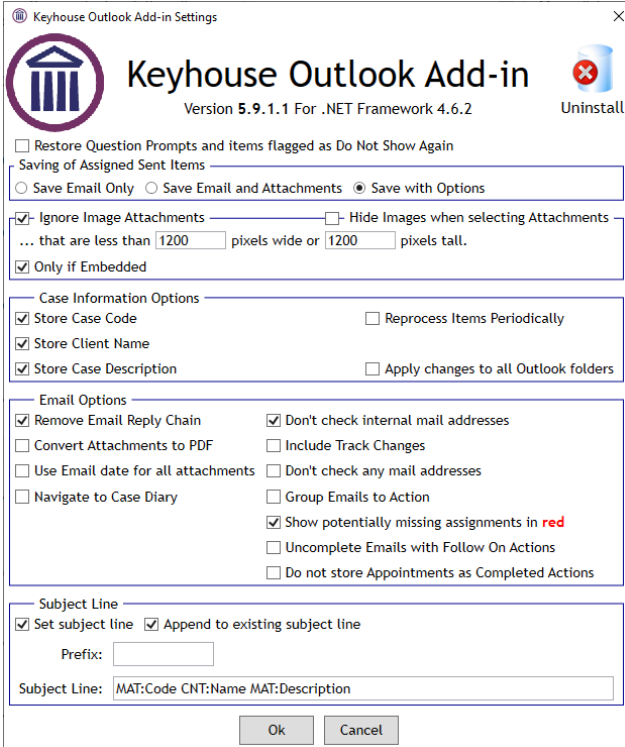
Likewise, when you are sending a new email from Outlook there is a button on your toolbar which will allow you to 'Select the Case' that it relates to. You will also be able to select associated parties connected to a case and also attach documents from the case.

Before you Start

Before using the Keyhouse Add-in, you need to check your settings. This can be done by

clicking the Settings Button  in the Keyhouse Group on the Outlook Home Ribbon.

Making changes at this level will apply to all emails. The Outlook Add-in version number should correspond with the Keyhouse version number. The Keyhouse Version number is located on the Help Tab on the Settings Button. See Appendix 1 for information on how to install the correct Add-In.



The screenshot shows the 'Keyhouse Outlook Add-in Settings' dialog box. The title bar reads 'Keyhouse Outlook Add-in Settings'. The main title is 'Keyhouse Outlook Add-in' with 'Version 5.9.1.1 For .NET Framework 4.6.2' below it. There is an 'Uninstall' button with a red 'X' icon. The settings are organized into several sections:

- Restore Question Prompts and items flagged as Do Not Show Again:**
- Saving of Assigned Sent Items:** Save Email Only, Save Email and Attachments, Save with Options
- Image Attachments:** Ignore Image Attachments ... that are less than 1200 pixels wide or 1200 pixels tall. Hide Images when selecting Attachments. Only if Embedded.
- Case Information Options:** Store Case Code, Reprocess Items Periodically, Store Client Name, Store Case Description, Apply changes to all Outlook folders.
- Email Options:** Remove Email Reply Chain, Don't check internal mail addresses, Convert Attachments to PDF, Include Track Changes, Use Email date for all attachments, Don't check any mail addresses, Navigate to Case Diary, Group Emails to Action, Show potentially missing assignments in red, Uncomplete Emails with Follow On Actions, Do not store Appointments as Completed Actions.
- Subject Line:** Set subject line, Append to existing subject line. Prefix: [text box]. Subject Line: MAT:Code CNT:Name MAT:Description.

At the bottom are 'Ok' and 'Cancel' buttons.

Saving of Assigned Sent Items

Save Email Only:	Will save the email only.
Save Email and Attachment:	Will save the email and the attachment which will 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).

Ignore Image Attachments

By setting this, it will automatically stop embedded images being saved to Keyhouse. A setting of 1000 pixels by 1000 pixels and ticking all 3 tick boxes should be enough to stop the images being saved.

Case Information Options

Allows the user to select the information that is stored in Outlook. If changes are made and the user wants them to apply to all Outlook Folders, tick the 'To apply to all other Outlook folders' option. There is also an option that will ensure the system checks periodically that all sent emails have been assigned to their matters.

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. 19)
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.
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.

Do not Store Appointments as Completed Actions:

If users do not have reminder times on their Calendar, then this option will stop appointments appearing in Keyhouse as completed when there are assigned to the matter.

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.

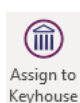
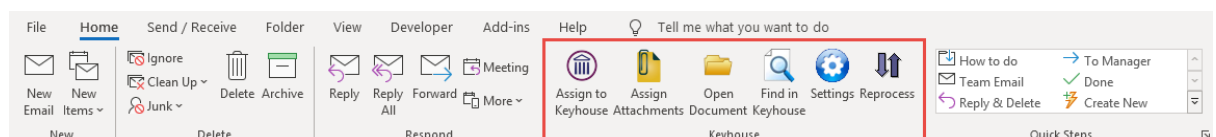
MAT:Code – Will include the Matter Code

CNT:Name – Will include the Client Name

MAT:Description – Will include the matter description

Assigning an 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.

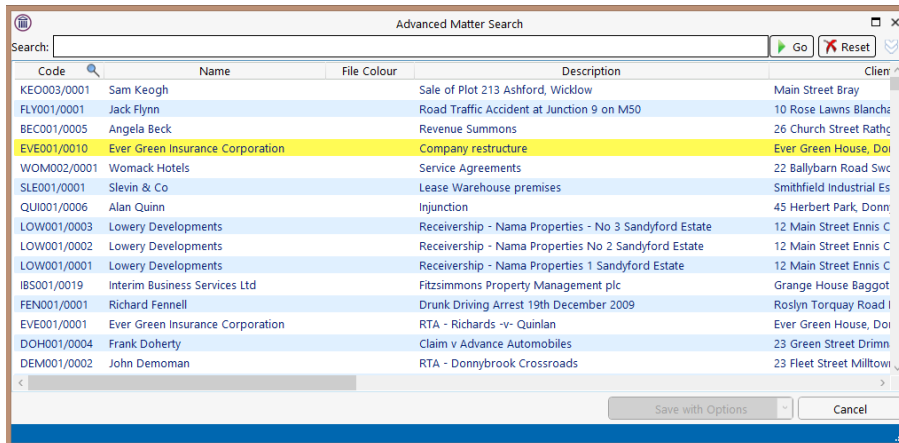


Allow you to change your setting and also displays the Keyhouse version.

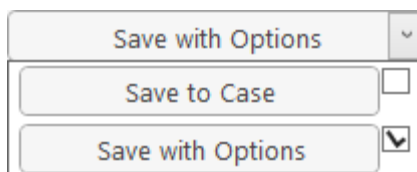


If emails have not been assigned correctly to matters, click the Reprocess button to reassign them.

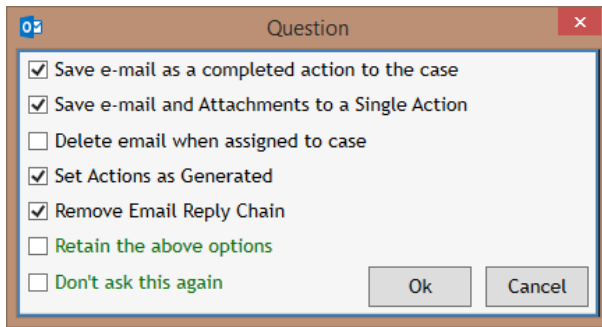
- From your Inbox, highlight the mail you wish to assign - you can hold the Ctrl key down if you are assigning more than one mail to the same matter.
- Click on the 'Assign to Case' or 'Assign Attachments' buttons and your Recent Matter list will open, as below:



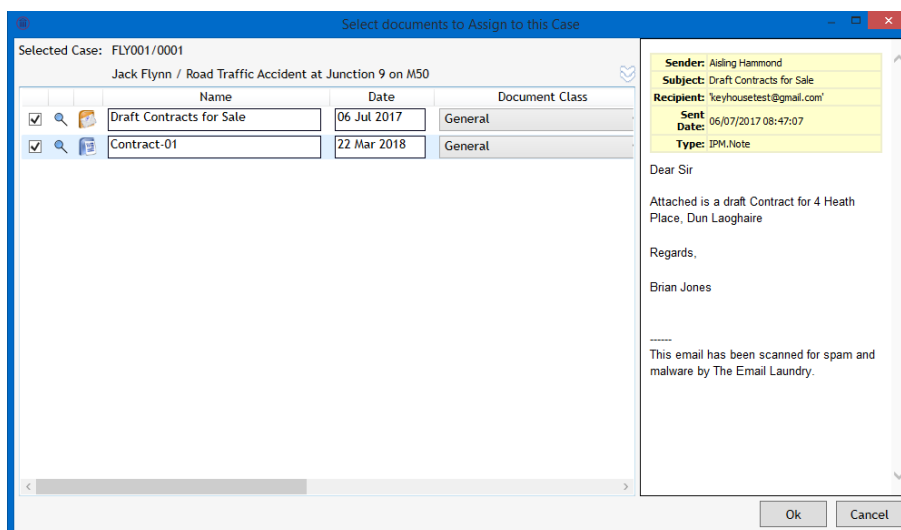
- If the Matter is not listed in your recent matter list, click into the Search box, and enter the case name or code and click Go.
- Select the case you wish to assign the email into.
- At this point you can 'Save to Case' or 'Save with Options' by click on the down arrow beside the current option.



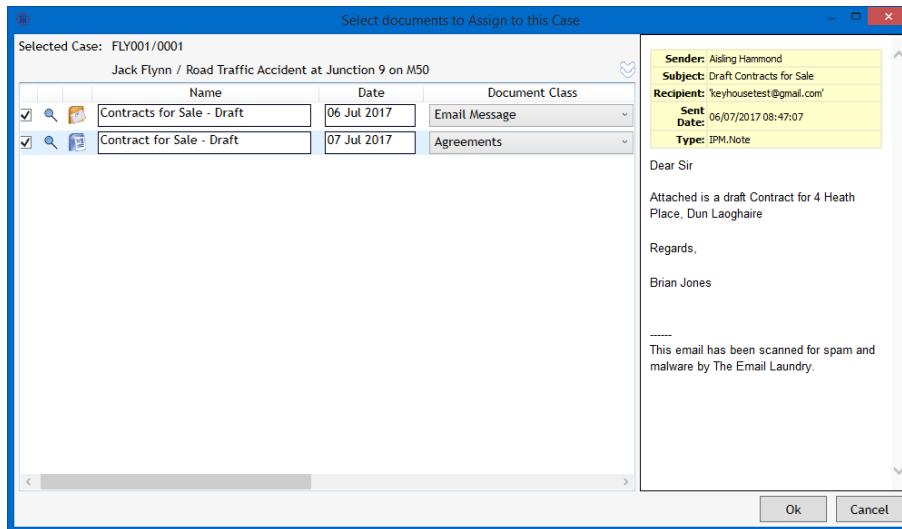
7. If the Save to Case option is selected, the following dialog box will appear giving you several options:



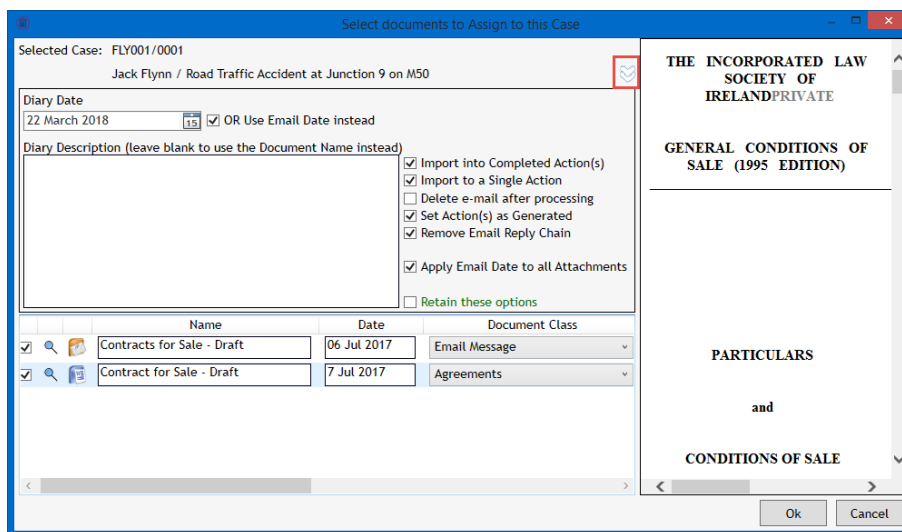
- a. *Save e-mail as a completed action to the case* – the mail will save as a completed action in the selected Case Diary; if deselect, the mail will save as an uncompleted action on your Case Diary/Task List. If ticked it will override the option to *Set Action as Generated*.
 - b. *Save e-mail and 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. This option will only work if the ‘Save e-mail as a completed action to the case’ is unticked.
 - 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 any changes made to 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



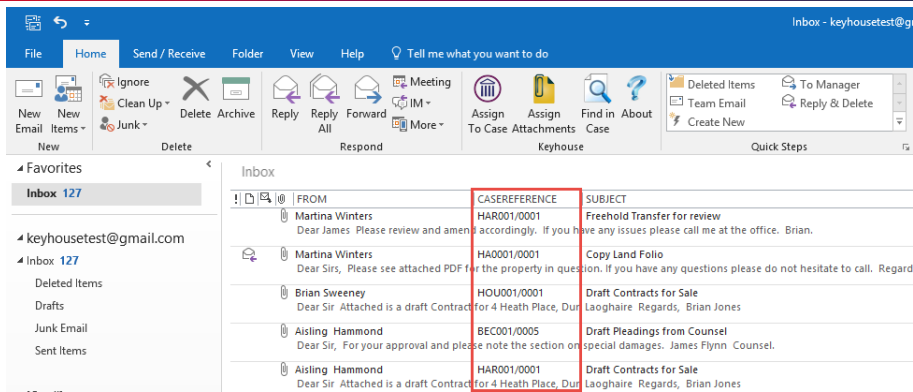
9. From this screen, you can choose to save the email, the image, the attachment, or all. If the document name or the classification are incorrect, change them by typing into the boxes.



10. If using this feature to assigned scanned documents, scroll to the right to change the action type to Scanned Post.
11. Ensure the Worktype is set to General Office and set the Action to Scanned Post/Mail
12. By clicking on the Double Arrow, the Save to Case options are available.

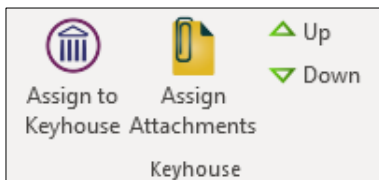


- a. *Diary Date – Reflects the date the email is assigned to the case if other than the date received. To have the email assigned with the date received, tick the box beside the Diary Date.*
 - b. *Diary Description – Adding a diary description makes searching for emails easier in Keyhouse. The diary description could reflect the sender/receiver and the subject of the email e.g. Email from James Kelly with Lease Agreement.*
All other options are as described in the ‘Save to Case’ section.
13. 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.

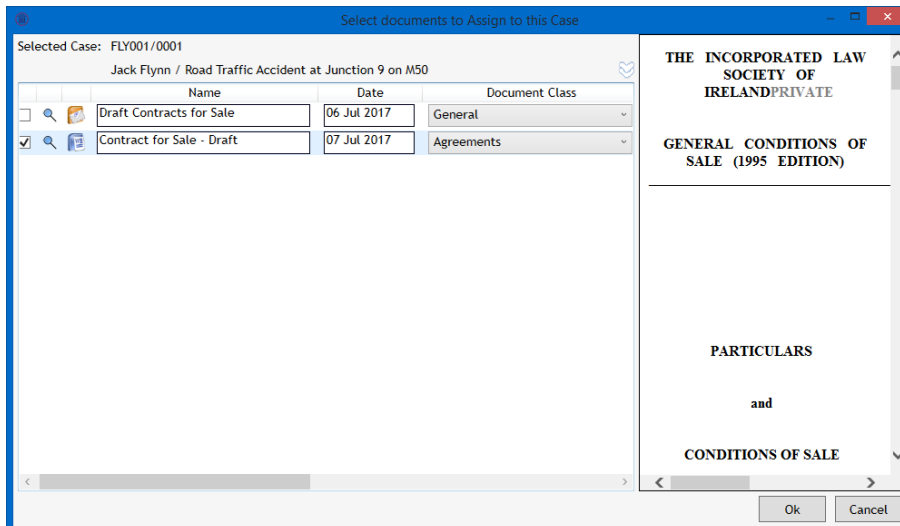


The Up and Down buttons will allow you to move through the emails assigned to a case.

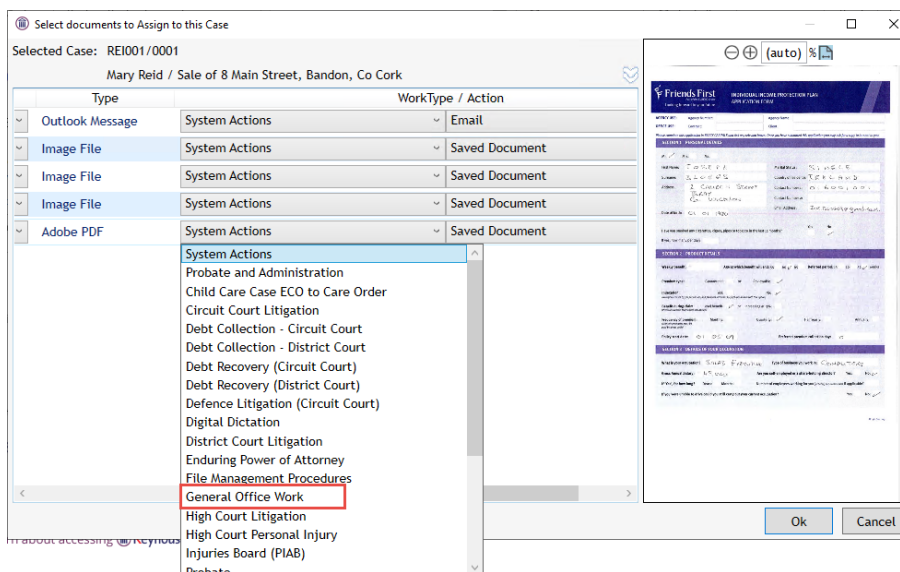
2. 'Assign to Case' will assign the email and the attachment to the case and it will behave in the same way as the 'Assign to Case' on the Home Ribbon.
3. To assign the attachment only, click on 'Assign Assignment' and your Recent Matter list will open.



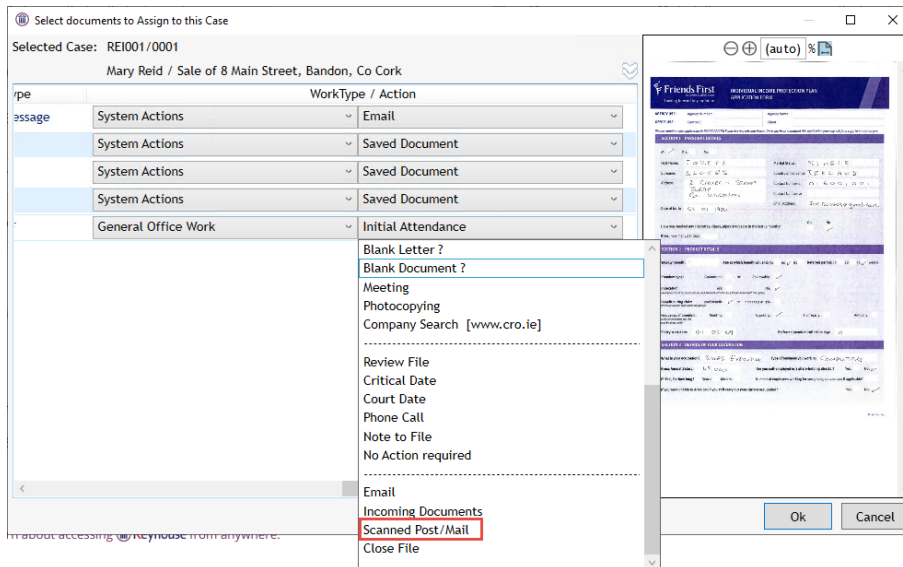
4. If the Matter you want to assign the email to is not listed in your recent matter list, just click into the Search box, and enter the case name or code and click Go.
5. Select the case you wish to assign the email to.
6. The following screen will appear, giving you several options.




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, classify, and change the classification of the attachments here.
8. If assigning in Scanned Post, use the scroll bar to move to System Actions and Action Code.
9. Change the System Actions to General Office Work.



10. Change the Action to Scanned Post/Mail.



11. This will enable users to easily find scanned post items as they will have the correct action type. 

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.

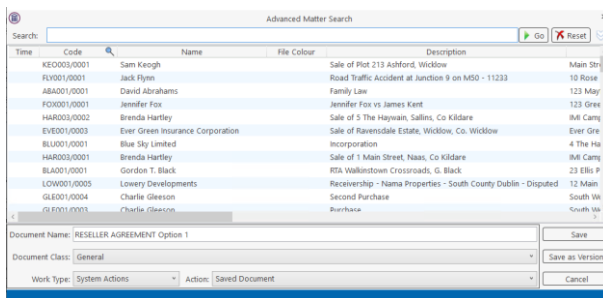
Saving an Attachment from Word

It is also possible to save an email attachment directly from Word.

1. Open the Word Attachment from the email.
2. Click the Save to Keyhouse option from the Home Ribbon.



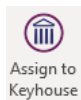
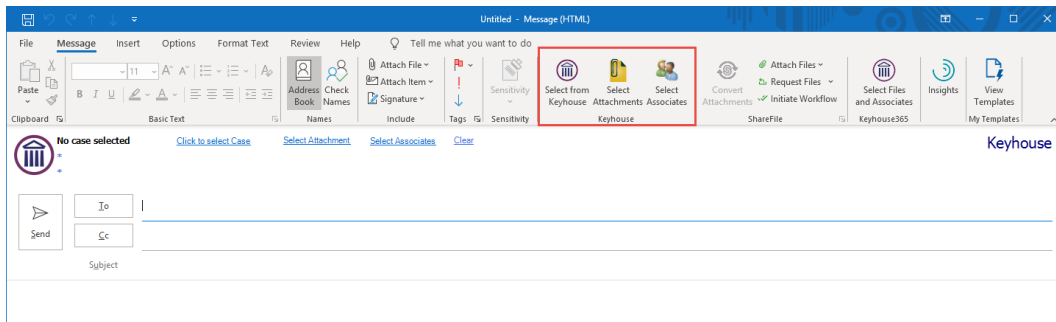
3. The Advance Search dialog box opens.



4. Modify the name of the document if required, set the Document Class and then either click Save or Save as New version if it a version of a document is already in Keyhouse. See Chapter 2 for more information on saving a new version of a document.

Sending new E-mails from Outlook

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



Assign to Keyhouse

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

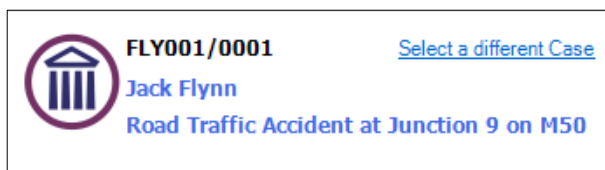


Select Associates

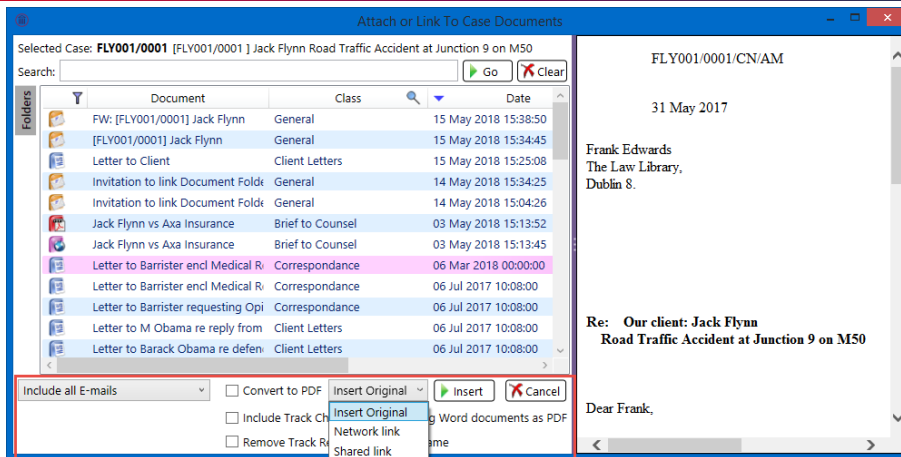
Select Associates

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

2. Open a new mail in Outlook.
3. 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.
4. The case details will appear on the e-mail.



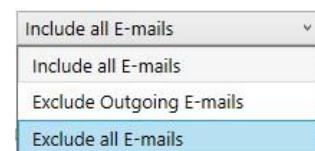
5. To attach a Case Diary Document to the email, click the 'Select Attachment' button.



- 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.

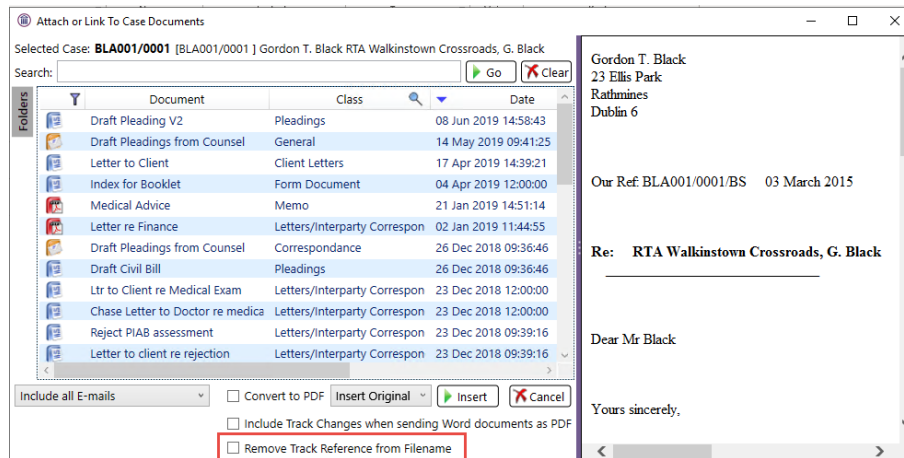
- It is also possible to search for a word or words in a document. A preview of the document will appear on the right side of the screen.
- You can choose to search specific types of files, by right clicking over the Type column and choosing a type listed, e.g. Word Document.
- Documents can be converted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



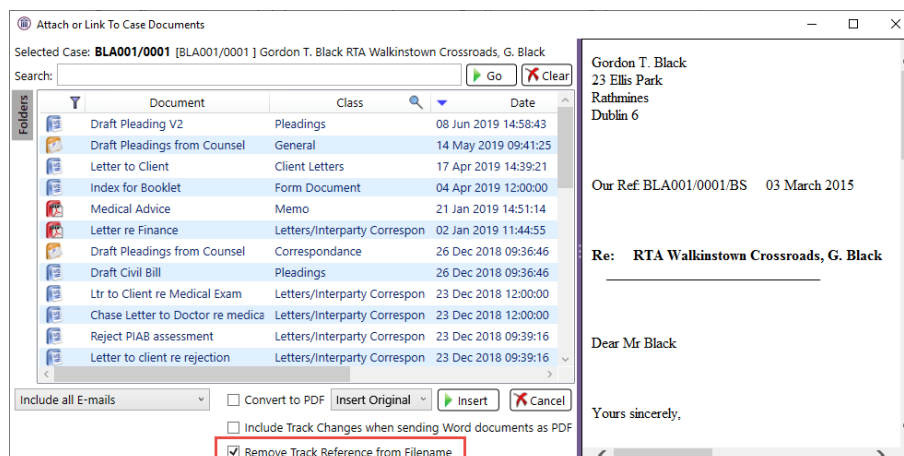
NOTE: If you have more than one document to attach, then hold down the Ctrl key and select the desired documents. To attach a document not in Keyhouse, use the standard Outlook insert file options.

NOTE: Tracking references may form part of the document name when it is assigned to an email. This can be turned off at a company level by the System Administrator. If it not turned off, users can choose to exclude it form the email document name or include it if it is turned off.

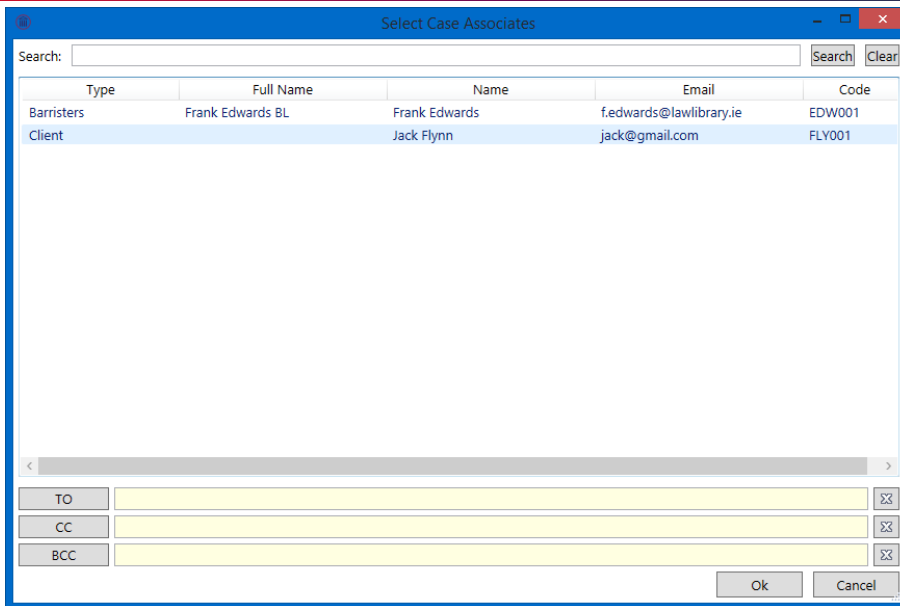
- If the Global 'Include Track Reference in email document name' is turned on, to remove the reference to the document, tick Remove Track Reference from Filename.




- If the Global 'Include Track Reference in email document name' is turned off, to add the reference to the document, untick Remove Track Reference from Filename.



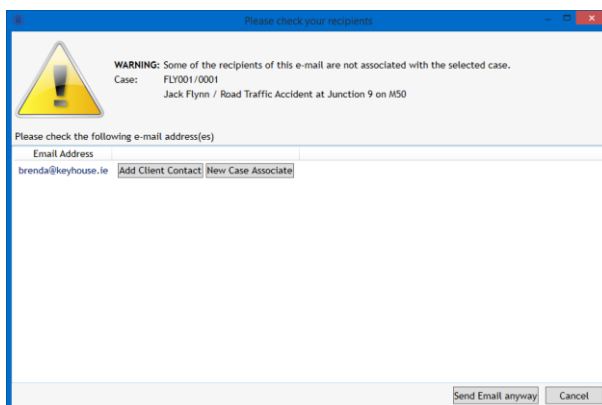
- If you are sending the mail to a Client and/or Case Associate, you can click the 'Select Associates' button.
- This will open a window as below, listing the case associates with their email addresses.



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  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.

Please note: these email addresses must be previously entered for each client and/or case associate.

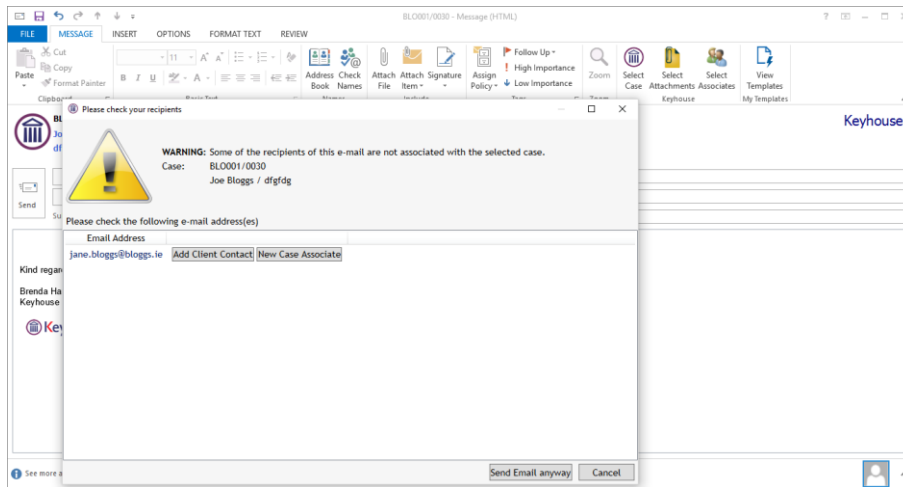
18. If you are not sending the email to a case contact, you can add the address in the normal way.
19. If the email address is not connected to the matter, then the following dialog box will appear:



20. 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. It is better and safer to add the client contact/associate to the system.

Add an Contact through Outlook

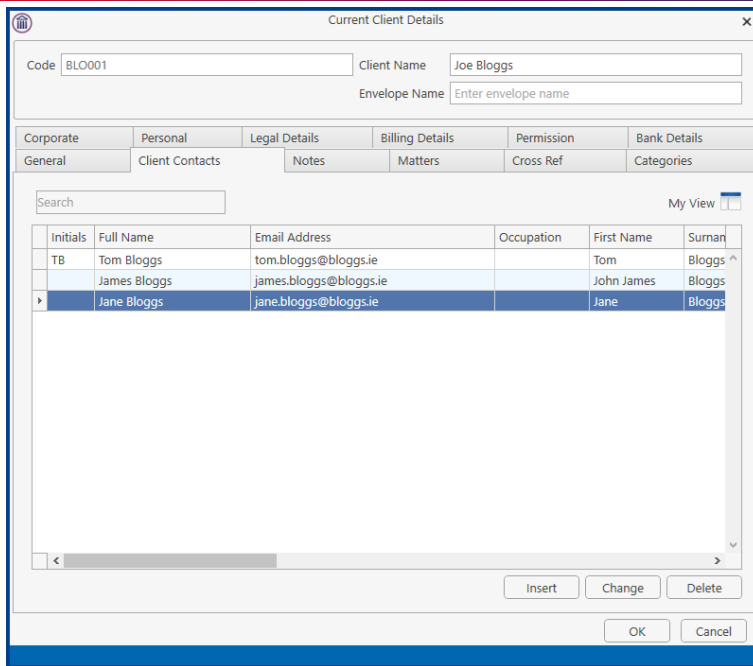
As all email address for your client may not have been added to the matter, when you try to send an email a warning message may appear when they are not entered.



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

A screenshot of the "Other Contact Details" dialog box. It has three tabs: "General", "Bank Details", and "Contact Categories". The "General" tab is active. It contains various input fields for contact information: Initial(s), Title, Full Name, First Name, Surname, Salutation, Address, County, Postal Code, DX Ref, Marital Status (dropdown), PPS Number, Home Phone, Work Phone, Fax Number, Mobile, Email Address (pre-filled with jane.bloggs@bloggs.ie), Date of Birth, Date of Death, Marriage Date (all with "Select a date" dropdowns), and Occupation. "OK" and "Cancel" buttons are at the bottom.

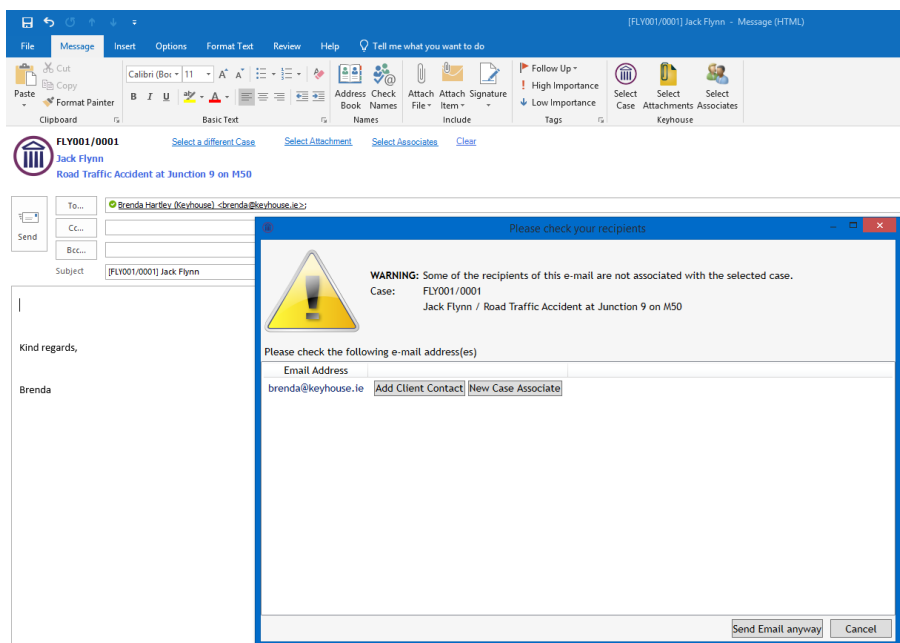
3. The details will be added to the matter and there will be no further warnings when sending email to this recipient.
4. The details will be visible on the Client Contacts tab on the Current Client Details in the matter.



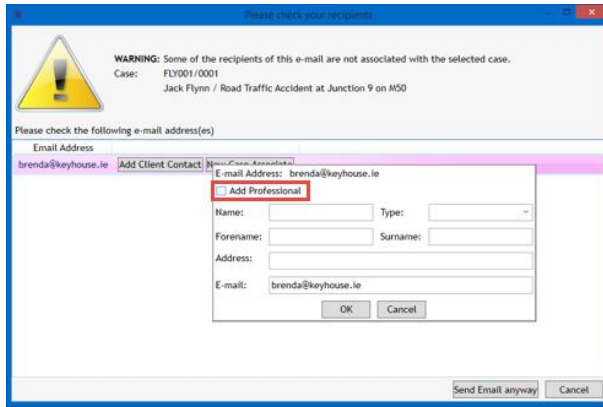
Add an Associate through Outlook

You may have to send an email to a new Associate not already in your Keyhouse System or an Associate where their details have not been stored. This can be done as you are sending the email.

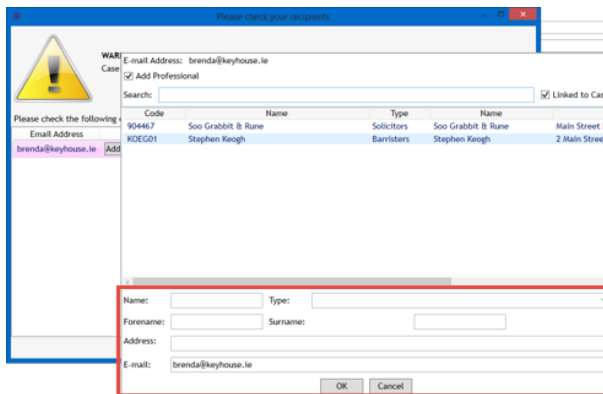
1. Create the email as normal and add the Associate's email address.
2. When you send the email a warning message will appear.



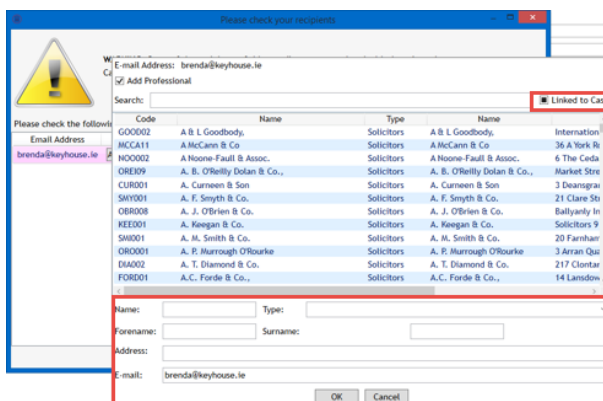
3. Click on New Case Associate.



4. Tick the Add Professional box to see the list of associates already assigned to the case.
5. If the recipient works for an associate already assigned to the case, add their details using the form below. It is not always necessary to add an address.



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



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.

- If, having checked, the associate is not on the system, untick the Add Professional box and enter the recipient details.

E-mail Address:

Add Professional

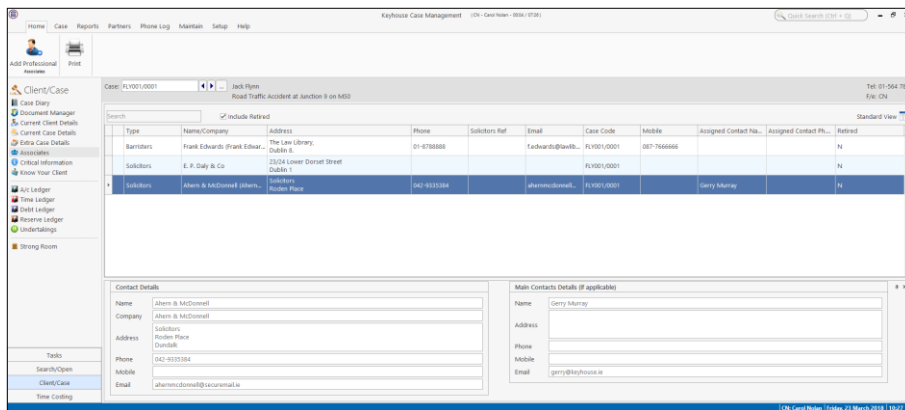
Name: Type:

Forename: Surname:

Address:

E-mail:

- This will create the associate on the matter and add them to the Associates Table. The details may need to be reviewed and modified on the matter or in the Case Associates.
- To see the entry, return to Keyhouse and open the Case Associates Screen.
- Click to the Associates on the matter and open the Associate.



- Double click on Associate Contact to add additional information for the new Contact.

The screenshot shows the 'Edit Case Associate' dialog box. It has a tabbed interface with 'Associate Contact' selected. The dialog contains a search bar, a table of associates, and an 'Assign Contact' section.

The table has columns for Relationship, Name, Phone, Email, and Address. It contains one entry:

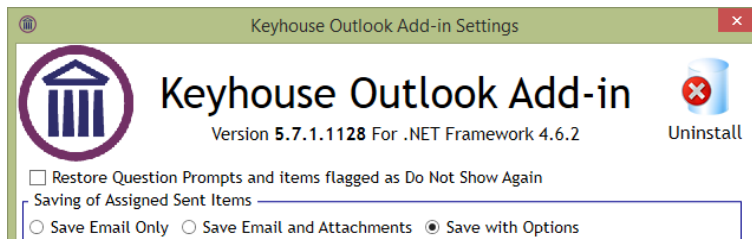
Relationship	Name	Phone	Email	Address
	Brenda Hartley		brenda@keyhouse.ie	

Below the table is the 'Assign Contact' section, which includes fields for Name, Title, Phone, Fax, Mobile, and Email. At the bottom right, there are 'Ok' and 'Cancel' buttons.

Save Sent Emails 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 Settings 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.

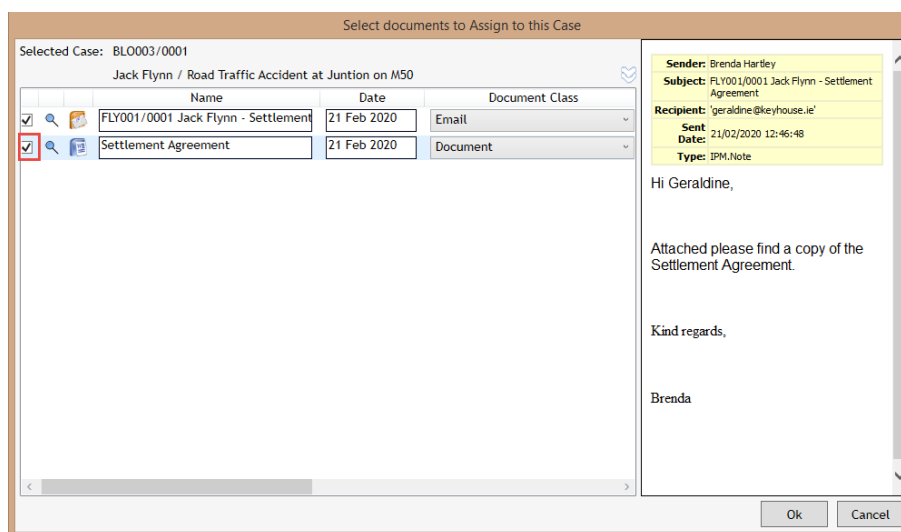
Save Email and Attachments

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

Save with Options

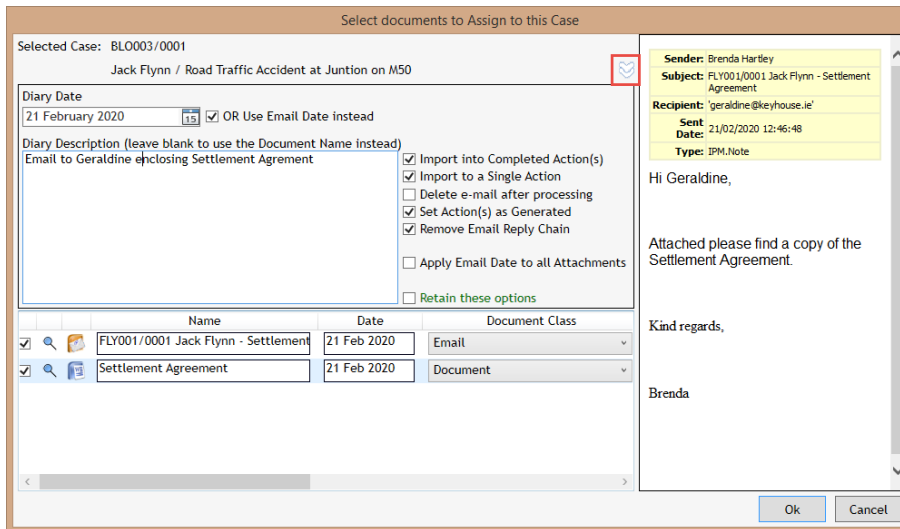
With this option the user gets to choose what is assigned to the case.

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

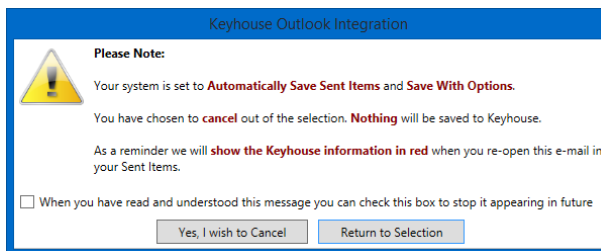


2. To prevent the duplication of the attachment, untick the box to the left of the document name.

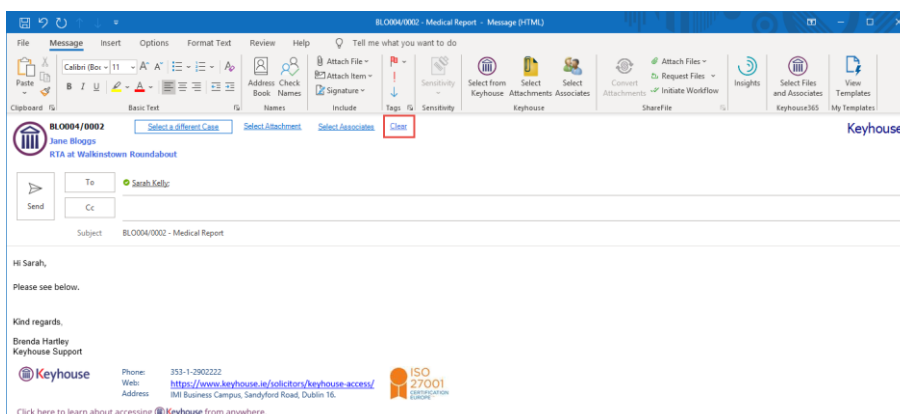
- Additional Information can be added to make searching for the email easier. Click on the chevron to open the dialog box.



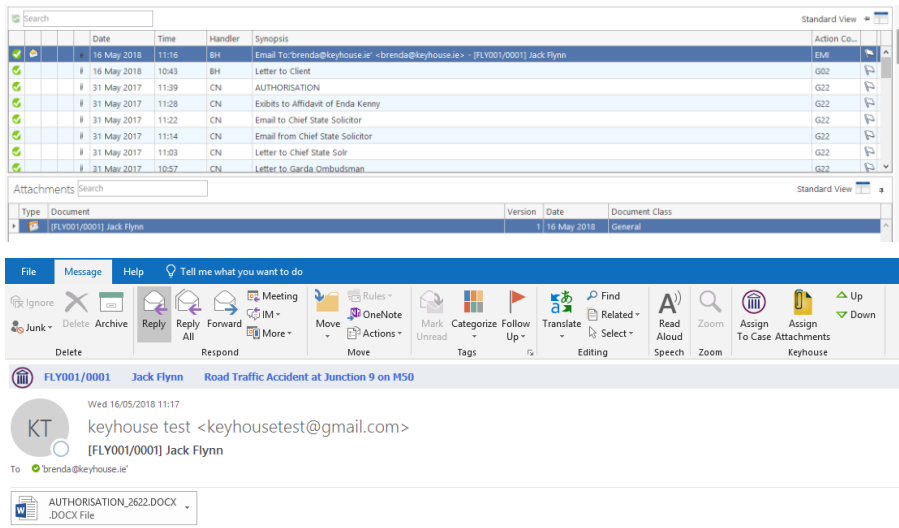
- Enter details in the Diary Description or edit the Diary Date as needed.
- Click OK to save to the case.
- If the user clicks cancel, the following dialog box appears



- If the user clicks 'Return to Selection' the user is returned to the screen in Step 1. If 'Yes, I wish to Cancel', is clicked, the user is returned to the email as it has **not** been sent.
- To send an email without it being assigned to a matter, use the Clear Button to remove the reference to the case before clicking on the Send button.

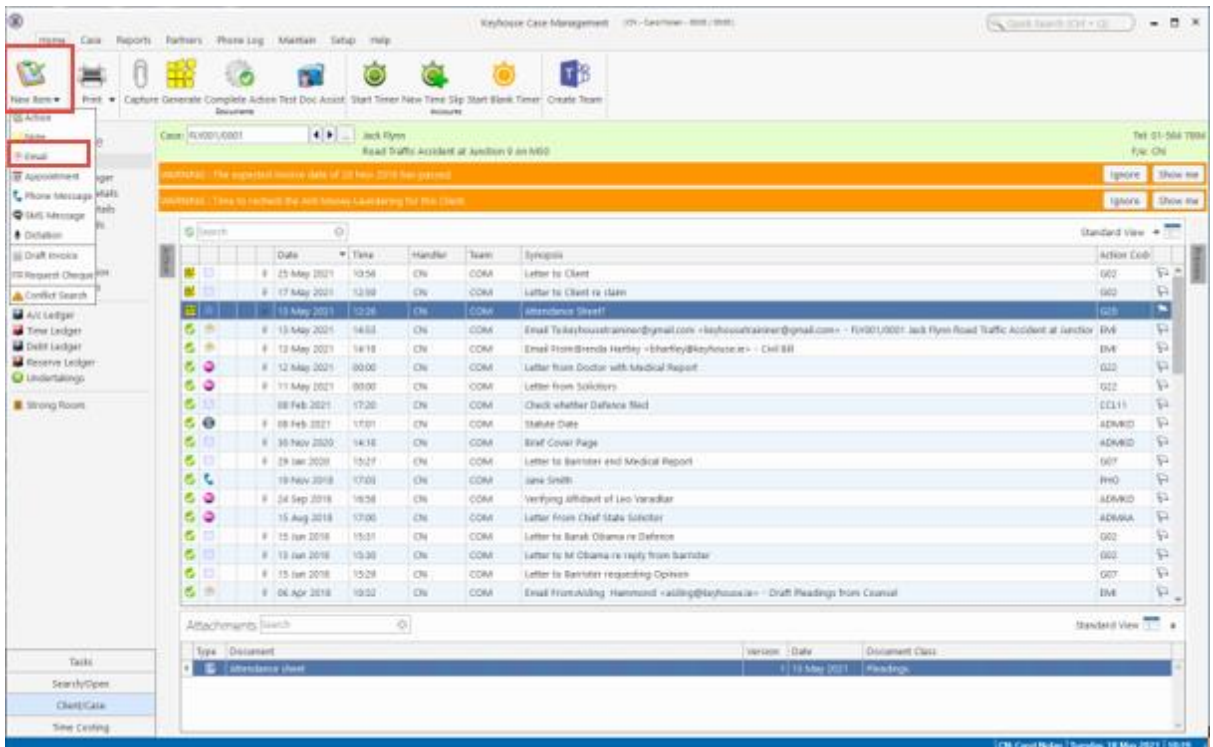


- To check if an attachment was sent with an email, open the email in Keyhouse.

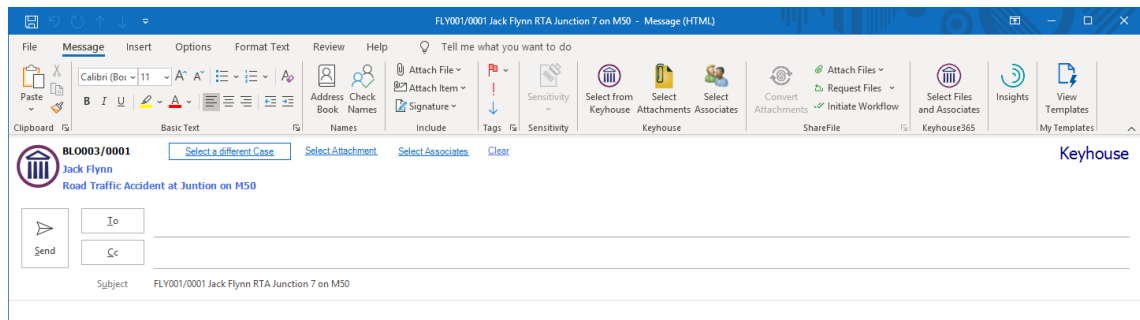


Sending a new E-mail from Keyhouse via Outlook

1. From the **Case Diary Window** of the matter click on the **New Item** button located on the Home Ribbon.



2. Click on Email and a new email window opens.

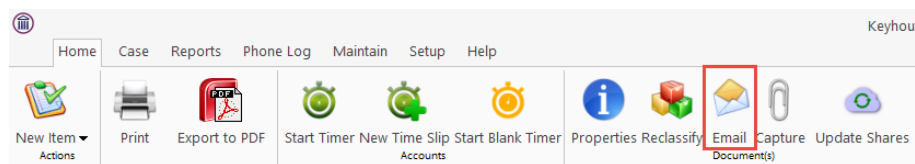


3. The Case Reference, client and matter description will automatically appear in the email.
4. You can now Select Attachments and Associates as per the previous section.

Send a document in an Email from Keyhouse

An existing document can be attached directly to an email. This can be done from the Document Manager or from the Case Diary.

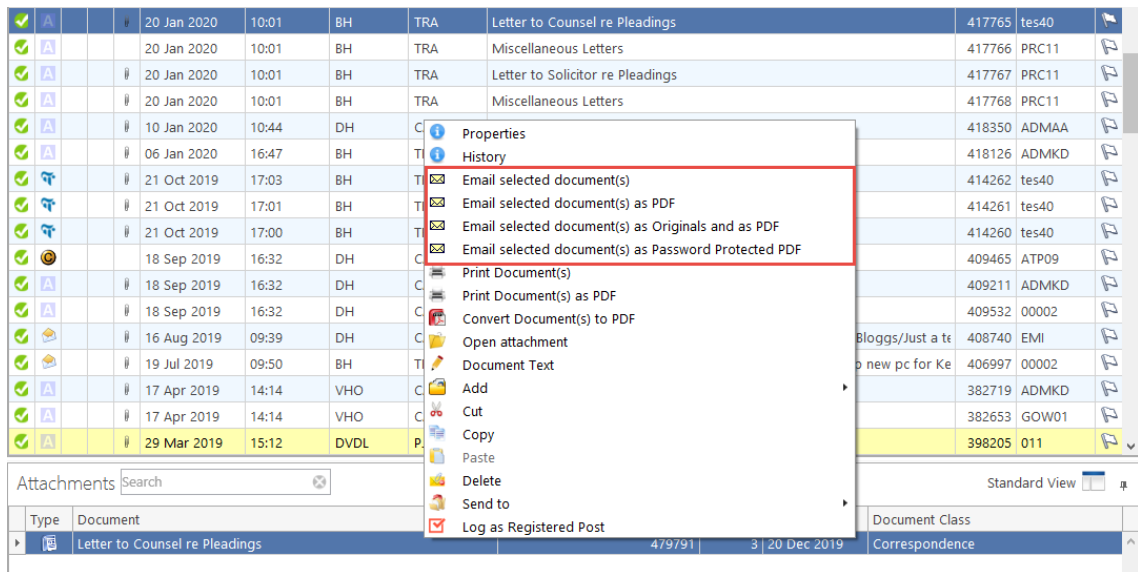
1. Click on the document to be emailed from the Document Manager and click Email from the ribbon. **Note:** Multiple documents can be selected for the email.



2. The email will open with the case information prepopulated. The option to convert documents to PDF is not available with this option.
3. Alternatively, use the right click option to add the documents to the email. This will allow you to convert the documents to PDF. Use the Control Key to select multiple documents to add to the email.

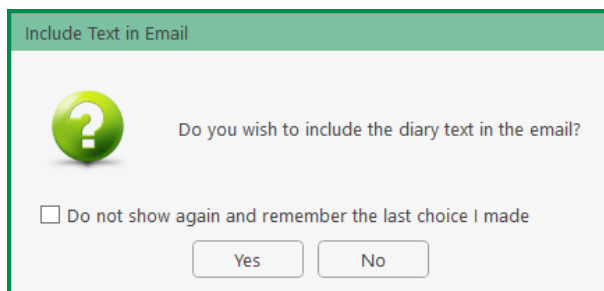
	Document Name	Diary Date	Track Referen...
	Report	30 Jan 2020	482874
	Letter to Council/Lea. Blogdipon	20 Jan 2020	479791
	Letter to		479792
	Blank Let		479793
	Letter to		480507
	Brief for		480211
	Brief for		480212
	Brief for		480213
	Bill of C		480508
	Draft Pl		473506
	Report		473505
	Person		473504
	Medical		467614
	Set up 9		467950
	FLY001/C		467207
	Set up a		464985
	Set up n		464989

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.

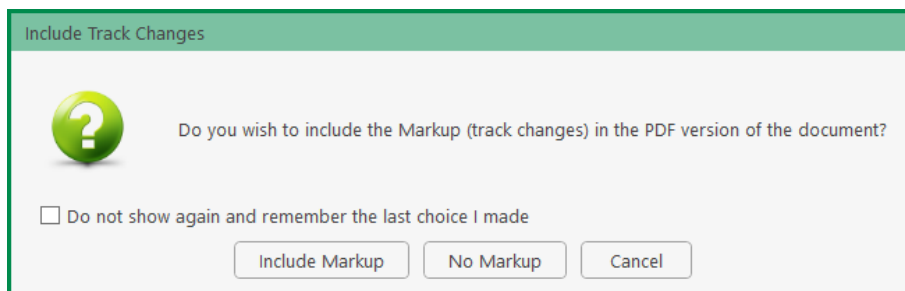


5. The following prompts will appear.

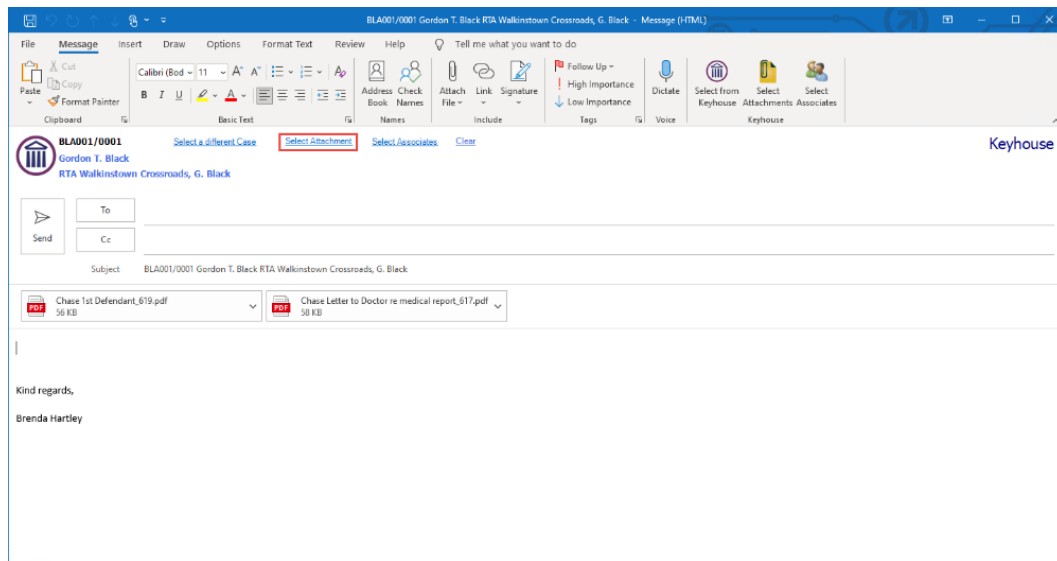
- a) Click Yes to add the diary description to the email. If this is never required, tick the Do not show again prompt and click No.



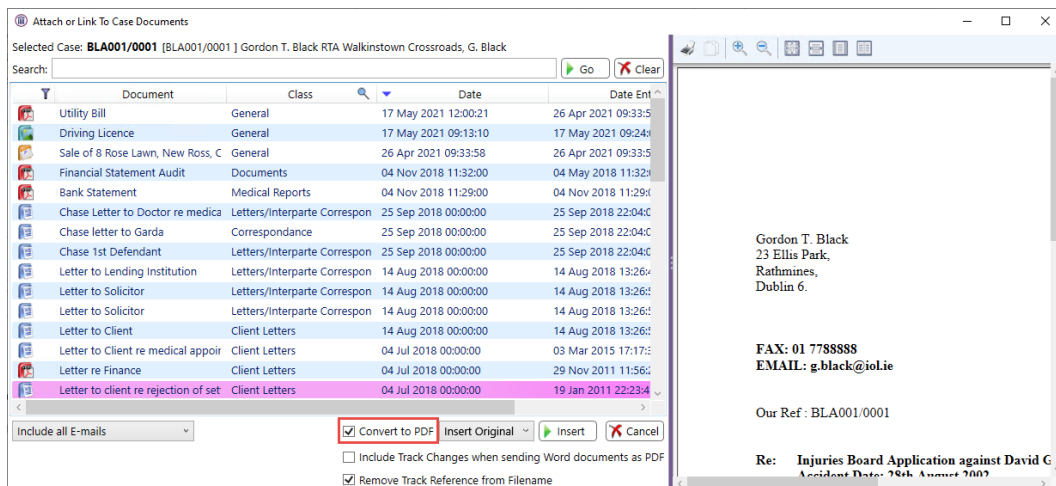
- b) Click Include Markup to show Track Changes. Click No Markup if there are no Track Changes. Only tick the Do not show option if Track Changes are never needed.



- To add additional documents to the email, click Select Attachment and select from the list of documents.



- Click Convert to PDF to attach a Word document as a PDF and click the Insert button.



- Complete the email and send.

NOTE: If the option Convert to PDF when sending attachments is set in the Setting, 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 on the Case Diary screen with the actual email & any documents visible in the Attachments.

Keyhouse Case Management (CN - Carol Nolan - 0002 / 0000)

Home Case Reports Partners Phone Log Maintain Setup Help

Case: BLA001/0001 Gordon T. Black RTA Walkinstown Crossroads, G. Black Tel: 01 4766666 Fax: 85

WARNINGS : Invoices outstanding over 9 Years 15 Days. Ignore Show me

WARNINGS : Time to recheck the Anti Money Laundering for this Client. Ignore Show me

SEARCH	Date	Time	Handler	Team	Synopsis	Action Code
	25 May 2021	11:59	CN	COM	provide proof of ID	ADMUD
	24 May 2021	09:42	CN	COM	Critical Date	G23
	17 May 2021	09:24	CN	COM	Photo card driving licence	
	04 May 2021	11:29	CN	COM	Bank Statement	G02
	26 Apr 2021	09:33	CN	COM	Email From: Brenda Hartley <bhartley@keyhouse.ie> - Sale of 8 Rose Lawn, New Ross, Co. Wexford	EMI
	01 Nov 2018	14:29	CN	COM	Email From: Brian Sweeney - Draft Civil Bill	EMI
	18 Oct 2018	09:36	CN	LIT	Email To: - Draft Pleadings	EMI
	08 Oct 2018	22:10	CN	COM	Chase Letter for Medical/Garda Report	G03
	27 Sep 2018	11:09	CN	LIT	Gordon Black	PHO
	25 Sep 2018	22:04	CN	COM	Chase Letters	G03
	06 Sep 2018	22:06	CN	COM	Letter from Accountants	G03
	14 Aug 2018	13:26	CN	COM	Letter to Client	G02
	14 Aug 2018	13:26	CN	COM	Letter to Solicitor	G03
	14 Aug 2018	13:26	CN	COM	Letter to Solicitor	G03
	14 Aug 2018	13:26	CN	COM	Letter to Lending Institution	G04
	04 Jul 2017	10:11	CN	LIT	Prepare Papers for Counsel.	G02
	07 Sep 2015	15:33	CN	COM	Email From: no-reply@accounts.google.com - New sign-in from Chrome on Windows	EMI

Attachments search

Type	Document	Version	Date	Document Class
	Sale of 8 Rose Lawn, New Ross, Co. Wexford	1	26 Apr 2021	General
	Utility Bill	1	17 May 2021	General

Tasks Search/Open Client/Case Time Costing

Standard View

CN: Carol Nolan | Monday, 17 May 2021 | 12:35

Use the View Button to filter for Emails. If a Diary Description has been used, it will be visible here.

Search

Emails

SEARCH	Date	Time	Handler	Description	Action Code
	26 Apr 2021	09:33	CN	Proof of address	EMI
	01 Nov 2018	14:29	CN	Civil Bill	EMI
	18 Oct 2018	09:36	CN	For your approval and please note the section on special damages. Counsel.	EMI
	07 Sep 2015	15:33	CN	Update to client	EMI
	07 Sep 2015	15:29	CN	Chasing for Copy of Civil Bill	EMI
	04 Aug 2015	12:35	CN	Following up on meeting	EMI
	04 Aug 2015	12:31	CN	Details of Claim	EMI
	28 Jul 2015	15:05	CN	Email detailing procedure	EMI
	16 Jan 2014	09:37	BS	Dear Sir, For your approval and please note the section on special damages. James Flynn Counsel.	EMI

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 edit them and then save them back to Keyhouse as:

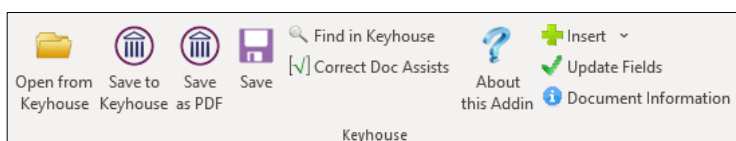
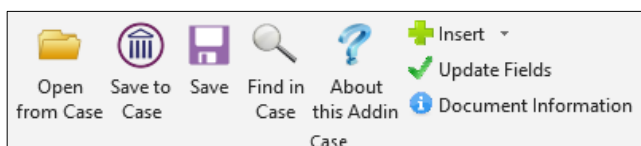
An update to an existing Document

A new version

A new document to the matter or another matter.

From the 5.9.1.1. Add-in onwards, versions of documents can be saved automatically. This feature can be activated by your System Administrator.

Keyhouse Ribbon



Open from Keyhouse Will allow the user to open any document from any matter without having to navigate to Keyhouse.

Save to Keyhouse 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.

For later versions of the Add-in, the following features can be found under Options.

Find in Keyhouse Allows the user to go to the assigned document in the Case Diary.

Correct Doc Assist Used when coding documents. It removes Microsoft formatting from Keyhouse Codes.

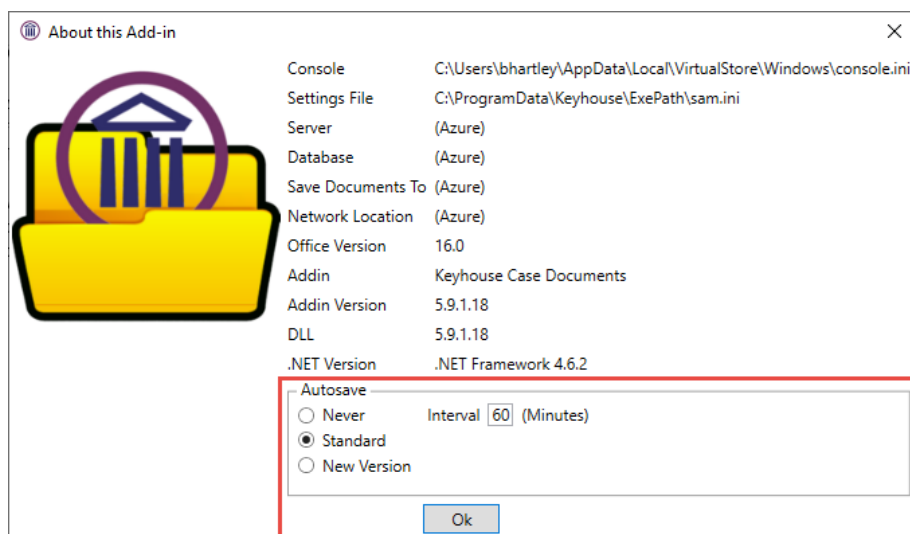
About this Addin	Gives details about storage location settings and the Add-In Version.
Insert	Allows the user to add a Tracking Reference and Version Number to a document.
Update Fields	Will update the Version Number and Tracking Reference if they have not updated automatically as part of the Save process.
Document Information	Details information about the document including Classification, Version Number, Tracking Number, and storage location.

Auto Save

New Document Generator Only

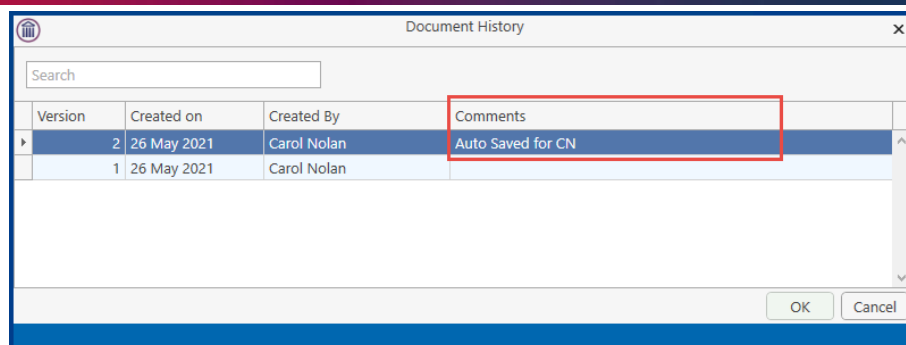
Auto Save can be turned on to ensure that documents are automatically save to Keyhouse. The will prevent documents being lost if the user forgets to save changes to a document. This feature is also available in Excel and is available from the 5.9.1.18. version of the Addin.

1. Click on the Options Button on the Home Ribbon and select About this Addin.



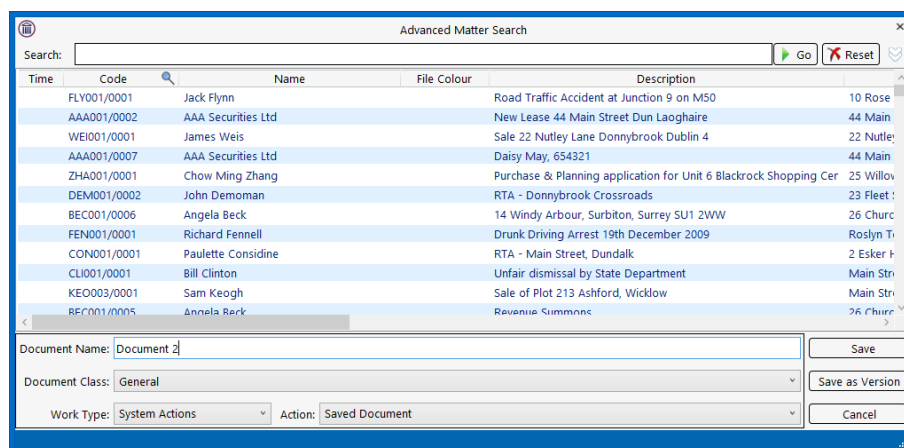
2. The feature is automatically turned on using the Standard setting. However, users can change this.

Never	Document will NOT be saved to the RecoveryBackup location.
Standard	Documents will automatically be saved to the RecoveryBackup location every 60 minutes (default). The interval can be changed by each user to their required interval
New Version	This will automatically save the document at the agreed interval time but it will save it as a new version of the original document. The History will show the following:



Create a document using Word

1. Open MS Word in the normal way and create your document.
2. Once the document is ready to be saved, click Save to Case. This will open the following dialog box:



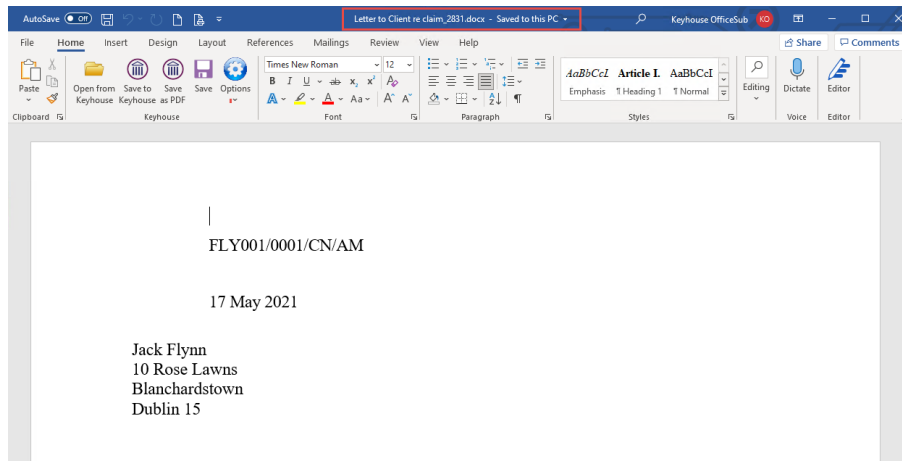
3. Select the matter to be used and enter a Document Name if it is not already named correctly. Change the class by clicking on the down arrow to the right of the Document Class box. Change the Work Type and Action as needed.
4. Click Save.

Add Tracking and Version Numbers to Document

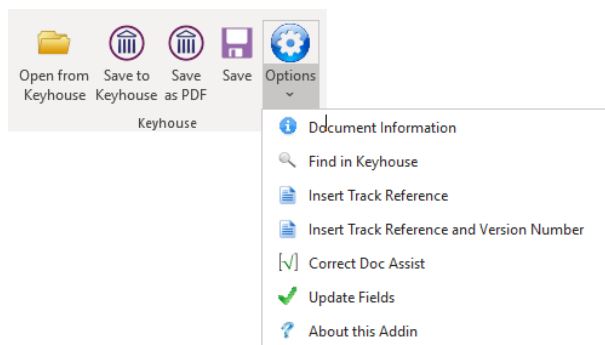
A tracking reference is a unique number given to each document in Keyhouse. It can be used to locate any document on the system.

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.

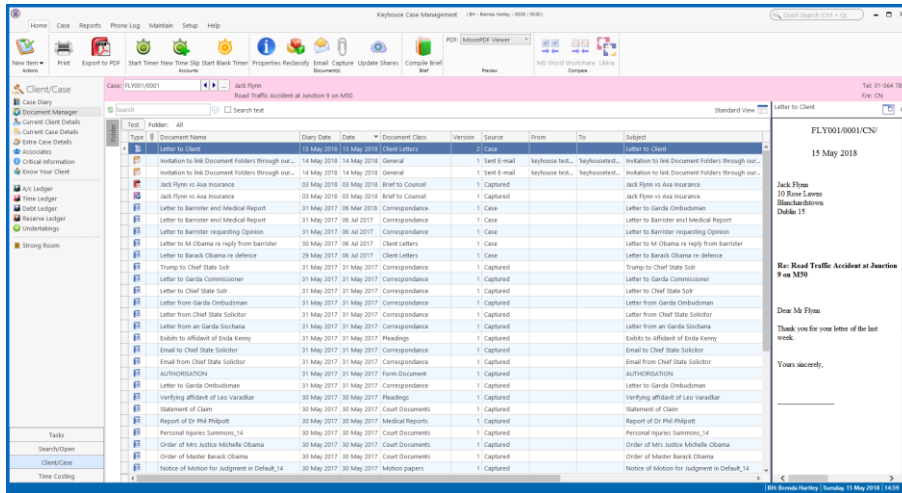
Opening and Editing a document from Keyhouse in MS Word (Version Control)

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 per document in the Document Manager and in the Case Diary and all older versions are stacked behind the most current version. The most recent version is always the visible version.

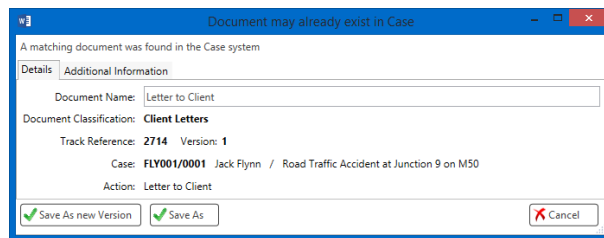
If the user is creating a document in Word, this must be saved to the case before applying Version Control.

From version 5.9.1.1. of the Add-in, saving as a version can be done automatically. This feature must be activated by the System Administrator.

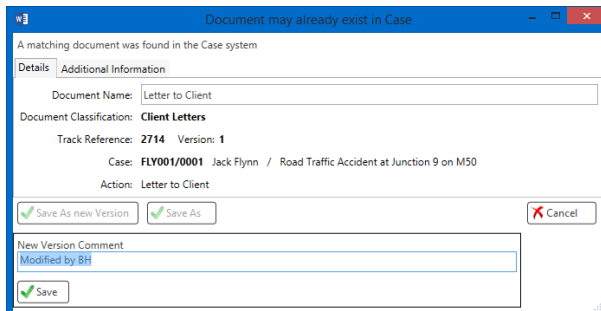
1. Select the Word Document from the Document Manager or from the Attachment section of the Case Diary and double click to open.



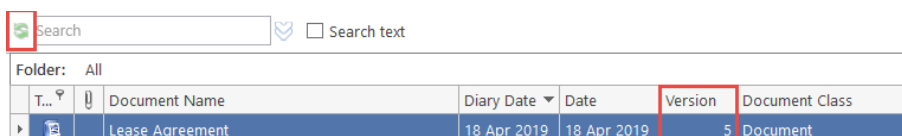
2. Make the necessary changes and click the Save to Keyhouse button
3. The following dialog box will appear:



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

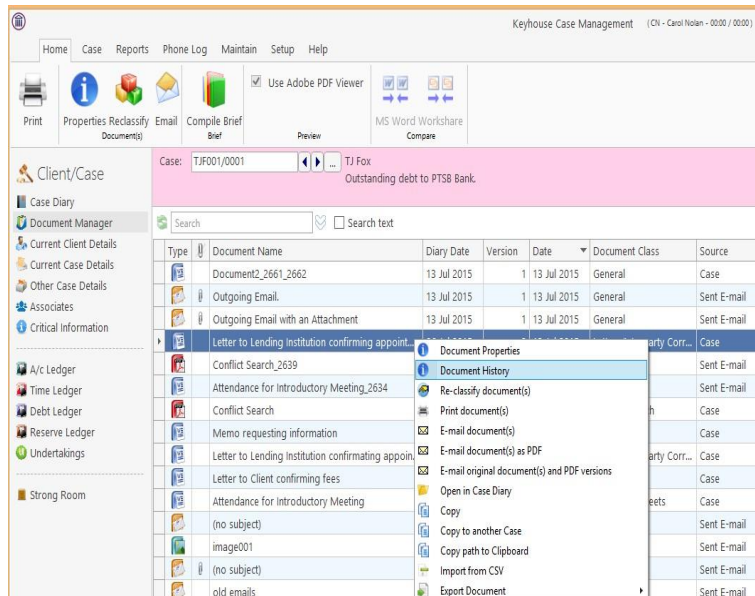


6. Click Save.
7. With Version Control, you will always see the latest version of the document in the Document Manager and Case Diary. However, it may be necessary to click the Refresh Button to update the screens.

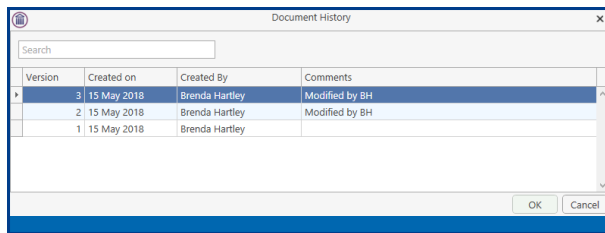


Working with Document Versions

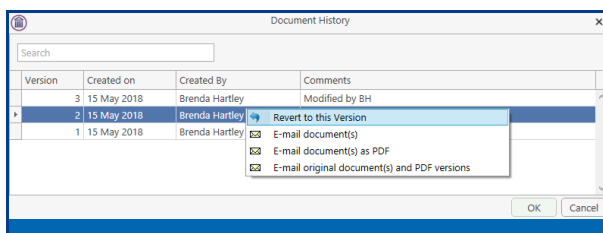
- To have visibility on older version of the document, right click on the document and select Document History. In the Case Diary, select History.



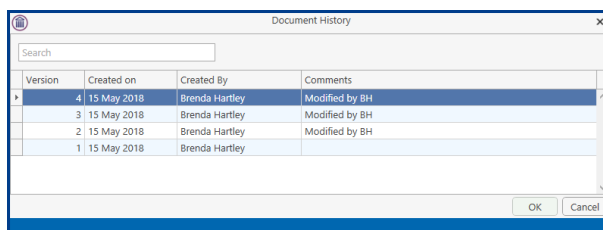
- The Document History Dialog Box will appear.



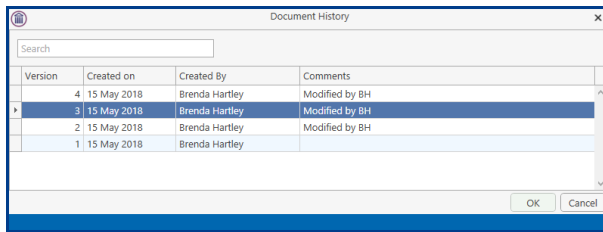
- To revert to a previous version, right click on the version required and select Revert to this Version.



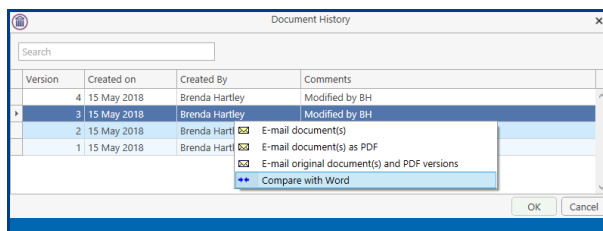
- This will create a new version



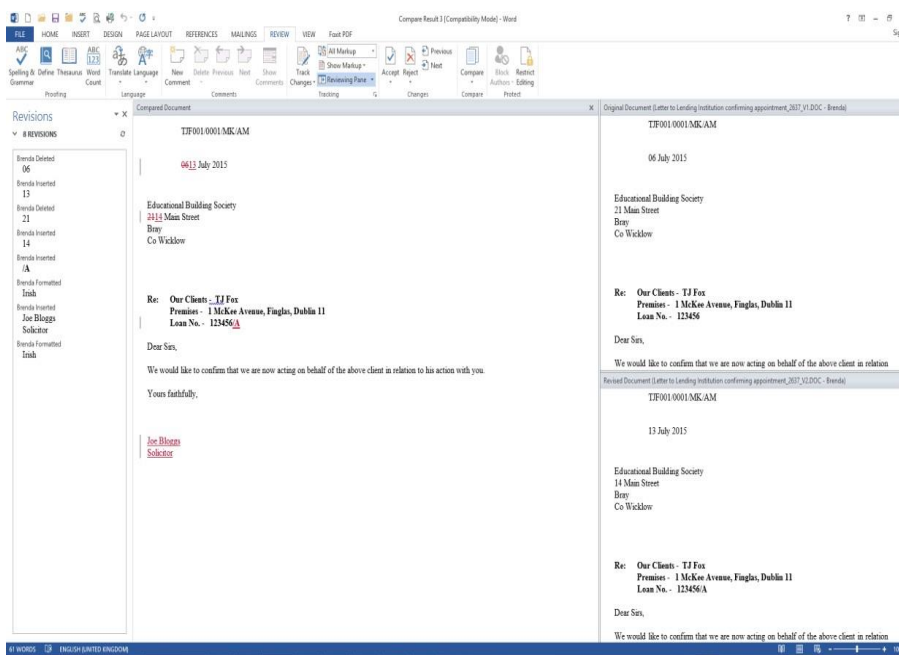
- To email a previous version, right click on the version and select the document needed. Process the email in the normal way.



- To do a comparison of two documents, select the document to be compared to and holding down the <CTRL> Key select to document to be compared.
- Right click on the highlighted area and select Compare with Word.



- A new document has been created showing all changes between the two documents.

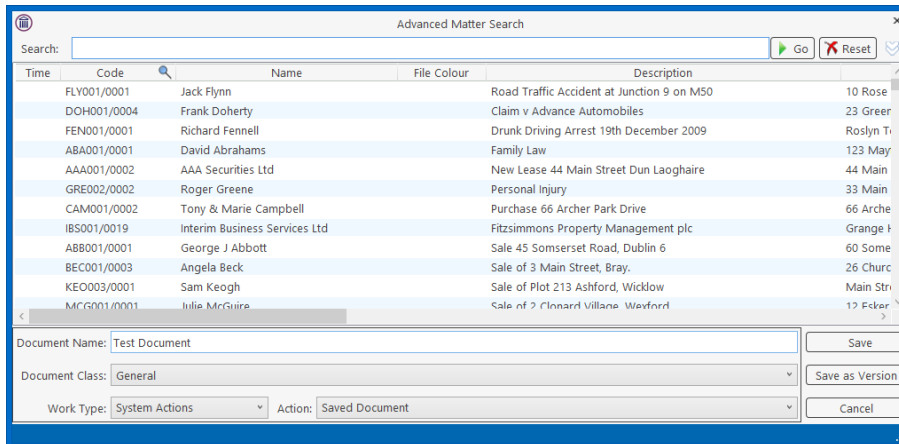


NOTE: The comparison document is a new document and is not automatically saved to Keyhouse. The user can either save the document as a new version of the existing document or save it as a new document with a **new** tracking number.

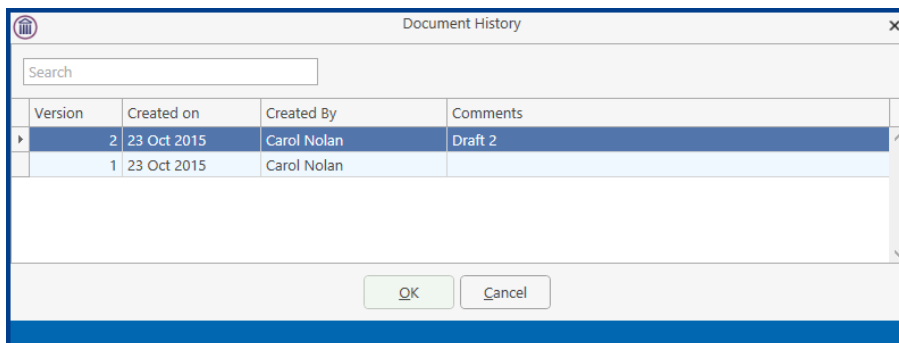
Working with Incoming Drafts

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 Keyhouse 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 as Version, modify the Comment if needed, and click Save.
5. The email can then be saved in **without** the attachment to avoid duplication.



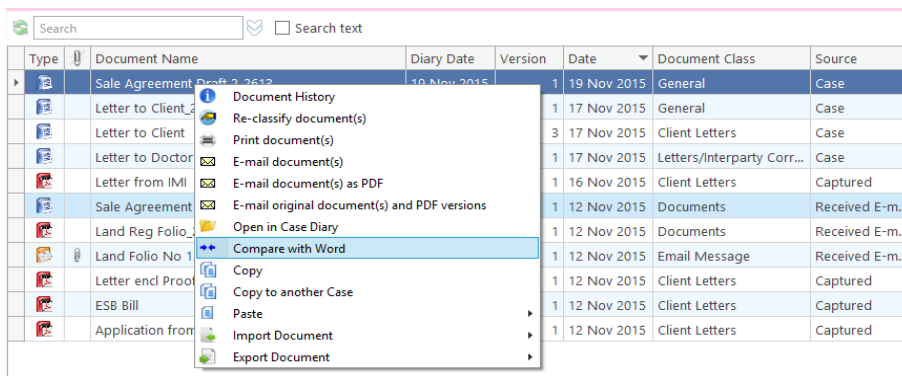
6. To view the versions, right click on the document in the Case Diary or the Document Manager and select Document History.

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 Keyhouse Button.

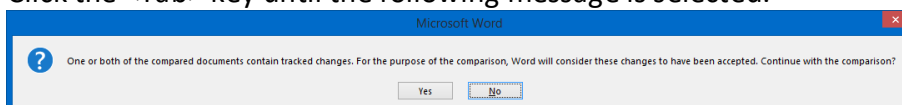
Comparing 2 Documents with Track Changes (Versions Prior to 5.7.1.1)

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.

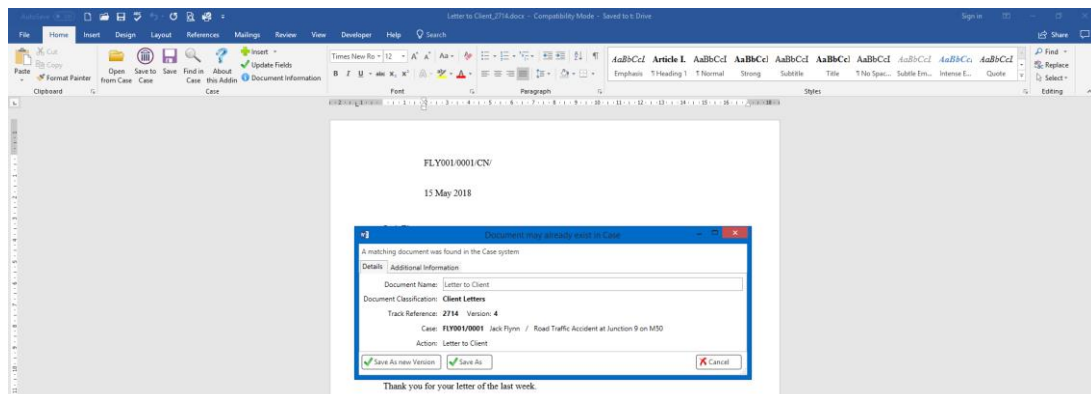


5. Click Yes. The comparison documents will open.
6. Continue as normal with the comparison.

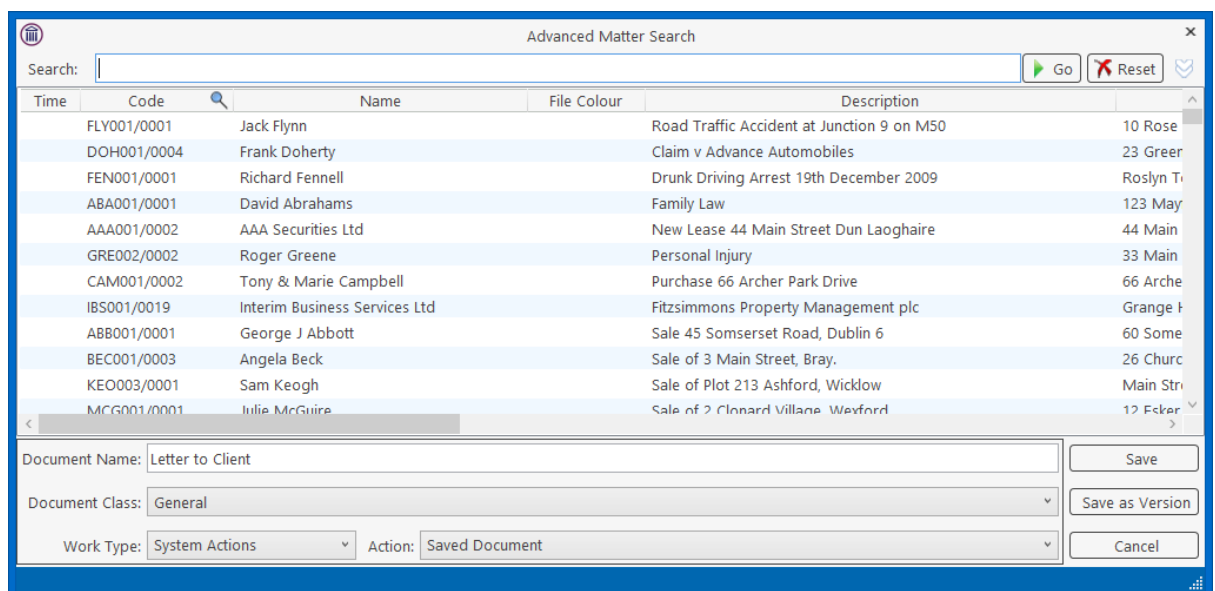
Using 'Save As' Through Keyhouse

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 Keyhouse.



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



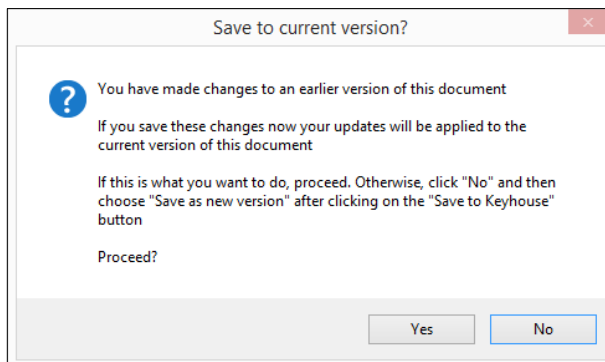
5. Click Save.
6. The document can now be edited as required.

Change Control for Word Documents

Version control can help prevent users from losing or overwriting documents in error. The warnings will be shown in both the Case Diary and Document Manager. This feature is also available in Excel and is available from the 5.9.1.18 version of the Addin.

Scenario 1

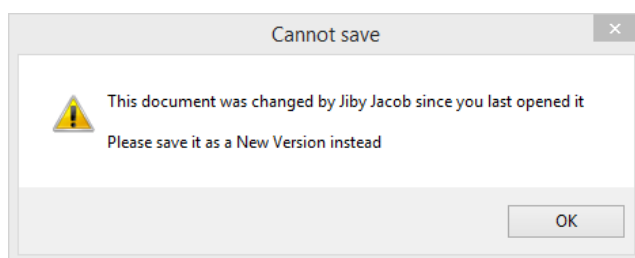
1. When a user opens an old version of a document, makes changes, and saves. A warning will appear notifying that it is not the latest version of the document.



2. Click Yes to continue or No to return to use the Save to Keyhouse option.

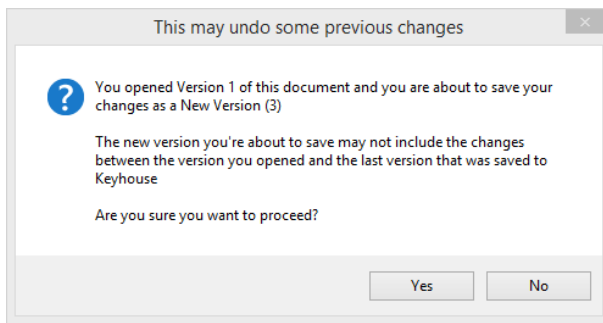
Scenario 2

1. User 1 create or opens a document, makes changes and saves, leaving the document open.
2. User 2 opens the document and makes further changes and saves the changes.
3. User 1 makes additional changes to the open document on their screen and click save. The following warning will appear.



4. Click OK to continue.

5. If the User 1 choses to save as a new version, the following warning will appear.



6. Click Yes to continue to create a new version. Click No, the document will not save.

Keep Recovery Copies of Documents until saved to Keyhouse

A copy of all unsaved documents will be stored to a Recovery Location so, if there is a software failure, the document can be retrieved and save to Keyhouse using the 'Save to Keyhouse' option. The documents will be held for a period of 2 weeks. This feature is available from the 5.9.1.1. version of the Addin.

When opening Word, the Word Addin will check the Recovery Folder and alert the user if there are documents in the folder. When the user opens the document, the system will check if it is a new document or an existing one and the user will then be prompted to save it to Keyhouse.



Appendix 1

Updating the Outlook Add-In

If using the Keyhouse Update Launcher, the Outlook Addin will be updated automatically. However, if the launcher is not installed, follow the instructions detailed below.

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

Keyhouse Outlook Add-in Settings

 **Keyhouse Outlook Add-in** 
Version 5.9.1.1 For .NET Framework 4.6.2

Restore Question Prompts and items flagged as Do Not Show Again

Saving of Assigned Sent Items

Save Email Only Save Email and Attachments Save with Options

Ignore Image Attachments Hide Images when selecting Attachments
... that are less than pixels wide or pixels tall.

Only if Embedded

Case Information Options

Store Case Code Reprocess Items Periodically
 Store Client Name
 Store Case Description Apply changes to all Outlook folders

Email Options

Remove Email Reply Chain Don't check internal mail addresses
 Convert Attachments to PDF Include Track Changes
 Use Email date for all attachments Don't check any mail addresses
 Navigate to Case Diary Group Emails to Action
 Show potentially missing assignments in red
 Uncomplete Emails with Follow On Actions
 Do not store Appointments as Completed Actions

Subject Line

Set subject line Append to existing subject line
Prefix:
Subject Line:

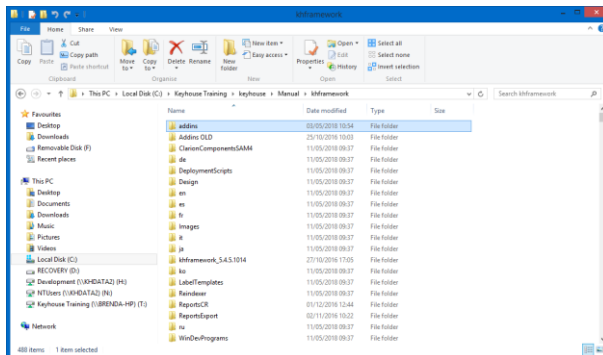
Ok Cancel

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

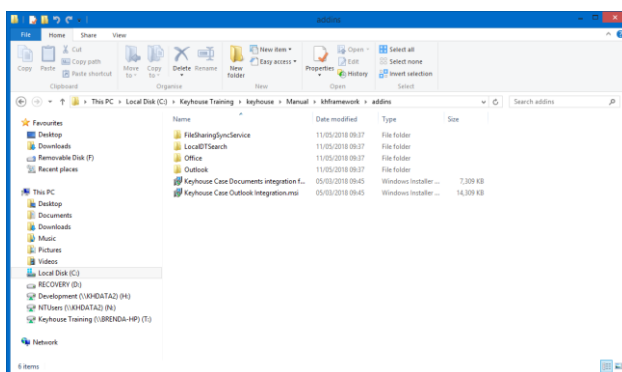
NOTE: Please save all draft emails before uninstalling the Addin.

3. Go to the Keyhouse Icon on your desktop.

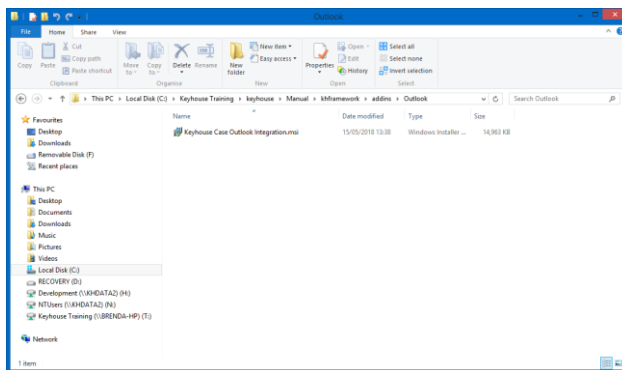
4. Right click and select Open File Location to navigate to the Keyhouse Mapped Drive. Below is an example of a mapped drive.



5. Open the Keyhouse Framework Folder and double click on the Add-ins Folder.

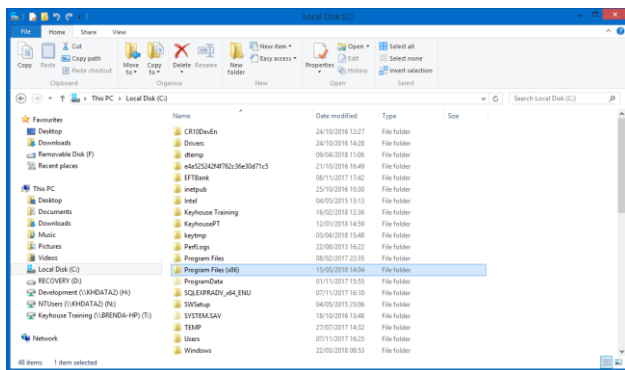


6. Open the Outlook Folder.

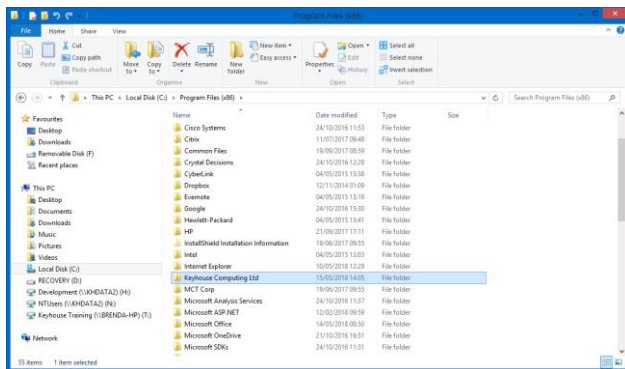


7. Double click on the Keyhouse Case Outlook Integration.msi and follow the instructions given.
8. Once finished, open Outlook.
9. Check that the Assign to Keyhouse button is working.
10. If there is an issue close Outlook, open Windows Explorer and go to the C:\\ Drive (Windows (C:)).

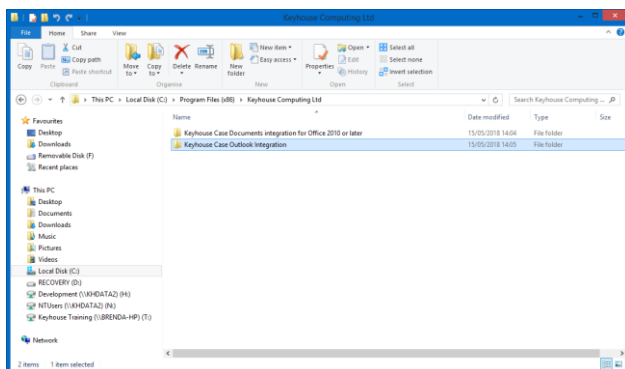
11. Select Program Files (x86).



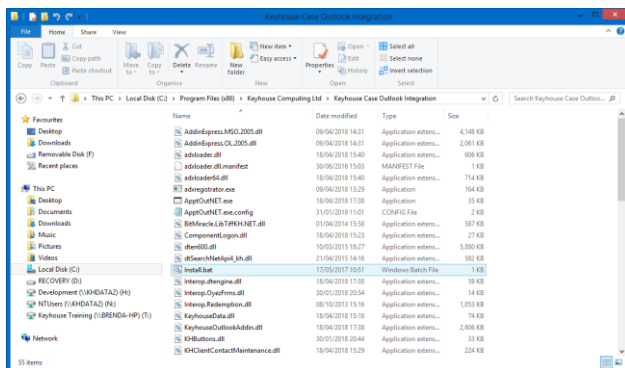
12. Go to Keyhouse Computing Ltd and double click.



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.

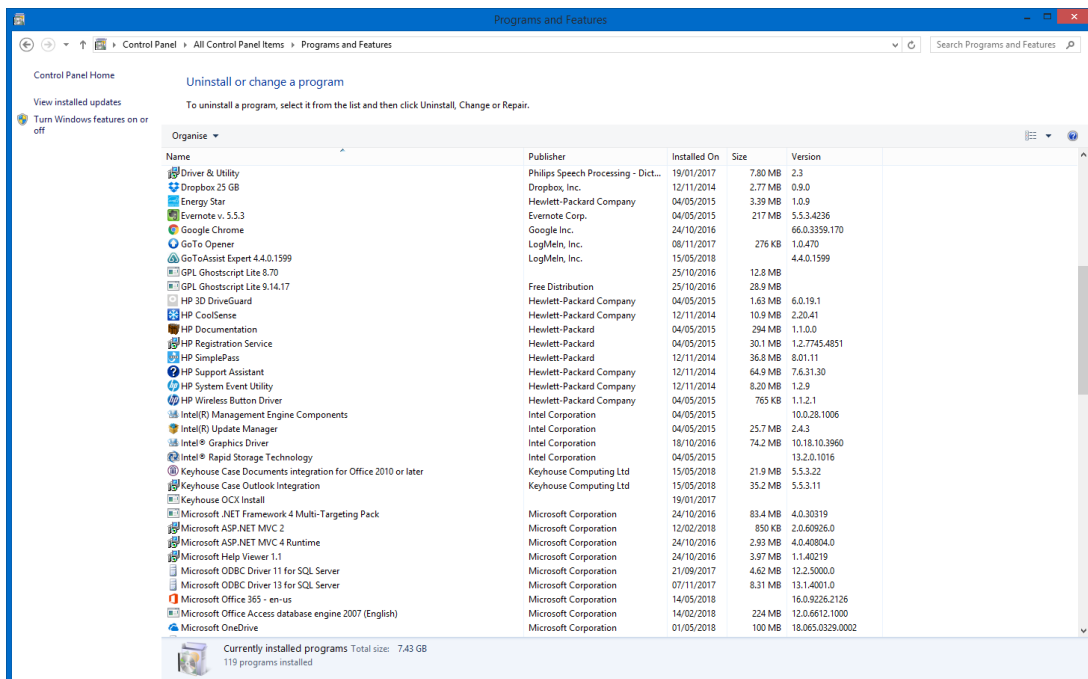
Appendix 2

Updating the Word Add-In

If using the Keyhouse Update Launcher, the Word Addin will be updated automatically. However, if the launcher is not installed, follow the instructions detailed below.

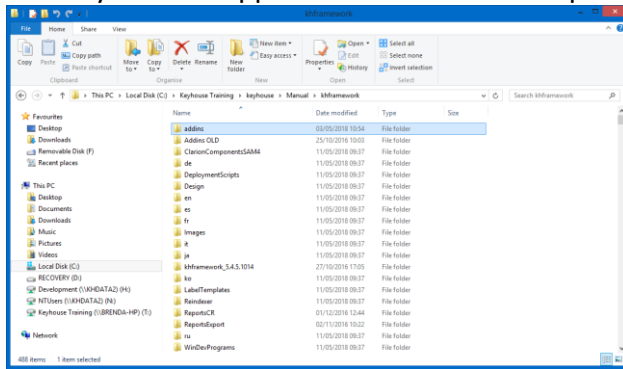
Before you install the Word Add-In, the old one has to be removed.

1. Close all MS Programs open on the system (e.g. Word, Excel, PowerPoint).
2. Open 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 (Depending on the version of MS Office installed).

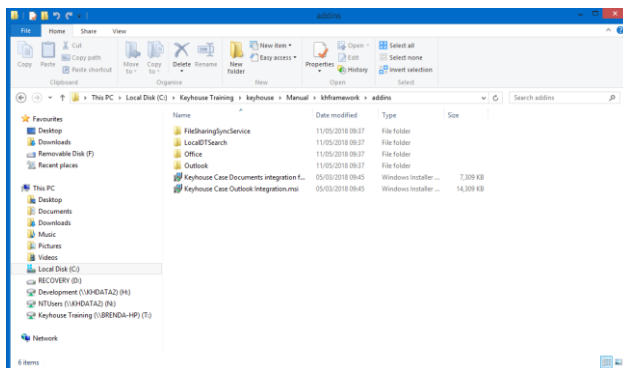


5. Click Uninstall and follow the instructions given. If you do not have permission to delete the program, contact your System Administrator to install the add in.
6. Once the Add-In has been uninstalled, close the Control Panel.
7. Right Click on the Keyhouse Icon and select Open File Location.

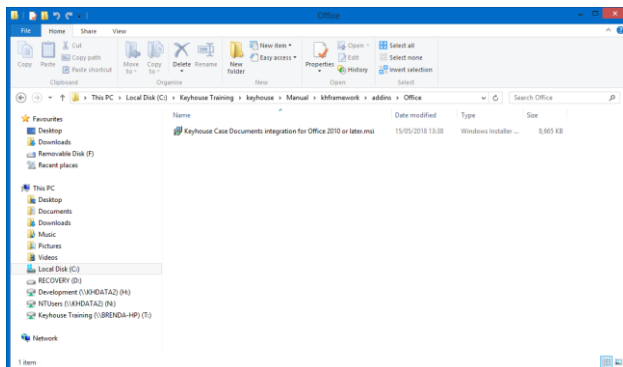
- The Keyhouse Mapped Drive location will open.



- Double click on Addins Folder.

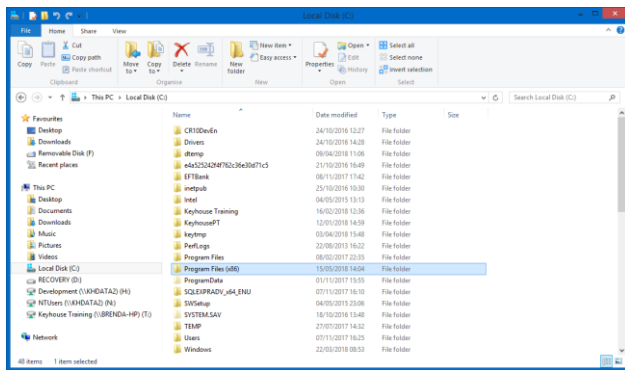


- Open the Office Folder.

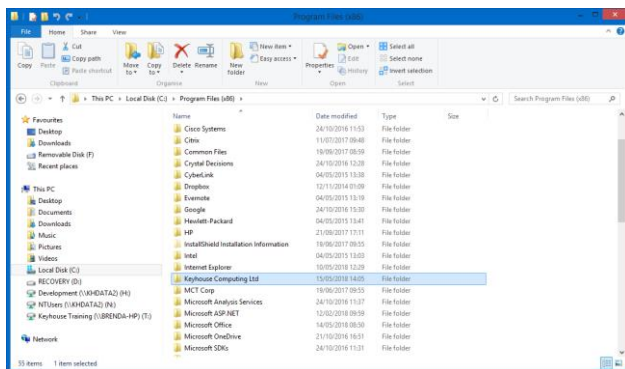


- Double Click on the file and follow the prompts.
- Once finished, open MS Word.
- Check that the Save to Case is working.
- If there is an issue close Outlook, open Windows Explorer and go to the C:\\ Drive (Windows (C:)).

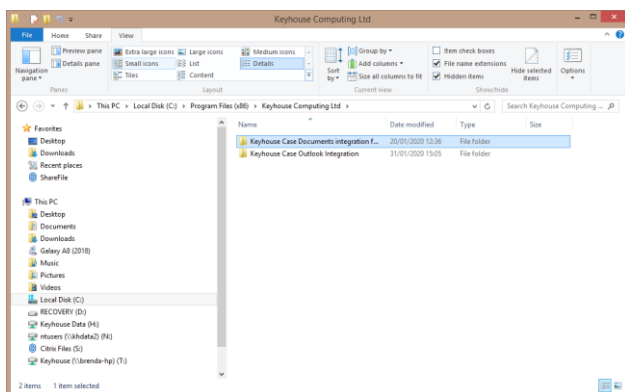
15. Select Program Files (x86).



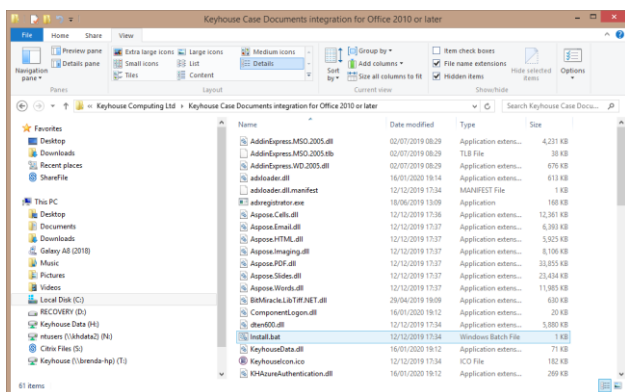
16. Go to Keyhouse Computing Ltd and double click.



17. Go to Keyhouse Case Outlook Integration.



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



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

20. Return to Word and check again.

21. If there is still an issue, contact Keyhouse Support.