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WHAT'S NEW IN KEYHOUSE
END USER INTERFACE
VERSION 5.9.1.1

We are constantly improving and implementing new features in our software. The attached guide is a summary of what has been added and improved in our system. This guide has been designed as a quick way to see all the changes with your latest upgrade.

We have made improvements in the following areas:

Area	Code	Description	
Logging into Keyhouse (Cloud Only)	001	Single Sign On Authentication	
Client & Matter Setup	002	Operating System Upgrade Warning	
	003	Envelope Name on Client Setup Screen	
	004	Additional Estimate of Fees Option	
Case Diary	005	Case Contacts	
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	007	Search near an Action	
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Document Generation	009	Tool Tips for Extra Case Details	
	010	New Preview Pane	
Document Manager	011	Set Document Manager as the Default Page	
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	013	Open Documents Locally	
	014	Improved searching for surname such as O'Brien	
	015	Track Reference visible on Document Properties Tab	
	016	Documents Near This	
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Document Searching	019	Modifications to Document Search	
	020	Searching for Will	
Digital Signature	021	Digital Signatures using DocuSign	
Accounts Ledger	022	View Bank on Account Ledger	
	023	Show or Hide Cleared Balances	
	024	Show Cleared Date on Account Ledger Grid	
	025	Notification of Task Assignment	
Tasks	026	Drag and Drop Document	
Brief Builder	027	Renaming and classifying documents in Brief can be reflected in the Document Manager	
	028	Document Time available in Brief	
	029	Submit Brief for Offline Generation	
	030	Re-process Documents in Brief Builder	
	031	Include Cover Page in Page number sequence of the Index	
	032	Exclude Date Column from Table of Contents	
	033	Deleted Briefs removed from Storage Location	
	034	Pre-Billed Outlay Indicator	
	Billing	035	Integration of Transact.ie with Keyhouse
	TransAct.ie	036	Tidy up of Keyhouse Options in Word
	Word Addin	037	Automatically create a new Version when saving a Document
		038	Keep Recovery Copies of Documents until saved to Keyhouse.

Area	Code	Description
Word Addin	039	Change Control for Word and Excel Documents
	040	Auto Save Option
Dictation	041	Play Dictations Locally
Email Addin	042	Save an Email Attachment from Word
	043	Resize the Outlook Attachment Window
Personal Settings	044	Set Category when assigning Post via Email
	045	Update Software/Switch to Build
	046	Search Feature added to Personal Preferences
	047	Notify User when Tasks Assigned to Them
	048	Hold Previous Search on Task Screen
	049	Add Start and End Time to Daily budget
	050	Load Full Grid after Cancelling Search
	051	Switch to Legacy Previewer

LOGGING INTO KEYHOUSE 365

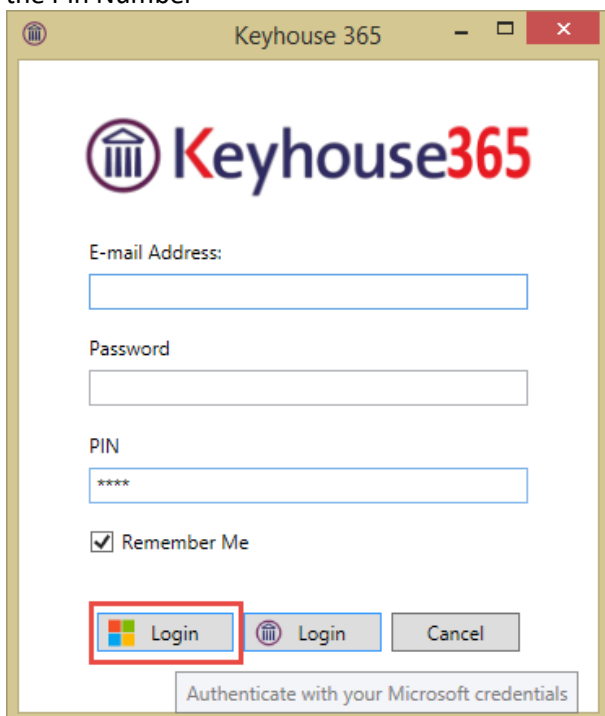
Cloud Users Only

001
KEYD-6630

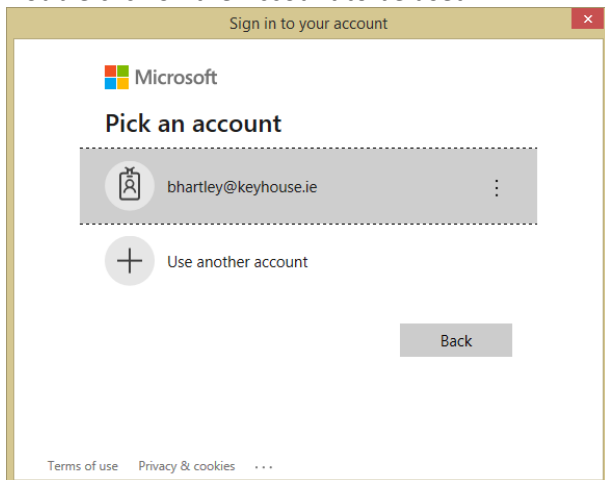
SINGLE SIGN ON AUTHENTICATION

Single Sign On enables user to log into Keyhouse using their Microsoft Login.

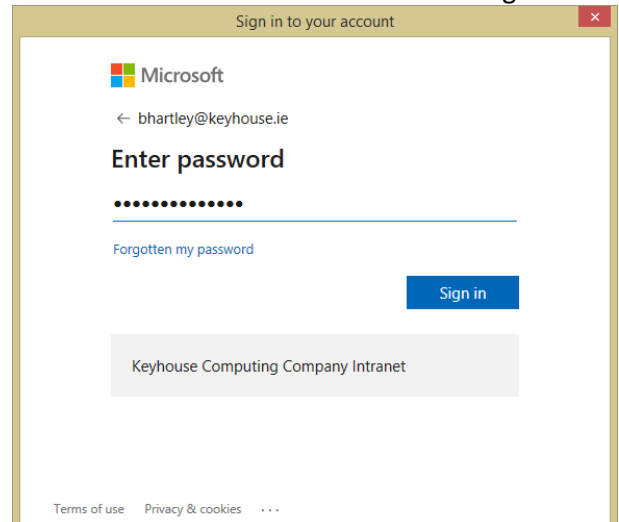
- Open Keyhouse and on the log in screen, enter the Pin Number



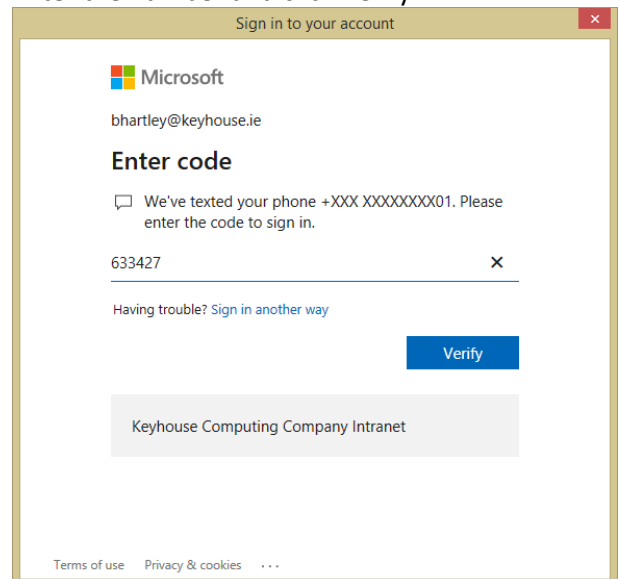
- Select the Microsoft Login
- Double click on the Account to be used



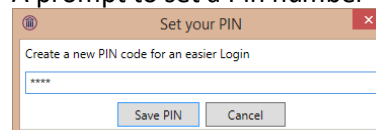
- Enter the Microsoft Password and click Sign In



- An OTP code will be sent to the mobile number connected to the account.
- Enter the number and click Verify



- A prompt to set a Pin number will open



- Enter the Pin number to be used for logging in and click OK.
- Keyhouse will open.

LOG ON SCREEN

002
DevOps
11701

OPERATING SYSTEM UPGRADE WARNING

Certain operating systems will become obsolete, and Keyhouse will no longer be able to support them. Keyhouse version 5.9.1.1 will be the last version to do so. A warning has been added to Keyhouse to advise if operating systems are out of date. If this warning appears then contact your IT for guidance.

- On the Log In Screen the Warning Icon will appear in the bottom left of the screen



- Click on Warning to view the message.

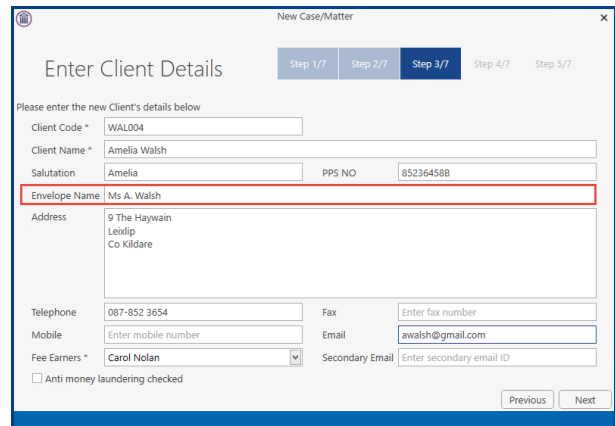


CLIENT & MATTER SETUP

003
KEYD-6463

ENVELOPE NAME ON CLIENT SETUP SCREEN

As you may want to have the name on envelope different from the name use to set up client, the Envelope Name options has been moved to the Client Setup screen.

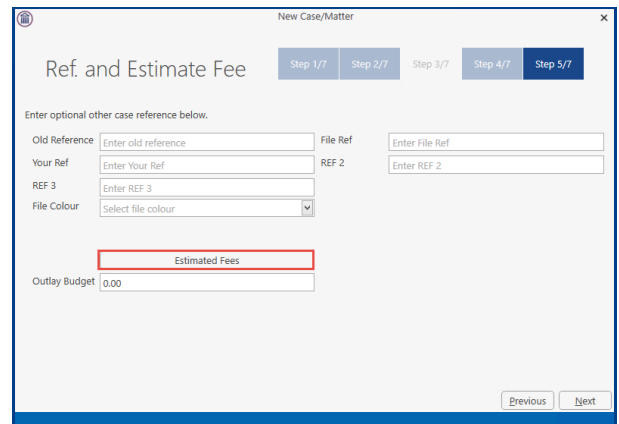


004
KP-37

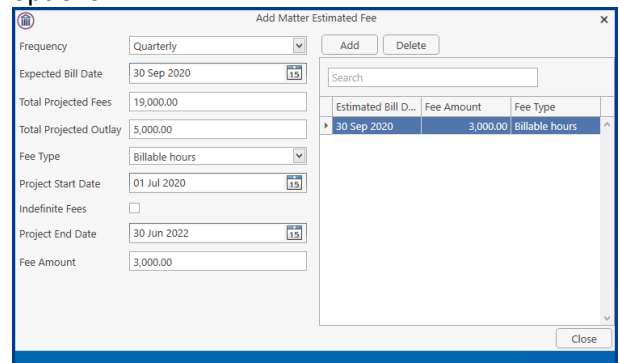
ADDITIONAL ESTIMATE OF FEES OPTIONS

With the new Section 150 requirements in relation to fees, we have created the ability to enter additional information in relation to fees. Please note this feature must be activated by the System Administrator.

- Create a new matter in the normal way.
- On the Ref and Estimated Fees screen, tick Estimated Fees

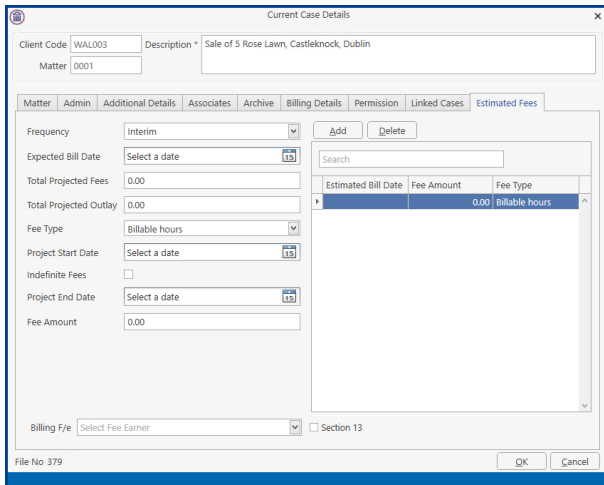


- The window will expand to give the following options.

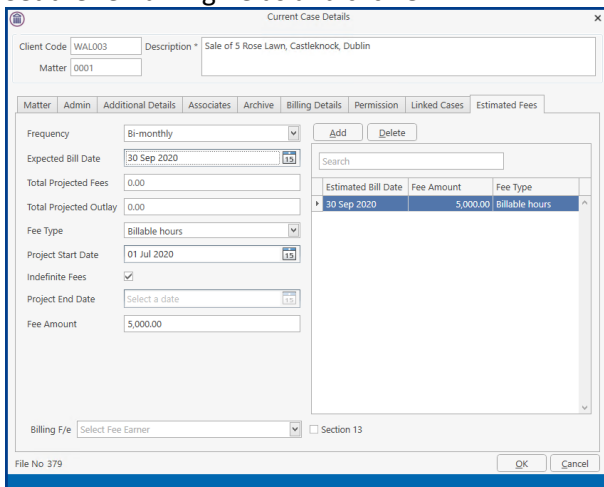


- Enter the required information and click Close.

- Changes can be made to the fees entered using the Estimated Fees Tab on the Current Case Details.



- If there is no foreseeable end date, tick the Indefinite Fees options. The Total Projected Fees, Outlay and Project End Date will be greyed out. Set the remaining fields and click OK.



CASE DIARY

005 CASE CONTACTS

KEYD-6648

A new feature dealing with Case Contacts has been added. For full information on using this feature, please refer to the Keyhouse End User Manual 5.9.1.1.

006 SMS MESSAGING

KEYD

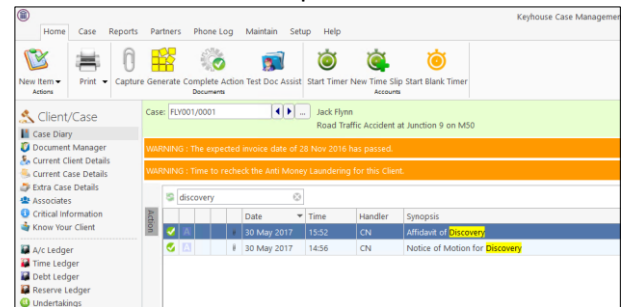
Text Messages can be sent from Keyhouse. For further information on this feature please refer to the SMSM Feature Manual.

007 SEARCH NEAR AN ACTION

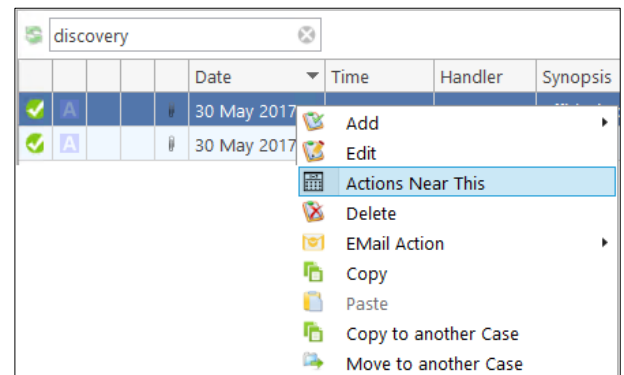
KEYD-6607

An option has been added to the Case Diary that will allow users to see actions near an action that they searched for. It will show action 2 weeks before and 2 weeks after the actions.

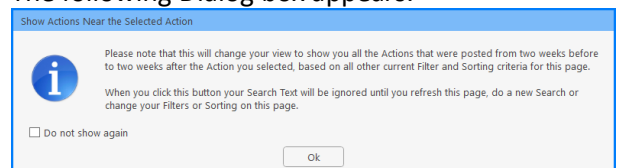
- Search for the action required



- Right click on the action to be used and select Actions Near This.

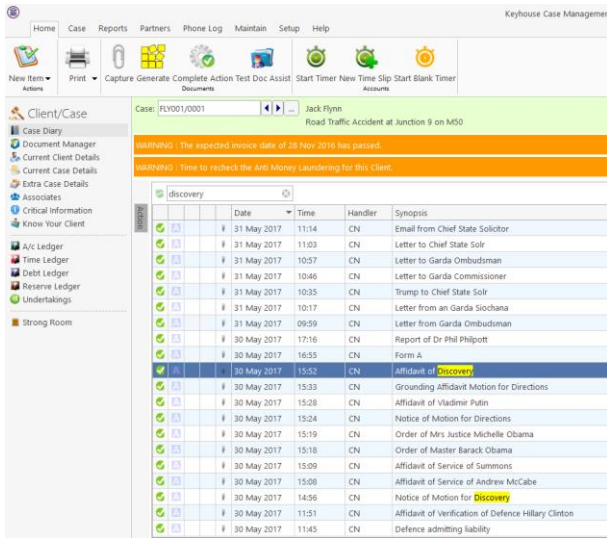


- The following Dialog box appears.



- If you do not want to see this warning again, click the Do not show again box.

- The Case Diary will now show all actions two weeks before and two weeks after this action.



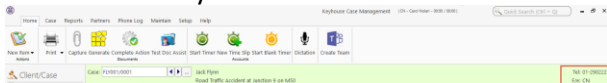
- To see the full case diary again, clear the search box.

008 DIAL CLIENT'S TELEPHONE NUMBER FROM CASE DIARY

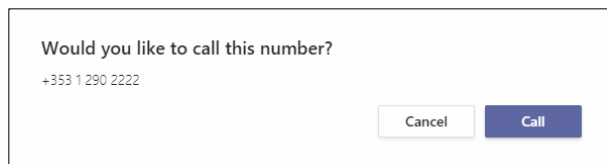
Dev Ops
7682

If you are using a VOIP phone system, you can click on the phone number for the client on the Case Diary to call the client.

- Click on the phone number in the top right corner of the Case Diary.



- Choose the phone system to be used. This will only be requested the first time.
- Using MS Teams, the following prompt appears on the screen.



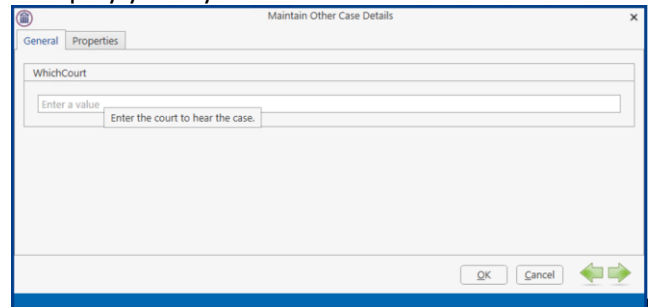
- Click Call to dial the number.

DOCUMENT GENERATION

009 TOOL TIPS FOR EXTRA CASE DETAILS

Dev Ops
11905

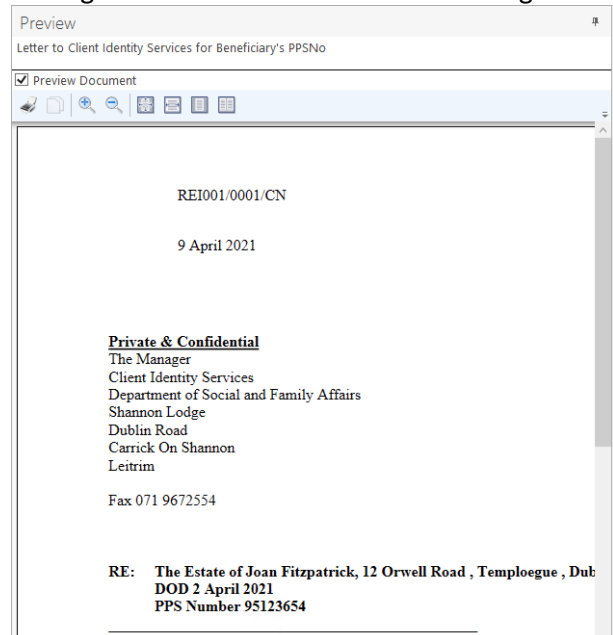
Tool Tips can be added to the Extra Case Details fields. They will be visible when you hover over an Extra Case Details field on the Extra Case Details Screen or when adding information to a case as part of the document generation process. These tips are set up by your System Administrator.



010 NEW PREVIEW PANE

Dev Ops
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The new Preview Pane layout is now in use in the Case Diary and the Document Manager for all programs except PDF. However, you can change it back to the Legacy Preview Pane. See the Personal Settings Section for details on how to change.



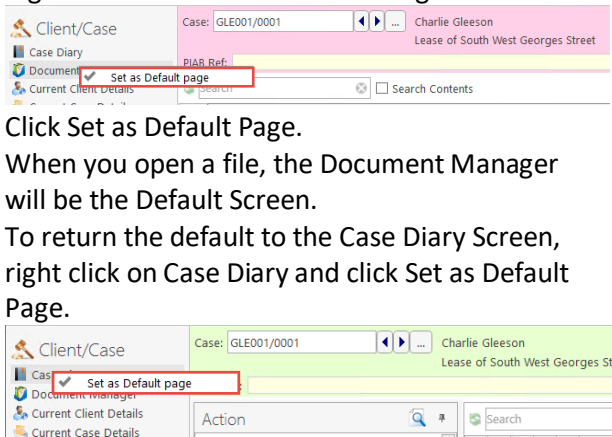
DOCUMENT MANAGER

011
KEYD-7002

SET DOCUMENT MANAGER AS THE DEFAULT PAGE

The Document Manager Screen can be set as the Default Screen when you open any case.

- Right click on the Document Manager.
- Click Set as Default Page.
- When you open a file, the Document Manager will be the Default Screen.
- To return the default to the Case Diary Screen, right click on Case Diary and click Set as Default Page.

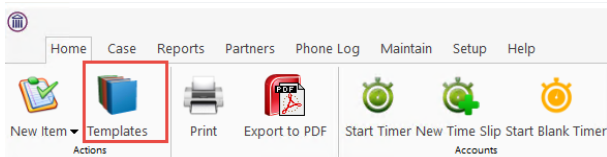


012
KEYD-7003

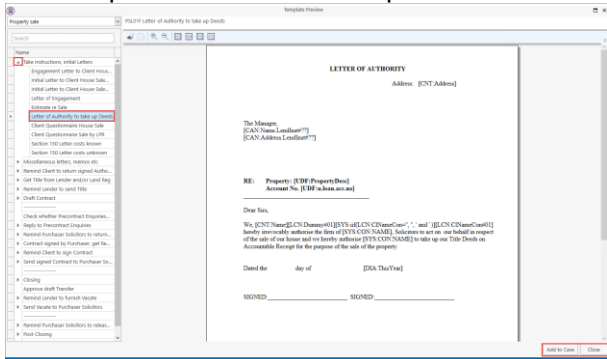
PRECEDENT TEMPLATE REVIEW IN DOCUMENT MANAGER

An option to review templates has been added to the Document Manager. It works in the same way as the template preview on the Case Diary.

- In the Document Manager, click Template on the ribbon.



- The Template Review window opens.



- Using the panel on the left, click to the step you wish to review.
- Click on the Black Arrow to open the action and select the document.
- The document can be reviewed from the panel on the right.
- To add to the case, click Add to Case or Close to close the window.

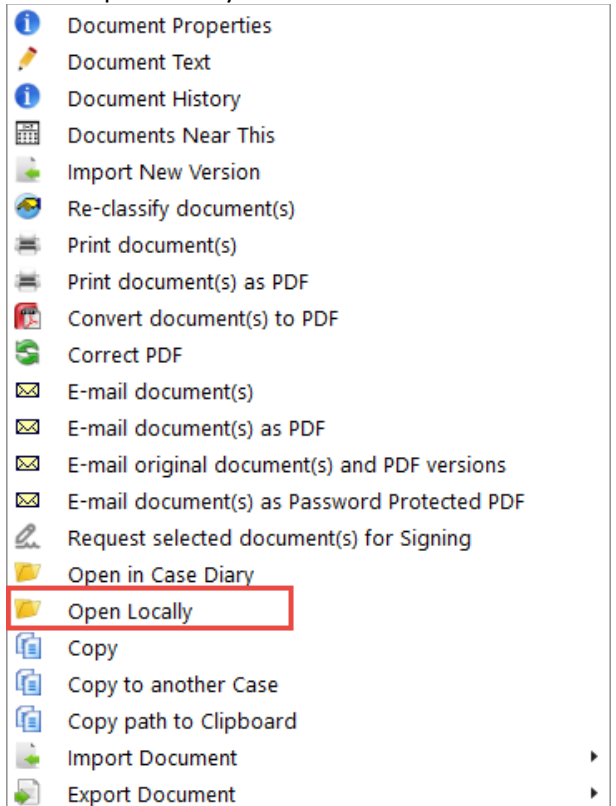
013

Dev Ops
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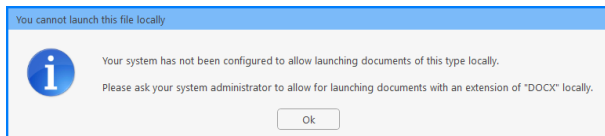
OPEN DOCUMENTS LOCALLY

For users who are using a remote desktop application or a Citrix environment, documents can be opened locally. This will improve the response time of the system. Please note, this option must be activated by the System Administrator.

- Select the document to be opened and right click.
- Select Open Locally.



- When using this feature in the Case Diary, the option will be to Open attachment Locally.
- If the application associated with the document is not set up to be opened locally, the following message will appear.



- Contact your System Administrator to add the application.

014 IMPROVED SEARCHING FOR SURNAMES SUCH AS O'BRIEN ETC

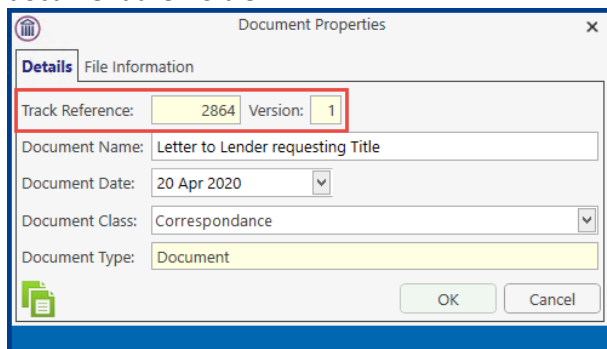
KEYD-6904

The search has been changed to facilitate searching for documents with surnames starting with O', Mc. This will ensure a faster search. It can be used when searching for a document or for content in a document.

015 TRACK REFERENCE VISIBLE ON DOCUMENT PROPERTIES TAB

KEYD-6477

When you open the Document Properties Tab from either the Document Management Screen or from the Attachment are of the Case Diary, the tracking reference and the version number of the document are visible.



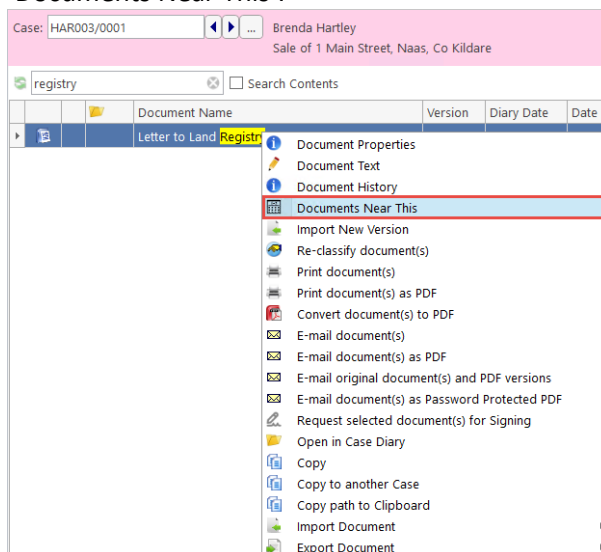
016 DOCUMENTS NEAR THIS

KEYD-6705

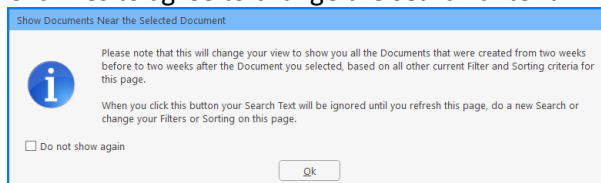
When searching for a document in the Document Manager, the search can be extended to show document near the document that was found.

- In the Document Manager, search for the document required.

- Right click on the document and select 'Documents Near This'.



- Right click on the document and select 'Documents Near This'.
- Click Yes to agree to change the search criteria.



- Documents 2 weeks either side of the document will be visible.
- Click the Refresh button to clear the documents and then clear the Search box.

017 EXTRACT TEXT TO ENABLE SEARCH CONTENT

Dev Ops 7672

The content of all documents should be available for the search content feature to work correctly. In the case of older documents, the full text may not be available. The Read Text button on the Document Manager Ribbon will update the document text. This must be activated on a case-by-case basis.

- Open the Document Manager
- Click the Read Text Button. This may take a little time.
- Progress can be seen under the Search Box

DOCUMENT SEARCHING

019 MODIFICATIONS TO DOCUMENT SEARCH

KEYD-6979

- Once finished, continue as normal.

SCAN CAPTURE

018 PICK FILE DATE WHEN USING SCAN CAPTURE

Dev Ops
7709

Additional date options have been added to the Scan Capture. Rather than just using the document date or diary date, the user can now choose from a list of options.

- Open the Scan Capture feature.
- Select the document to be added to a matter and rename and reclassify as needed.
- Click the Assign Docs option

- Click on the Dropdown and choose the Diary Date and Document Date option from the list.

- Continue to capture the document.

When searching from documents, the search uses key words only and ignores noise words such as 'and', 'the', 'of' etc. It also only returns up to 500 documents that meet the criteria entered.

It is now possible to carry out Full Result Set which will return every document that meets the criteria. However, this will have a major impact of the performance of the system for all users.

An 'Unoptimised' search can also be undertaken. This will search all words entered into the search field. This search, by its nature, is slower and it must be enabled by the System Administrator.

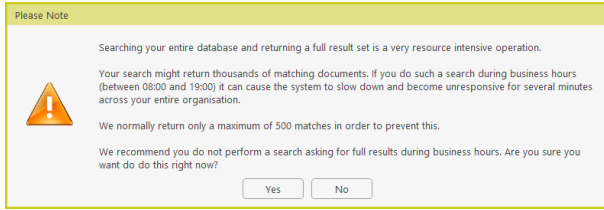
For example, when searching for 'The date of the hearing', the standard search will look for 'date' and 'hearing' while the unoptimised search will look for 'The date of the hearing'.

The search default is to search by content. To search based on the name of the document, tick 'Search Document Name only'.

Full Result Set

- On the Search Open screen, click to Document Search.
- Enter the search criteria.
- Tick Full Result Set to see all documents that meet the criteria.

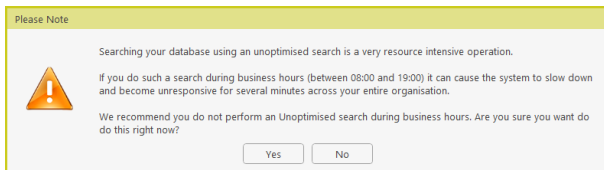
- The following warning will appear as the full search has an **impact on performance** for all users.



- Click Yes to continue or No to return to the search screen.

Unoptimised Search

- On the Search Open screen, click to Document Search.
- Enter the search criteria.
- Tick Unoptimised
- The following warning will appear as the full search has an **impact on performance** for all users.



- Click Yes to continue or No to return to the search screen.

020 SEARCHING FOR WILL

KEYD-6631

Will is normally classified as a common word and as such was excluded from searches. The system will now facilitate the search of the word 'Will'

DIGITAL SIGNATURES

021 DIGITAL SIGNATURES USING DOCUSIGN

KEYD-

A new module has been added to Keyhouse to enable users to use Digital Signatures for documents. This feature must be set up by the System Administrator in conjunction with Keyhouse Support. Please refer to the DocuSign Manual for information on using this feature.

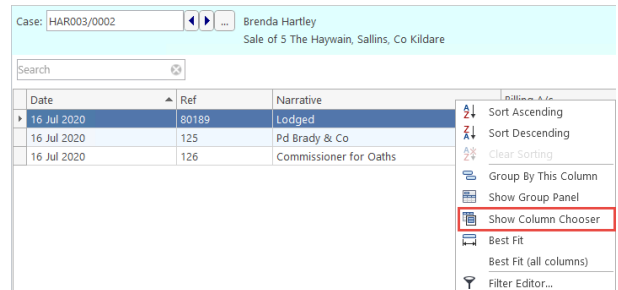
ACCOUNTS LEDGER

022 VIEW BANK ON ACCOUNT LEDGER

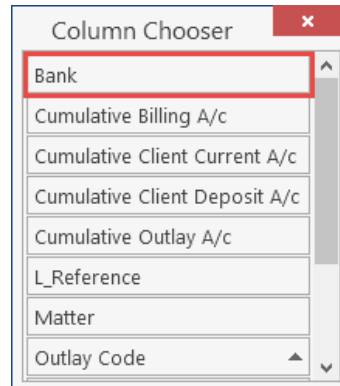
KEYD-6446

The Bank has been added to the list of fields that can be seen on the Account Ledger.

- Go to the Accounts Ledger for a matter/case
- Right click in the Header Row and select 'Show Column Chooser'.



- Select Bank from the list of options and drag it to the Header Row



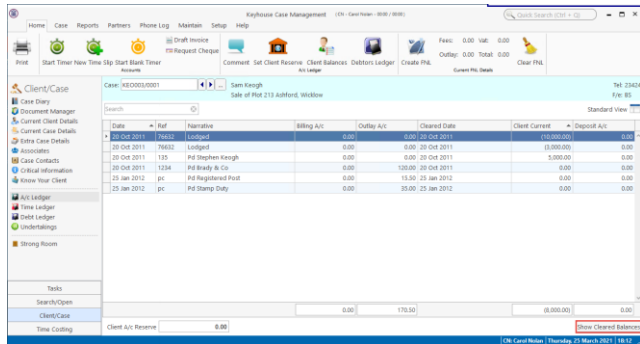
- Save the view for future use, if required.

023 SHOW OR HIDE CLEARED BALANCES

Dev Ops
8949

When funds are posted to the account ledger for a matter, they are not cleared for a number of days. Users can now see if funds have been cleared.

- Click Show Cleared Balances in the bottom right of the screen.



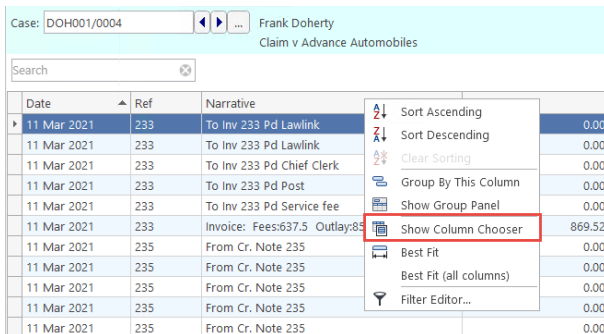
- To hide the cleared balances, click Hide Cleared Balances.

024 SHOW CLEARED DATE ON ACCOUNT LEDGER GRID

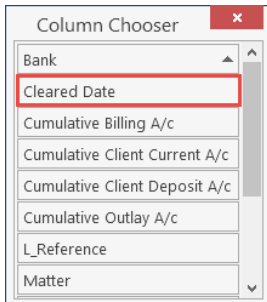
Dev Ops
8949

A Cleared Date heading has been added to the list of heading that can be added to the grid. This will so the date that funds have been cleared.

- Right click on the headings on the Account Ledger and select Show Column Chooser.



- Select Cleared Date from the list of options.



- Drag to the header row to the position of your choice.



- Save the view for future use, if required.

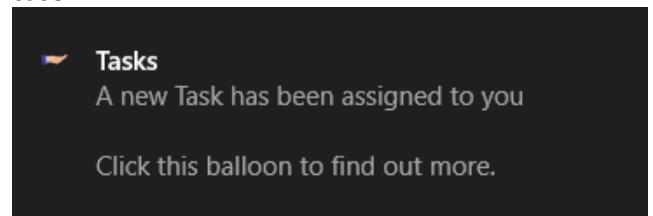
TASKS

025 NOTIFICATION OF TASK ASSIGNMENT

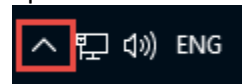
Dev Ops
7480

Once the option to receive notification of task assignments is turned on each time an action is assigned to you, a message will appear. (See the Personal Settings section for information on turning on Notification of Task Assignments.

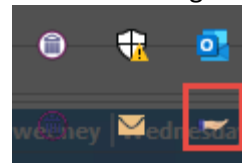
- A message appears in the bottom right corner of the screen.
- Click on the message to go to the action on the case.



- If you choose not to go to the task as the message arrives, the warning will appear in the hidden icon option on the Taskbar.



- Click on the up arrow to view the icons.
- Select the Delegated Task Icon to go to the task.



BRIEF BUILDER

026 DRAG & DROP DOCUMENTS

Dev Ops
7480

When using the drag and drop feature in the brief builder it was previously necessary to drag the document from the document section to the Brief section at the top of the screen. This is no longer the case: a document can be dragged and dropped within the document section.

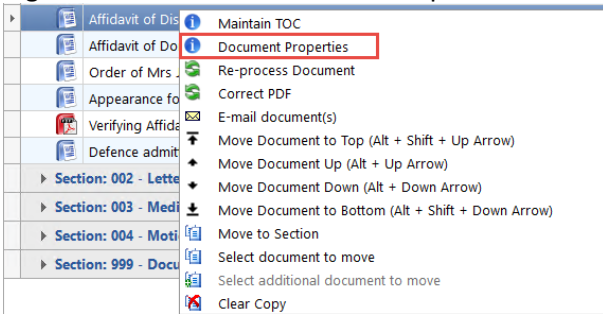
027

Def Ops
11689

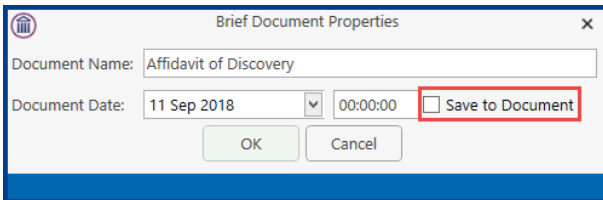
RENAMING AND CLASSIFYING DOCUMENTS IN BRIEF CAN BE REFLECTED IN THE DOCUMENT MANAGER

Until now changing the name of a document in a section of the brief did not change the name in the Document Manager. A new option has been added to enable the change to be saved to the Document Manager.

- Create new brief or open an existing one.
- Select the document to be renamed.
- Right click and select Document Properties.



- Tick Save Document Name.



- Click OK.
- If the name and/or the classification of a document in Section 999 is changed. This is automatically changed in the Document Manager.

028

Dev Ops
7391

DOCUMENT TIME AVAILABLE IN BRIEF

The time a document was saved can be seen in the date column. This will only apply to documents created in the 5.9.1.1 build or greater. If the option to always save as a new version is turned on, then the time relates to the last time the document was saved.

 A screenshot of the Document Manager interface. It shows a table with columns: Type, Document Name, Class, Document Date, Action Priority, and Action Type. The table lists various documents under different sections, such as 'Section: 002 - Letters/Interparts Correspondence (5 documents)'. One document entry is highlighted with a red box, showing a 'Document Date' of '08 Feb 2021 17:21:19'.

NOTE: The option to always save as a new version must be turned on by your System Administrator.

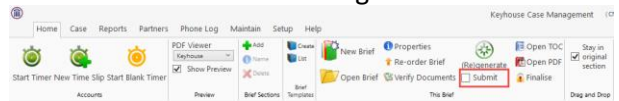
029

KEYD-6647

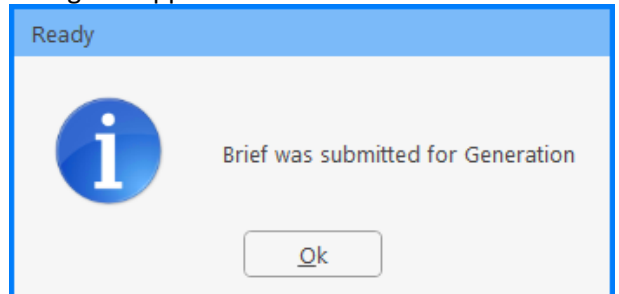
SUBMIT BRIEF FOR OFFLINE GENERATION

When creating a brief, it can now be submitted so that it is generated and printed from a computer other than the user's Pc. This feature needs to be set in conjunction with Keyhouse and activated by the System Administrator.

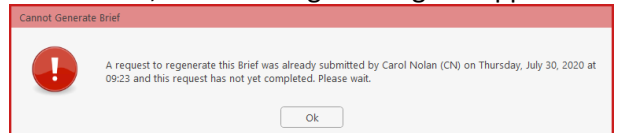
- Compile the brief in the normal way
- Tick Submit and then click Regenerate



- Once the brief has been generated, the following dialog box appears



- If the user tries to regenerate the brief before the it is finished, the following warning will appear.



- Click OK to clear
- The user will be able to continue to create additional briefs.
- To stop briefs being submitted, untick the Submit box.

030
KEYD-6773

RE-PROCESS DOCUMENTS IN BRIEF BUILDER

New Brief Generator Only

An option to reprocess PDF documents has been added to the Right Click menu in the Brief Builder. This can be used if a PDF document failed to generate and is shown with a red X.

Case: FLV001/0001 Jack Flynn
Road Traffic Accident at Junction 9 on M50 - 11233

Brief: Brief for Road Traffic Accident

Search

Type	Document Name
Section: 000 - Cover Letters (0 documents)	
Section: 001 - Pleadings (6 documents)	
Letter from State	Maintain TOC
Affidavit of Discov	Document Properties
Affidavit of Service	Re-process Document
Affidavit of Donal	E-mail document(s)
Authorisation	Move Document to Top (Alt + Shift + Up Arrow)
Appearance	Move Document Up (Alt + Up Arrow)
	Move Document Down (Alt + Down Arrow)
	Move Document to Bottom (Alt + Shift + Down Arrow)
	Move to Section
	Select document to move
	Select additional document to move
	Clear Copy

031
KEYD-

INCLUDE COVER PAGE IN PAGE NUMBER SEQUENCE OF THE INDEX

When submitting briefs to the Court of Appeal, the Brief Cover Page must be included in the page numbering sequence. This can be done as when setting the brief printing parameters.

- Create the brief and click Regenerate
- Ensure the Page Numbering format is set to Page
- Tick the 'From the Top' option.

Keyhouse Brief Generation Wizard

Print Order
Order Documents as specified during Brief Maintenance

Page Footer and Table of Content

Page Numbering
Page
 From the Top
 Include Totals

Footer and TOC Font
Times New Roman (Footer) Size: 10 Bold
 NO Footer
 High Contrast Footer
Times New Roman (TOC) Size: 10 Bold

Manually Enter Page Numbering or TOC codes
 Create PDF Bookmarks
 Left-Align TOC Columns
 Include Dates in TOC columns

Brief for Road Traffic Accident at Junction 9 on M50
Author: Carol Nolan
Brief for Road Traffic Accident at Junction 9 on M50

SECTION A - Pleadings

No.	Description	Date	Page No
1	Affidavit of Service of Andrew McCabe	15 Jun 2018	2
2	Affidavit of Service of Summons	15 Jun 2018	5
3	Affidavit of Verification of Defence Hillary Clinton	15 Jun 2018	8

032
KEYD-6701

EXCLUDE DATE COLUMN FROM TABLE OF CONTENTS

The date column is not always needed when creating a Table of Contents for a brief. There is now an option to remove the date column if it is not required.

- Create the brief and click Regenerate
- Untick 'Include Dates in TOC columns' if the date column is not required.

Keyhouse Brief Generation Wizard

Print Order
Order Documents as specified during Brief Maintenance

Page Footer and Table of Content

Page Numbering
Section - Page
 Include Totals

Footer and TOC Font
Arial (Footer) Size: 7 Bold
 NO Footer
 High Contrast Footer
Arial (TOC) Size: 10 Bold

Manually Enter Page Numbering or TOC codes
 Create PDF Bookmarks
 Left-Align TOC Columns
 Include Dates in TOC columns

- Continue to generate the brief.

Brief for Road Traffic Accident at Junction 9 on M50 - 11233
Author: Carol Nolan
Brief for Road Traffic Accident at Junction 9 on M50 - 11233

SECTION A - Correspondance		
No.	Description	Page No
1	Email from Chief State Solicitor	1
2	Letter from Garda Ombudsman	2
3	Trump to Chief State Solr	3
4	Verifying affidavit of Leo Varadkar	4
5	Letter to Barrister end Medical Report 1	7
6	Letter to Barrister requesting Opinion 2	8

SECTION B - Court Documents		
No.	Description	Page No
1	Order of Master Barack Obama	1
2	Order of Mrs Justice Michelle Obama	2
3	Personal Injuries Summons_14	3
4	Defence admitting liability	9

033 DELETED BRIEFS REMOVED FROM STORAGE LOCATION

Dev-Op
11693

When a brief is deleted from a matter, it will now also be deleted from the document storage location.

BILLING

034 PRE-BILLED OUTLAY INDICATOR

Dev-Op
8943

As Outlay may have to be pre-billed, a pre-billed indicator has been added to the Outlay screen.

- Create the invoice in the normal way.
- Right click to add a new bill line and select Outlay.
- Tick the Pre-Billed Outlay option.

- Complete the entry as normal.

TRANSACT.IE

035

Dev Ops

INTEGRATION OF TRANSACT.IE WITH KEYHOUSE

Keyhouse has introduced full integration between Keyhouse Case Management and Transact.ie, the digital conveyancing platform. Please see contact Keyhouse for further information.

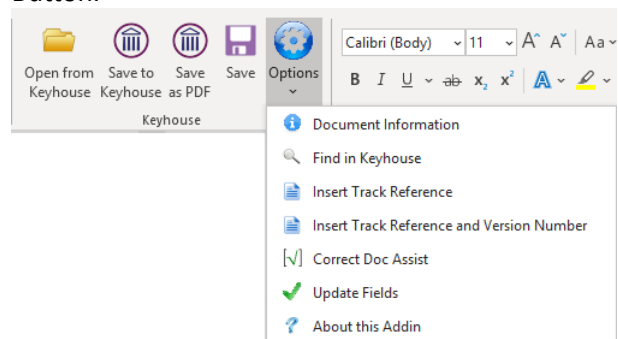
WORD ADDIN

036

KEYD-6464

TIDY UP OF KEYHOUSE OPTIONS IN WORD

As the number of options available for Keyhouse in Word has grown, it was necessary to reduce the amount of space taken up by them. Some of these features have been added to the Options Button.



037

Dev Ops

AUTOMATICALLY CREATE A NEW VERSION WHEN SAVING A DOCUMENT

Version Control can be set to automatically happen each time you save a change to a document. This is a system setting and will apply to all documents and all users. It must be activated by your System Administrator.

038

KEYD-6944

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.

When opening Word, the Word Addin will check the Recovery Folder and alert the user if there are documents in the folder. If 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.

039

Dev Ops
7678

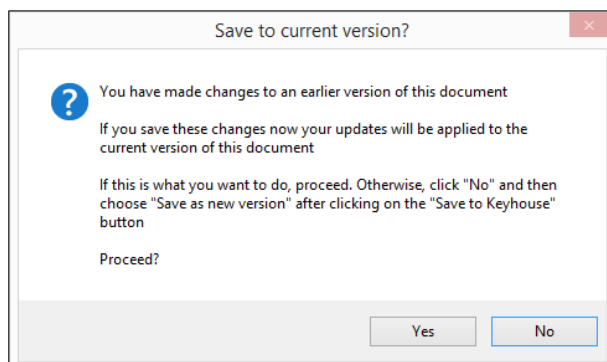
CHANGE CONTROL FOR WORD AND EXCEL DOCUMENTS

Warnings have been added to version control. These warning will help prevent changes from being lost or overwritten in error. The warnings will be shown in both the Case Diary and Document Manager.

Scenario 1

- User opens an old version of a document, makes changes, and saves.

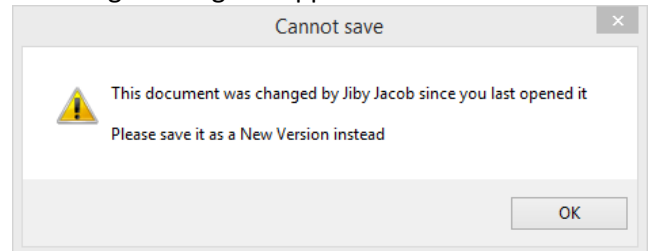
A warning will appear notifying that it is not the latest version of the document.



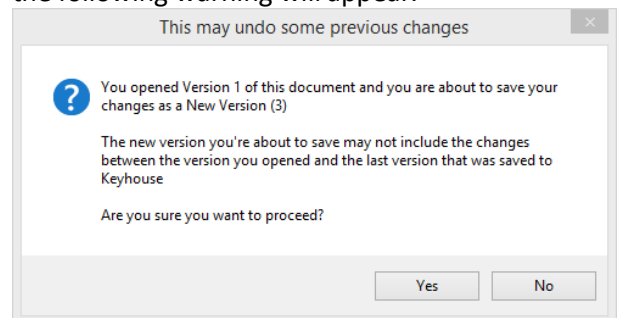
- Click Yes to continue or No to return to use the Save to Keyhouse option.

Scenario 2

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



- Click OK to continue.
- If the User 1 choses to save as a new version, the following warning will appear.



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

040

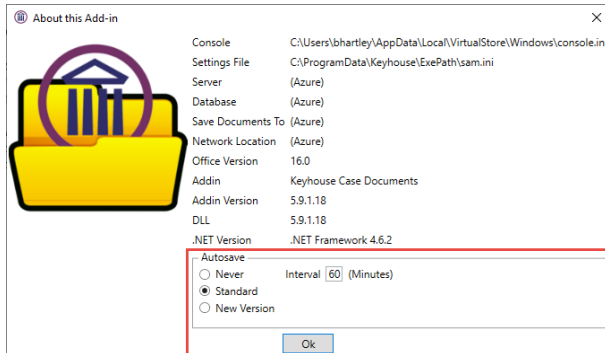
Dev Ops
12200

AUTO SAVE OPTION

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.

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

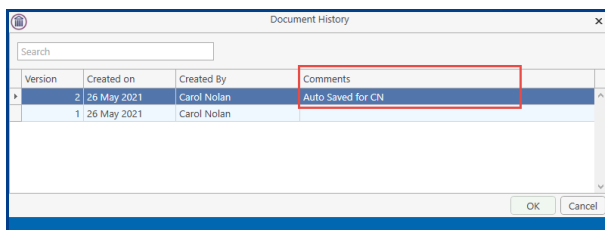


- The feature is automatically turned on using the Standard setting. However, users can change this.

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:



DICTIONATION

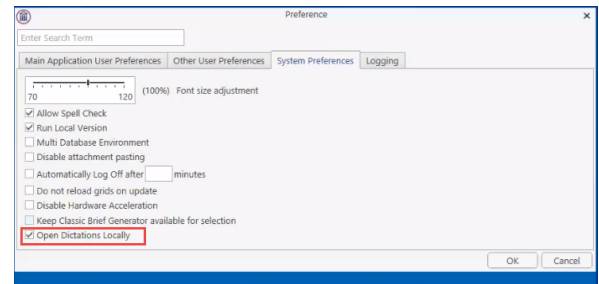
041

Dev Ops
7539

PLAY DICTATIONS LOCALLY

User who are using a remote desktop or a Citrix environment can play dictations locally. However, this feature must be activated by the System Administrator. Once activated:

- Go to Setup and select Personal Settings.
- Click to the System Preferences Tab
- Tick 'Open Dictations Locally' and click OK.



- Play the dictations in the normal way.

Once it has been set up, it will also enable documents to be opened locally, improving the response time.

- Right Click on the document in the Document Manager and select 'Open Locally' OR
- Right Click on the document in the Case Diary and select 'Open Attachment Locally'.

EMAIL ADDIN

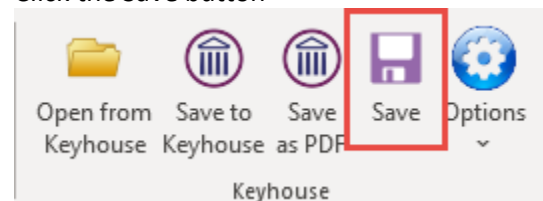
042

KEYD-6841

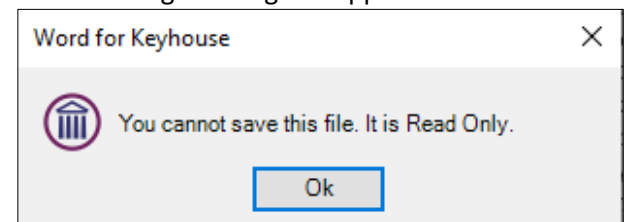
SAVE AN EMAIL ATTACHMENT FROM WORD

When a user opens a Word document from an email, they can now save it to the matter using the **Save to Keyhouse** button. However, they **cannot** use the Save button.

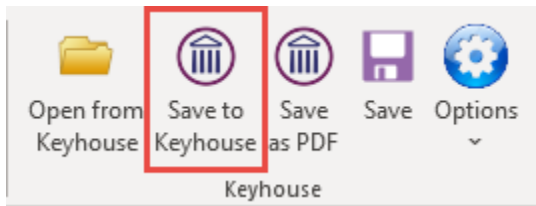
- Open the email attachment
- Click the Save button



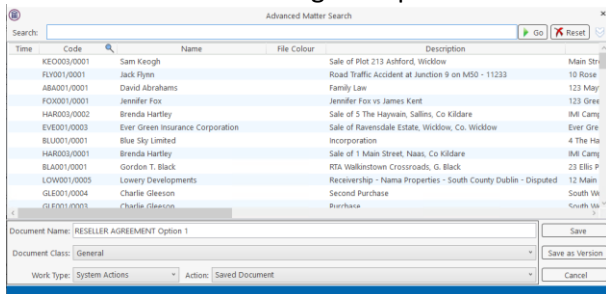
- The following warning will appear



- Click Save to Keyhouse



- The Advance Search dialog box opens.

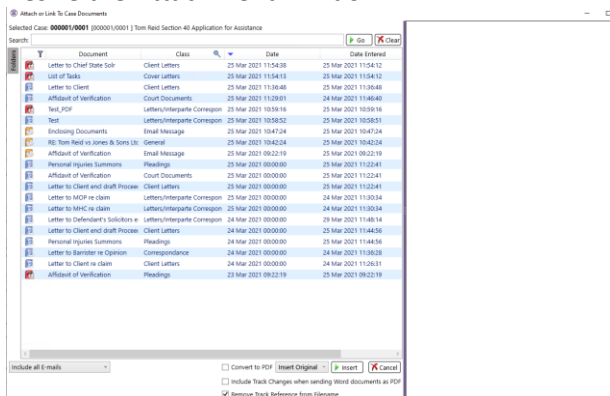


- Modify the name, set the Document Class and then either click Save or Save as New version if it a version of a document already in Keyhouse.

043 RESIZE THE OUTLOOK ATTACHMENT WINDOW

When sending an attachment and you increase the size of the Attachment window, it will now remain at the size you choose.

- Create an email and select the matter.
- Click Select Attachment.
- Resize the Attachment Window

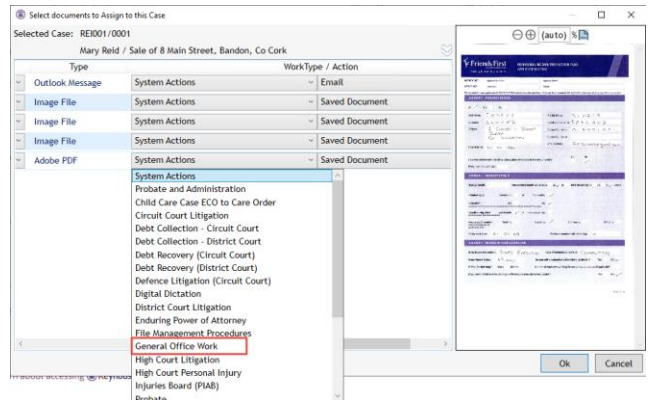


- The screen will stay at the chosen size.

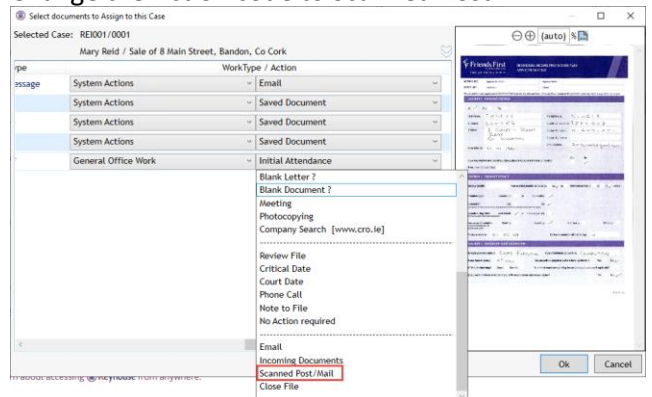
044 SET CATEGORY WHEN ASSIGNING POST VIA EMAIL

When assigning post to Keyhouse from an email the action ID can be set as Scanned Post.

- Open the Outlook and select the email with the attachment.
- Click Assign Attachment
- In the Popup window rename and classify the document.
- Using the Scroll bar at the bottom of the window, scroll and change the System Actions to General Office Work.



- Change the Action code to Scanned Post.



- Click Ok to finish the assignment.

PERSONAL SETTINGS

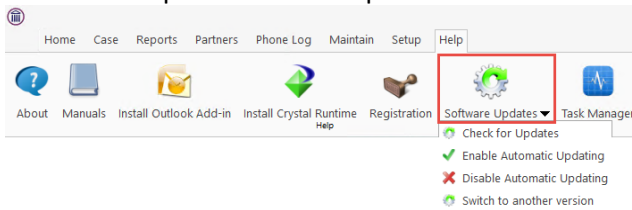
045 UPDATE SOFTWARE/ SWITCH TO BUILD

User can now upgrade their system to the latest build. This can be done in one of two ways – using Update Software on the Help Tab or using Switch to Build from their Startup Menu. **Before starting the update ensure that Keyhouse, Word, Outlook and Excel are closed as you may lose data if documents are not saved.**

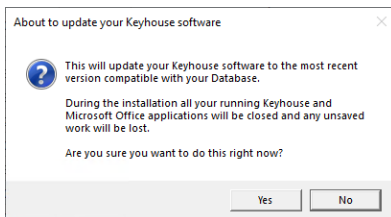
Using the Update Software Option.

With this option you will automatically be updated to the latest build.

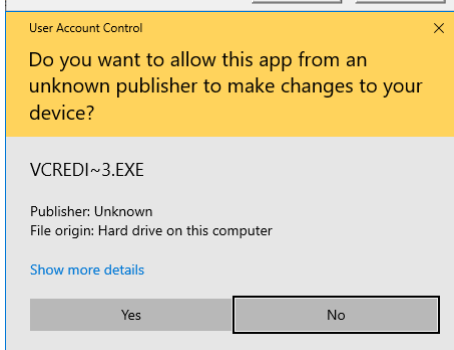
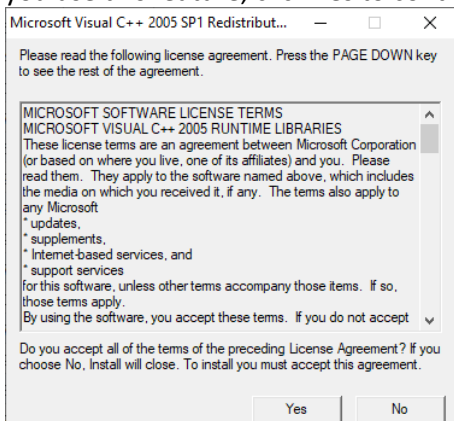
- Go to the Help Tab and click Update Software



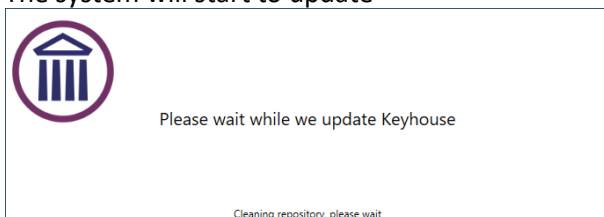
- Select Check for Updates. Note you can set the system to automatically update each time a new update is available, or you can disable the feature. The user can also choose the version to be used.



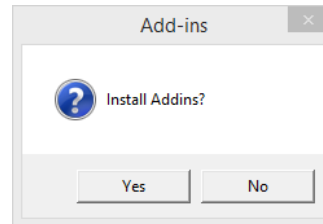
- Click Yes to continue
- The following screens may appear the first time you use this feature, click Yes to continue



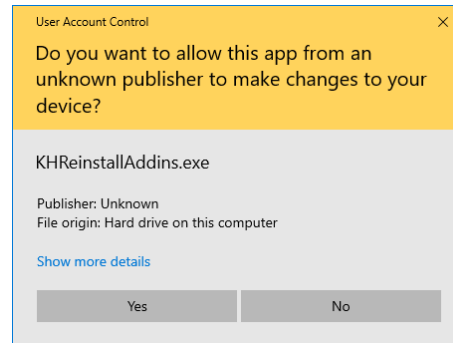
- The system will start to update



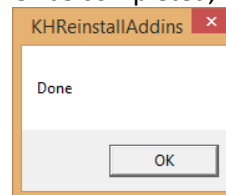
- It is recommended to have the Addins match the build being installed. Click Yes to update the Addins.



- Click Yes to enable the addins to be updated




- Once completed, click OK

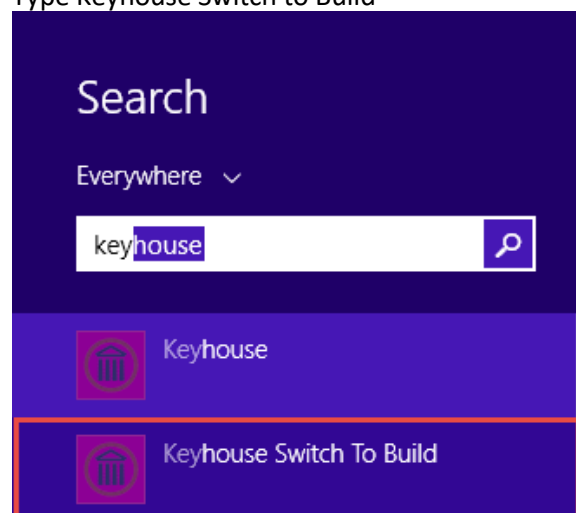


- Keyhouse will launch automatically.
- Once logged in you may get a further prompt to update scripts, if so, click OK.

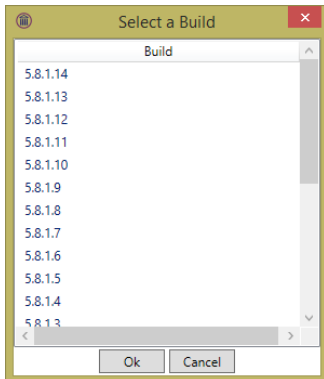
Using Switch To Build.

With this option, the user can choose the build they want to use.

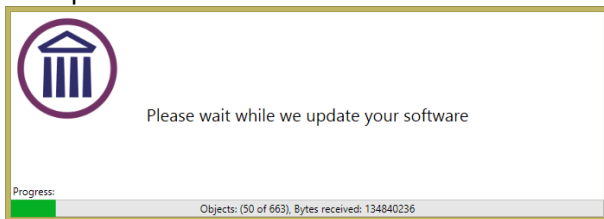
- Click on the Window Button at the bottom of the screen  and select Search or click into your search box.
- Type Keyhouse Switch to Build



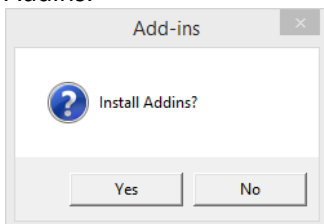
- The select the build to be installed and click OK.



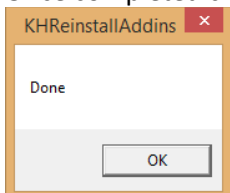
- The update will commence.



- It is recommended to have the Addins match the build being installed. Click Yes to update the Addins.



- Once completed click OK



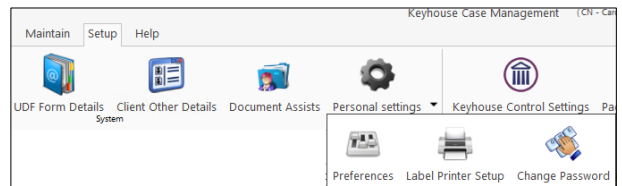
- Keyhouse will launch automatically.
- Once logged in you may get a further prompt to update scripts, if so, click OK.

046 SEARCH FEATURE ADDED TO PERSONAL PREFERENCES

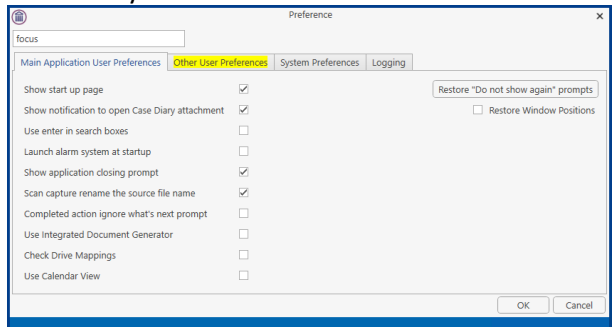
KEYD-5512

A search option has been added to the Personal Settings Preference option on the Setup Tab. This will make it easier to review options and search for the require field.

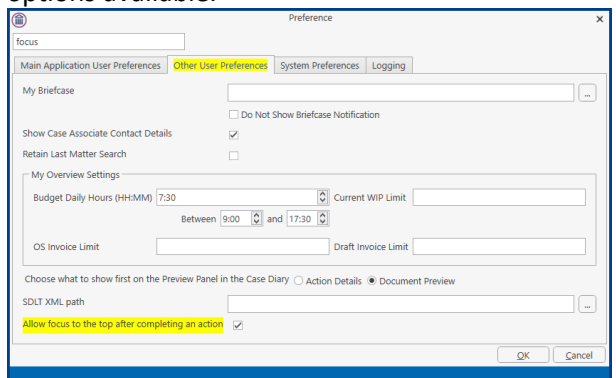
- Go to the Setup Tab and select Personal settings, then Preferences



- Enter a key word in the search box



- Click to the tab that is highlighted to see the options available.



- Make any changes required and click OK.

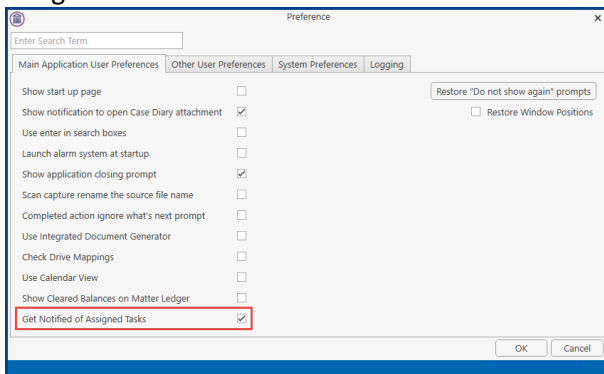
047 NOTIFY USER WHEN TASKS ASSIGNED TO THEM

Dev Ops
11552

Users can now receive notifications when tasks are assigned to them.

- On the Setup Tab, click Personal Setting and select Preferences.

- On the first tab, click Get Notified of Task Assignment.

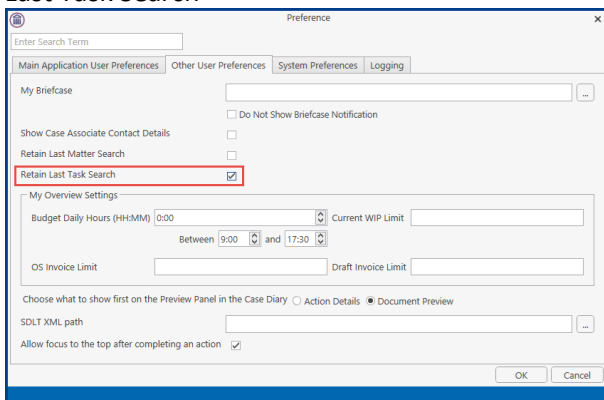


048 HOLD PREVIOUS SEARCH ON TASK SCREEN

KEYD-5512

An additional option to hold the search on the Task Screen has been added to the Personal Settings.

- On the Setup Tab, click Personal Setting and select Preferences.
- Click to the Preferences Tab and tick the Retain Last Task Search



- Click Ok

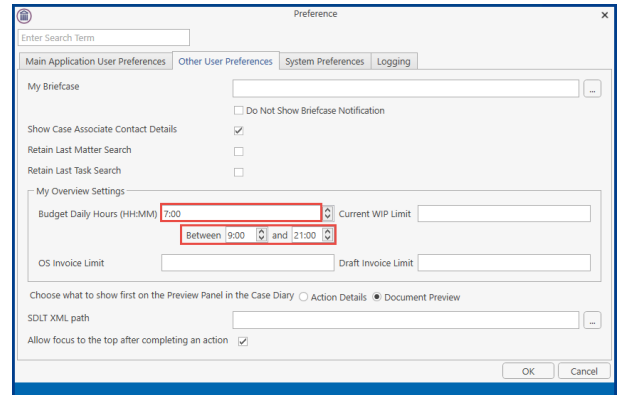
049 ADD START AND END TIME TO DAILY BUDGET

KEYD-5512

Rather than using the standard 09.00 – 17.30 timeframe, users' can set the hours they work between and set the number of hours to be worked within that timeframe.

- Click on the Setup Tab and select Personal Settings.
- Click on the 'Other User Preferences'.

- In the 'My Overview Settings', set the 'Budget Daily Hours' to the amount of time to be worked e.g. 7.30
- Change the 'Between' to the period of time in which the hours are to be worked e.g. between 07.00 and 19.00.



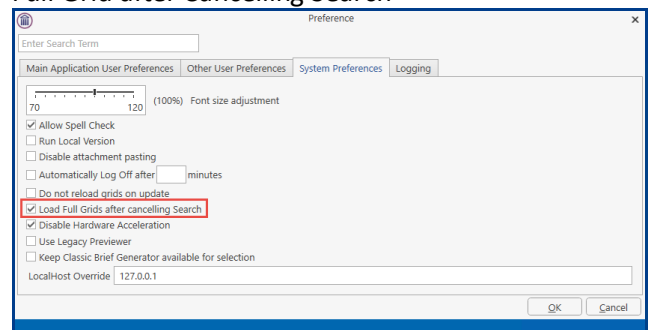
- Click OK to save the changes.
- This change will be reflected on the Day Book in Time Costing and in My Overview under Performance.

050 LOAD FULL GRID AFTER CANCELLING SEARCH

Dev Ops
11650

When you search for a document and then clear the search after you have finished with the document, they system automatically keeps you at the top of the screen regardless of where the document is located. However, you can now keep the document highlighted after the search is cleared.

- On the Setup Tab, click Personal Setting and select Preferences.
- Click to the System Preferences tab and tick Load Full Grid after Cancelling Search

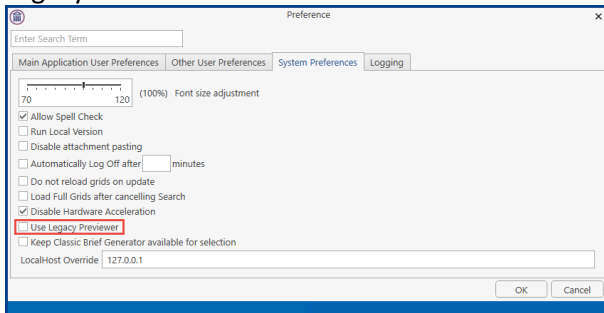


- Click OK.

SWITCH TO LEGACY PREVIEWER

To use the Legacy Previewer rather than the new Previewer.

- On the Setup Tab, click Personal Setting and select Preferences.
- Click to the System Preferences tab and tick Use Legacy Previewer.



- Click Ok