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WHAT'S NEW IN KEYHOUSE
END USER INTERFACE
VERSION 5.9.2.65

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 365	001	Trust this Device
Current Client Details	002	Client Occupation Field size increased
Current Case Details	003	Eircode moved to under the Address Field
	004	Amend the Archive Screen without Reopening the Matter
	005	Check for Draft Bills when Closing Files
	006	Hold the Original Closed Date
	007	Destroy Date Extended to 2199
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	009	Add the Note Column to Associate Screen on a Matter
Case Diary	010	Reminder Option added to New Item Menu
	011	Complete Hold Date Option added to the Complete Button
	012	Edit & Save a PDF Document from Keyhouse
	013	Open Documents Locally from the Action Window
	014	Different Document Previewers Available
	015	Improved Scrolling for Keyhouse Previewer
	016	Sort on Synopsis Field on Case Diary
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	018	Improvements to Document Folder Structure
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	020	Use Keyboard Shortcuts to select and generate Documents
	021	Tool Tips added for Extra Case Details
	022	Indicator for missing data in Documents
	023	Document Checkout Facility
	024	Auto Save Option for Word
	025	End Word and Excel Processes
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Time Recording	028	Post Time without reviewing Time Slips
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	031	Time option added to Scan Capture Screen
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	037	Open Documents locally on Right Click Menu
Undertakings	038	Undertaking Log reflects Diary Warning Changes
	039	Discharge Undertakings from Case Diary
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Addins	041	Turn Off Notifications when sending and assigning Emails from/to Keyhouse
	042	Check Addins are installed when opening Keyhouse
	043	Document Class Code visible when assigning emails

	044	Print Case Details on emails when printing from Keyhouse
	045	Create a Hyperlink to documents in Keyhouse on an Email
Brief Builder	046	Drag and Drop indicator in Brief
	047	Create a Brief based on the Sort Order of Documents
	048	Add Hyperlinks to a Brief Table of Contents
	049	Optimise the size of a Brief
	050	Create Default settings when choosing to save a Brief to a Case
Phone Log	051	Show more than 200 characters in Phone Log Report
Billing	052	Allocate all Fees to Matter Fee Earner
	053	Round Invoice values to nearest 5 Cents
Preferences	054	Reset iManage Credentials
	055	Show Notification Screen when opening Documents
	056	Keep MS Word running in the Background
	057	Reset Layout

LOGGING INTO KEYHOUSE 365

001

TRUST THIS DEVICE

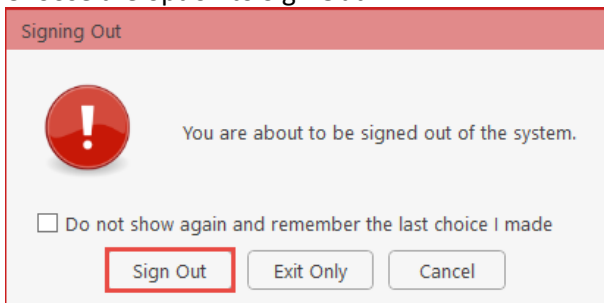
Dev Ops
12696

Up until now it has been necessary to enter a PIN number when logging into Keyhouse365. This is no longer required if users choose to use the Trust Me option when signing back into the system. With this option, the system will open automatically once you click on the Keyhouse Icon.

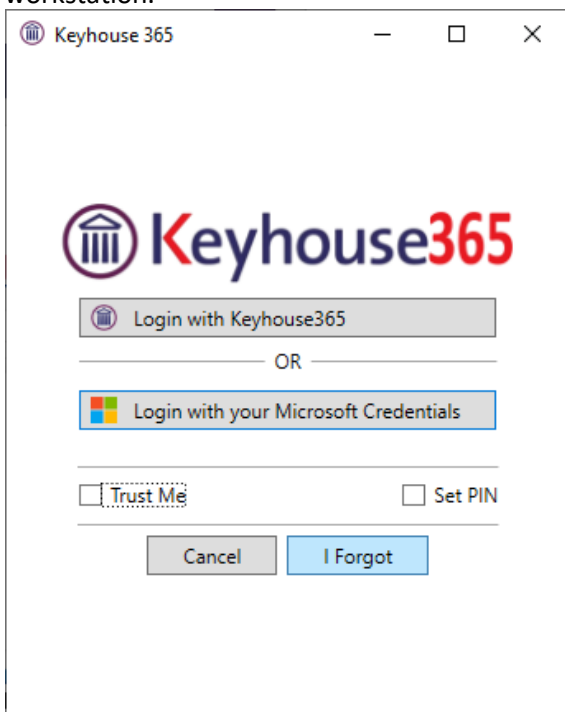
- Sign out of the system by clicking on the Keyhouse Icon in the top left of the screen.



- Choose the option to Sign Out.



- Double click on the Keyhouse Icon on the workstation.



- Tick Trust Me if you trust the workstation you are using. If not, tick Set PIN.
- Log in using either Keyhouse365 or with your Microsoft Credentials.
- To revert back to using a PIN number, Sign Out again and choose the Set PIN option.

CURRENT CLIENT DETAILS

002

CLIENT OCCUPATION FIELD SIZE INCREASED

Dev Ops
13140

For both the Current Client Details and Client Contact Details, the size of the Occupation field has been increased to 100 characters.

003

EIRCODE MOVED TO UNDER THE ADDRESS

Dev Ops
12850

The position of the Eircode on the Current Client Details screen has been moved under the Client Address.

CURRENT CASE DETAILS

004

AMEND THE ARCHIVE SCREEN WITHOUT REOPENING THE MATTER

Dev Ops
7273

It is no longer necessary to open a matter to amend the Archive Screen. This will enable users to add in destroy dates, set the actual destroy date and who authorised the destruction.

- Open the Current Case Details and select the Archive Tab.

- Enter the required information

- Click Save. Click Cancel to close the window.

005 CHECK FOR DRAFT BILLS WHEN CLOSING FILES

Dev Ops
13009

When closing a file, the system can be set to check for draft invoices that have not been issued but marked as closed. This feature must be turned on by the System Administrator.

- Go to the Archive Tab on the Current Case Detail.
- Click Close
- If the case has an outstanding Draft Invoice the following dialog box will appear.

- Click OK and then click OK again.

006 HOLD THE ORIGINAL CLOSED DATE

Dev Ops
12268

When a matter is reopened and then closed again the date will show the new closed date. A new option has been added to allow users to hold the original closed date.

- Click into the file to be reopened and open the Current Case Details screen
- Click to the Archive Tab and untick Closed
- The following dialog box will appear

- Choose the option required and the file will open.
- When the option to keep the original date is chosen, once the file is closed again, the date will be visible on the Archive Tab

007

Dev Ops
13503

DESTROY DATE EXTENDED TO 2199

The maximum date that can be set for archiving files is 2199.

The screenshot shows a 'Current Case Details' window. The 'Expected Destroy Date' field is highlighted with a red box and contains the value '31 Dec 2199'. Other fields include Client Code (AB8001), Description (RTA The Rise, Stillorgan), Matter (0005), and various tabs like Matter, Admin, Additional Details, etc.

ASSOCIATES

008

Dev Ops
13226

RIGHT CLICK OPTION TO ADD NEW ASSOCIATES

An option to Add a new Professional has been added to the right click menu on the Add Associate Screen. This option will take the user to the list of existing associates and will help prevent the creation of duplicate associates.

The screenshot shows the 'Add Professional' screen with a right-click context menu open. The 'Add Professional' option is highlighted with a red box. The background shows a table of existing associates.

009

Dev Ops
11990

ADD THE NOTE COLUMN TO ASSOCIATE SCREEN ON A MATTER

Although it was possible to add notes to an Associate, it was not possible to see them without opening the Associate. The Notes field can now be added to the Associate screen on a Matter.

- Open the Matter and select Associates
- Right Click on the Header Row and select Show Column Chooser.

The screenshot shows a table with columns: Type, Name/Company, Address, and Solicitors Ref. A right-click menu is open over the header row, and the 'Show Column Chooser' option is highlighted with a red box.

- Select Notes from the list of options and drag to the Header Row.

The screenshot shows the same table as above, but now with a 'Notes' column added to the header row, highlighted with a red box.

- Save the view to keep the Notes option visible.

CASE DIARY

010

Dev Ops
7700

REMINDER OPTION ADDED TO NEW ITEM MENU

It is possible to add a reminder to the case from the New Item Menu on the Case Diary and Document Manager.

- Click to New Item
- Select Reminder from the list and continue to add the required information.

The screenshot shows a 'New Item' dropdown menu. The 'Reminder' option is highlighted with a red box. Other options include Action, Note, Email, Appointment, Phone Message, SMS Message, Dictation, Draft Invoice, Request Cheque, and Conflict Search.

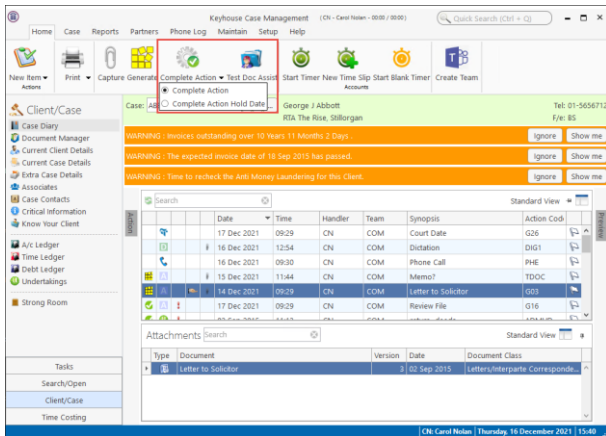
011

COMPLETE HOLD DATE ADDED TO THE COMPLETE BUTTON

Dev Ops

The Complete Button on the Ribbon enables the user to use the Complete Hold Date option. The Complete Hold Date option can also be set as a default option.

- Select the Action to be completed.
- Click on the down arrow on the Complete Action Button and select Complete Hold Date.
- To make Complete Hold Date the Default Option, tick the circle.

**012**

EDIT & SAVE A PDF DOCUMENT FROM KEYHOUSE

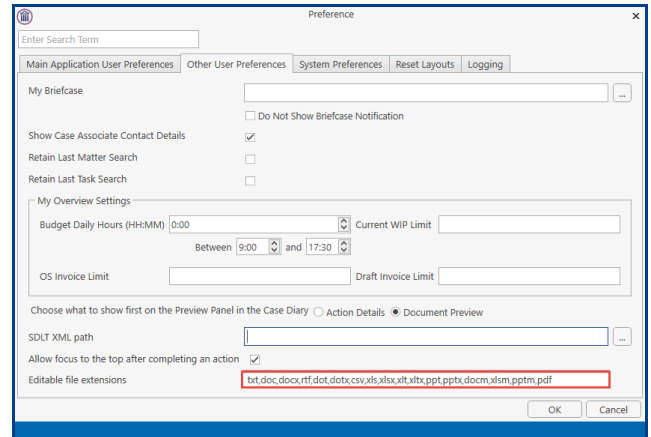
Dev Ops
7394

Adobe Editor required

With Adobe Editor it is possible to edit and save a PDF document from Keyhouse. The PDF will always save as a new version of the document.

This must be activated through Personal Preferences.

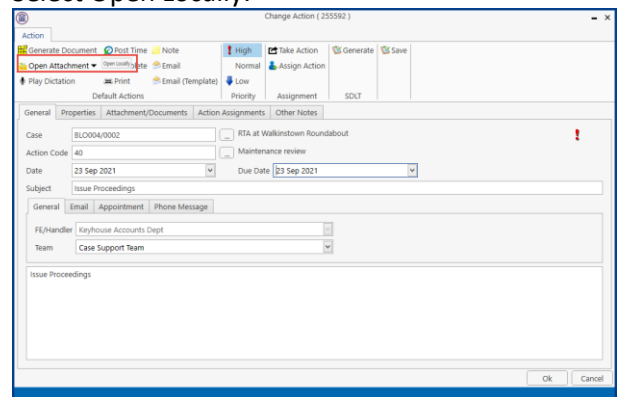
- Go to the Setup Tab and select Personal Settings and select Preferences.
- On the Other User Preferences Tab, add .pdf to the Editable file Extensions box. Ensure it is separated from the other Extensions by a comma.

**013**Dev Ops:
11467

OPEN DOCUMENTS LOCALLY FROM THE ACTION WINDOW

If your system enables users to open documents locally, this can now be done from the Action Window.

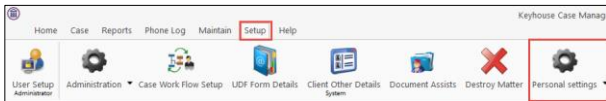
- Open the Action.
- Click on the down arrow beside Open Attachment.
- Select Open Locally.

**014**Dev Ops
12905

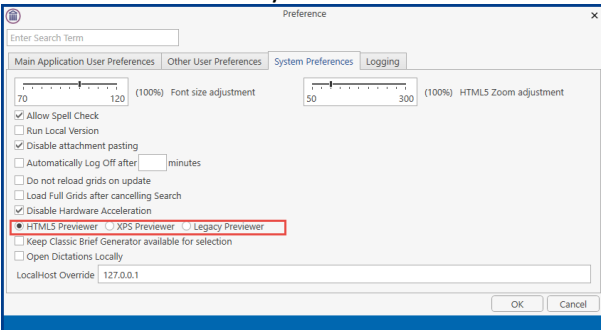
DIFFERENT DOCUMENT PREVIEWERS AVAILABLE

Until now you could only use a standard document Previewer. There are now three options available, each giving different options for viewing the document.

- Go to Setup and select Personal Settings



- Select Preferences and click on the System Preferences Tab
- Choose the Previewer you wish to use



- When using the HTML5 Viewer, users can decide on a default Zoom Value.
- The HTML5 Previewer:



- XPS Previewer



- Legacy Previewer:



015 IMPROVED SCROLLING FOR KEYHOUSE PREVIEWER

Dev Ops:
12014

The scrolling buttons can be used to move through documents on the Preview Windows in both the Case Diary and Document Manager.

- <PgDn> will move the user down a screen at a time.
- <PgUp> will move the user up a screen at a time.
- <Home> will move the user to the top of the document.
- <End> will move the user to the bottom of the document.

016 SORT ON SYNOPSIS FIELD ON CASE DIARY

Dev Ops:
13315

The ability to sort the Case Diary based on the Synopsis Column has been added to the system. This feature must be turned on by your System Administrator.

DOCUMENT MANAGER

017 SORT BY DOCUMENT NAME

Dev Ops:
12822

The ability to sort documents by name in the Document Manager has been reintroduced. This feature must be activated by the System Administrator.

- Open the Document Manager
- Click on Document Name in the Header Row

Document Name	Version	Diary Date	Date	Document Class
Appt Letter to Dr No 1	1	26 Jan 2010	16 Jan 2010	Letters/interpartu
Authority Forms	1	28 Sep 2009	02 Feb 2011	General
Chase Counsel	1	07 Apr 2010	07 Apr 2010	Letters/interpartu
Chase Letter Insurance Co 1	1	16 Oct 2009	02 Feb 2011	Letters/interpartu
Chase Letter Insurance Co 1	1	09 Nov 2009	02 Feb 2011	Letters/interpartu
Chase Letter to Doctor	1	16 Oct 2009	02 Feb 2011	Letters/interpartu
Chase letter to Garda	1	16 Oct 2009	02 Feb 2011	Letters/interpartu
Chase Letter to Witness 1	1	16 Oct 2009	02 Feb 2011	Letters/interpartu
Chase Letter to Witness 1	1	09 Nov 2009	02 Feb 2011	Letters/interpartu
Chase Nomination Ins Co 1	1	07 Apr 2010	07 Apr 2010	Letters/interpartu
Confirm appt to Def 1 Solrs	1	16 Jan 2010	16 Jan 2010	Letters/interpartu
Confirm appt to insurance Co 1	1	16 Jan 2010	16 Jan 2010	Letters/interpartu

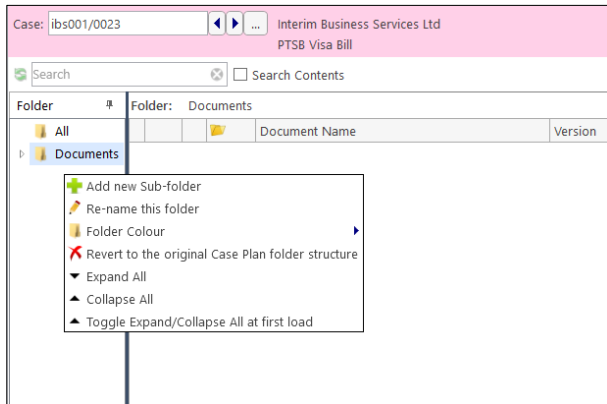
- The documents will appear in alphabetical order from A-Z.
- To change the direction to Z-A, click on Document Name in the Header Row again.

018 IMPROVEMENTS TO DOCUMENT FOLDER STRUCTURE

Dev Ops:
7580

The user can decide whether or not they want the Document Folder Structure expanded or collapsed when they open the Document Manager.

- Right click on Documents to open the menu.



- Choose Expand All to open the document folder structure.
- Collapse All will close the folder structure.
- Toggle Expand/Collapse All at first load will enable users to choose whether the folder structure is open or closed when they open the Document Manager.

DOCUMENT GENERATION

New Document Generator Only

019 EXTRA CASE DETAILS APPEAR AS ORDERED IN DOCUMENTS

Dev Ops
13199

Until now, when using the new Document Generator, Extra Case Details appeared in alphabetical order. This has now been changed so they appear in the order they are detailed in documents.

020 USE KEYBOARD SHORTCUTS TO SELECT AND GENERATE DOCUMENTS

Dev Ops
11451

New Document Generator Only

The option to use Keyboard shortcuts is available in the New Document Generator.

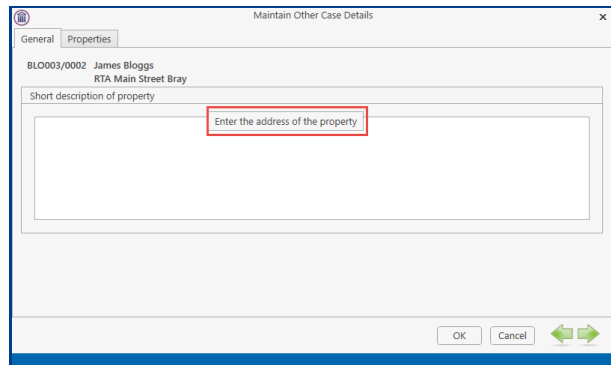
- Generate the Action as normal.

- The Cursor will appear in the Search Box at the top of the dialog box. Use the Tab key to move to the Check All/Uncheck all boxes.
- Use the down/up arrows to move through the documents.
- To select a document to generate, click the Tab key and then the space bar, repeat for each required document.
- To deselect a document, click the Tab key and then the space bar.
- Once all the documents are selected, click the Enter key to generate them.
- Continue generating the documents as normal.

021 TOOL TIPS ADDED FOR EXTRA CASE DETAILS

Dev Ops
12189

In addition to seeing the name of the Extra Case Details field, a Tool Tips can also be added. These must be set up by the System Administrator.



022 INDICATOR FOR MISSING DATA IN DOCUMENTS

Dev Ops
12802

To prevent information being missed in a document, “???” will be added where case information is missing. However, if the data is an Extra Case Details field, then the field must be set as a required field and information must be entered at the time of document generation. You may need to advise the system supervisor of the Extra Case Detail fields that should be marked as required.

023

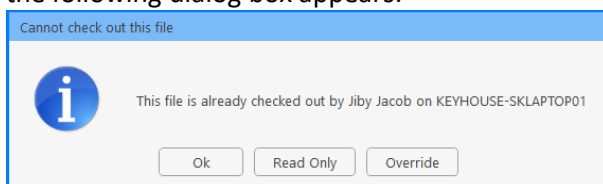
Dev Ops
12276

DOCUMENT CHECKOUT FACILITY

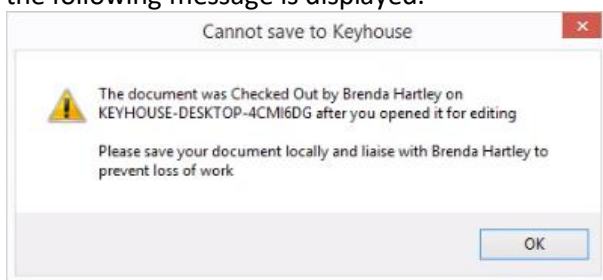
A Document Checkout facility has been added to Keyhouse to ensure documents are not accidentally over written by users when they are already open by another user. This feature must be activated by your system Administrator.

When a document is open and another user tries to open it, a message will appear detailing the name of the user who has the document open and giving the new user the choice of opening the document as a read only document or of taking control of it. Any changes made by the users can be saved as separate versions of the document.

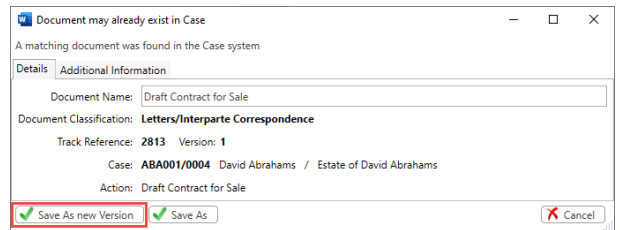
- User 1 opens the document and leaves it open on their machine.
- When User 2 tries to open the same document the following dialog box appears:



- User 2 can then click OK to close the document, Read Only to review the document or Override to take control of the document.
- If User 2 then makes changes and saves the document, it will save their version of the document.
- When User 1 then goes to save the document, the following message is displayed.



- The document can then be saved locally to their computer or be saved as a new version of the document.
- Click the Save to Keyhouse Button in the Keyhouse section of the Home Tab and select Save as a New Version.



- This will ensure that both versions are saved.
- Modify the existing comment if required and click Save.
- **NOTE:** if the automatic saving of versions of documents is turned on, there is no need to use the Save to Keyhouse Option, as the documents will be saved automatically as new versions.

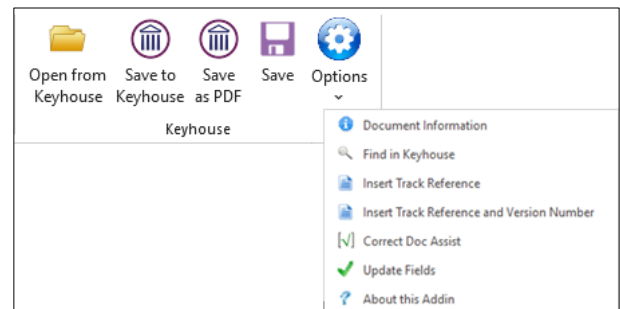
024

Dev Ops
122200

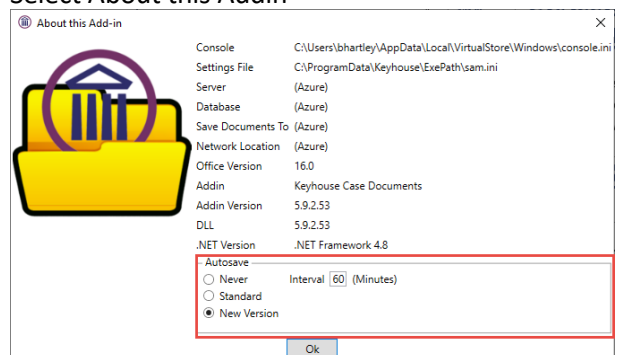
AUTO SAVE OPTION FOR WORD

To ensure documents are not lost, an auto save feature has been added to the MS Word Addin. To activate this:

- Click on the Keyhouse Options button on the Home Ribbon.



- Select About this Addin



- Choose Never if you do not want to Auto Save documents.
- The default interval is 60 minutes but this can be changed to the user's required time frame.
- Standard – will save the document to the Recovery Backup folder. The document will be saved to Keyhouse once a Save option is chosen.

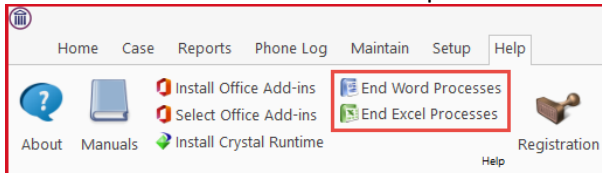
- New Version will create a new version of the document in Keyhouse, keeping the original documents unchanged.

025 END WORD AND EXCEL PROCESSES

Dev Ops
13932

If Word or Excel documents do not open from Keyhouse, this could be caused by the programs running in the background. Word and Excel need to be closed to refresh the system.

- Ensure all documents are saved before starting this process.
- Go to the Help Tab
- Select End Word or End Excel as required.



- The programs will close **without** saving any open documents.
- To continue, open the required document.

KNOW YOUR CLIENT

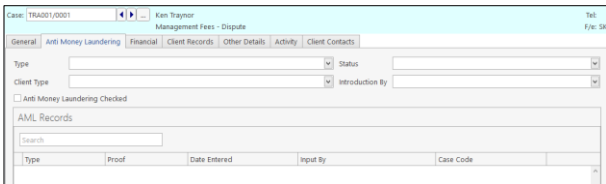
026 AML WARNING GOES TO KNOW YOUR CLIENT SCREEN

Dev Ops
12614

When AML warnings appear on the Case Diary, the Show Me option takes users to the AML Tab on the Know Your Client Screen.

WARNING : Money Laundering checks have not been completed for this Client.

WARNING : Time to recheck the Anti Money Laundering for this Client.



027 NOT APPLICABLE OPTION FOR AML

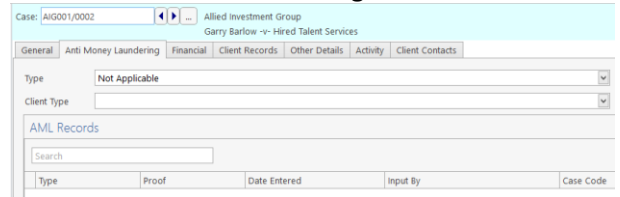
Dev Ops:
13865

In some instances, AML is not required for clients, so to facilitate this, an option of Not Applicable has been added to the AML Tab in Know Your Client.

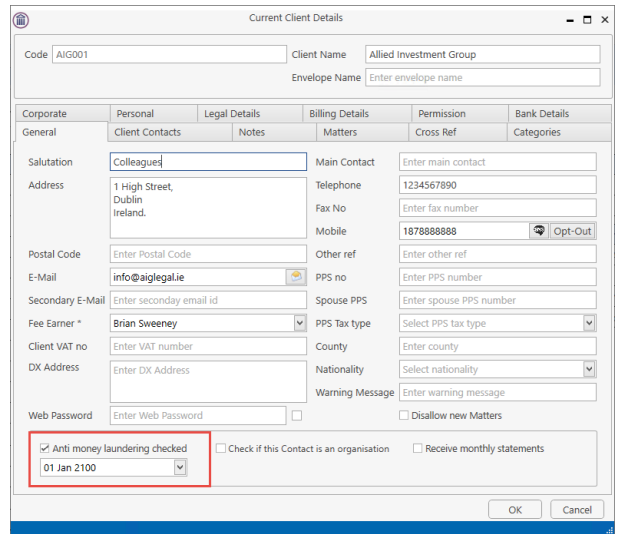
- Click to Know Your Client and select the AML Tab.
- Click on the Type Option and select Not Applicable.



- The AML Check Box is no longer visible.



- On both the Current Client Details Screen and the Critical Information Screen the Approval Date will be set to 1 Jan 2100.



TIME RECORDING

028 POST TIME WITHOUT REVIEWING TIME SLIPS

Dev Ops
13862

When default tasks have been set for users, it is no longer necessary to open each time slip before they can be posted to the time ledgers. An option has been added to enable users to post the entries without reviewing and adding additional narrative detail.

Please note that this feature must be turned on by the System Administrator.

TIME LEDGER

029 TIME BILLED ADDED TO TIME LEDGER

Dev Ops
13235

To improve the information visible on the Time Ledger, the time billed is detailed on the screen.

Date	Comment	Time in Charge	Time	Other	Charged	Billed amount	Time
18 Nov 2021	Interview with the...	1:00	1:00	0:00	1:00	1:00	1:00
18 Nov 2021	Administrative	Time	0:00	0:00	0:00	0:00	0:00
18 Nov 2021	Interview	Time	0:00	0:00	0:00	0:00	0:00
18 Nov 2021	Interview	Time	0:00	0:00	0:00	0:00	0:00
18 Nov 2021	Interview	Time	0:00	0:00	0:00	0:00	0:00
18 Nov 2021	Document Drafting	Time	1:00	0:00	1:00	1:00	1:00

CAPTURING DOCUMENTS

030 SCAN CAPTURE PROGRESS BAR

Dev Ops
12732

A progress bar has been added to Scan Capture.

031 TIME OPTION ADDED TO SCAN CAPTURE SCREEN

Dev Ops
13210

The time has been added to the Scan Capture screen. This will help keep documents in the correct order for the purpose of briefs.

- Capture the document in the normal way.
- The current time automatically appears on the capture window.

- The time can be adjusted to the required time either by using the arrows or typing it in.

032 SHOW WHO CAPTURED DOCUMENTS INTO KEYHOUSE

Dev Ops
13970

When documents are captured into a case and assigned to a handler, the name of the person who assigned the document into the case can be seen. This will only apply when the document is not marked as complete at the time of capture.

- Right click on the action and select Edit.
- Click to the Action Assignment Tab.
- The Created name will be the name of the person who captured the document to the case.

By	Action	For	Date Assigned	Time Assigned	Date Returned	Time Returned	Assigned By	Returned By	Delegate	Team
Carol Nolan(CN)	Released	Brian Sweeney(BS)	16 Mar 2022	11:00	16 Mar 2022	11:00	CN	BS	CN	COM
Carol Nolan(CN)	Created	Carol Nolan(CN)	16 Mar 2022	11:00						

033

Dev Ops
13847

SAVE MS OFFICE DOCUMENTS FROM CLOUD LOCATIONS

Office documents can now be captured from Cloud Locations e.g. One Drive, Sharepoint, using the Save to Keyhouse button in Word.

CASE CONTACTS

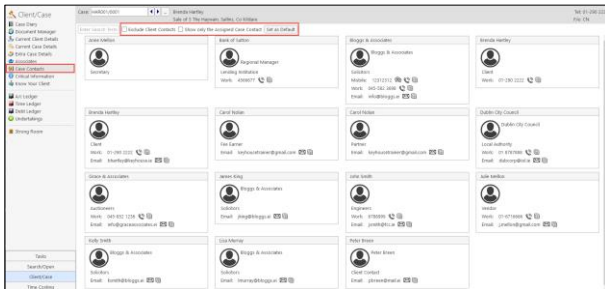
034

Dev Ops
13243

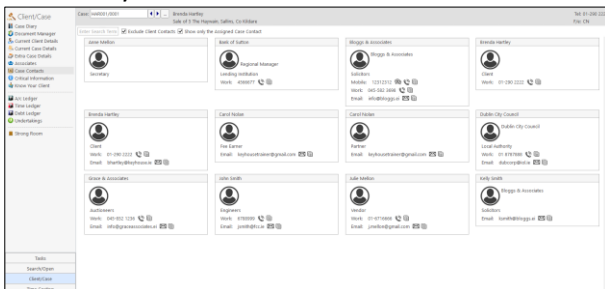
FILTER OPTION FOR ASSIGNED CASE CONTACTS

As all case and associate contacts appear on the Case Contacts screen, filters have been added to enable users to only see the assigned case contacts for the matter.

- Click to the Case Contacts



- Choose to:
 - exclude client contact
 - see just assigned associate
 - set a default
- In the example below, the client contacts and non assigned associates have been removed and the layout has been set as a default.



- To see all the associates or change the default, untick the options.

CONFLICT SEARCH

035

Dev Ops
11469

CLIENT AND ASSOCIATE CODES ADDED TO CONFLICT SEARCH

The client codes and associate codes are now visible on Conflict Search. This will make it easier to review the information in the Case Management System.



TASKS

036

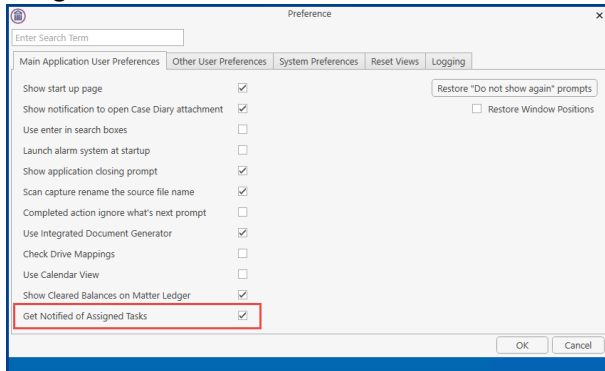
Dev Ops
13654

NOTIFICATION OF TASK ASSIGNMENT

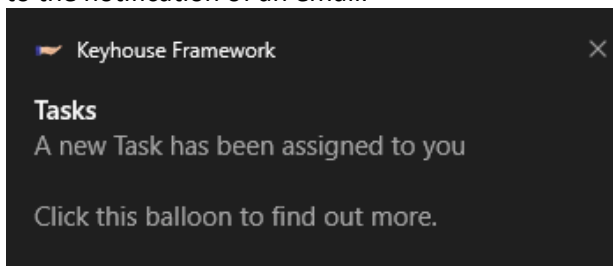
Users can now get notifications when tasks are assigned to them. The feature must be turned on in the User Preferences.

- Click to the Setup Tab, select Personal Settings and then Preferences.

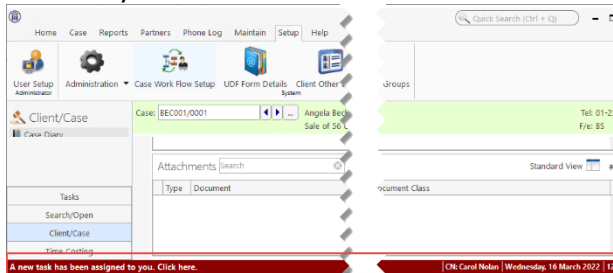
- Tick the box beside 'Get Notification of Task Assignments




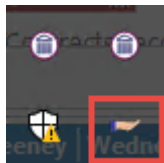
- When a task is assigned, a notification will appear in the bottom right of the screen, similar to the notification of an email.



- Click the X to clear it or allow it to disappear after a few seconds.
- A bar will appear at the bottom of your screen reminding you of the task assignment.
- Click on the bar to take you to the action in the Case Diary



- Alternatively, click on the  on the Task Bar at the bottom of the screen to show the hidden icons.



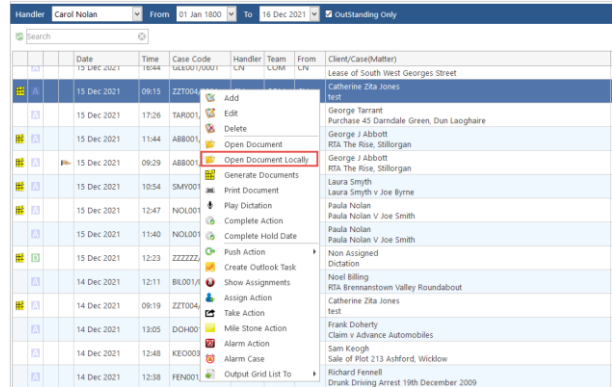
- Click on the Hand Icon to go to the task on the Case Diary.
- If more than one task has been assigned, the most recent task will be the first task you go to. Each task will appear in turn.

037

Dev Ops
11467

OPEN DOCUMENTS LOCALLY ON RIGHT CLICK MENU

A new option has been added to the short cut menu to enable uses to open documents locally.



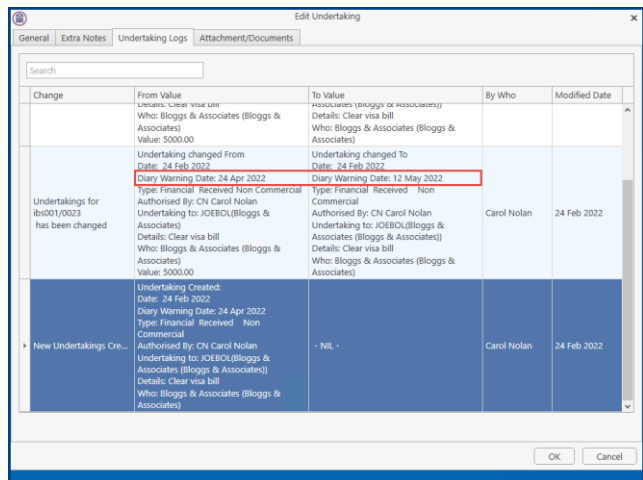
UNDERTAKINGS

038

Dev Ops
12694

UNDERTAKING LOG REFLECTS DIARY WARNING CHANGES

When the Diary Warning Date for an Undertaking is changed, this change can now be seen in the Undertaking Log.



039

Dev Ops
12989

DISCHARGE UNDERTAKINGS FROM CASE DIARY

Undertakings can be discharged from the Case Diary using the Complete Action Button or by using the Shortcut Menu.

- Select the Undertaking in the Case Diary
- Click Complete Action from the Ribbon or right click and select Complete Action or Complete Hold Date.
- The Undertaking Discharge dialog box will open.
- Discharge the Undertaking as normal.

STRONG ROOM

040

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13233

INCREASED MAXIMUM DESTROY DATE

The destroy date in the Strong Room can now be set to 31 December 2999.

Strong room - Change File info

General | Item History | Item Diary | Client Info | Attachment/Documents

Needs Attention IN

Item Type * Papers Item Code * ABC000

Client Code ABB001 Matter Code ABB001/0001

Client Name George J Abbott Description Sale 45 Somerset Road, Dublin 6

Item Description * Personal Papers

Location Box 1 Box No Enter box number

Search Code Enter search code Fee Earner Select Fee Earner

Entry & Destroy Date

Entry Date 16 Dec 2021 Destroy Date 31 Dec 2999

Open Closed Closed Date Please select date Closed File No select file number

OK Cancel

ADDINS

041

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13331

TURN OFF NOTIFICATION WHEN SENDING AND ASSIGNING EMAILS FROM/TO KEYHOUSE

When sending and assigning emails to Keyhouse from Outlook, notifications appear in the bottom right corner of the screen. If these notifications are not required, they can be turned off.

- In Outlook click on the Settings Button.
- In the Email Options section, untick the Show Notifications option.

Keyhouse Outlook Add-in Settings

Keyhouse Outlook Add-in Version 5.9.2.53 For .NET Framework 4.8 Uninstall

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 1000 pixels wide or 1000 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 Notifications Show potentially missing assignments in red

Screen Scaling 100 % 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: MAT:Code

OK Cancel

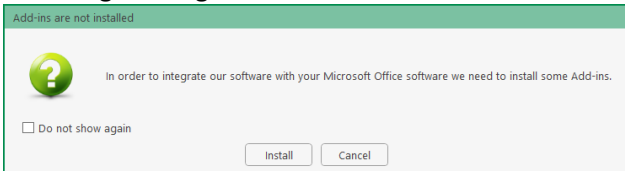
- Click OK to save changes.

042

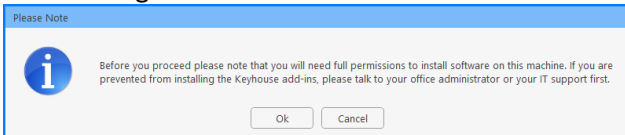
Dev Ops
13557

CHECK ADDINS ARE INSTALLED WHEN OPENING KEYHOUSE

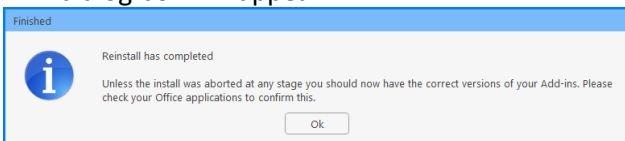
Once Keyhouse has been updated when the user opens the program the system will check that the Addins are installed. If not, the user will get the following message.



- Click Install and will receive the following message.



- Once the Addin has been installed the following dialog box will appear



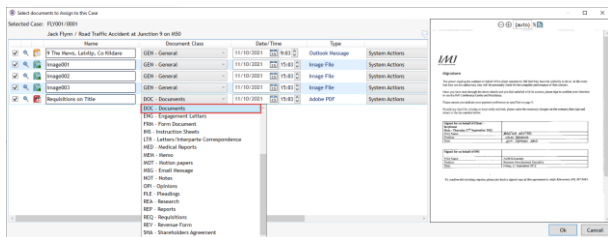
- The process will then need to be repeated for the 2nd Addin.

043

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7269

DOCUMENT CLASS CODES VISIBLE WHEN ASSIGNING EMAILS

The Document Class Code is now visible beside the Document Class Name when assigning emails.



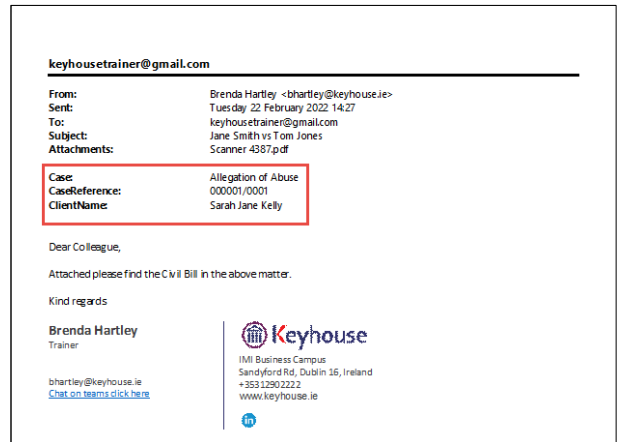
044

Dev Ops
7269

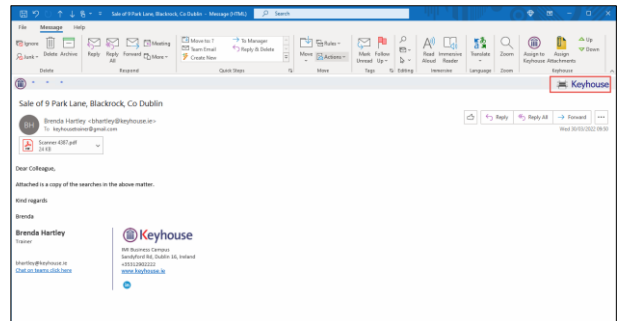
PRINT CASE DETAILS ON EMAILS WHEN PRINTING FROM KEYHOUSE

When you print an email from Outlook you can see the case details.

- Open the email to be printed.
- Click File and Select Print



- If you do not want the Case information, use the print email option on the email.



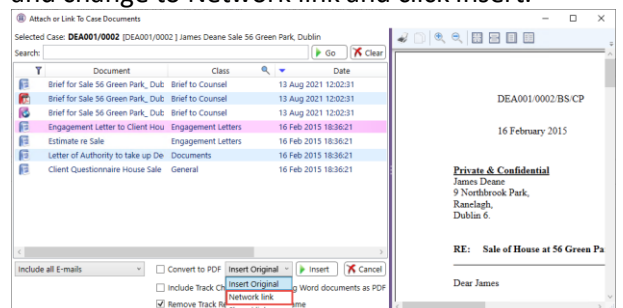
045

Dev Ops
12279

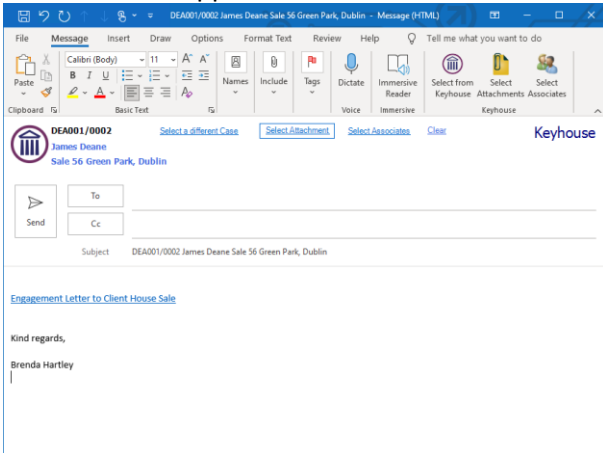
CREATE A HYPERLINK TO DOCUMENTS IN KEYHOUSE ON AN EMAIL

The option to send a hyper link to an internal Keyhouse user is now available.

- Create the email as normal.
- Click Select Attachments and choose the document to be sent.
- Click on the down arrow beside Insert Original and change to Network link and click Insert.



- The document appears as a link in the email



- Complete the email and send.

BRIEF BUILDER

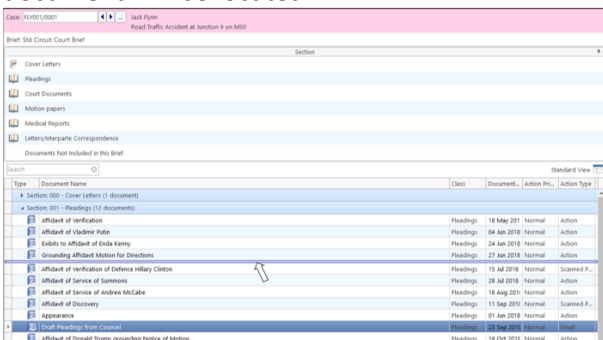
046

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12094

DRAG AND DROP INDICATOR IN BRIEF

When dragging and dropping documents within a section or sections, an indicator bar will appear to help guide the user for document placement.

- Create a brief in the normal way
- Select the document to be moved and drag to the new location.
- The Indicator bar will appear indicating where the document will be located.



- Complete the brief

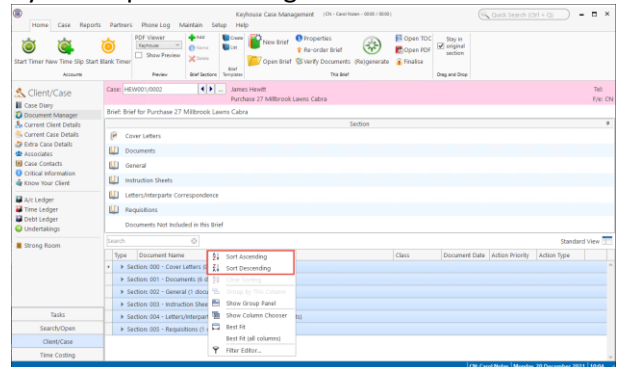
047

Dev Ops
13537

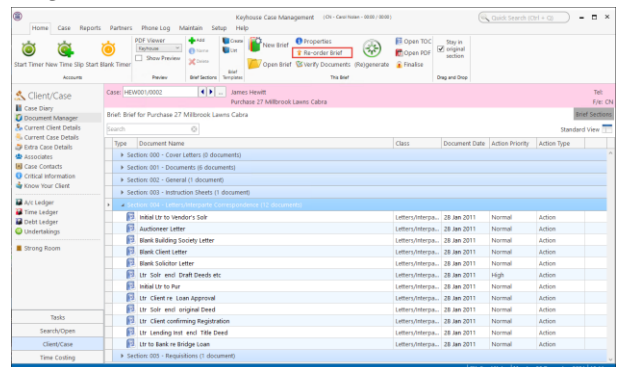
CREATE A BRIEF BASED ON THE SORT ORDER OF DOCUMENTS

When documents are sorted in a brief, this order can be used to compile the brief.

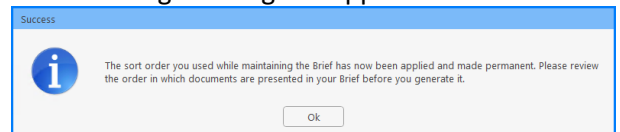
- In the Create Brief Window, sort the documents by the required heading.



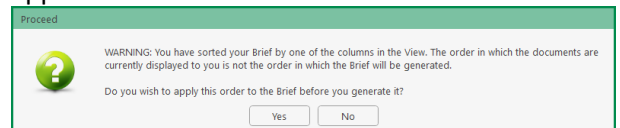
- To keep the Sort order for the Brief, click Re-order Brief.



- The following warning will appear.



- Click OK to continue.
- Complete the Brief in the normal way.
- If a sort has been applied to the Brief and the Re-Order button is not set, the following warning will appear.



- Click Yes to keep the Sort. No will return the documents to their original order in the Brief.

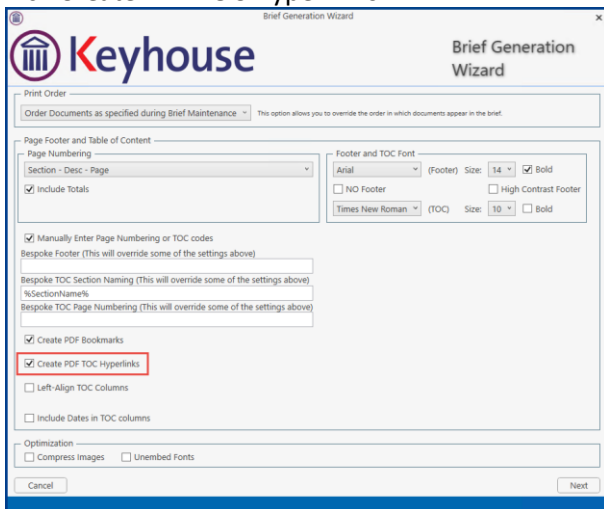
048

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7048

ADD HYPERLINKS TO A BRIEF TABLE OF CONTENTS

With Courts needing hyperlinks in the Table of Contents for briefs, this feature has been added to the brief.

- Create a brief in the normal way and generate/regenerate it.
- Tick Create PDF TOC Hyperlinks



- Complete the brief.

Brief for RTA The Rise, Stillorgan
Author: Carol Nolan
Brief for RTA The Rise, Stillorgan

Letters/Interparte Correspondence

No.	Description	Page No
1	Chase Letter to Doctor	1
2	Chase letter to Garda	2
3	Chase Letter Insurance Co re costs	3
4	Chase Letter to Witness - June Murray	4
5	Chase Letter Insurance Co	5
6	Chase Letter to Witness - Emma Long	6
7	Reply to Insurance Company Queries	7
8	Letter to client re Insurance Queries	8
9	Reply to Insurance 2 Queries	9
10	Ltr to Client re Medical Exam	10
11	Send Client to Def Doctor - med exam	11
12	Letter to Client PLAB med exam	12
13	Confirm appt to Insurance Co	13

- Click on the link to navigate to the document in the brief.

049

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12094

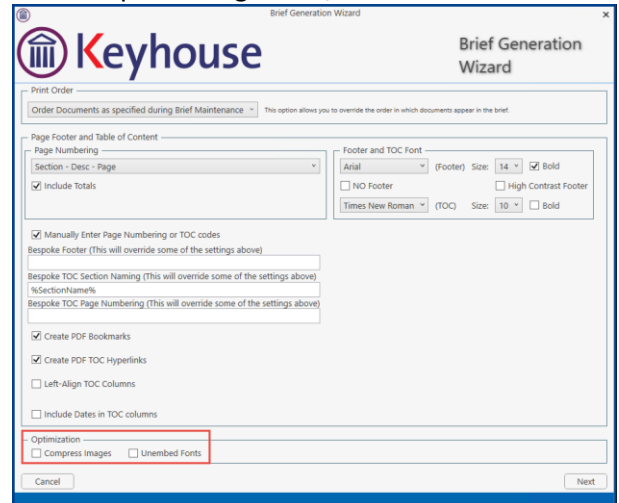
OPTIMISE THE SIZE OF A BRIEF

When images are added to a brief, the size of the brief increases. To help combat this, images can be changed to low resolution.

The Unembed Font option can also be used to reduce the size of a brief. This will ensure that only standard fonts are used in the brief. This may prevent the recipient from being able to read the

document but if that happens, just untick Unembed Fonts and generate the brief again.

- Create a brief in the normal way and generate/regenerate it.
- Tick Compress Images and/or Unembed Fonts



- Click Next to continue.

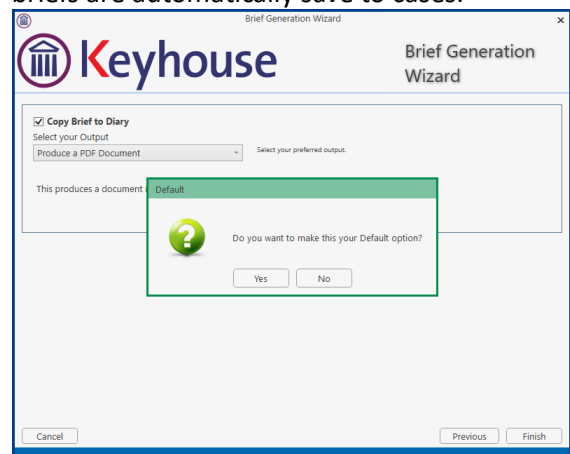
050

Dev Ops
11739

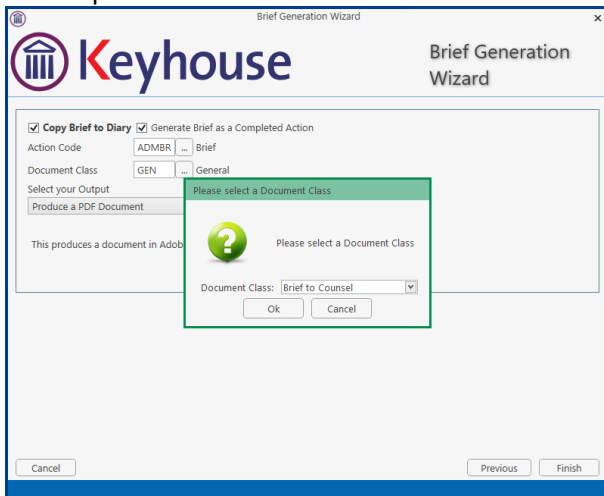
CREATE DEFAULT SETTINGS WHEN CHOOSING TO SAVE A BRIEF TO A CASE

Additional settings have been added to the Brief Builder to enable users to create default settings when saving briefs to a case.

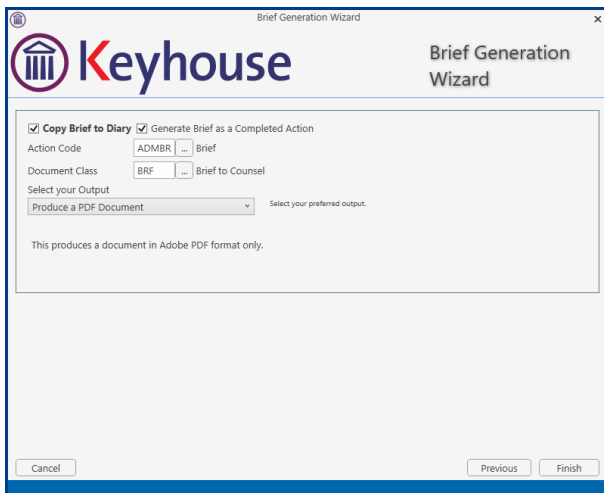
- Create a brief in the normal way and generate/regenerate it.
- Tick Copy Brief to Diary to save to the case.
- On the dialog box, click Yes to ensure all future briefs are automatically save to cases.



- Choose whether or not the brief is assigned as a completed action
- To change the classification of the Brief, click on the dropdown arrow



- These will be the default setting for all future briefs.



- These options can be changed for each individual brief if required.

PHONE LOG

051 SHOW MORE THAT 200 CHARACTERS IN PHONE LOG REPORT

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13766

As the number of characters visible on the Phone Log report was restricted, this has now been increased to ensure full messages are visible.

BILLING

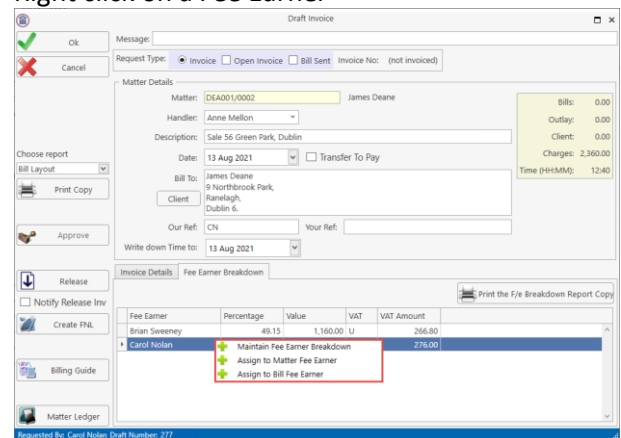
052

Dev Ops
7636

ALLOCATE ALL FEES TO MATTER FEE EARNER

New options have been added the Fee Earner Breakdown to allow all the fees to be allocated to the Matter Fee Earner or the Bill Fee Earner.

- Create the invoice in the normal way
- Click to the Fee Earner Breakdown Tab
- Right click on a Fee Earner



- To assign all the fees to the fee earner, choose Assign to Matter Fee Earner. In this case – Carol Nolan
- To assign fees to the Bill Fee Earner chose Assign to Bill Fee Earner – in this case Ann Mellon.

053

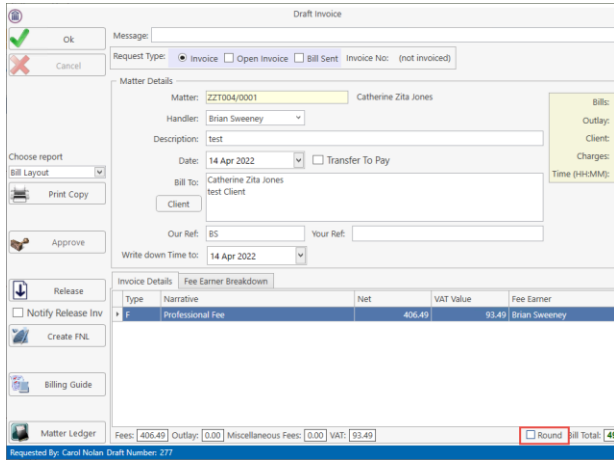
Dev Ops
13167

ROUND INVOICE VALUES TO NEAREST 5 CENTS

The value on an invoice can now be rounded to the nearest 5 cents.

- Enter the invoice in the normal way.

- Tick the round box



- Click Ok or Release as required.
- In the example above, the value of the invoice will change to €500.00.

PREFERENCES

iManage Users Only

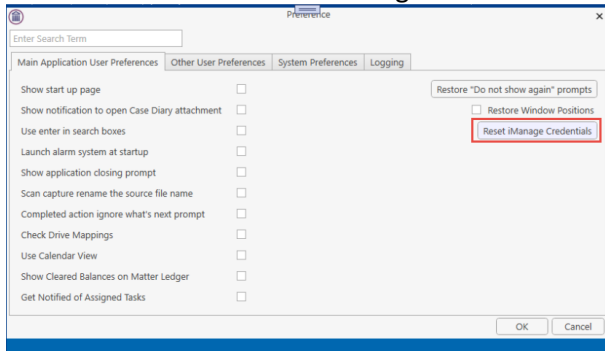
054

Dev Ops
13053

RESET IMANAGE CREDENTIALS

Users can reset their credentials from their Personal Preferences.

- Go to the Setup Tab and select Personal Preferences.
- Then select Preferences.
- On the first Tab tick Reset iManage Credentials.



- Click OK to close the dialog box.

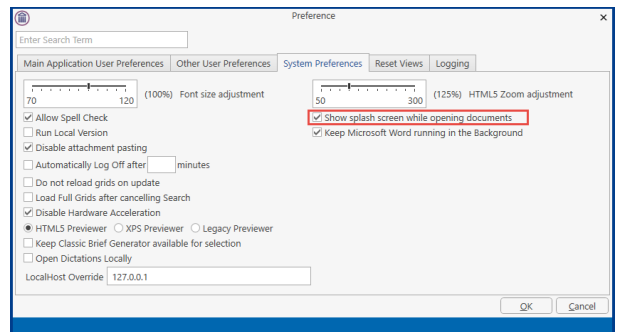
055

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13859

SHOW NOTIFICATION SCREEN WHEN OPENING DOCUMENTS

As it can sometimes be difficult to know if a document is opening, an option to add a notification screen can be active.

- Go to the Setup Tab, select Personal Preferences and then Preferences.
- Click to the System Preferences Tab.
- Tick Show splash screen while opening documents.



- Click OK to save
- When you open a document the following dialog box will open.



056

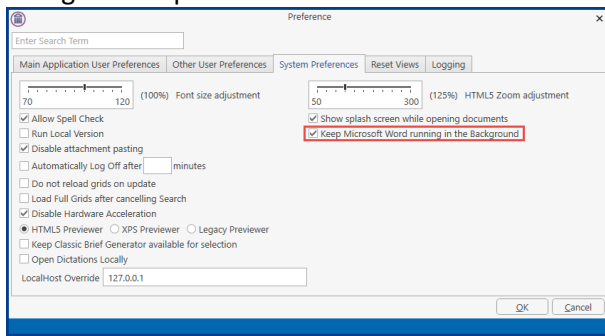
Dev Ops
13860

KEEP MS WORD RUNNING IN THE BACKGROUND

To help speed up the opening and processing of documents, an option has been added to keep MS Word open in the background of your computer.

- Go to the Setup Tab, select Personal Preferences and then Preferences.
- Click to the System Preferences Tab.

- Tick the Keep Microsoft Word running in the Background Option.



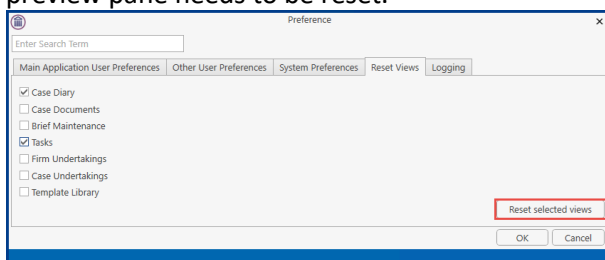
- Click OK to save.

057 RESET VIEWS

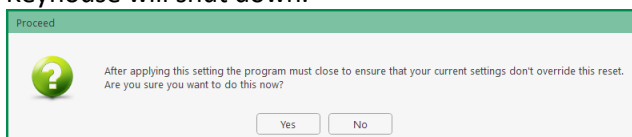
Dev Ops
13481

An option has been added to enable users to reset the layout of the main screens such as the Case Diary, Document Manager, Undertakings and Tasks.

- Go to the Setup Tab and select Personal Preferences.
- Then select Preferences.
- Choose the Reset View tab.
- Tick the box beside each view where the preview pane needs to be reset.



- Click Reset selected views and then click OK.
- The following warning will appear advising that Keyhouse will shut down.



- Click Yes to continue.
- Reopen Keyhouse to continue working.