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Keyhouse MS Office Add In Modules
System Overview

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 all their emails, both incoming and outgoing for all cases from within Outlook.

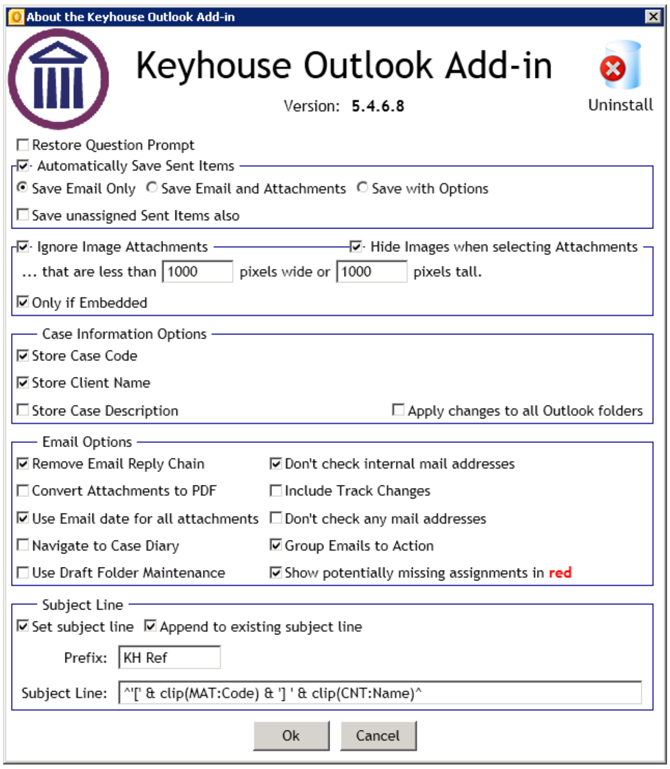
Emails can be directly assigned from your Inbox to a case by clicking on the button *"Assign to Case"* which will now appear in your Outlook toolbar. Email attachments can also be saved separately into a case by clicking on the *"Assign Attachments"* button.

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

All email correspondence with any associated attachments will automatically be stored against the cases in the Keyhouse Case Management system.

Before you Start

Before you send an email from Keyhouse you need to check your settings. This can be done by clicking on the About Button. Making changes at this level will apply to all emails. It is also very important that the Outlook Add-in Version number correspondents with the Version number in Keyhouse. The Keyhouse Version number is located on the Help Tab on the About Button. See Appendix 1 to install the correct Add-In.



Automatically Save Sent Items

Save Email Only:	Will only save the email and not the attachment.
Save Email and Attachment:	Will save the email and the attachment which may result in the attachment appearing more than once in Document Manager.
Save with Option:	Will give you options to choose what to save to the case when saving sent emails and attachments.
Save unassigned Sent Items also:	Prompts to save unassigned emails once they have been sent.

Ignore Image Attachments

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

Case Information Options

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

Email Option

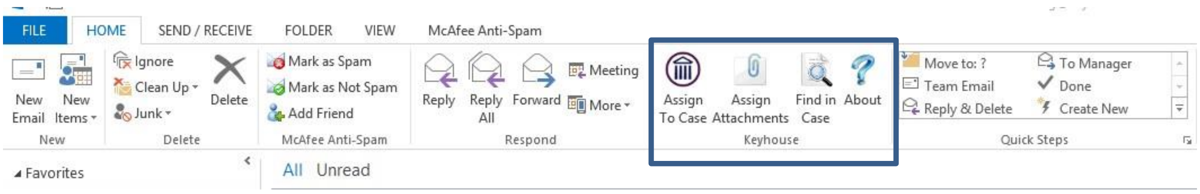
Remove Email Reply Chain:	Will stop the email chain from being assigned to the case. It is possible, by exception, to assign the chain of an email to a case from the email. See Save with Option (pg. 6)
Convert Attachments to PDF:	Automatically converts all attachments to PDF
Use Email date for all attachments:	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.
Use Draft Folder Maintenance:	This will keep the draft emails folder empty provided it is empty before this option is set.
Show potentially missing Assignments in Red:	When you open an email again the system checks if it is in Keyhouse. If it is not then it adds the detail at the top of the email in Red.

Subject Line

Set subject Line:	By ticking this box information in the Subject Line Box will automatically appear in the subject line of all emails.
Append to existing subject line	Will allow additional information to automatically be add to the subject line.
Prefix:	Information set to appear at the start of the subject line. This is set by Keyhouse Support.

Assigning existing E-mail to Case

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



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

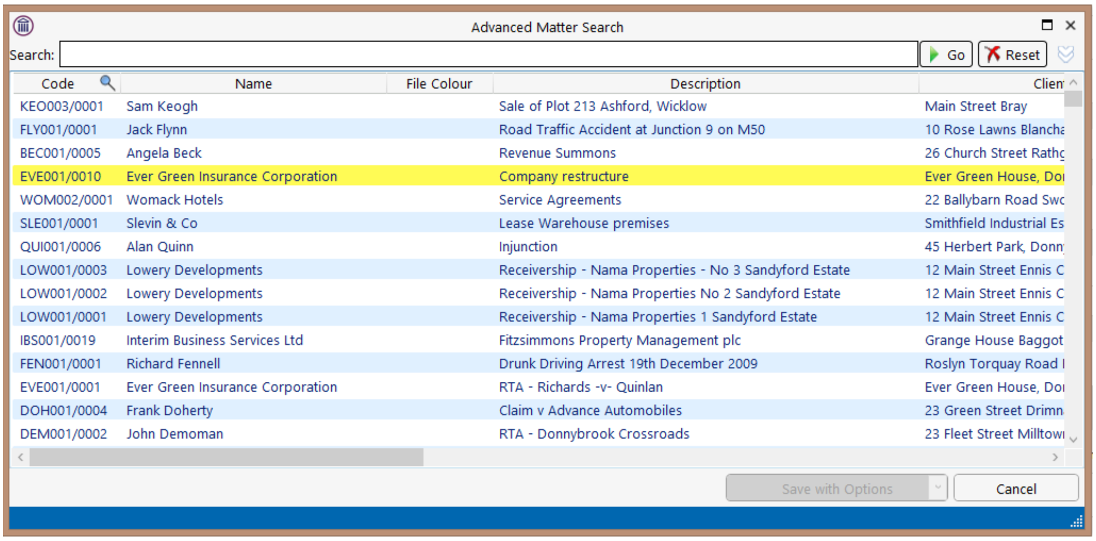
The Assign Attachments button will be used when assigning the attachment(s) of an email only

The Find in Case button will be used to take you directly to the case file in Keyhouse.

The About button will display the Keyhouse version for record purposes .
It will also allow you to change your settings

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

2. From your Inbox, highlight the mail you wish to assign - you can hold the Ctrl key down if you are assigning many mails.

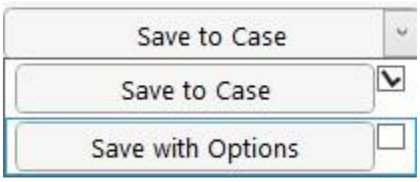


3. Click on the 'Assign to Case' button and your Recent Matter list will open, as below:

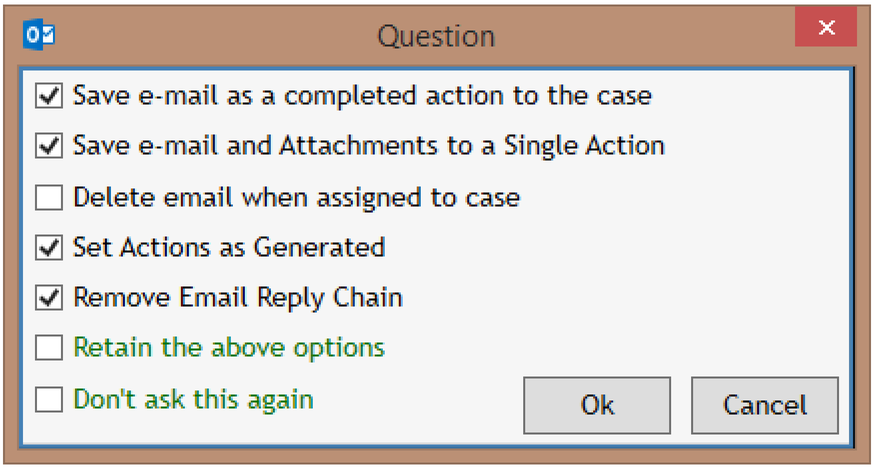
4. If the Matter you want to assign the email to is not listed in your recent matter list, just click into the Search box and enter the case name or code and click Go.

5. Select the case you wish to assign the email into.

6. At this point you can save to Case or Save with Option by click on the down arrow beside Save to Case



7. If the Save to Case option is selected, the following question 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 two separate actions, making it easier to find the attachment.*

c. *Delete e-mail when assigned to case* – the original mail will be deleted from your Outlook Inbox while saving a copy of the mail into the selected Case Diary.

d. *Set Actions as Generated* – the email will come in as an action to be completed at a future date.

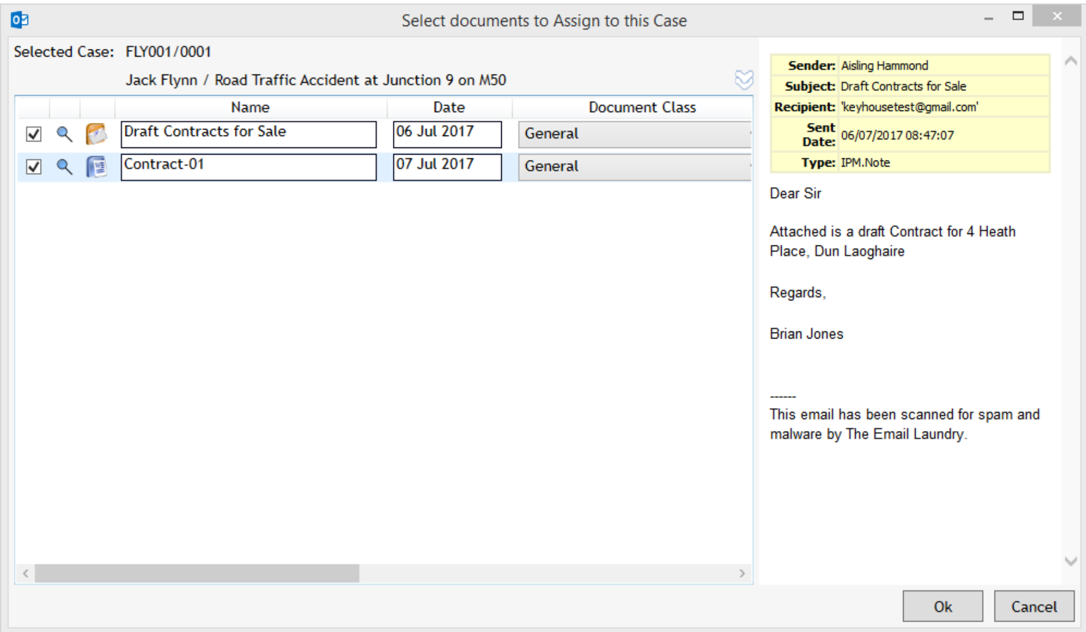
e. *Remove e-mail reply chain – when this option is selected only the current email is saved. It will not save any previous e-mails in the chain.*

f. *Retain the above options – the system will save the above options for all future e-mails.*

g. *Don't ask this again – Your selected options will be saved for future emails you assign to Case and this pop-up message will no longer appear.*

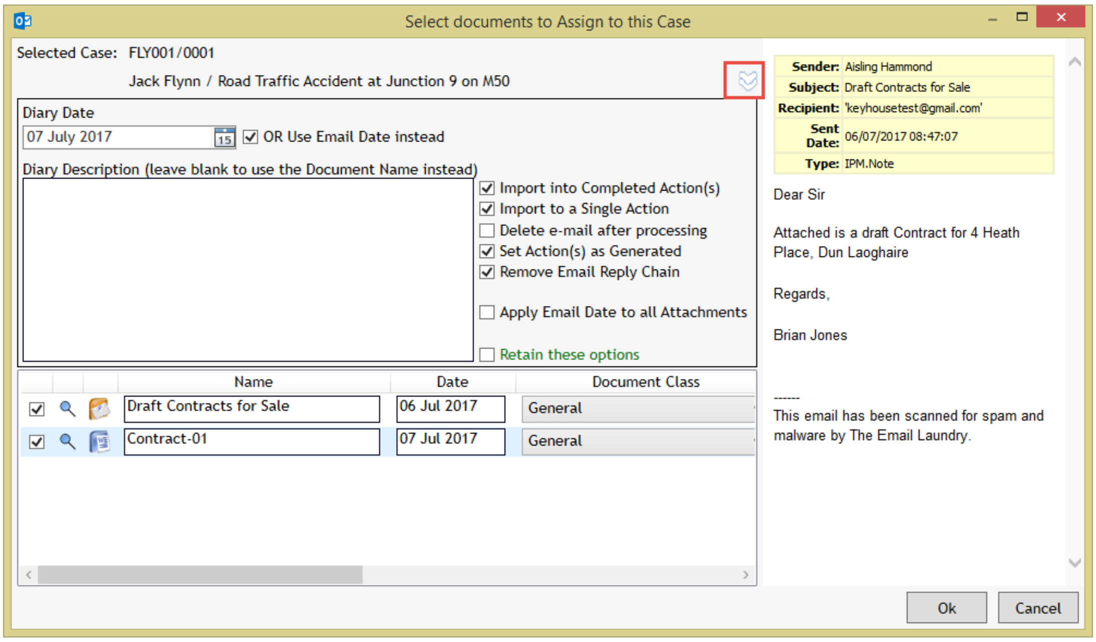
h. *Tick the options per your choice & OK to save.*

8. If the Save with Options is selected, the following dialog box appears

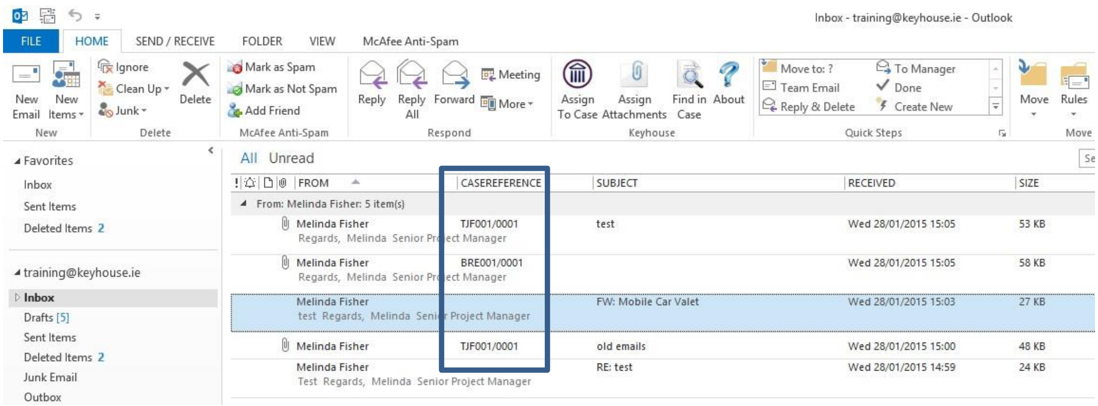


9. From this screen, you can choose to save the email, the image, the attachment or all.

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



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



Assigning an E-mail Attachment

1. Occasionally you may want to only save the attachment. To do this you open the email. On the ribbon the Keyhouse Group will be visible.

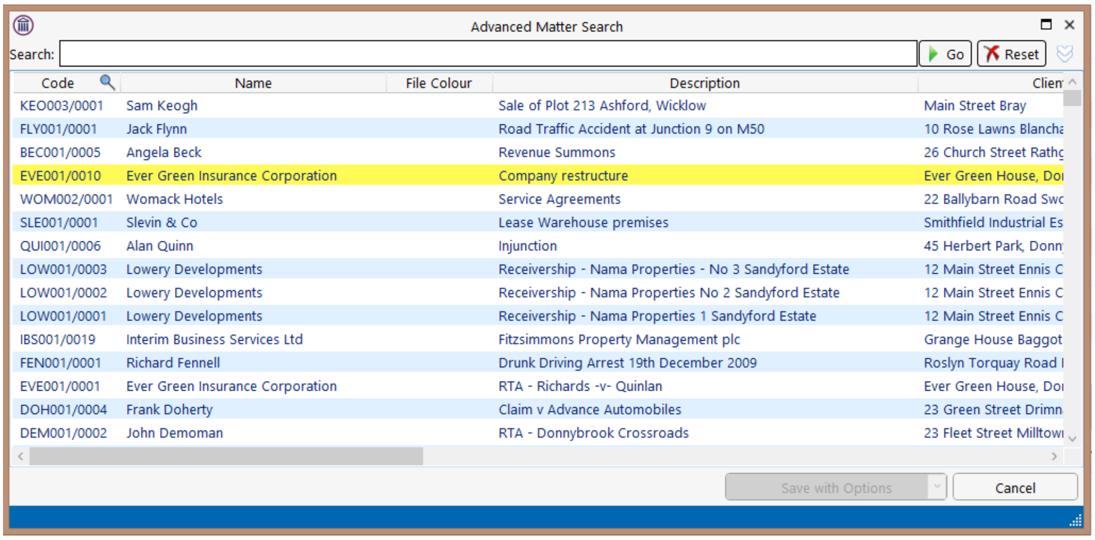
The Assign to Case button will be used when assigning an email and the attachment into the Case Diary.

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

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

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

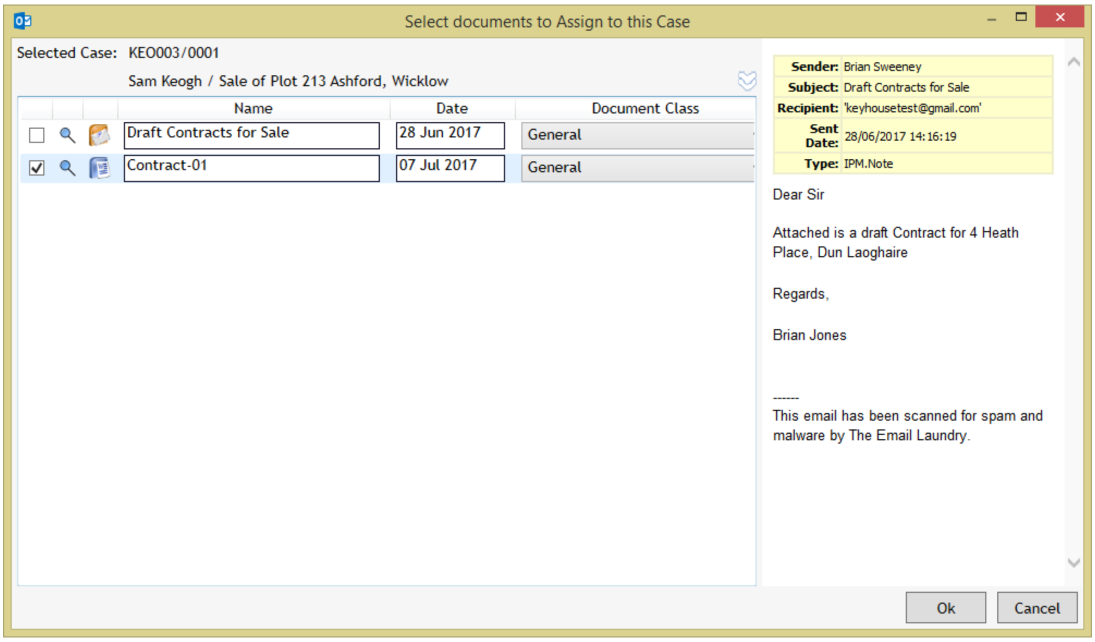
3. To assign the attachment only, click on Assign Assignment and your Recent Matter list will open.



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 into.

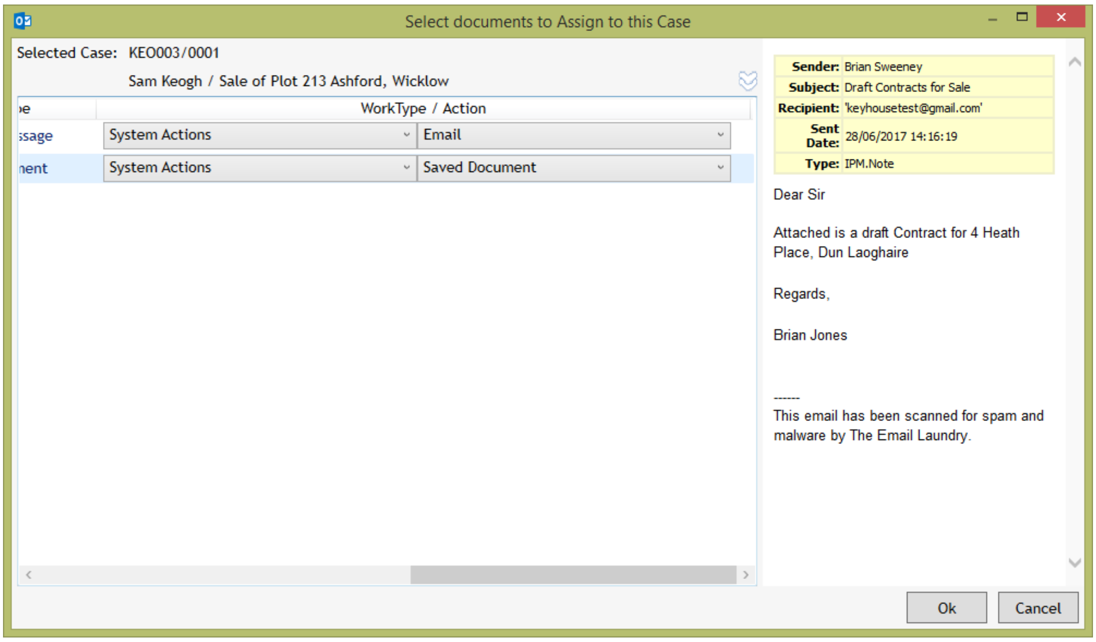
6. The following screen will appear, giving you a number of options.



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

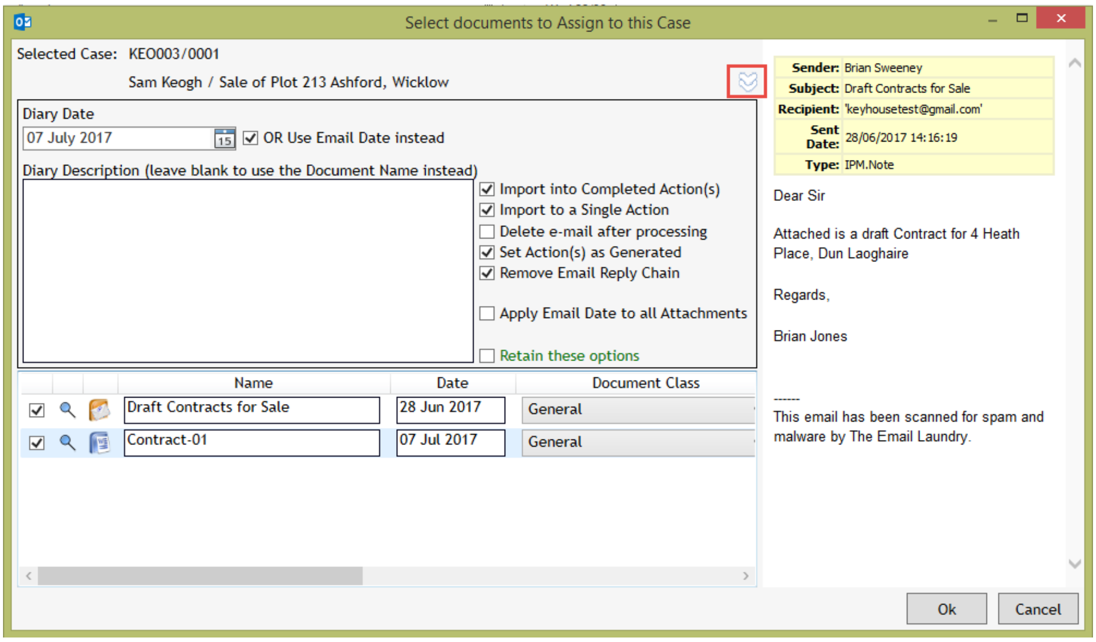
***Note**:* Embedded image in the email e.g. Twitter, LinkedIn, company logos should not be ticked as it has been set to block them. However, occasionally an image may be ticked if it is larger than is specified on the About screen.

8. Email, images and attachments come into the system with a Document Class of General. This can be changed from here to match your Document Classes. Click on the Down Arrow to select the required class.



9. Use the scroll bar at the bottom of the screen to see the Work Type/Action. These can also be changed by clicking on the dropdown arrow and selecting the required option.

10. It is possible to get further options by clicking on the white chevron at the top of the screen.



a. *Import into Completed Action(s)* – the attachment will save as a completed action in the selected Case Diary; if deselect, the action will save as an uncompleted action on your Case Diary/Task List. If ticked it will override the option to *Set Action as Generated.*

b. *Import to a Single Action - this will ensure the email and the attachments are saved as one action rather than as two separate actions, making it easier to find the attachment.*

c. *Delete e-mail when assigned to case – the original mail will be deleted from your Outlook Inbox while saving a copy of the mail into the selected Case Diary.*

d. *Set Actions as Generated – the email will come in as an action to be completed at a future date.*

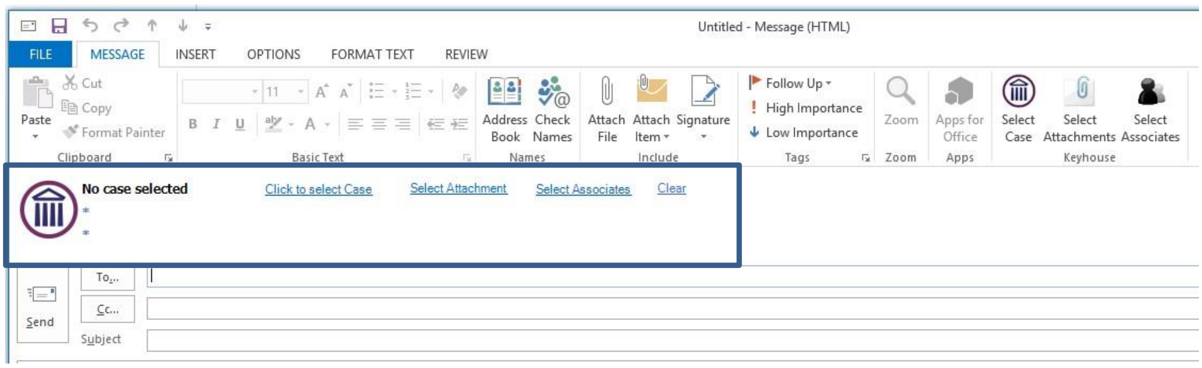
e. *Remove e-mail reply chain – when this option is selected only the current email is saved. It will not save any previous e-mails in the chain.*

f. *Apply Email Date to all Attachments – this will put the email date on all documents.*

g. *Retain the above options – the system will save the above options for all future emails.*

Sending new E-mails from Outlook

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



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

Click to select Case	**Select Case**	Select the case that the email is associated with.
Select Attachment	**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.
Clear	**Clear**	Will remove any case information from the email.

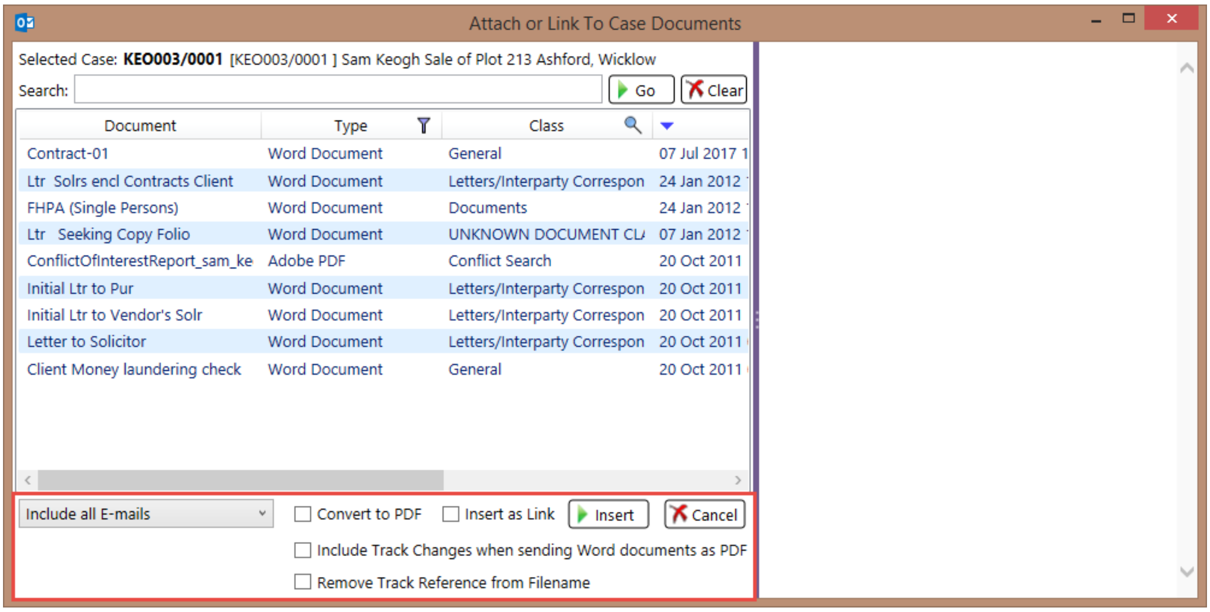
3. Open a new mail in Outlook.

4. If you want to send this new mail via Keyhouse, choose 'Click to select Case'. Click to select Case

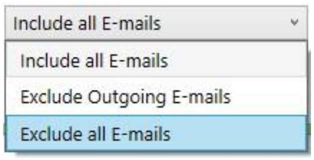
   This will open your Recent Matter list - use the Search box to fine the relevant Case the email is to be assigned to.

5. The case details will appear on the e-mail.

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



7. The documents will be listed in Date created descending order. Select the required document to be sent.
8. It is also possible to search for a word or words in a document. A preview of the document will appear on the right side of the screen.
9. You can choose to search specific types of files, by right clicking over the Type column and choosing a type listed, e.g. Word Document.
10. Documents can be converted to PDF by ticking the Convert to PDF box before clicking on Insert.

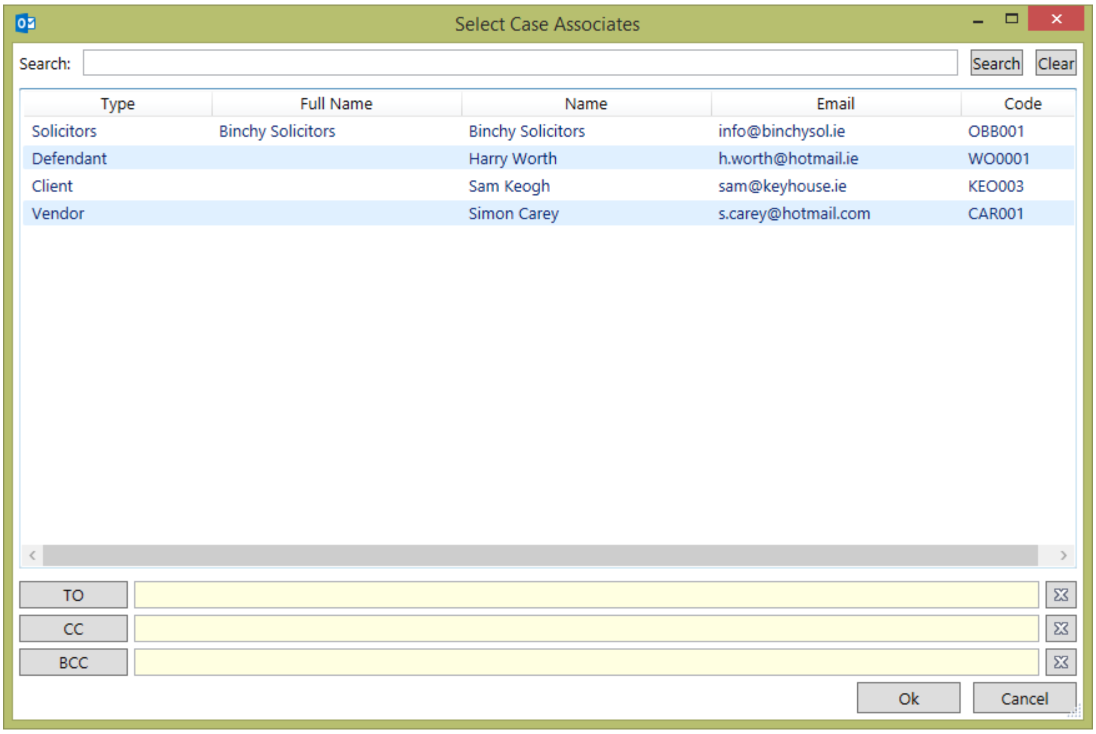


11. It is also possible to include/exclude emails from the list of documents to be attached. Choose the drop-down arrow beside Include all E-mails to choose.
12. If you would like to view the actual client document folder for more search/sort options, click on the look up button beside this option. Select your document & choose Insert

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

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

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



15. Highlight the associate you wish to email and click on To/Cc/Bcc and ok when all names added.

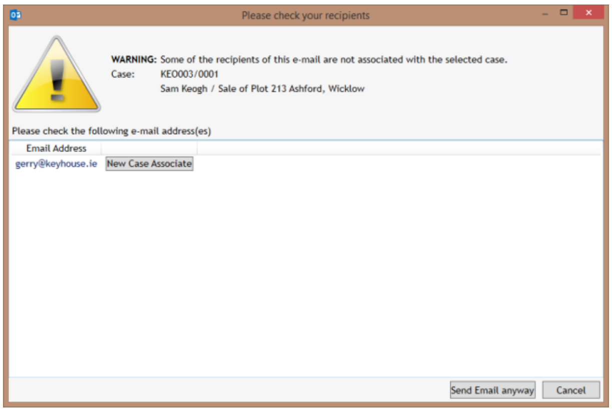
16. To remove email addresses from the To/Cc/Bcc fields click on the button.

17. Click OK to return to the email with the selected addresses or click Cancel to return to the email without any selected addresses.

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

19. If you are not sending the mail to a case contact, you can type or select the address as normal going through the Outlook contacts section.

20. If the email address is not connected to the matter then the following box will appear:

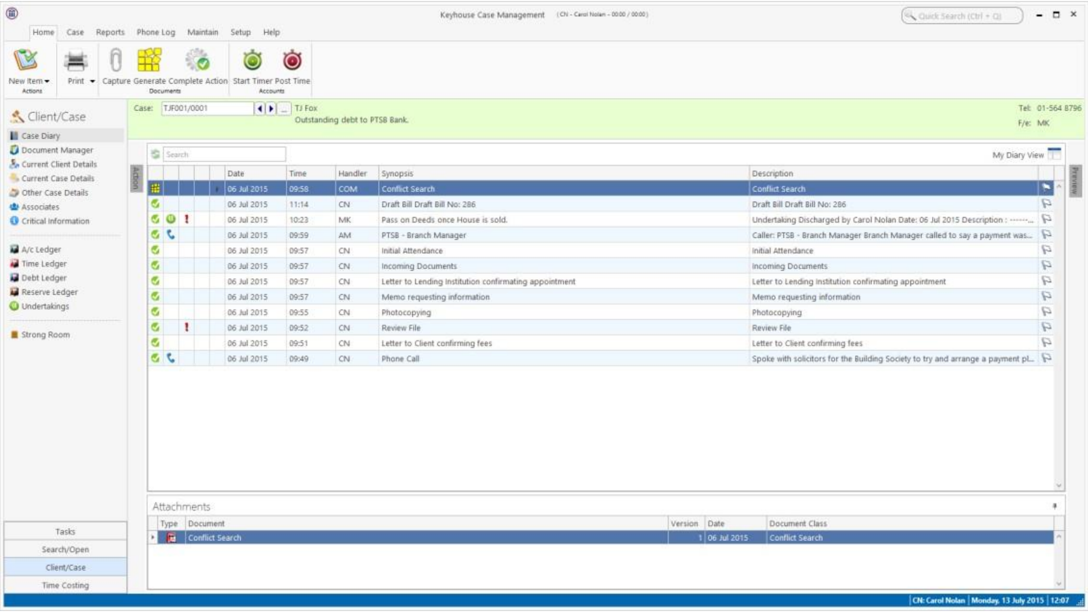


21. It acts as a warning to ensure emails are not sent to the wrong person. If the email is ok then you can Send Email anyway.

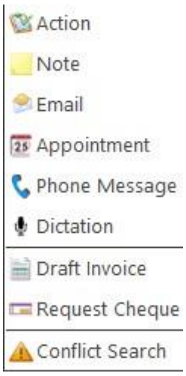
22. Alternatively, you can add the person as a New Case Associate so their details will be available for future use.

Sending new E-mail from Keyhouse via Outlook

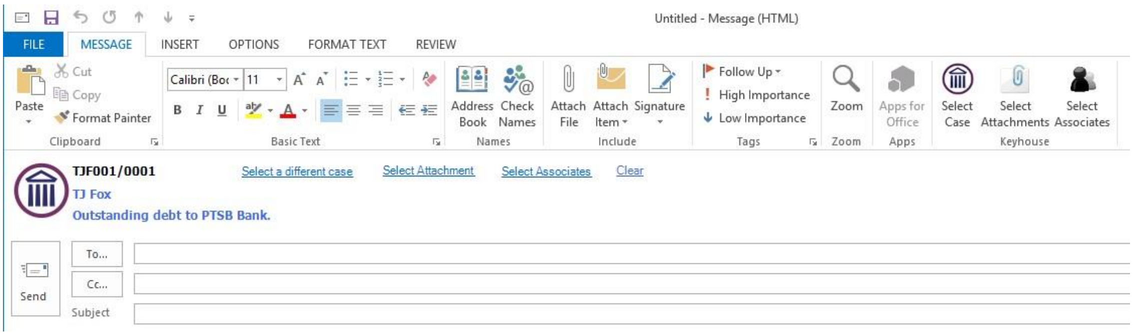
1. From the **Case Diary Window** open the matter you want to assign the email to – as below:



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



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

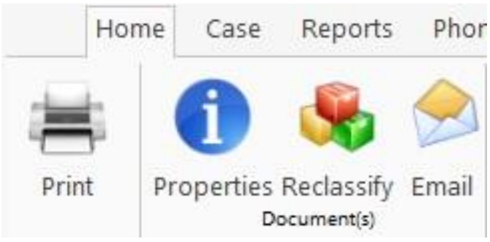


4. The Case Reference, client and matter description will automatically appear in the email.
5. You can now Select Attachments and Associates as per the previous section.

Send a generated letter in an Email

An existing document can be attached directly to an email.

1. Click on the document to be emailed from the Document Manager.
2. Click on the Email Icon on the Home Ribbon to generate the email. The email will open with the case information prepopulated.

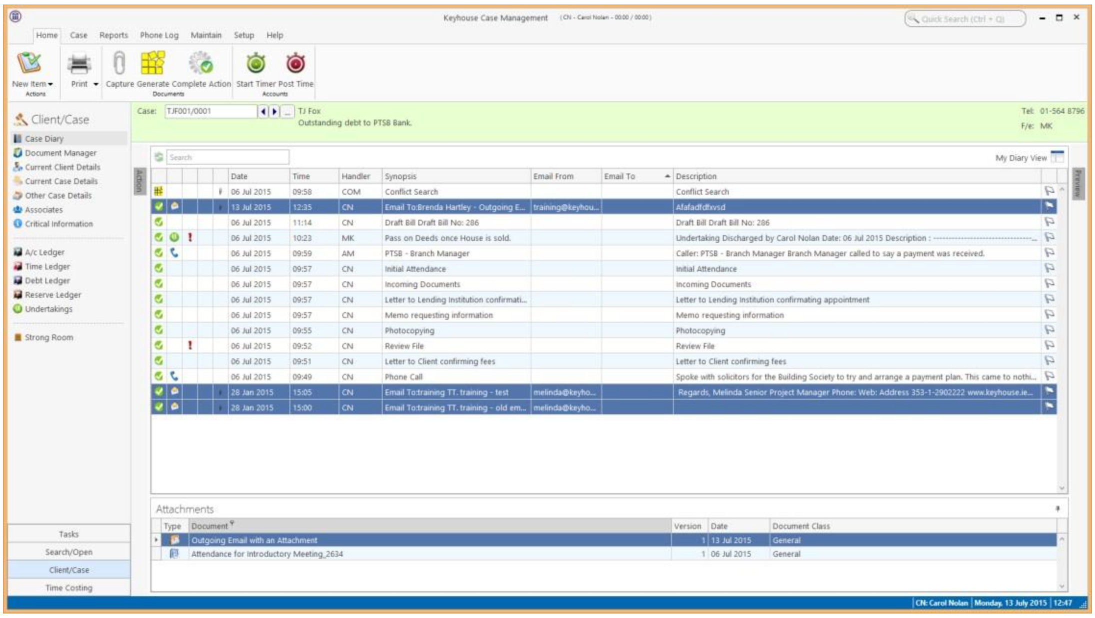


3. Complete the email and send.

Case Diary View

Viewing Emails:

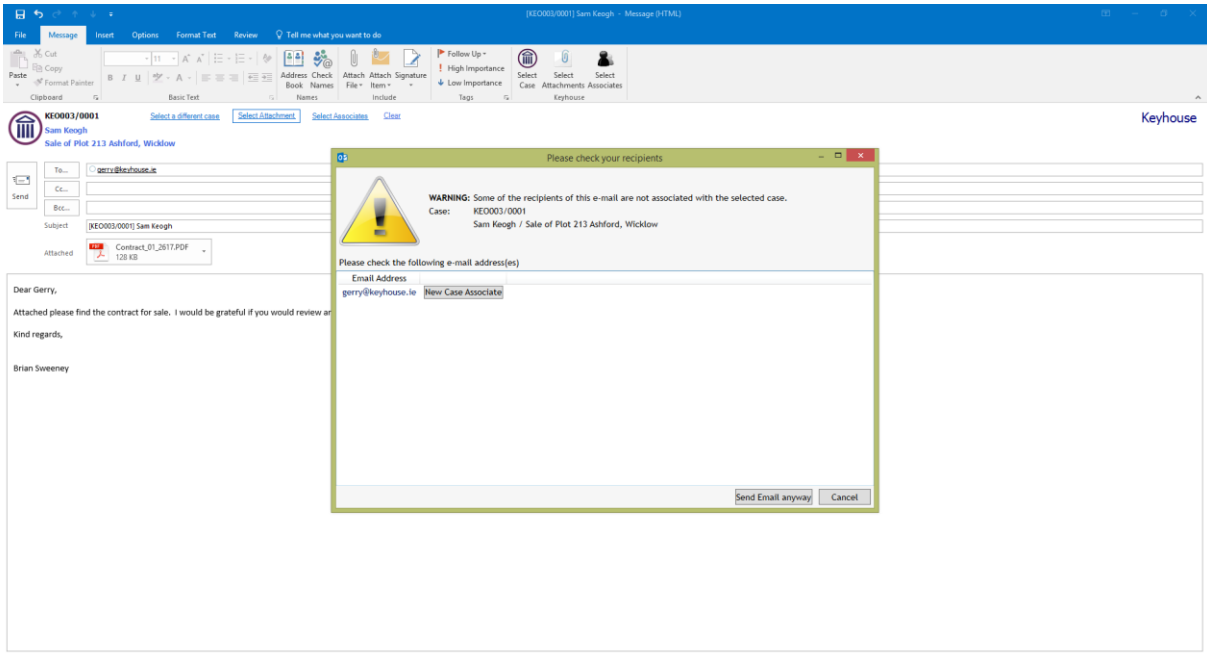
When you assign an email from outlook, the Email will be listed as an action in the Case Diary screen with the actual email & any documents listed in the Document Pane.



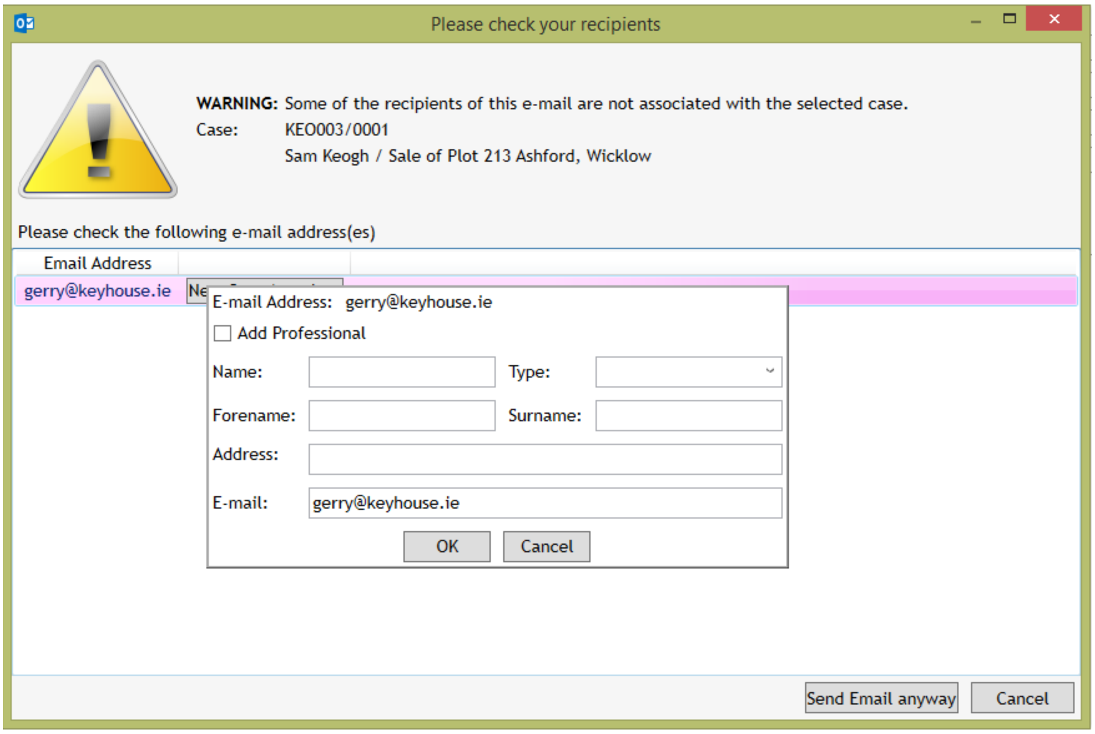
Add an Associate through Outlook

You may have to send an email to a new Associate not already in your Keyhouse System. This can be done through Outlook.

1. Create the email as normal and add the Associate's email address.
2. When you are ready to send the mail click Send.

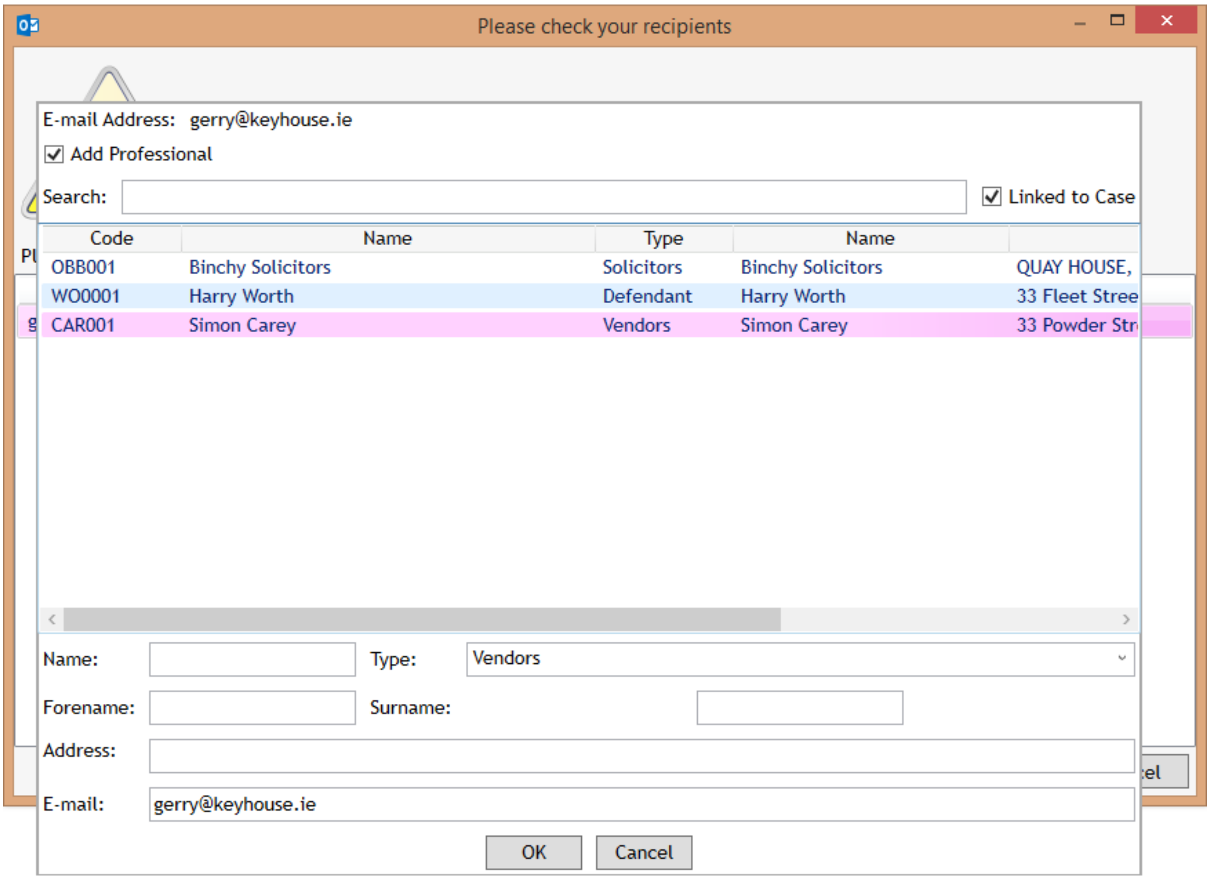


3. Click on New Case Associate

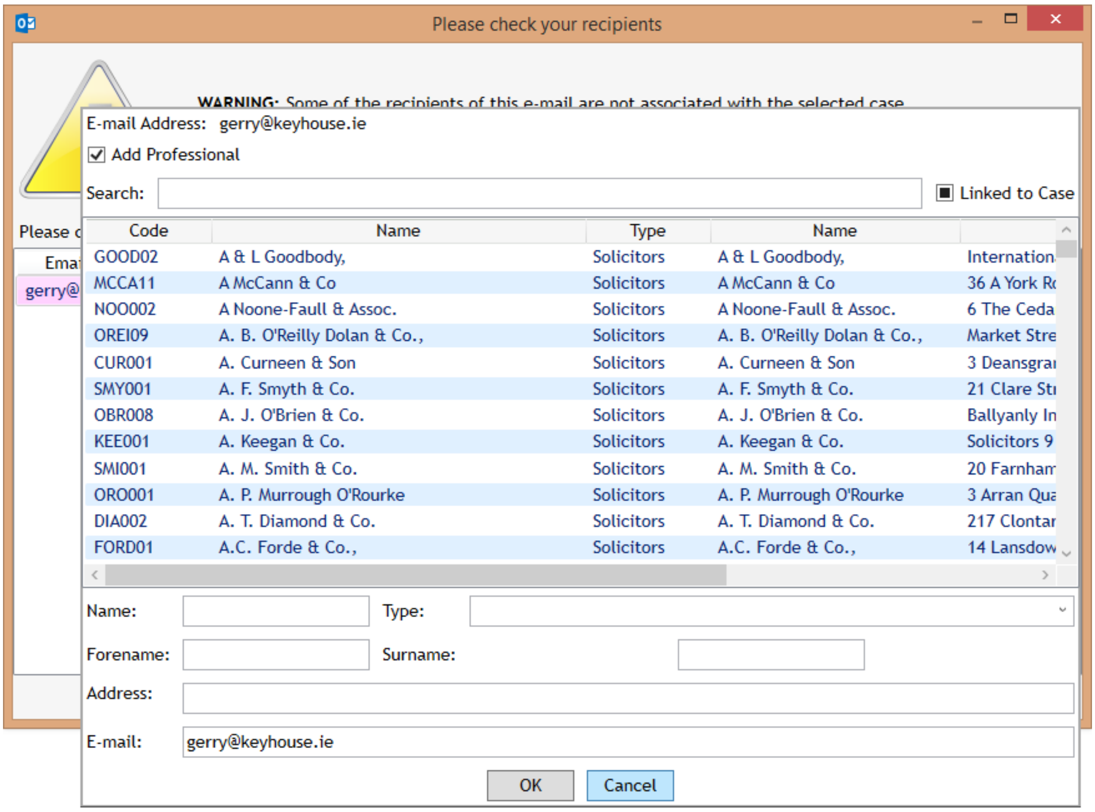


4. If the recipient is not connected with an associate already on the database, complete the fields above.

5. If the recipient relates to an associate already assigned to the matter, tick the Add Professional box and add the relevant associate from the list and add the details.



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

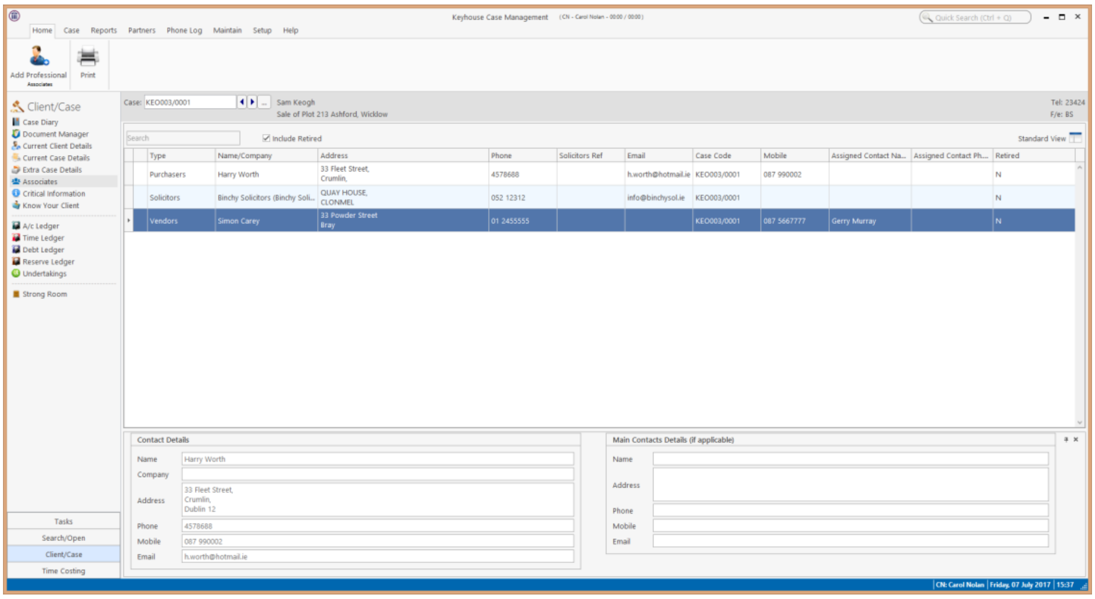


7. Select the associate then add the recipient details and click OK.

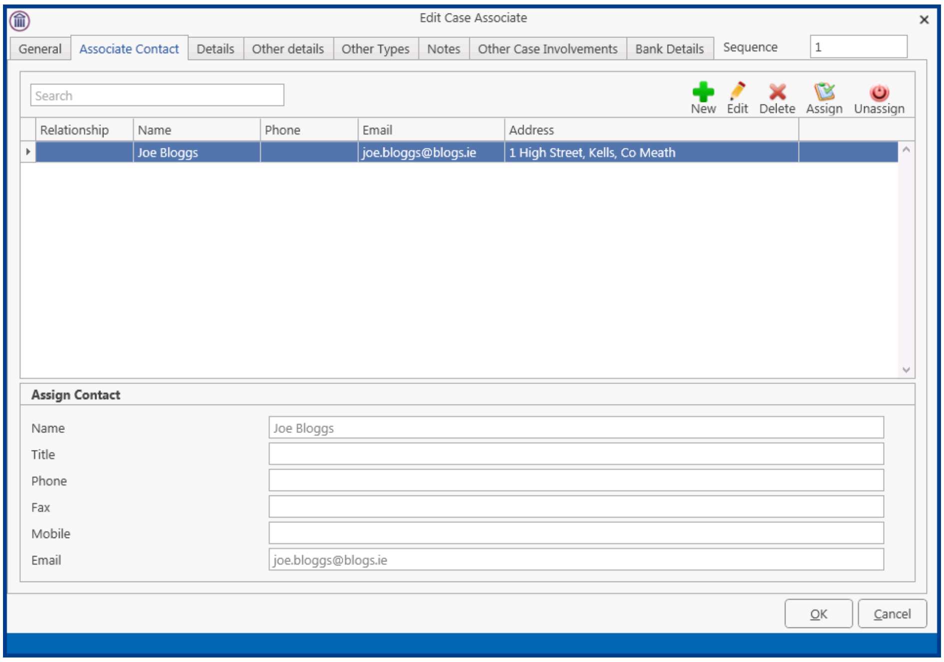
8. The Associate will be added to the case and the email sent.

9. To see the entry return to Keyhouse and open the Case Associates Screen.

10. Click on Associate to see the new entry.



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



Chapter 2: Using Word Add-In

The Keyhouse Word Module is designed to allow users to manage all their documents within MS Word.

Documents can be created in Word and you can then Save to Case. This will ensure that the documents are found in the Document Manager for the matter in question.

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

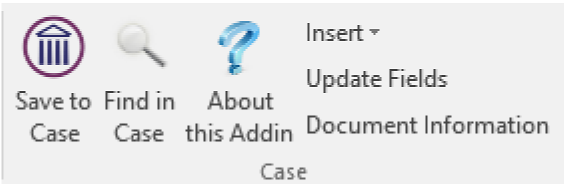
An update to an existing Document

A new version

A new document to the matter or another matter.

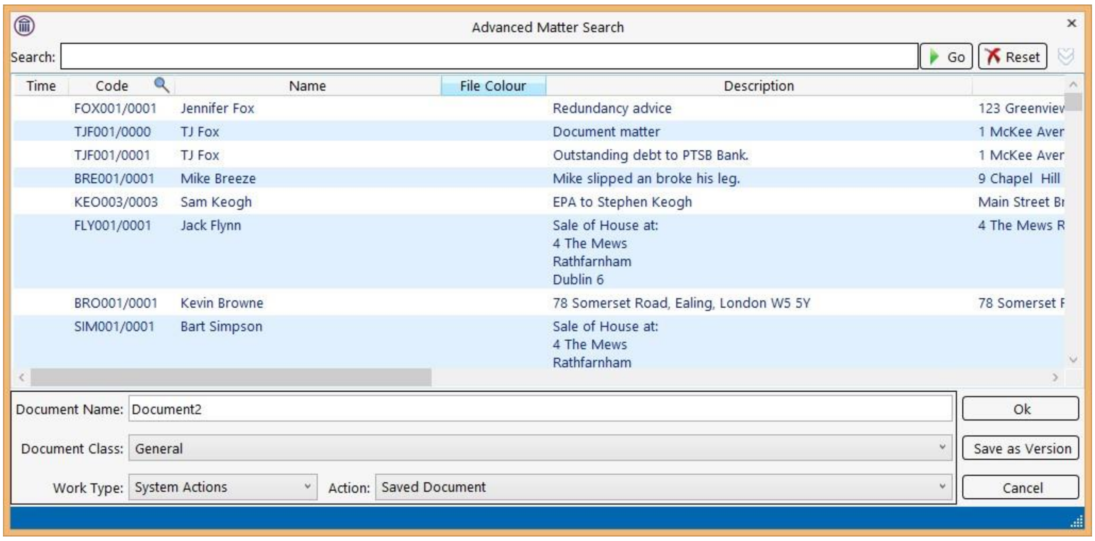
Create a document

1. Open MS Word in the normal way and create your document.
2. You will have a new Group called Case on your Home Ribbon.



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

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

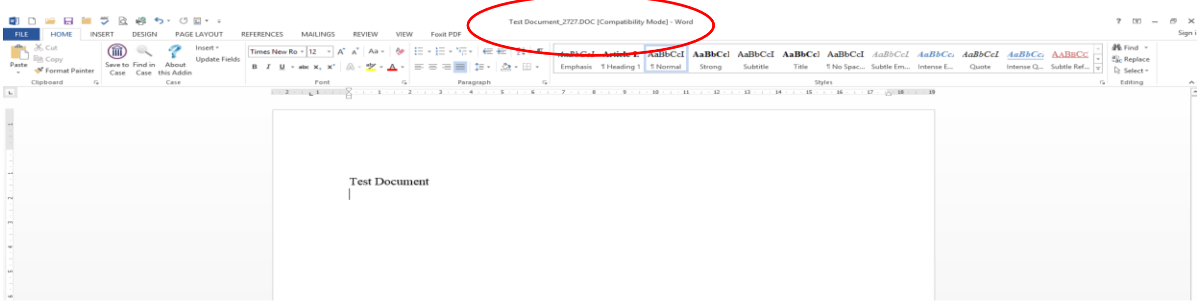


4. Select the file to be used and enter a Document Name. Change the class by clicking on the down arrow to the right of the Document Class box. Change the Work Type and Action as needed.

5. Click OK to save.

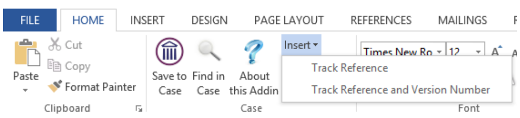
Add Tracking and Version Numbers to Document

1. Create your document and save it to Keyhouse. A tracking reference is generated.



2. To add the reference to the document, go to where you want the Tracking Reference to appear.

3. On the Home Ribbon in the Case Group click on Insert

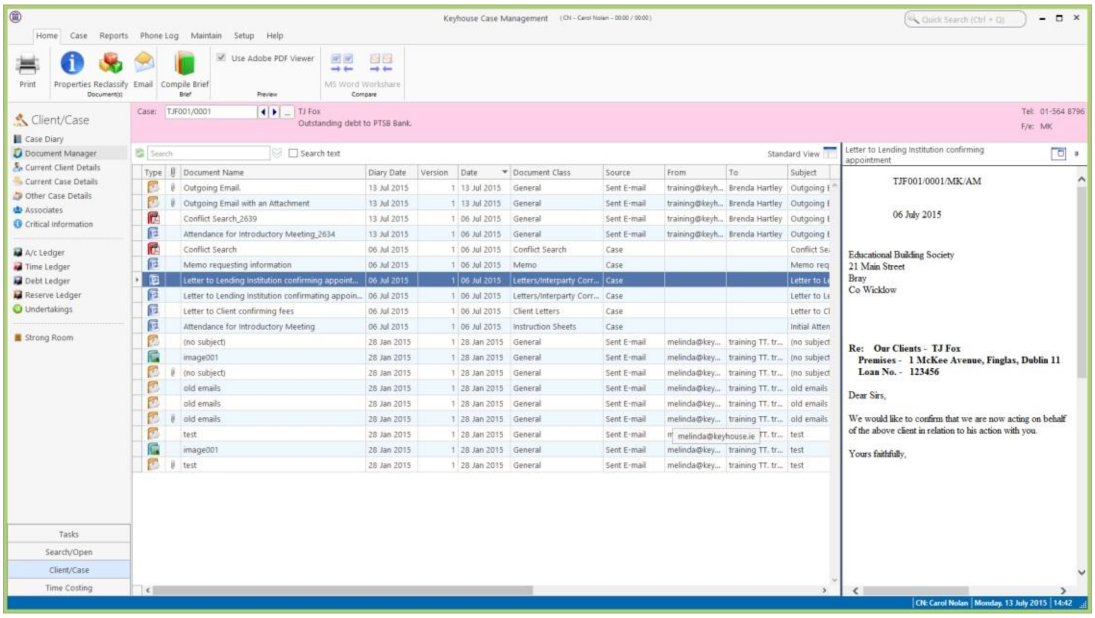


4. Select either Track Reference or Track Reference and Version Number.

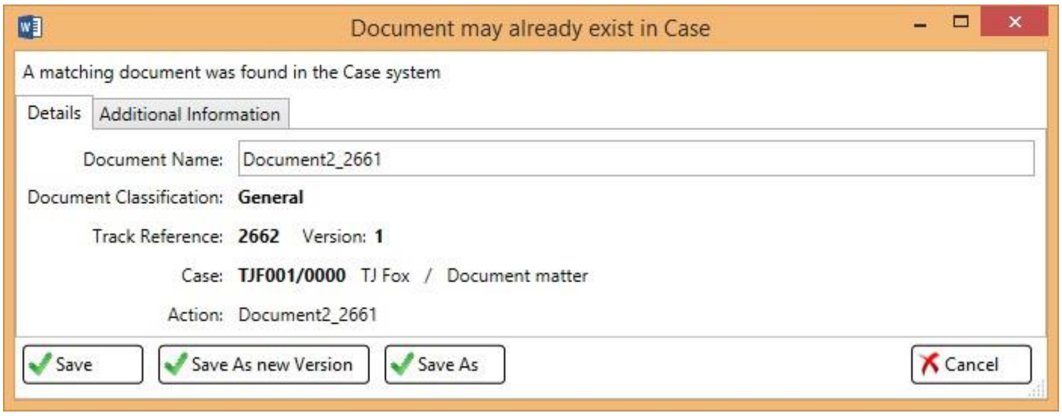
5. The version number will automatically update when using version control.

Opening and Editing a document from Keyhouse in MS Word

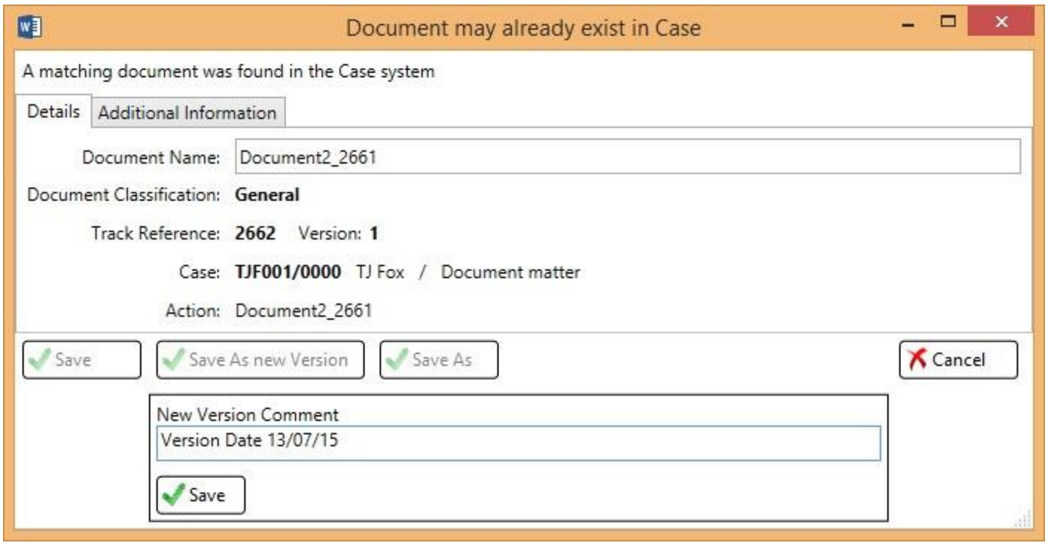
1. Select the Word Document from the Document Manager and double click to open.



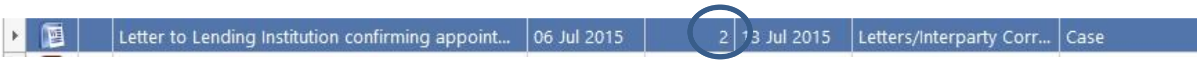
2. Make the necessary changes and click Save to Case
3. The following dialog box will appear:



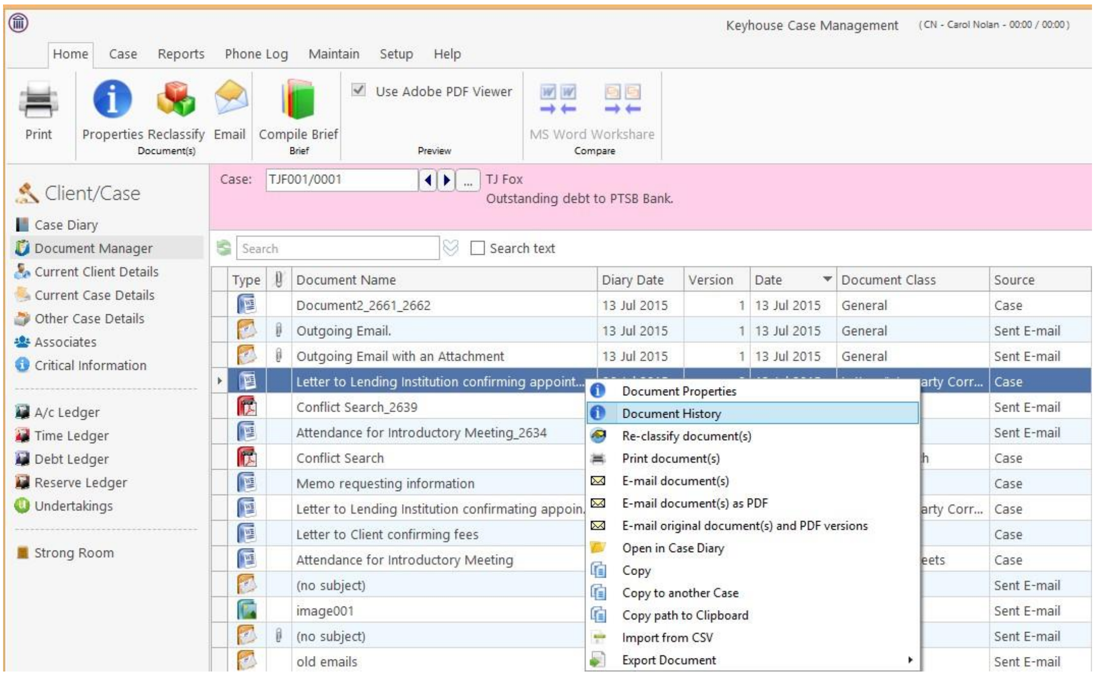
4. Click Save to save the changes to the existing document.
5. To save the document as a different document, click the Save As.
6. To save the document as a new version, click Save As new Version. You will be prompted to enter a New Version Comment and then click Save.



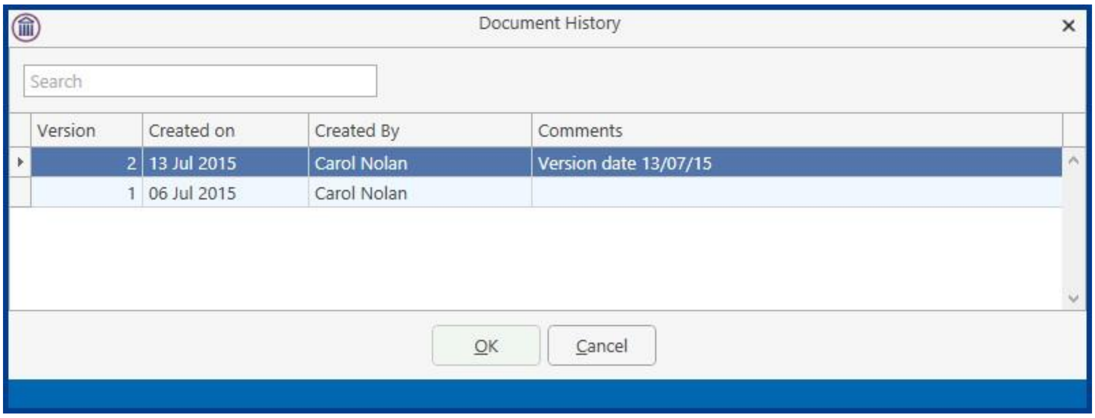
With Version control you will always see the latest version of the document.



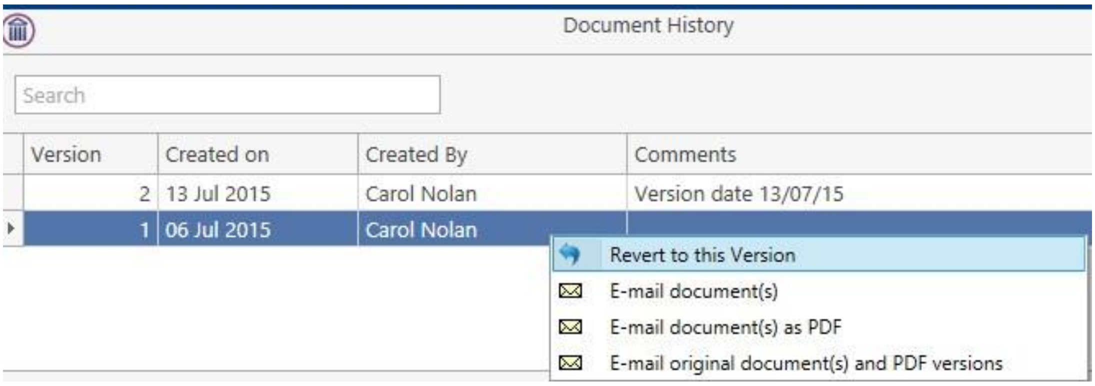
7. However it is possible to revert to previous versions by selecting the document to be viewed and right click and select Document History



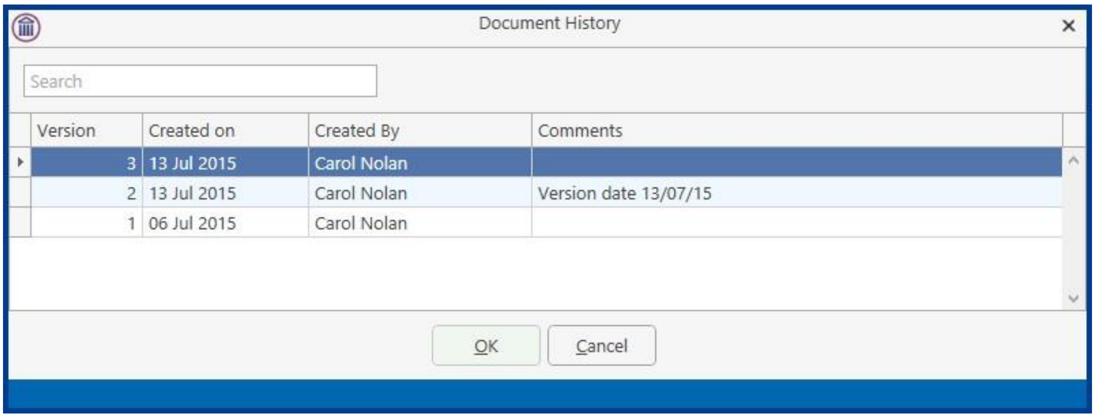
8. The Document History Dialog Box will appear



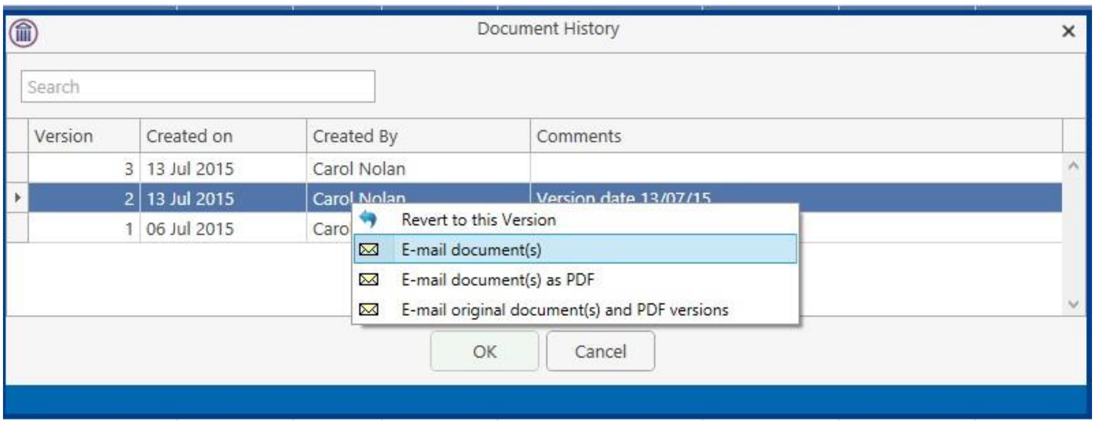
9. To revert to a previous version, right click on the version required and select Revert to this Version



10. This will create a new version

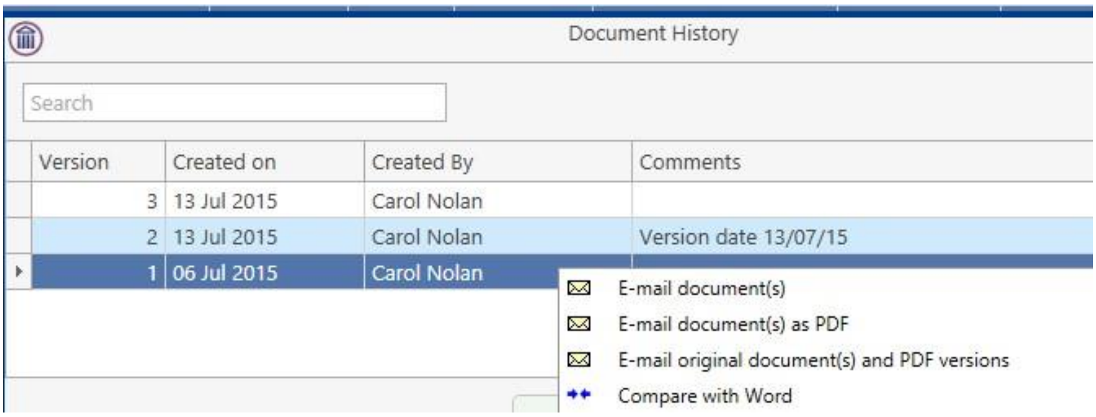


11. To email a previous version right click on the version required option and an email window will open bring in all the case details.



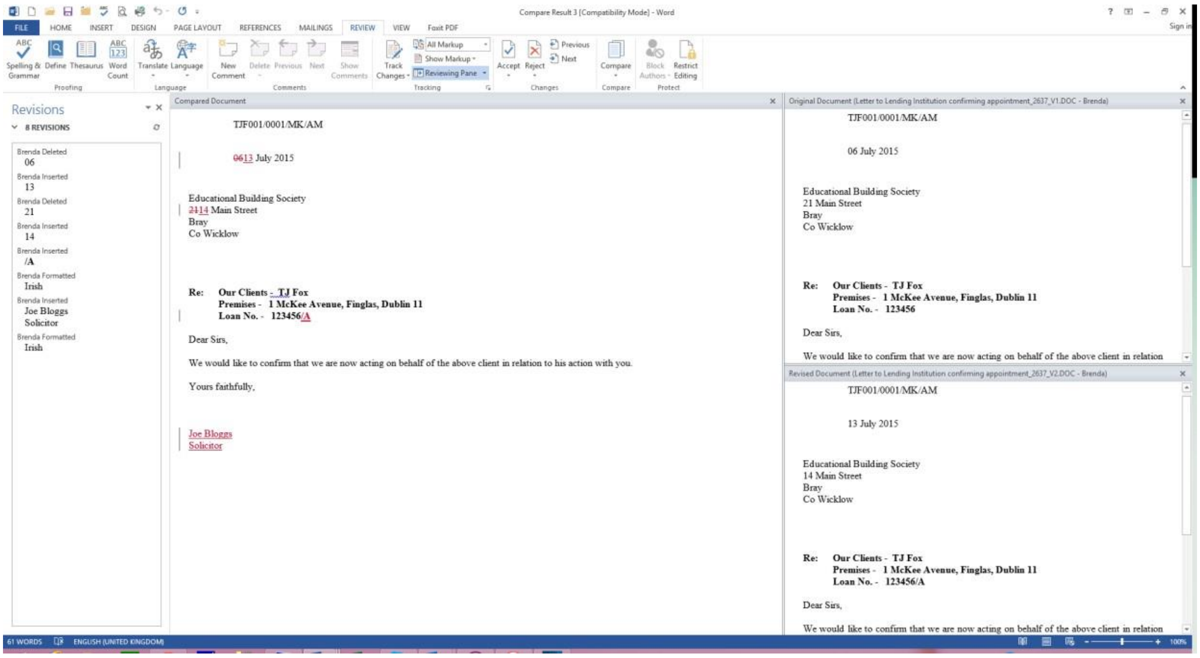
12. To compare 2 versions for changes, select the document to be compared to and holding down the <CTRL> Key select to document to be compared.

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



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

15. To see the actual changes in the document ensure the Markup option is sent to All Markups.

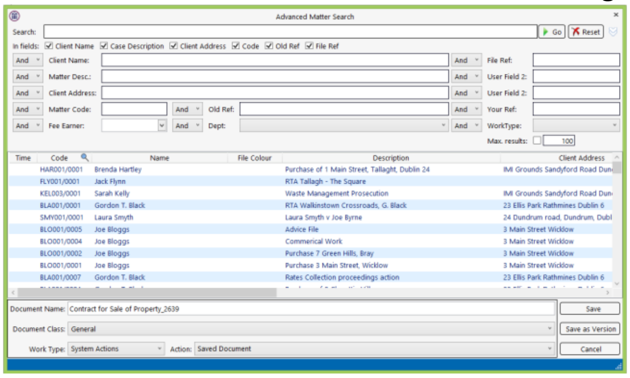


16. Once changes have been view, close the window without saving.

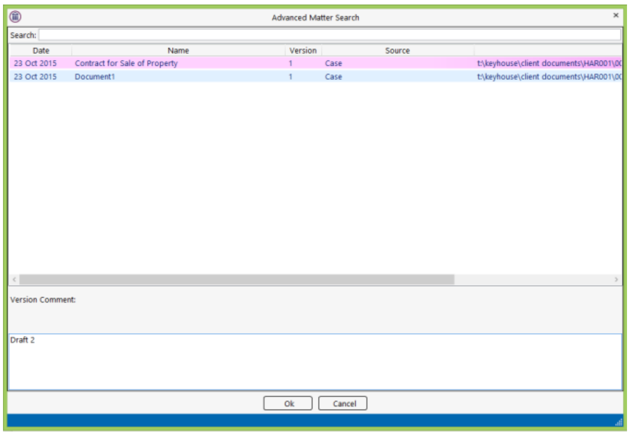
Attaching a Incoming Draft of an Existing Document.

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

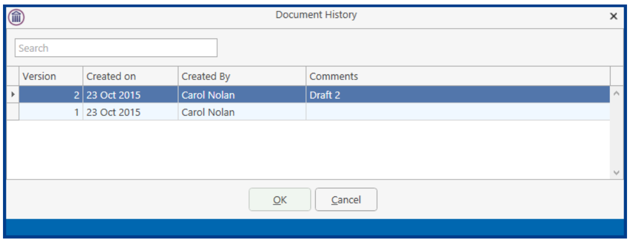
1. Open the Document in Word.
2. Select Save to Case on the Home Ribbon.
3. Select the Matter the document refers to using a single click.



4. Change any options needed e.g. Document Class and select Save as Version.



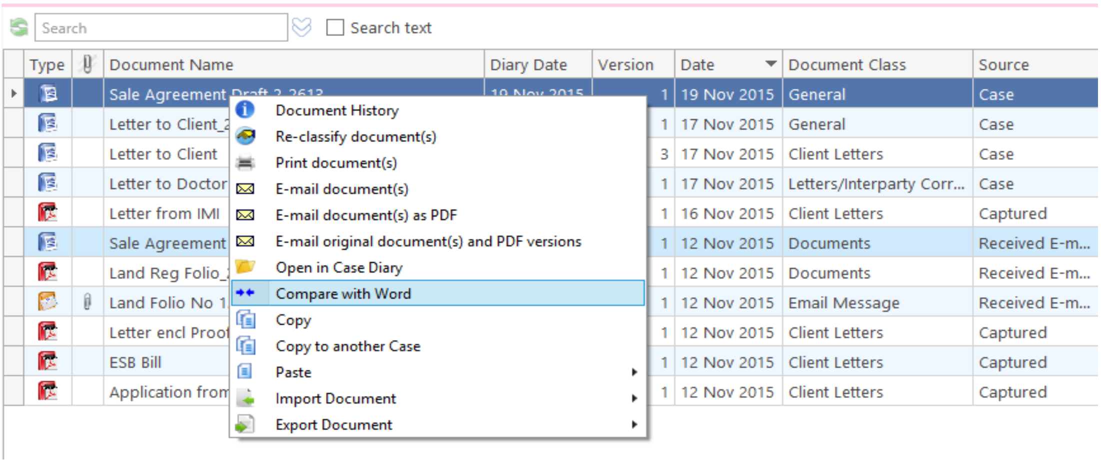
5. Select the Document it needs to be attached to.
6. Enter a Version Comment and click OK.
7. To view the versions, right click on the document in the Case Diary or the Document Manager.



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.

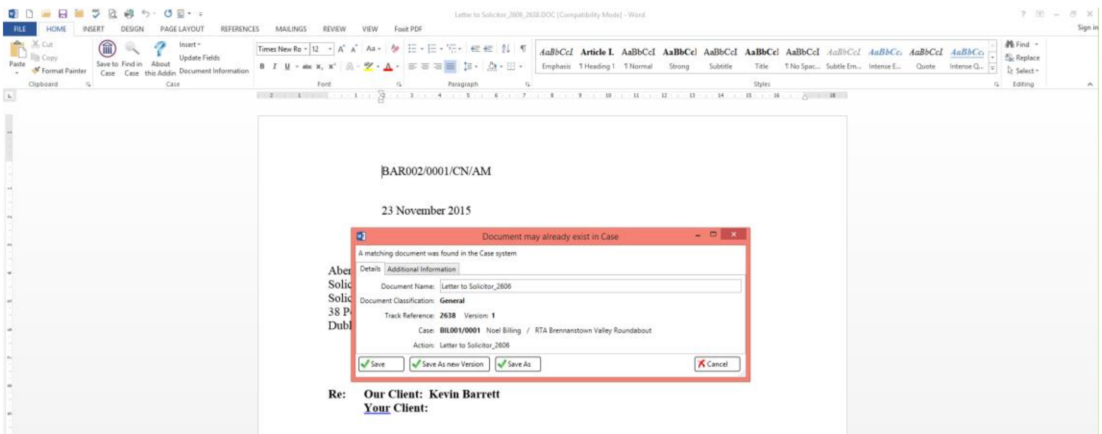
1. Select the document to be compared with.
2. Then select the document to be compare.
3. Right click and select Compare with Word.
4. The documents will open in MS Word.
5. Once the document have been viewed, close them. The Comparison Document can be saved to the matter if necessary.



Using 'Save As' Through Keyhouse

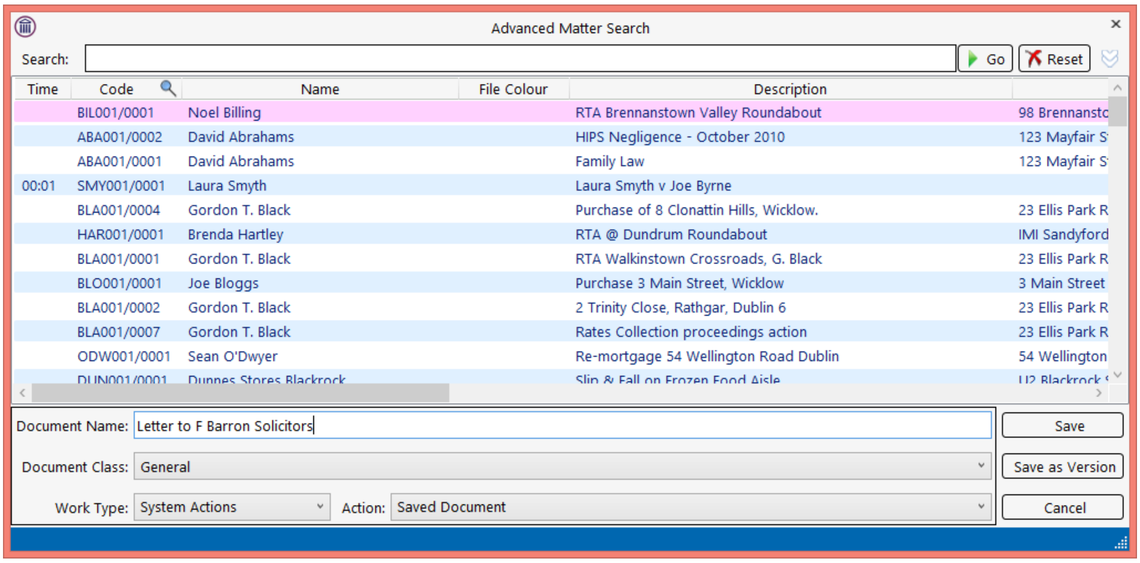
When a document already exists on a matter in Keyhouse, it can be used again in the same matter or saved to another matter. Please note if the document is being saved to another matter, any information related to the matter will need to be updated e.g. name, address etc.

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



3. Click Save As

4. Select the Client and change the Document Name

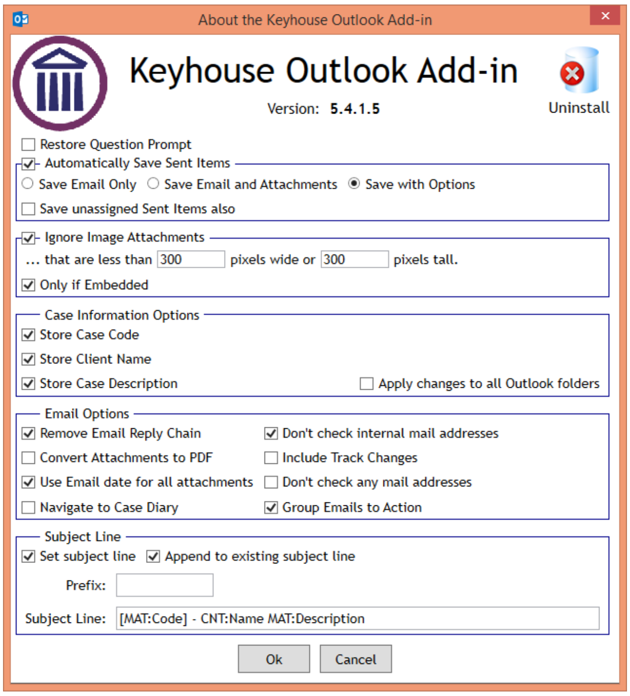


5. Click Save.
6. The document will can now be edited as required.

Appendix 1

Updating the Outlook Add-In

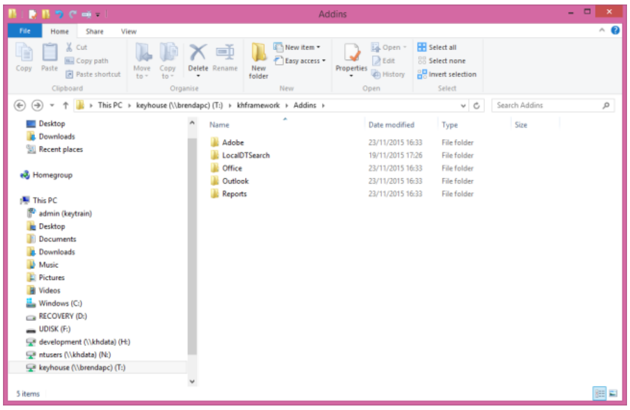
1. Go to the About Button in the Case Group on the Outlook Home Screen.



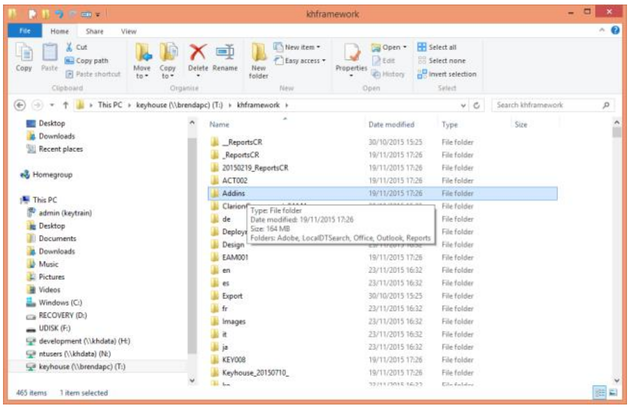
2. Click on Uninstall and this will open the Command Prompt. Follow the instructions in the Command Prompt to finish the uninstall and this will close Outlook automatically.

3. NOTE: Please save all draft emails before uninstalling.

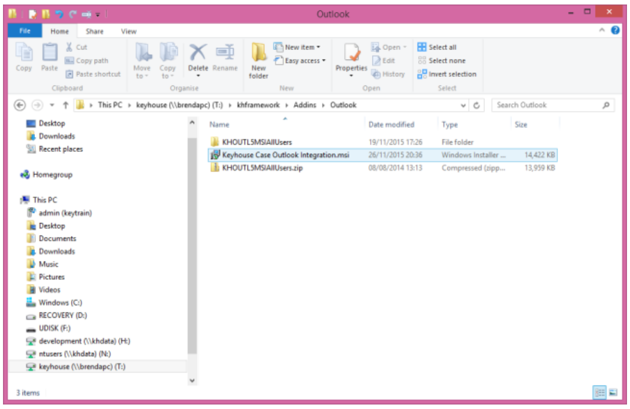
4. Go to Windows Explorer and go to the Keyhouse Mapped Drive. Below is an example of a mapped drive



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



6. Open the Outlook Folder



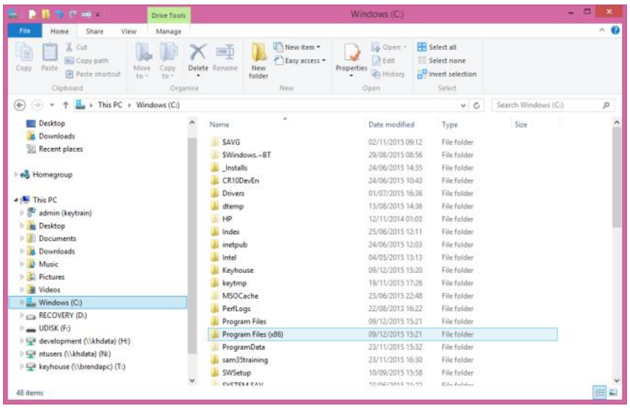
7. Double click on the Keyhouse Case Outlook Integration.msi and follow the instructions given.

8. Once finished, open Outlook.

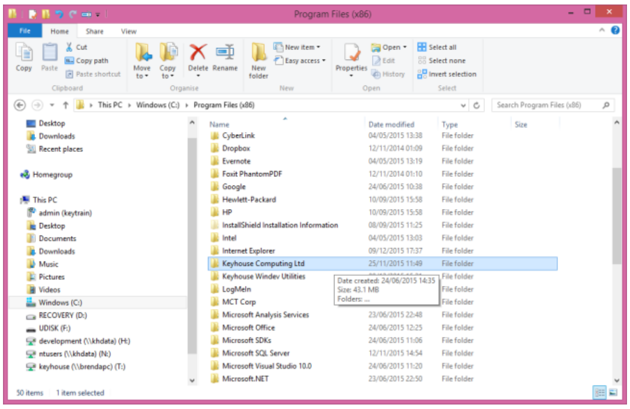
9. Check that the Assign to Case button is working.

10. If there is an issue close Outlooki and go back to Windows Explorer and go to the C:\\ Drive (Windows (C:)

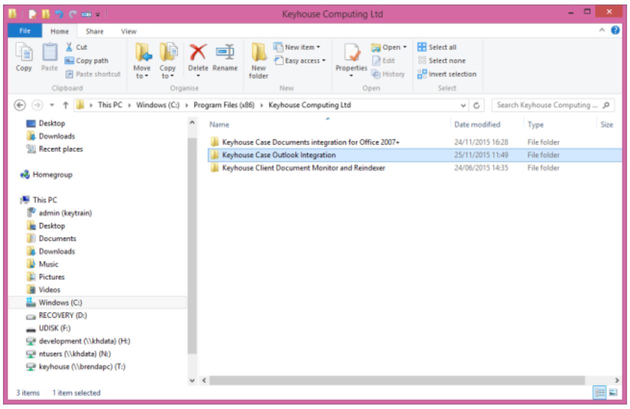
11. Select Program Files (x86)



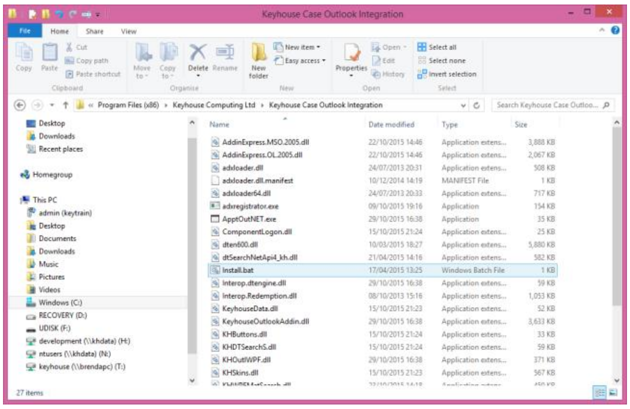
12. Go to Keyhouse Computing Ltd and double click.



13. Go to Keyhouse Case Outlook Integration



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



15. This opens a black box, opening and closing itself.

16. Return to Outlook and check again.

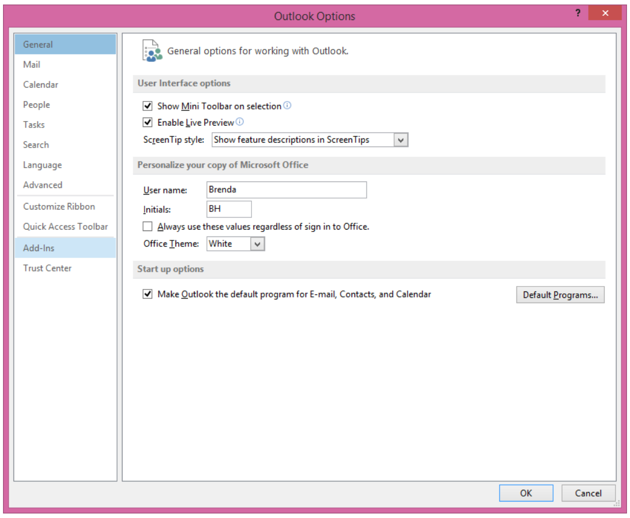
17. If still missing email support@keyhouse.assist.com

Appendix 2

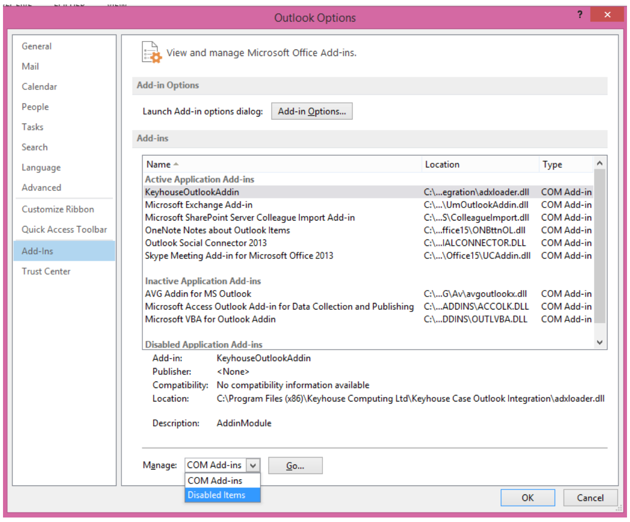
Enabling Add-Ins in Outlook

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

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



2. Select the Add-Ins option

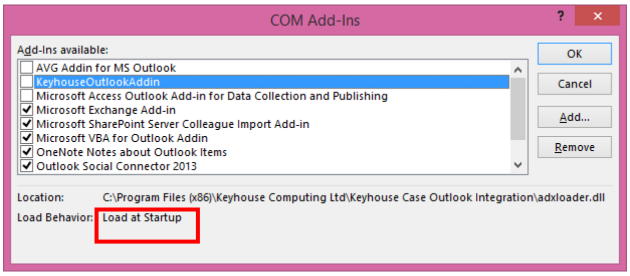


3. At the bottom of the Screen, click on the down arrow beside Manage and select Disabled Items. Click Go.

4. Select the Keyhouse Add-In and click Enable.

5. If the Add-In is still not working, go to File and select Add-Ins.

6. Click Go beside Manage COM Add-ins.



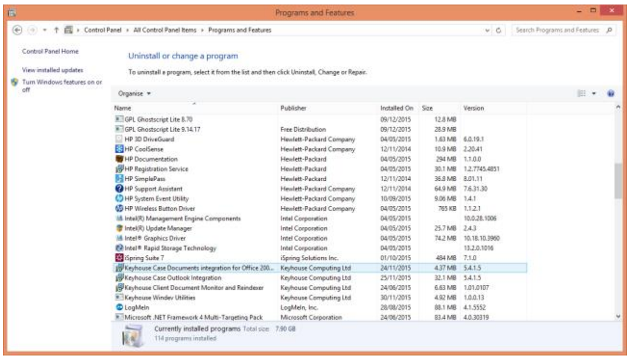
7. Tick the box to the left of KeyhouseOutlookAddin and click OK.
8. Close Outlook and reopen.
9. If Load Behaviour says unloaded please email support@keyhouse.assist.com

Appendix 3

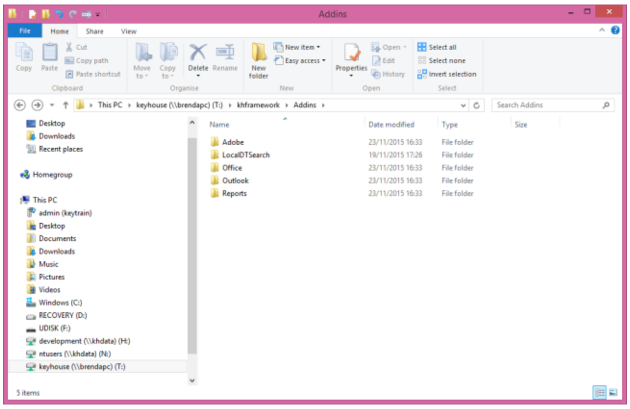
Updating the Word Add-In

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

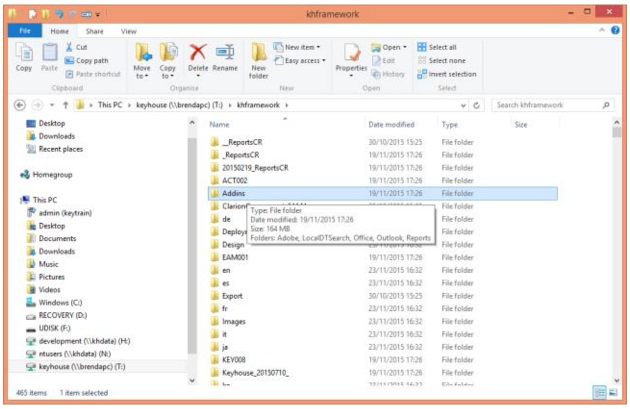
1. Close all MS Programs open on the system (e.g. Word, Excel, PowerPoint).
2. Go to the Control Panel and go to Programs and Features.
3. Scroll and find Keyhouse Case Documents integration for Office 2007+



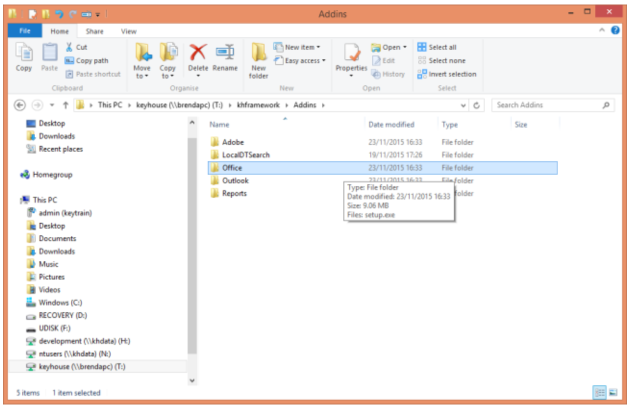
4. Click Uninstall and follow the instructions given.
5. Once the Add-In has been uninstalled, close the Control Panel.
6. Go to Windows Explorer and go to the Keyhouse Mapped Drive. Below is an example of a mapped drive.



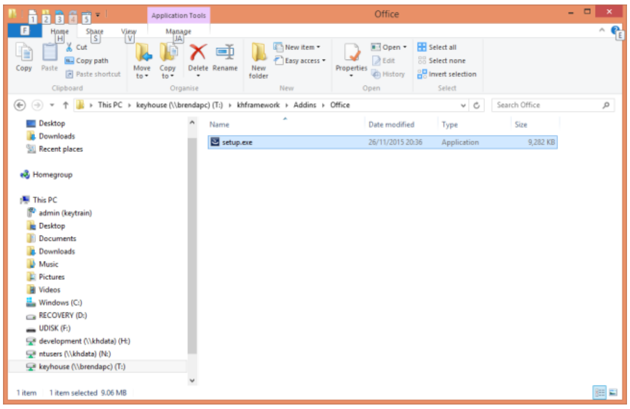
7. Open the Keyhouse Framework Folder and double click on Addins.



8. Open the Office Folder



9. Right click while holding the Shift Button and run the Setup.exe as administrator.



10. Once finished, open MS Word.
11. Check that the Save to Case is working.