KMD WORKZONE

_configurator

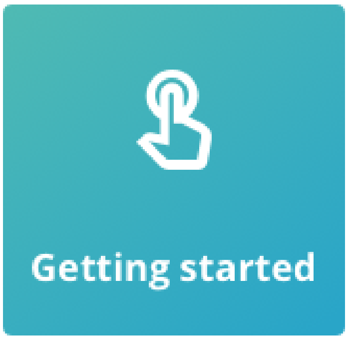
2021.0

Administrator Guide

Contents

1. Administrator Guide for WorkZone Configurator 2021.0

This guide describes how to configure the WorkZone products for the needs of your organizations.



Related product documentation

- WorkZone Client User Guide
- WorkZone Client Administrator Guide
- WorkZone Process User Guide
- WorkZone for Office User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

2. What's new in WorkZone Configurator 2021.0

Custom icons for WorkZone Client

You can store and assign custom SVG icons to items and entities in WorkZone Client. After adding an icon to the icons collection in WorkZone Configurator, you can define where and when this icon will be used by creating an icon assignment with specific conditions. Using custom icons, you can visually group, emphasize, or differentiate your WorkZone items according to your needs. See Icons collection and Custom icons assignments.

Postcode format improvements

Postcodes can now contain not only numbers, but also letters, spaces, hyphens, and similar characters, because these symbols can be part of postcodes in some countries. See Create a postcode.

WorkZone Configurator 2020.3

System messages for WorkZone applications

You can create system messages that will be displayed to the end users in the user interface of the WorkZone applications. For example, you can create a system message about planned maintenance hours during which your system will be down or communicate any other information. You can select to display your system message to all or specific users based on their assigned access code. See System messages.

Improved PDF conversion settings for review information in PDF documents

- PDF forms: You can now select whether to include PDF forms as regular content or to show them as review edits when converting PDF documents.
- Annotations: You can now select whether to include annotations as regular content, show as edits, or hide completely, when converting PDF documents.

See PDF Crawler and Engine configuration.

WorkZone Configurator 2020.2

Information on WorkZone users

- The number of active users in your WorkZone system is now displayed on the start page of WorkZone Configurator. See Start page.
- On the new **Users** page, you can view a list of all users in your WorkZone system and their details (including user ID, full name, authority, user number, security code, UPN, and employee end date), and export this information to Excel for further processing. See Users.
- You can check access codes for a specific user. See View access codes for a user.

Process logs

You can view process logs for a specific workflow instance to track additional information about it (for example, to troubleshoot a failed process). See Process logs.

Create, edit, and update contact types

You can now create, fully edit, and delete contact types directly from WorkZone Configurator. See Contact types.

Mass edit service workflows

You can now enable or disable multiple service workflows at once. See Mass edit service workflows.

Mass Dispatch settings

Specify the **Mass Dispatch service URL** (located under **Process > Process settings > Mass Dispatch settings**) to use for the Mass Dispatch module. See Process settings.

e-Boks mail mapping

If your organization receives e-Boks messages that are sent to subunits (for example, to different authorities or subdivisions), you can map these messages to specific WorkZone cases and units. See e-Boks mail mapping.

Custom type improvements

- You can add descriptive text to a custom type entity, and have this text displayed in WorkZone Client when users look up this custom type field value in a drop-down list, or when users analyze relevant custom type data displayed in the dashboard widgets. See Add descriptive label to a custom type.
- You can now create custom type fields of the type **Unique**, and set validation rules for them. See Custom type fields and Validation rules.

Custom fields improvements

- A new data type, **Custom type**, has been added for custom field values. Custom fields of this type will become selectable from relevant droplists in WorkZone Client. See Custom fields.
- You can now create validation rules for custom fields of the type **Unique**. See Validation rules.

Define custom domain values as selectable or non-selectable

You can define whether specific custom domain droplist values will be selectable or non-selectable to users in WorkZone Client or WorkZone 365. The **Selectable** option is added for custom domain droplist values and properties for cases (Case categories, Case types, Case states), documents (Document groups, Document types, Document classification), taxonomies (subnumber type), retentions (reason for deletion), system droplists, and custom droplists. See Properties, Custom droplists, System droplists, Subnumber types, Reasons for deletion.

Case number format improvements

Case number components are now not case-sensitive (except for l and L). See Components and syntax of case number mask.

WorkZone Configurator 2020.1

Customize labels for your copied processes

You can easily view, add, and edit labels for your copied processes (including labels in the process forms and user tasks) displayed in WorkZone Client to adjust them per your needs and context of your copied process. See Customize process labels.

Improved PDF conversion settings for review information

You can select to show, hide, accept, or reject review information (such as annotations, comments, notes, and tracked revisions) in the PDF, Word, Excel, and PowerPoint documents during the PDF conversion. See PDF Crawler and Engine configuration.

New settings for retention policies

- **Purge period**: Define the purge period, after which the soft deleted cases and documents will be automatically purged (permanently deleted) from the system.

- **Automatic purging**: You can enable automatic purging (permanent deletion) of cases and documents after the specified purge period.
- **Automatic soft deletion**: You can enable automatic soft deletion of cases and documents after the specified retention period.

See Retention policies.

Define retention period for chats

You can define the retention period after which unretained inactive chats will be automatically deleted. See Chat settings.

Configure Templafy connection

If your organization uses Templafy to store and manage its Microsoft Office templates, you can configure settings for the Templafy connection and be able to create documents (Word, Excel, or Powerpoint) in WorkZone Client based on the Templafy templates. See Templafy settings.

Deletion log improvements

- You can define whether to include text values, such as case, document, or contact title/number, in the deletion logs. See Deletion log settings.
- You can see in the deletion logs who has soft-deleted the item (in addition to information who has hard-deleted the item). See Deletion logs.

Improved validation for custom droplist values to delete

Validation of the custom droplist values selected for deletion is improved.

WorkZone Configurator 2020.0

Use logs

You can now view the use logs for WorkZone items to track who has accessed an item, when and how. You can also export the use logs to Excel for further processing. See Use logs.

Use log settings

You can set up the use logs settings for your organization: start or stop recording the use logs in your organization, minimize the use logs level, and consolidate your most recent use logs. See Use log settings.

Deletion logs

You can view the deletion logs for WorkZone items to track who has deleted an item, when and why. You can also export the deletion logs to Excel for further processing. See Deletion logs.

Date and time format for different languages

For systems with multiple language settings, you can define the date and time format to be displayed for each language in WorkZone Client. See Set date and time format for selected language.

Custom types

You can now create and configure custom types (previously known as custom lists) and enable them for cases, documents, or contacts to allow your WorkZone users register and maintain all information related to a custom type directly from a case, document, or contact they are working with. See Custom types.

Import/export configuration

The import/export configuration functionality now supports exporting/importing custom types. See Export and import WorkZone configurations.

Resizable columns in the lists

You can now resize the columns displayed in the lists. See Working with lists.

Process settings

The **Processes overview** section is removed from **Process settings**. You can configure process settings directly from **Processes** overview. See WorkZone Process User guide for more information about the Processes overview and how to use it.

WorkZone Configurator 2019.3

Language configuration

For systems with multiple language settings, you can activate and deactivate available language packs and set the default language. See Language settings.

Global and departmental access

You can grant specific users global or departmental access to allow them access and edit items protected by security access codes that the user is not a part of. See Global and departmental access.

> **Important:** Global and departmental access are extensive rights that will allow the user to access sensitive information. Assign these rights only when needed.

Custom fields

- You can now configure custom fields for addresses.
- New custom field types have been introduced for cases, documents and contacts: **Unique**, **Address**, **Contact**, **Employee**, **Unit**, **Case**, and **Document**.

See Custom fields.

Sorting by rank

You can now sort all droplists in custom domain by **Rank**. Ranking is assigned to entries in WorkZone Client. Sorting the droplist entries by **Rank** will order them according to their rank instead of alphabetical order.

Mass email registration

The new **Mass registration of emails** setting is added for **Outlook configuration**. Enable this option to edit common metadata for multiple Outlook emails saved at the same time.

Process notification settings

You can define notification settings for smarttasks sent as emails, push notifications and email notifications. See WorkZone Process settings.

Import/export configuration

The import / export configuration functionality now supports exporting/importing custom case lists, case categories, contact configuration (including custom fields) and address configuration (including custom fields). See Export and import WorkZone configurations.

Lock access rights inheritance

WorkZone can be set up to lock access rights inheritance, preventing users from removing inheritance of access codes. Inherited access rights are still displayed.

Lock access rights inheritance by enabling the **Enforce Access Code Inheritance** setting under **WorkZone Configurator** > **Global** > **Feature settings** > **Content Server**.

WorkZone Configurator 2019.2

WorkZone module and feature activation

When installing WorkZone 2019.2, all modules are now installed collectively. This means that all features and functionality are included in the initial installation of WorkZone and do not require individual installation. Some modules and features are made available by default while others require individual activation in order access, configure and become available to users. You can activate modules and features in the **Feature settings** page on the **Global** tab of the WorkZone Configurator.

Custom lists and fields

A new way of storing case information has been introduced in WorkZone 2019.2 called custom lists and custom list fields.

Custom lists are case lists you can create and make available to WorkZone users. Custom lists must consist of at least one custom list field, which also must be created and set up.

Once you have created a custom list and its custom list fields, a user can include the list in the detail tabs of the case detail page and start entering data.

Custom list fields resemble customized fields, but are data fields that can contain multiple data values per case as opposed to custom fields which only can contain one data value per case. Like custom fields, you can attach a validation rule to a field and if it is a Droplist, define which droplist to use in the field.

You can define an activation period to a custom list as well as to each individual custom list field, enabling you to activate and deactivate lists and fields. Deactivated lists and fields are not displayed in the WorkZone Client user interface but retain any data they may contain.

Custom lists and custom list fields can be deleted but only if they do not contain any data. You can deactivate the custom list or field instead.

For more information, see Custom case lists

DateTime date type in Custom fields

Custom fields in WorkZone have been updated to include the DateTime data type. DataTime custom fields can contain a date and time.

OAuth2 framework

If the OAuth2 framework is to be utilized in your organization, a system administrator can create and set up the OAuth2 connections in **WorkZone Configurator** > **Global** > **OAuth2 settings**.

AGM Settings

As an experimental version, WorkZone Client can integrate with the Ditmer Agenda Management Module, allowing users to access the meetings, committees, meeting agendas and other elements of the Agenda Management Module.

The Agenda Management Module is part of the initial WorkZone installation, but must be set up correctly in order to be available to the user.

The Agenda Management Module is set up in **WorkZone Configurator** > **Global** > **AGM Settings** where a system administrator can configure OAuth2 settings for integration with the Agenda Management OAuth2 framework.

> **Important:** The Ditmer Agenda Management module uses its own OAuth2 authentication framework to validate its own clients, where WorkZone is considered a client connecting to the Agenda Management module using the Agenda Management OAuth2 framework.
> This is not the same as using the WorkZone Content Server OAuth2 authentication framework for validation of WorkZone clients or other external devices when integrating to WorkZone.

Installation information moved

You can now find information about installing WorkZone Configurator in a common WorkZone Installation Guide that covers installation of all WorkZone products.

See WorkZone Installation Guide.

WorkZone Configurator 2019.1

No new features in the release.

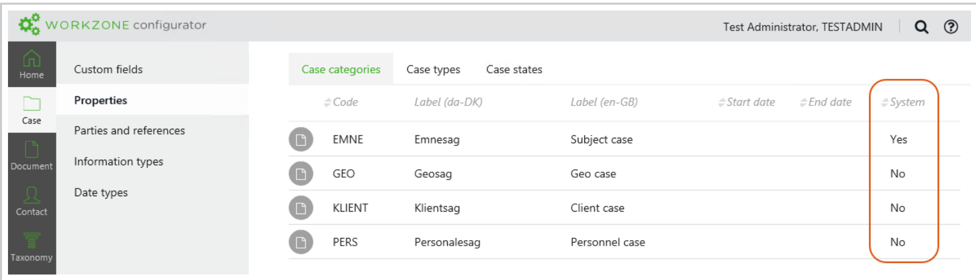
WorkZone Configurator 2019.0

WorkZone Process:

- Create, edit, and delete PDF conversion policies.
- Create, edit, and delete case monitoring rules sets and their rules.
- Define which documents are permitted to be sent via SmartPosts by using new fields in SmartPosts settings – **ValidationProperty** and **ValidationValues**. You can define values for these fields in custom document properties.

Global settings:

- Add, edit, and delete external (historical) databases.
- System droplists are now defined in a separate tab. There you can add and edit their values.
- It is now possible to define a rank for custom and system droplist values.
- Create, edit, and delete validation rules and associate them with the text custom fields. The validation rules define required text format (pattern) for custom fields.
- The **System** property is now displayed on the most of **Case**, **Document**, and **Contact** pages. It notifies you whether a list item is used by the system. If it is used, you cannot delete it as well as edit start and end dates.



Other changes:

- In WorkZone Client, any custom field or an information field can now display a list of countries. To configure this, select the **FLAND, Countries** droplist for the custom field in WorkZone Configurator.
- Define a text extraction method for all or selected file extensions.

WorkZone Configurator 2018.2

New functionality:

- Configure Office Online Server to edit Word, Excel, and PowerPoint documents in a browser.

- Edit Contact types.

WorkZone Process:

- Create and edit e-Boks materials.
- Create and edit Process dispatchers and their parameters.
- Create, edit, and configure Dispatch sequences.
- Create and edit Print types and their parameters.
- Configure general WorkZone Process settings.

User interface changes:

- The **Draft versioning** tab has been moved from **Office** to **Documents**. The reason for this is that the draft versioning functionality is, additionally to WorkZone 365, now also supported by WorkZone Client and WorkZone PDF.

WorkZone Configurator 2018.1

New functionality:

- Export and import WorkZone configurations. A configuration includes a number of settings to be applied for WorkZone products. Now you can test any changes before applying them to real environments.
- New types for the custom fields – decimal and integer – are now available.
- Manage access code filters. If there is no need to show all access codes in **Read access** and **Write access** fields, you can display only organizational units or individual user access codes.
- Version format has been changed. Now it is unified among all WorkZone products.
- Search is no longer case-sensitive.

WorkZone Process:

- View, edit, and copy WorkZone Process processes, their parameters and labels.WorkZone Process allows you to manage WorkZone documents in a workflow and have your work process documented automatically.
- Configure service workflows and their parameters. A service workflow runs continuously in the environment and can start any kind of defined workflow.

WorkZone Explorer:

- Define whether the document's letter date must inherit the created date. You need the setting **Use letter date as document creation date** for this.

WorkZone Configurator 2018.0

EU GDPR requirements

GDPR (General Data Protection Regulation) is the primary law on personal data protection in the EU. It unifies data protection, so that each EU member state no longer needs to write its own laws concerning data security. GDPR becomes effective on May 25, 2018. With this release, WorkZone introduces the following functionality to meet the GDPR requirements:

- Document classification aims to order and prioritize data based on its sensitivity. For example, some documents can be available to everybody, while other documents might contain information that cannot be shared with a wide audience. Starting with this release, document classification code is a required field for each document and it defines its sensitivity level. In WorkZone Configurator, you can add, edit, and delete classification codes. You can also define default classification codes on the case group level and globally for the entire organization.

- Reason for case deletion is a new mandatory requirement. You can add, edit, and delete pre-defined reasons for case deletion, so that users can select them from the drop-down list.
- Retention policies define time and conditions for when cases and documents can be deleted. For example, some cases must be retained for 10 years after closure, while some cases can be deleted at any time. All these rules are defined and automated in the retention policies. Each retention policy has a retention code associated with it, and this retention code can be assigned to a case or to a document. You can create, edit, and delete retention policies and define the default retention policy for the whole organization in WorkZone Configurator.

New functionality

- Add, edit, and delete case groups in the classification scheme of your organization. You can also define default values and default references for a particular case group.
- Add, edit, and delete facets. Facets are used as a complimentary method to classify cases in addition to the classification scheme WorkZone Client.
- Add, edit, or delete note types.
- Add, edit, or delete countries and postcodes. Countries and postcodes are used as the contacts' meta data.
- Add and edit supported file types for your organization. By defining supported file types for your organization, you ensure that only documents with the permitted file types exist in your WorkZone system. Therefore, other file types must be detected as erroneous.
- Define the default settings for WorkZone Explorer.
- Define the default settings for WorkZone PDF Crawler and WorkZone PDF Engine.
- Define the default path to a folder with Office templates. When WorkZone 365 users create a new document, they can easily access the proper template.

User interface changes

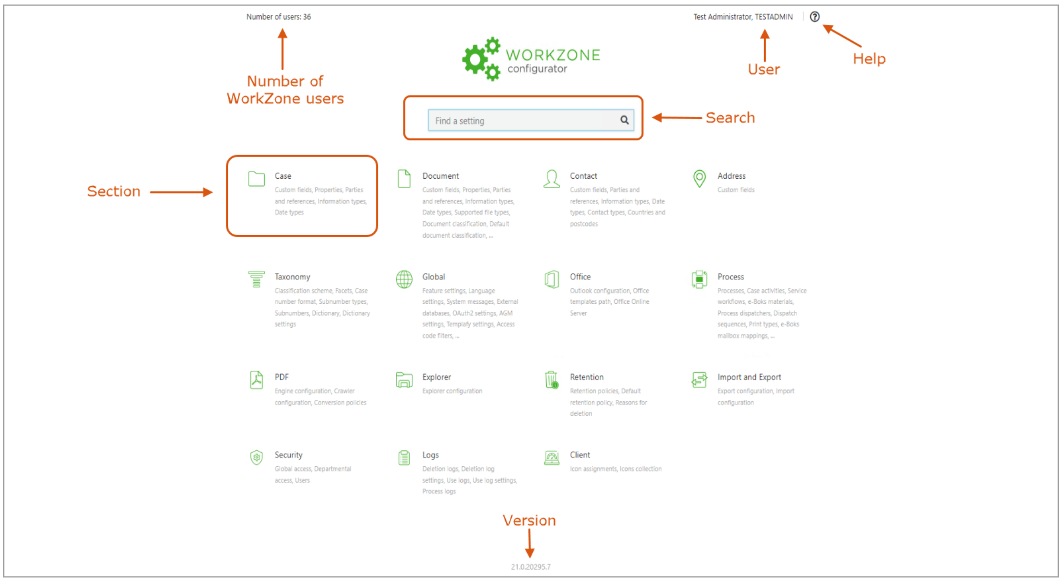
- Two sections have been moved to make navigation in WorkZone Configurator more intuitive:
    - **Case number format** has been moved to **Taxonomy**
    - **Draft versioning** has been moved to **Office settings**

3. Getting started

3.1 Start page

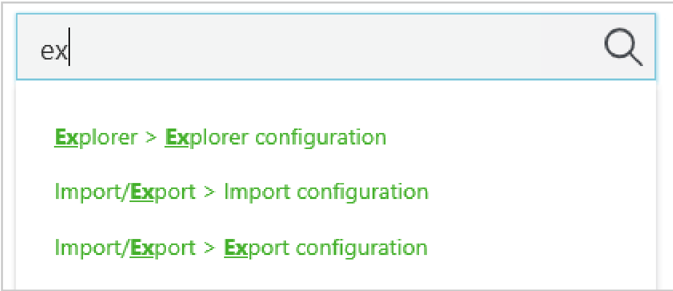
WorkZone Configurator is a convenient tool to customize the WorkZone products in order to meet the requirements and specification of your company.

WorkZone Configurator has a simple and user-friendly web interface.



The start page represents the following key elements:

- **Number of WorkZone users** - the total number of active WorkZone users in your system.
- **Search** – Start typing a search request in the search field and the most relevant suggestions to your request will appear. Note that you can search only for the WorkZone entities. Values defined by you are not available for searching.



- **Section** – All information that can be configured in WorkZone Configurator is divided into 14 sections. This helps you easily find the needed settings. On the start page, you can see the sections' icons, titles, and listed settings that you can configure.
- **Help** – Click the **Help** icon to open the Administrator Guide.
- **Version** – See which version of WorkZone Configurator you are running at the bottom of the start page. The version follows format `MM.m.yyddd.b`, where:
  - `MM` – main version
  - `m` – minor version
  - `yy` – year
  - `ddd` – day
  - `b` – build number

3.2 Working with lists

Filter a list by values

You can filter any list to view a subset of its content or find a specific item. You can apply a filter to one or more columns of a list.

Apply a filter

1. Open a list.
2. Point at the name of the column you want to filter. The column filter icon is displayed.
3. Click the column filter icon .
4. In the **Apply filter** dialog box, select a value or start typing in the **Define filter value** field.

   > **Tip:** You can enter part of the requested word and all words that include this part will be listed. For example, if you type `DOC`, search result may include such values as `DOC`, `DOCX` and `OMDOC`.

5. Click **Apply**.

Reset a filter

1. You can easily reset any filter you have applied to a list, that is, remove your filter.
2. Open the list from which you want to remove a filter.
3. Click on the column filter icon .
4. In the **Apply filter** dialog box, delete the value to reset this particular filter

   - Or -

   Click **Reset all filters** to reset all filters applied to the table.

Sort a list

You can sort a list in the ascending or descending order by values in a list column.

- To sort a list in the ascending order, click the title of the desired column.
- To sort the list in the descending order, click the title one more time.

Resize a column

You can resize columns in the displayed lists.

1. Select a column to resize.
2. Drag its right corner to resize the column width as needed.

4. Cases, documents, and contacts

Case Document Contact

4.1 Custom fields

Case Document Contact Address

Prerequisite: To configure custom fields, you must have the DATAADM access code.

About custom fields

Along with the default WorkZone fields, you can define custom fields that are specific for your organization. You can add, edit, and delete custom fields for cases, documents, contacts and addresses. Custom fields can store one value per case, document or contact and can be displayed on the detail pages for cases, documents and contacts as well as added to the case, document and contact lists.

Note: Custom fields cannot be added to custom type lists. Instead, you must create custom type fields to populate custom types. See Actions on custom type fields.

Custom field types

When you create a custom field, you must define the custom field type. The custom field type determines what kind of data the field can store and how the input is interpreted.

There are 13 types of custom fields: text, unique, date, address, contact, employee, unit, case, document, custom type, decimal, integer, and droplist.

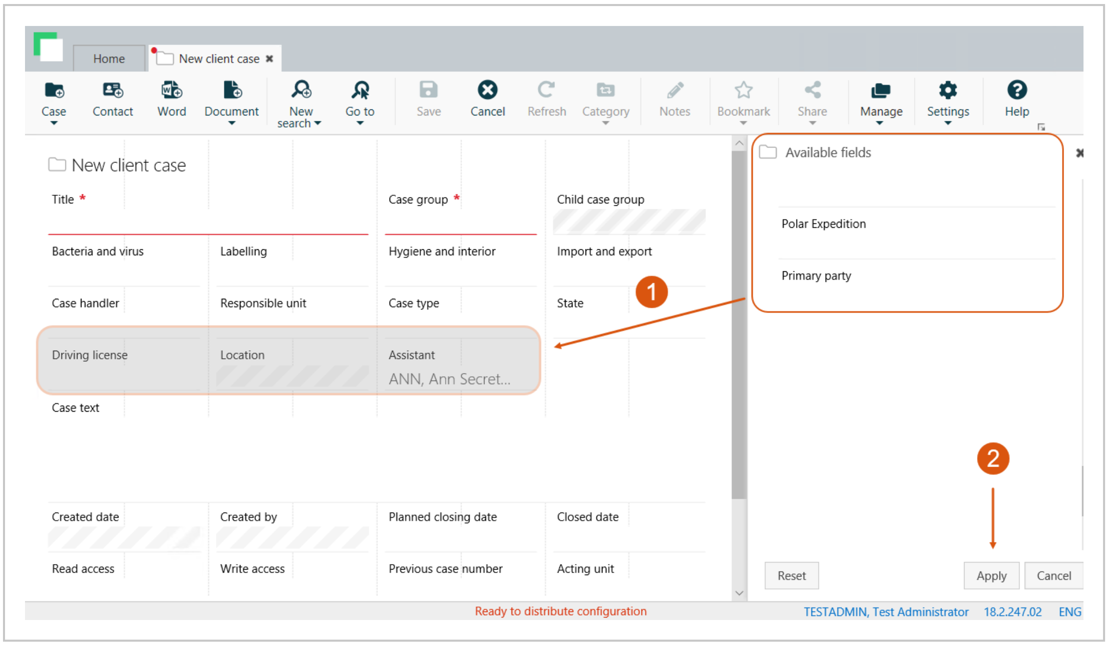
> **Note:** The **Unique** custom field type is not supported for addresses.

Data type	Description
Text	Any characters including numbers can be entered and are considered text and not numbers. The content of this field cannot be used for subsequent calculations but can be validated using validation rules.
Unique	Any characters including numbers can be entered and are considered text and not numbers. The field will only accept unique values.
Date	A set of integers that are interpreted as a date. Values that cannot be interpreted into a date format cannot be entered. When selecting **Date** data type, a date selector will automatically be added to the field to enable a user to open a calendar-like form and select the date.
Address	Custom field value registered in the database as an **Address**.
Contact	Custom field value registered in the database as a **Contact**.
Employee	Custom field value registered in the database as an **Employee**.
Unit	Custom field value registered in the database as an **Organizational unit**.
Case	Custom field value registered in the database as a **Case**.
Document	Custom field value registered in the database as a **Document**.
Custom type	Custom type value registered in the database as a **Custom type**.
DateTime	A set of integers that are interpreted as a date and time.

Data type	Description
	Values that cannot be interpreted into a date and time format cannot be entered. When selecting the **DateTime** data type, a date and Time selector will automatically be added to the field to enable a user to open a calendar-like form , select the date and enter a time.
Decimal	All numbers, including fractional elements of a number. Negative values can be used.
Integer	All numbers, excluding fractional elements. Negative values can be used.
Droplist	A list of predefined values a user can chose from. Custom droplists can be created and maintained in **Global** > **Custom Droplists**.

In the following example, **Driving license**, **Location** and **Assistant** are custom fields. An administrator adds them from the **Available fields** list.

> **Tip:** You can define a default value for a custom field in WorkZone Client. In the following example, the administrator set *ANN* as a default contact for the **Assistant** field.



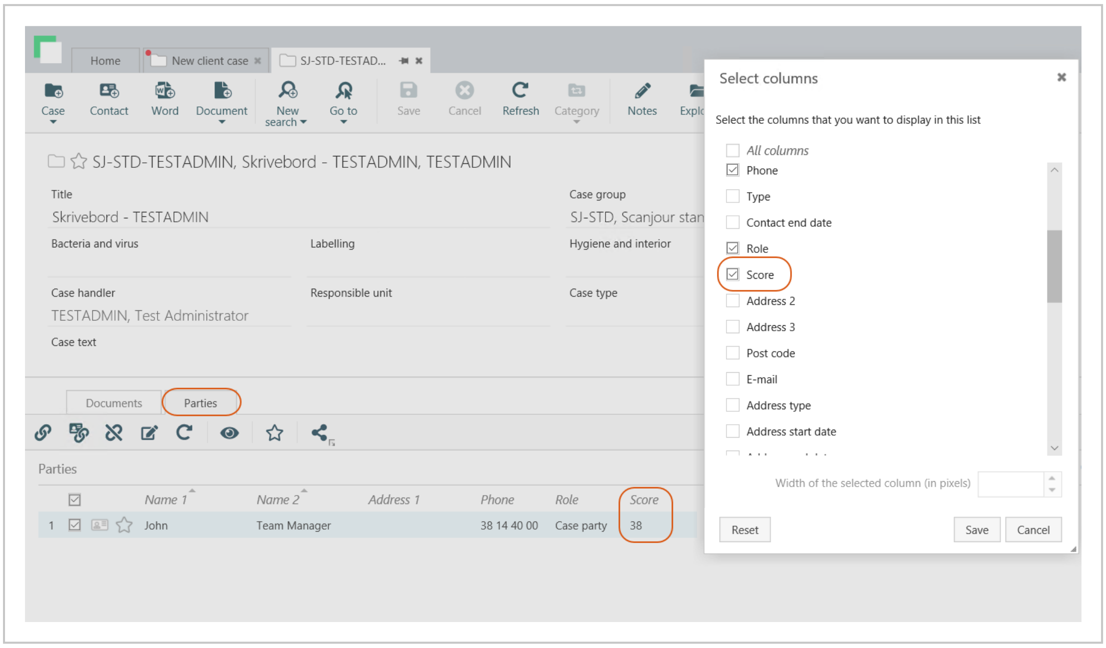
About case custom fields

In contrast with **Document** and **Contact** custom fields, **Case** custom fields are divided on two tabs:

- **Primary** – These custom fields are available everywhere where you can add case custom fields.
- **Case parties** – These custom fields are only available on the **Parties** tab on cases. Use these fields to define additional content that connects a specific case with a specific contact. To see a custom field in WorkZone Client, right-click the table headings and add a new column.

Example:

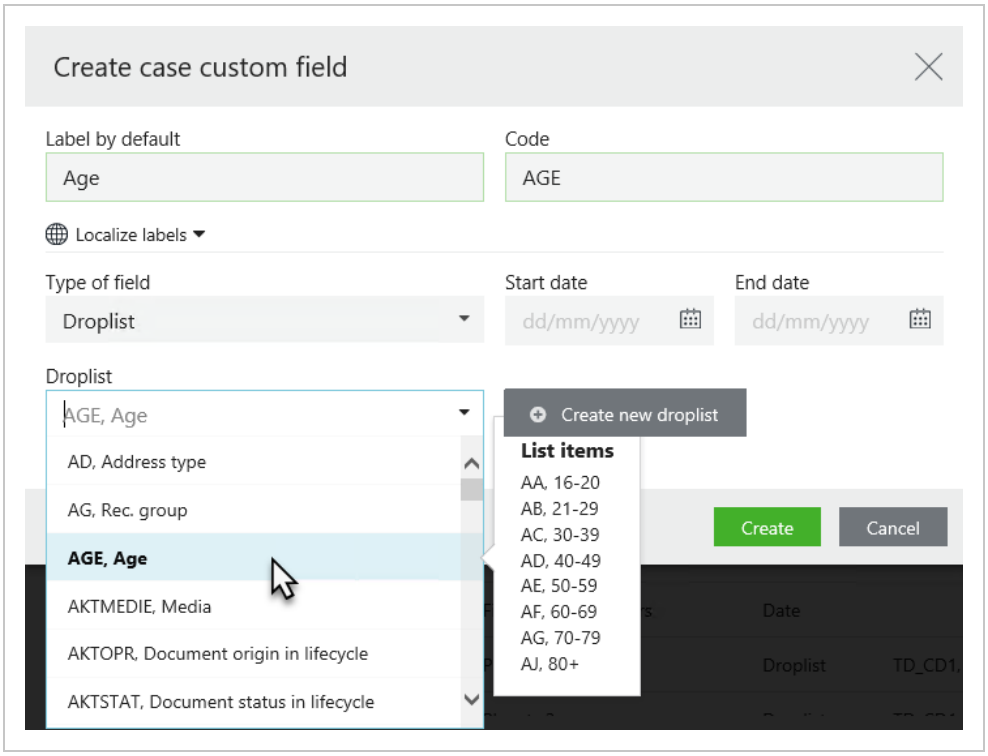
John applies to three faculties within the same university. In WorkZone Client, each faculty represents a separate case and each applicant represents a separate contact. John's admission scores differ for each faculty, therefore, this information cannot be added to John's contact information. Instead, you can add a new custom field named **Score** on the **Case parties** tab that will represent applicants' scores for a particular faculty. For example, John's admission scores are 38 for the first faculty, 41 for the second one, and 9 for the third one. In WorkZone Client, you can see John's admission scores for the first faculty if you add the **Score** table column on the **Parties** tab on the **First faculty** case.



Create a custom field

Create a custom field to make it available for the WorkZone Client users.

1. On the main page, select **Case**, **Document**, **Contact**, or **Address** depending on where to you want to add a custom field.
2. On the **Custom fields** tab, in the right bottom corner, click **Create**. The **Create custom field** dialog box opens.



3. Fill in the following fields to define properties of the custom field:

- **Label by default** – Default name that is visible for users.
- **Code** – The name of the custom field as it is registered in the database. The value in the **Code** field must be 11 characters or less.
- **Localize labels** – Optionally, specify names in other languages.
- **Type of field** – Data type for this field:
  - **Text** – string values;
    - **Validation rule** – Optionally, you can associate the custom field with the validation rule. The validation rule defines required text format. See how to configure validation rules.
  - **Date** – date values;
  - **Decimal** – floating-point numbers;
  - **Integer** – whole numbers;

        - **Droplist** – multiple values:
            - **Select droplist** – Select a droplist of a desired category. To view list items that are included in a list, point to the list name. See how to configure custom droplists.
            - **Create new droplist** – Click the button if you want to create a custom droplist that is relevant to your organization. You will be redirected to the Custom droplist page.
        - **Address** – custom field value registered in the database.
        - **Contact** – custom field value registered in the database.
        - **Employee** – custom field value registered in the database.
        - **Unit** – custom field value registered in the database.
        - **Case** – custom field value registered in the database.
        - **Document** – custom field value registered in the database.
    - **Start date** – The date when the custom field becomes active. Before the start date, the custom field is invisible in the user interface.
    - **End date** – The date when the custom field is deactivated. After the end date, the custom field becomes invisible in the user interface.
4. Click **Create**.

Edit a custom field

1. Open a list with the custom field that you want to edit and point to the field. A menu bar with action buttons appears.
2. Click **Edit**.

3. Apply the required changes in the **Edit custom field** dialog box.

   > **Note:** You cannot edit the **Label by default**, **Code** and **Type of field** values.

4. Click **Save**.

Delete a custom field

> **Note:** You can only delete custom fields that have no records in the database.

1. Open a list with the custom field that you want to delete and point to the field. A menu bar with action buttons appears.
2. Click **Delete** and then click **Delete**.

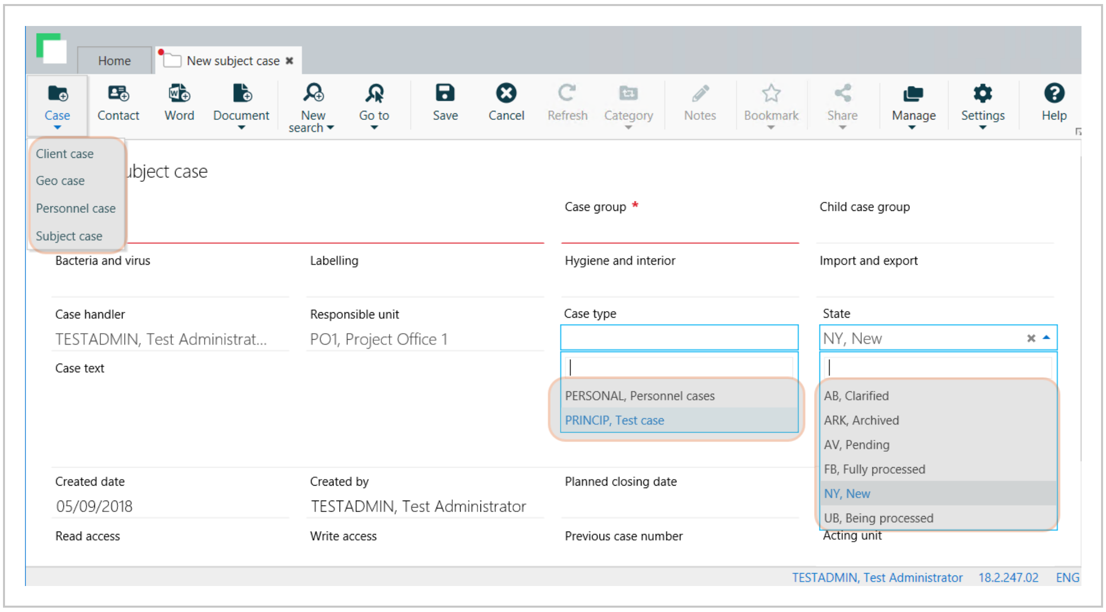
4.2 Properties

Case   Document

> **Prerequisite:** To configure properties, you must have the DATAADM access code.

About properties

A property represents one of the values of a meta data field. You can add, edit, and delete properties for case and document meta data fields.



In WorkZone Configurator 2021.0, you can configure values for the following meta data fields:

Case

Name in WorkZone	WorkZone product	Place in WorkZone product	Description
Case categories	WorkZone Client	**Case** button on the main ribbon	Division of cases by category. An organization configures case categories individually depending on its architecture, requirements, and needs.
Case types	WorkZone Client WorkZone 365	**Case type** meta data field	Division of cases by type. An organization configures case types individually depending on its architecture, requirements,

Name in WorkZone	WorkZone product	Place in WorkZone product	Description
			and needs.
Case states	WorkZone Client	**State** meta data field	States that a case can get during its life cycle. An organization configures case states depending on its requirements and needs.

Document

Name in WorkZone	WorkZone product	Place in WorkZone product	Description
Document groups	WorkZone Client WorkZone 365	**Document group** meta data field	Shows the group to which the document belongs. For example, **Decision**, **Confirmation**, or **Consultation**.
Document types	WorkZone Client WorkZone 365	**Document type** meta data field	Indicates whether the document is, for example, incoming, outgoing, or internal.

Create a property

Add a property to create a new value for a meta data field.

1. On the main page, select **Case** or **Document** depending on where the meta data field is located.
2. On the **Properties** tab, select a tab, for example, **Document types**.
3. In the right bottom corner of the page, click . The **Create document type** dialog box opens.
4. Fill in the following fields:
   - **Label by default** – Default name that is visible for users.
   - **Code** – Code in the database. On the user interface, the code is often displayed next to the label.
   - **Localize labels** – Optionally, specify names in other languages.
   - **Rank** - An integer number that indicates value priority (1 has the highest priority).
   - **Selectable** - Disable to make this value non-selectable for the users in WorkZone Client or WorkZone 365.
   - **Start date** – The date when the property becomes active. Before the start date, the property is invisible on the user interface.
   - **End date** – The date when the property is deactivated. After the end date, the property becomes invisible on the user interface.
5. Click **Create**.

Edit a property

1. Open a list with the property that you want to edit and point to it. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit <property>** dialog box.

> **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete a property

You can only delete a property that does not have any records in the database.

1. Open a list with the property that you want to delete and point to it. A menu bar with action buttons appears.
2. Click **Delete** and then click **Delete**.

4.3 Parties and references

Case Document Contact

> **Prerequisite:** To configure parties and references, you must have the DATAADM access code.

About parties and references

In this section, you can define values for the **Role** and **Reference** fields that are available on specific case, document, and contact tabs.

Tab in Client	Field in Client	Tab in Parties and references	Description
Party	Role	Case party roles Document party roles Contact party roles	Relation between case and contact. Relation between document and

Tab in Client	Field in Client	Tab in Parties and references	Description
			contact. Relation between contact and contact.
Case reference	Role	Case references	Relation between case and case.
Document reference	Reference	Document references	Relation between case and document on cases. Relation between document and document on documents.

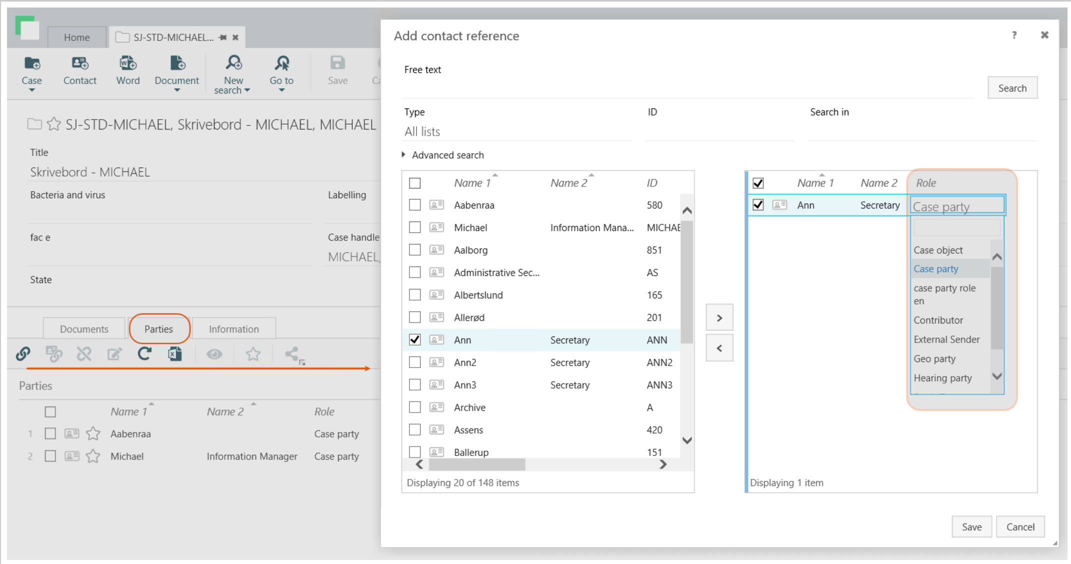
Example:

Consider an example of how to add a new case party with a role in WorkZone Client. This example helps you to understand where end users see and use the values that you define on the **Parties and references** tab in WorkZone Configurator.

1. In WorkZone Client, open a case detail page.
2. Add the **Parties** tab and then the **Role** field in the list of parties.

   > **Tip:** Extend the dialog box if you don't see the **Role** field.

3. Click **Add**.
4. On the dialog box, double-click the desired contact.
5. Select a role in the **Role** drop-down list, and click **Save**.



Create a role or reference

Create a new value for the **Role** field.

1. On the main page, select **Case**, **Document**, or **Case** depending on where the field is located.
2. On the **Parties and References** tab, select the desired detail tab, and click **Create** in the bottom-right corner of the page. Fill in the following fields:
    - **Label by default** – The default field name that is visible for users.
    - **Code** – The code in the database.
    - **Localize labels** – Optionally, specify names in other languages.
    - **Start date** – The date when the role or reference becomes active. Before the start date, the role or reference is invisible in the user interface.
    - **End date** – The date when the role or reference is deactivated. After the end date, the role or reference becomes invisible in the user interface.

- **Reverse code** – A reverse role or reference. This field is available for case references on cases, document references on documents and contact reference roles on contacts.

  Example: You create the *Sender* role with the *Recipient* **Reverse code**. In WorkZone Client, you open a contact named Ann. You add a new contact reference for Ann. You select Michael, and set his role to *Sender*. When you open Michael's contact references, you see Ann, and her role is *Recipient*.

3. Click **Create**.

Edit a role or reference

1. Open a list with the role that you want to edit, and point to it. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit role** dialog box.

   > **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete a role or reference

You can only delete a role that does not have any records in the database.

1. Open a list with the role that you want to delete, and point to it. A menu bar with action buttons appears.
2. Click **Delete**, and then click **Delete**.

> **Note:** When you delete contact role *A* that has a reverse code to contact role *B*, the reverse code for contact role *B* will be removed automatically.

4.4 Information types

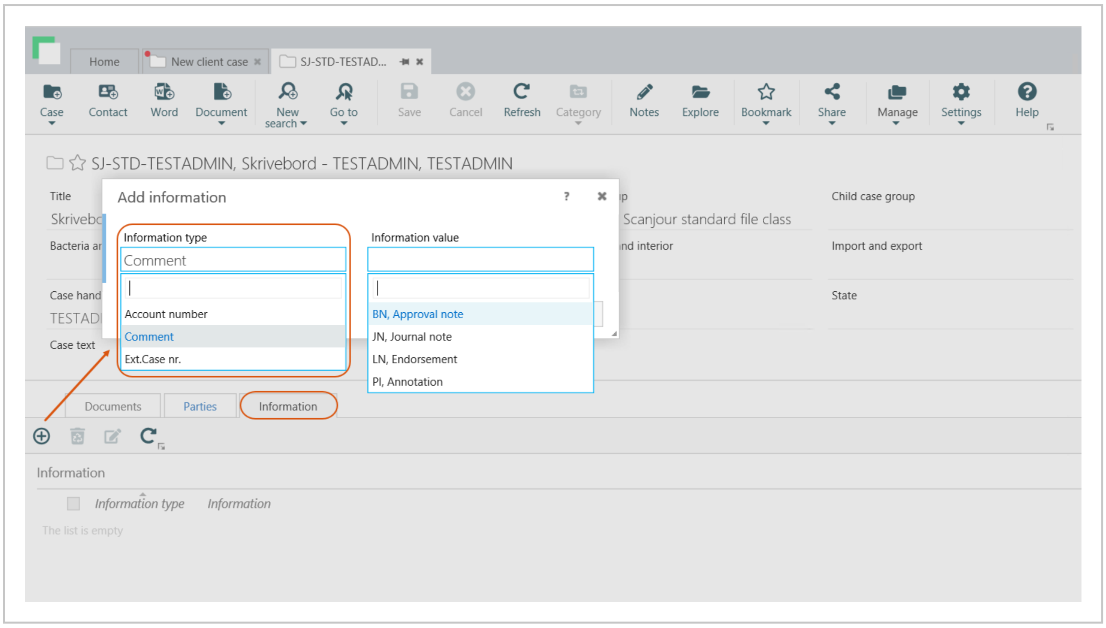
Case Document Contact

> **Prerequisite:** To configure information types, you must have the DATAADM access code.

About information types

It is possible to specify additional structured information on cases, documents, and contacts. For example, it could be involved towns, companies, building numbers, and any other information. In WorkZone Configurator, you can define the information types, and users will see them on the **Information** tab in WorkZone Client. When users want to add new information, they need to click ⊕ **Add**, select an information type from the list, and indicate the information.

> **Tip:** In WorkZone Configurator, you can select a predefined list of items for a new information type. If a user selects this information type in WorkZone Client, the items will then be available in the **Information** drop-down list.

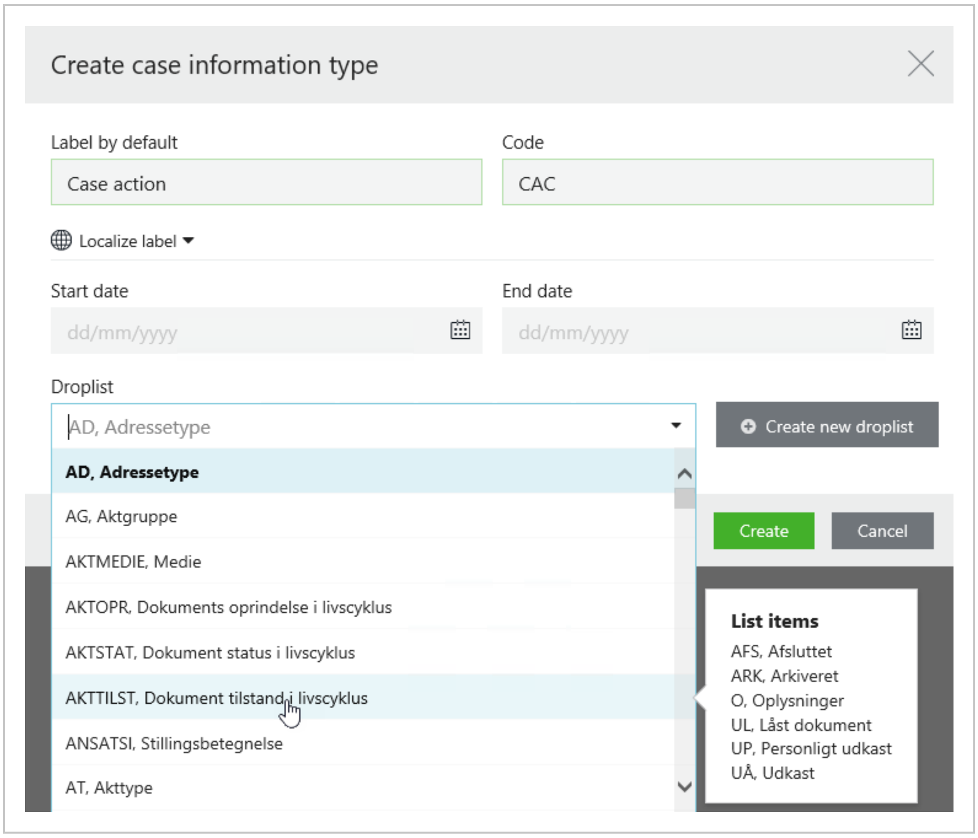


Create an information type

Tip: There are two types of **Information type** – *text* and *droplist*. If you need a text information type, skip the **Droplist** field in the **Add information type** dialog box.

Create a new value for the **Information type** list:

1. On the main page, select **Case**, **Document**, or **Contact** depending on to which of them you want to add a new value.
2. On the **Information types** tab, in the bottom-right corner of the page, click **Create**.
3. Fill in the following fields in the **Create information type** dialog box:



- **Label by default** – The default information type name that is visible for users.
- **Code** – The code in the database.
- **Localize labels** – Optionally, specify names in other languages.
- **Start date** – The date when the information type becomes active. Before the start date, the information type is invisible on the user interface.
- **End date** – The date when the information type is deactivated. After the end date, the information type becomes invisible on the user interface.
- **Droplist**
  - **Select droplist** – Select a droplist of a desired category. To view list items that are included in a list, point to the list name.

> **Tip:** See how to configure custom droplists.

- **Create new droplist** – Click the button if you want to create a custom droplist that is relevant to your organization. You will be redirected to the Custom droplist page.

4. Click **Create**.

Edit an information type

1. Open a list with the information type that you want to edit, and point to it. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit information** dialog box.

   > **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete an information type

You can only delete an information type that does not have any records in the database.

1. Open a list with the information type that you want to delete, and point to it. A menu bar with action buttons appears.
2. Click **Delete**, and then click **Delete**.

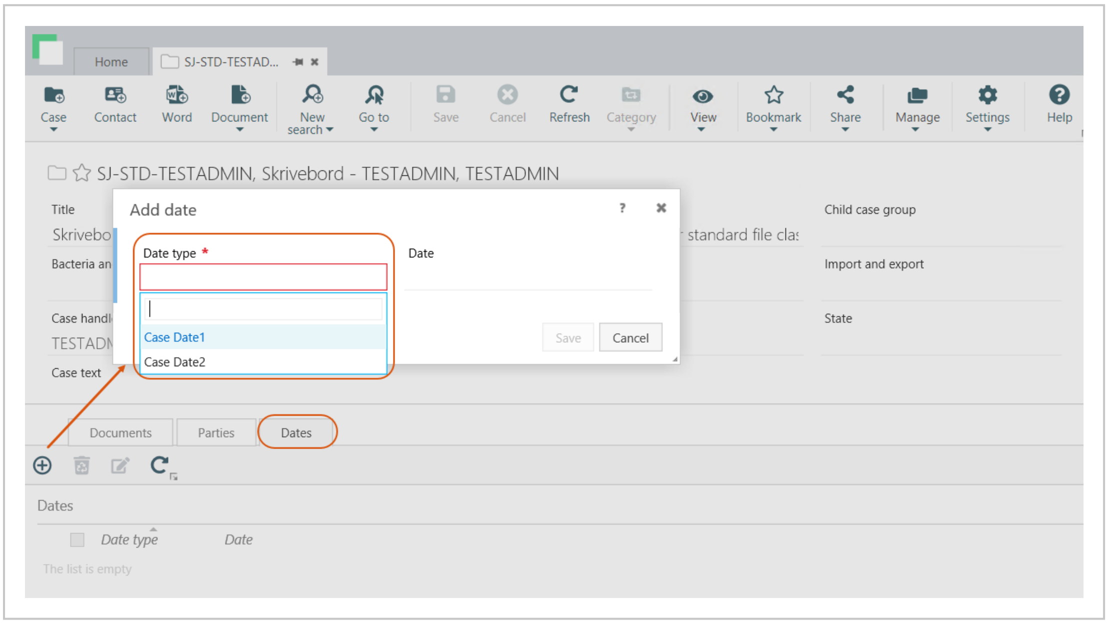
4.5 Date types

Case Document Contact

Prerequisite: To configure date types, you must have the DATAADM access code.

About date types

It is possible to specify different date types on cases, documents, and contacts. For example, it could be a contact's birthday, day of retirement, day of a call, and any other date type. In WorkZone Configurator, you can define the date types, and users will see them on the **Dates** tab in WorkZone Client. When users want to add a new date, they need to click **Add**, select a date type from the list, and indicate a date.



Create a date type

Create a new value for the **Date type** list.

1. On the main page, select **Case**, **Document**, or **Contact** depending on why you add a new value.
2. On the **Dates** tab, in the bottom-right corner of the page, click **Create**.
3. Fill in the following fields in the **Create date** dialog box:

- **Label by default** – The default name that is visible for users.
- **Code** – The code in the database.
- **Localize labels** – Optionally, specify names in other languages.
- **Start date** – The date when the date type becomes active. Before the start date, the date type is invisible on the user interface.
- **End date** – The date when the date type is deactivated. After the end date, the date type becomes invisible on the user interface.

4. Click **Create**.

Edit a date type

1. Open a list with the date type that you want to edit, and point to it. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit date** dialog box.

   > **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete a date type

You can only delete a date type that does not have any records in the database.

1. Open a list with the date type that you want to delete, and point to it. A menu bar with action buttons appears.
2. Click **Delete**, and then click **Delete**.

4.6 Supported file types

Document

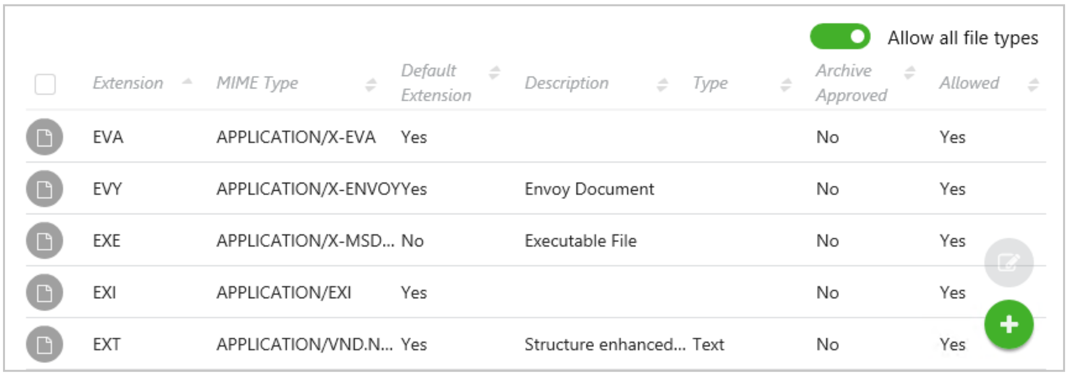
> **Prerequisite:** To configure supported file types, you must have the DATAADM access code.

About supported file types

Usually, organizations work with a specific scope of work that demands specific file types. Therefore, other file types must be detected as erroneous. Define supported file types for your organization on this page to ensure that only documents with the required file types exist in your WorkZone system.

Documents with the supported file types can be uploaded/attached in WorkZone.

Supported file types cannot be deleted from WorkZone Configurator, but you can prohibit their usage at any time.



Allow all file types

Extension	MIME Type	Default Extension	Description	Type	Archive Approved	Allowed
EVA	APPLICATION/X-EVA	Yes			No	Yes
EVY	APPLICATION/X-ENVOY	Yes	Envoy Document		No	Yes
EXE	APPLICATION/X-MSD...	No	Executable File		No	Yes
EXI	APPLICATION/EXI	Yes			No	Yes
EXT	APPLICATION/VND.N...	Yes	Structure enhanced...	Text	No	Yes

- **Allow all file types** – Enable this toggle button to allow uploading of all file types in WorkZone.

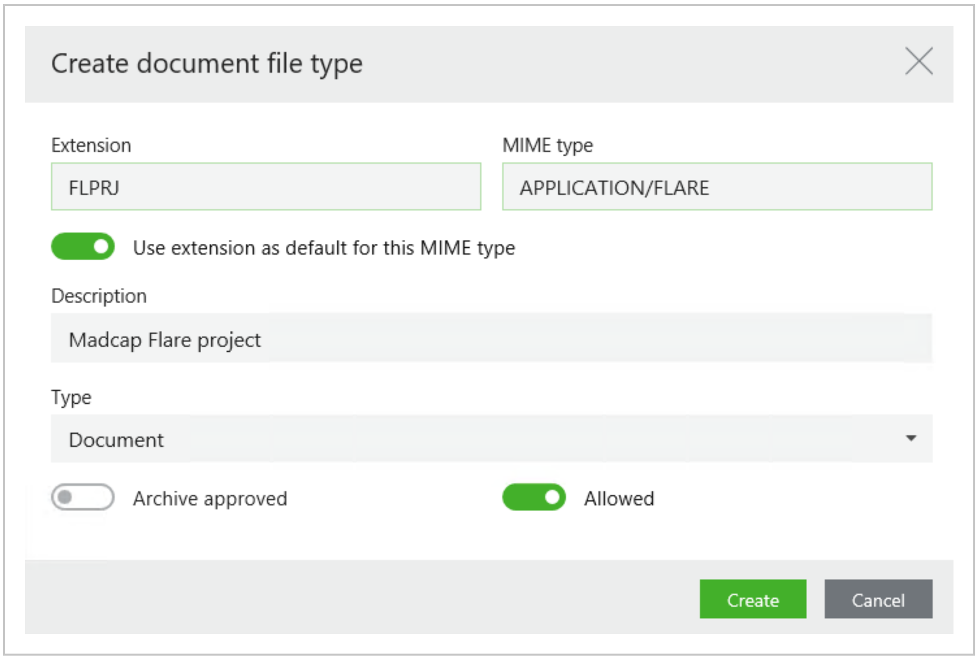
Regulation rules for supported file types:

WorkZone provides flexibility to fine-tune different combinations of supported and non-supported file types. They comply with these rules:

- To make all file types available, simply allow usage of all file types globally;
- To allow usage of some specific file types only, disallow usage of all file types globally and allow these specific file types individually. Note that these file types must be explicitly approved for the archive (the **Archive approved** toggle button must be activated). This indicates that these file types are approved by the Danish National Archives.
- To prohibit usage of some specific file types, allow usage of all file types globally and disallow these specific file types individually.

Create a new file type

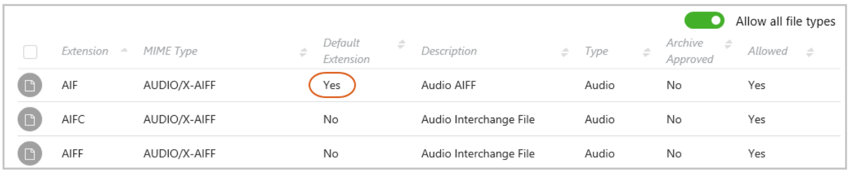
1. On the main page, select **Document**.
2. On the **Supported file types** tab in the bottom-right corner of the page, click **Create**.
3. Fill in the following fields in the **Create supported file type** dialog box:



- **Extension** – The short file extension.
- **MIME type** – Specify the MIME type. MIME type makes it possible to identify files on the Internet according to their nature and format.
- **Use extension as default for this MIME type** – A MIME type can support multiple extensions. If you want to use current extension as default for the current MIME type, enable this toggle button.

Example:

Consider an example where three extensions exist within the AUDIO/X-AIFF type in your database – AIF, AIFC and AIFF. According to the settings, AIF is set as the default extension. A user receives an email with an attachment and tries to save it. The attached file has information about its MIME type and it is AUDIO/X-AIFF. WorkZone saves the attachment as a *.aif file because this extension is default.



Allow all file types

Extension	MIME Type	Default Extension	Description	Type	Archive Approved	Allowed
AIF	AUDIO/X-AIFF	Yes	Audio AIFF	Audio	No	Yes
AIFC	AUDIO/X-AIFF	No	Audio Interchange File	Audio	No	Yes
AIFF	AUDIO/X-AIFF	No	Audio Interchange File	Audio	No	Yes

- **Description** – The descriptive information about the new file type, for example, what it is or what it is used for.
- **Type** – Select a file type from the predefined drop-down list.
- **Archive approved** – Enable this toggle button if the Danish National Archives accepts the current file type. Users will see this information in read-only mode as complimentary information.

  > **Note:** This setting must be activated for the file types that you allow to use individually. See Regulation rules for supported file types.

- **Allowed** – Enable this toggle button to allow WorkZone use files with this type.

4. Click **Create**.

Edit a file type

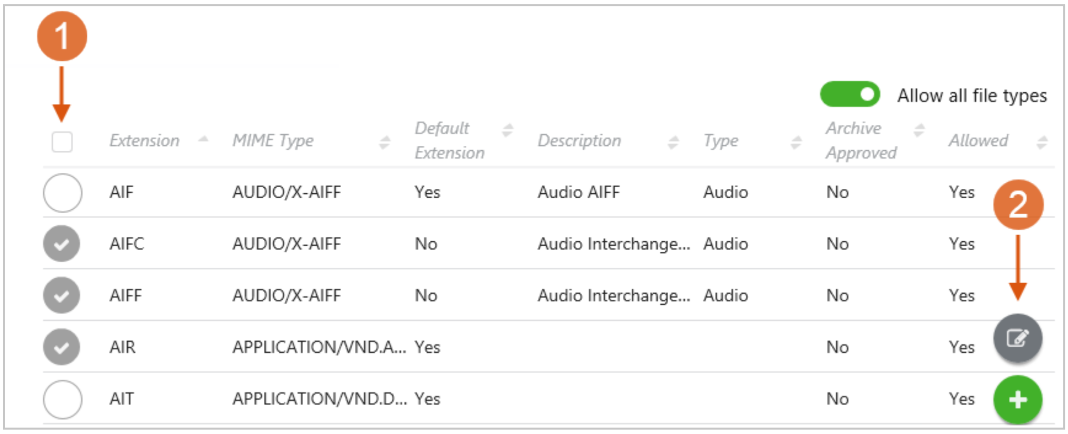
1. Point to the file type that you want to edit. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit file type** dialog box.

   > **Note:** You cannot edit the **Extension** value.

4. Click **Save**.

Edit multiple file types

If you need to change the **Archive approved** or **Allowed** setting for multiple file types at once, use multiple edit.



1. Click the icon next to the file type that you want to edit. The item is then selected .
2. Select other file types that you want to edit one by one.

   Tip: To select all file types, select the top check box in the column of icons.

3. Click **Edit** in the bottom-right corner of the page.
4. Select a desired property and apply the required value in the **Edit document file type properties** dialog box.
5. Click **Save**.

4.7 Countries and postcodes

Contact

Prerequisite: To configure countries and postcodes, you must have the DATAADM access code.

About countries and postcodes

Country and postcode is a part of contacts' meta data. Each country has multiple postcodes. In WorkZone Configurator, you can define countries and postcodes that will be available to WorkZone users.

Create a country

1. On the start page, select **Contact**.
2. On the **Countries and postcodes** tab, click **Create country**.
3. Fill in the following fields in the **Create country** dialog box:
    - **Code** – The code in the database.
    - **Name** – Specify the country name that is visible for users.
    - **Localize names** – Optionally, specify names in other languages.
4. Click **Create**.

Edit a country

1. Select a country that you want to edit from the drop-down list on the top.
2. Click **Edit country**.
3. Apply the required changes in the **Edit country** dialog box.

    Note: You cannot edit the **Name** and **Code** values.

4. Click **Save**.

Delete a country

You can only delete a country if it is not used yet.

1. Select a country that you want to delete from the drop-down list on the top.
2. Click **Delete country**.

Create a postcode

1. Select a country to which you want to add a postcode.
2. In the bottom-right corner of the page, click **Create**.
3. Fill in the following fields in the **Create postcode** dialog box:
    - **Postcode** – The postcode number (can include numbers, letters, spaces, hyphens, and similar characters, as in some countries they are part of a postcode. Cannot contain the following characters: ! @ ? " ', . ; {} ( ) + _* $< > # & % ^ | = / \).
    - **District** – The district related to the postcode.
4. Click **Create**.

Edit a postcode

1. Select a country on which you want to edit a postcode.
2. Point to the desired postcode, and click **Edit**.
3. Apply the required changes in the **Edit postcode** dialog box.
4. Click **Save**.

Delete a postcode

You can only delete a postcode if it has not yet been used by WorkZone Client users.

1. Select a country from which you want to delete a postcode.
2. Point to the desired postcode, and click **Delete**, and then click **Delete**.

4.8 Document classification

Document

> **Prerequisite:** To configure document classification codes, you must have the DATAADM access code.

About classification

Document classification aims to order and prioritize data based on its sensitivity. For example, some documents can be available to everybody, while others might contain information that cannot be shared with a wide audience. Document classification code is a required field for each document and it defines its sensitivity level. You can configure document classification codes in WorkZone Configurator on this page.

Create a classification code

1. On the main page, select **Document**.
2. On the **Document classification** tab, in the bottom-right corner of the page, click **Create**.
3. Fill in the following fields in the **Create classification code** dialog box:

- **Label by default** – The name of the classification code that will be visible for users.
- **Code** – The code in the database.
- **Localize label** – Optionally, specify names in other languages.
- **Rank** – An integer number that indicates classification code priority (1 has the highest priority). For example, if you merge two documents with different classification codes, then classification code with a higher priority will be assigned to the resulting document.
- **Selectable** - Enable to make this value selectable for the WorkZone Client users.

  > **Note:** Non-selectable values can still be set as the default values and will be visible to the users in WorkZone Client, but users will not be able to select them (or to re-add them, if the user has changed a non-selectable default value to something else).

- **Start date** – The date when the classification code becomes active. Before the start date, the classification code is invisible on the user interface.
- **End date** – The date when the classification code is deactivated. After the end date, the classification code becomes invisible on the user interface.

4. Click **Create**.

Edit a classification code

1. Point to the classification code that you want to edit. A menu bar with action buttons appears.
2. Click **Edit**.

3. Apply the required changes in the **Edit classification code** dialog box.

> **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete a classification code

You can only delete a classification code that does not have any records in the database.

1. Point to the classification code that you want to delete. A menu bar with action buttons appears.
2. Click **Delete**, and then click **Delete**.

Define default classification code

You can define default classification code for your organization globally. It will be applied to all documents automatically if a different classification code is not defined specifically on a document or on the case group level. See Define default values for a case group.

> **Note:** Documents created in WorkZone 2017 SP1 and earlier versions are not classified automatically. Default classification code is not applied to them, too. Users can assign classification codes to such documents only manually.

1. On the main page, select **Document**.
2. On the **Default document classification** tab, select the desired classification code from the drop-down list.

4.9 Draft versioning

Document

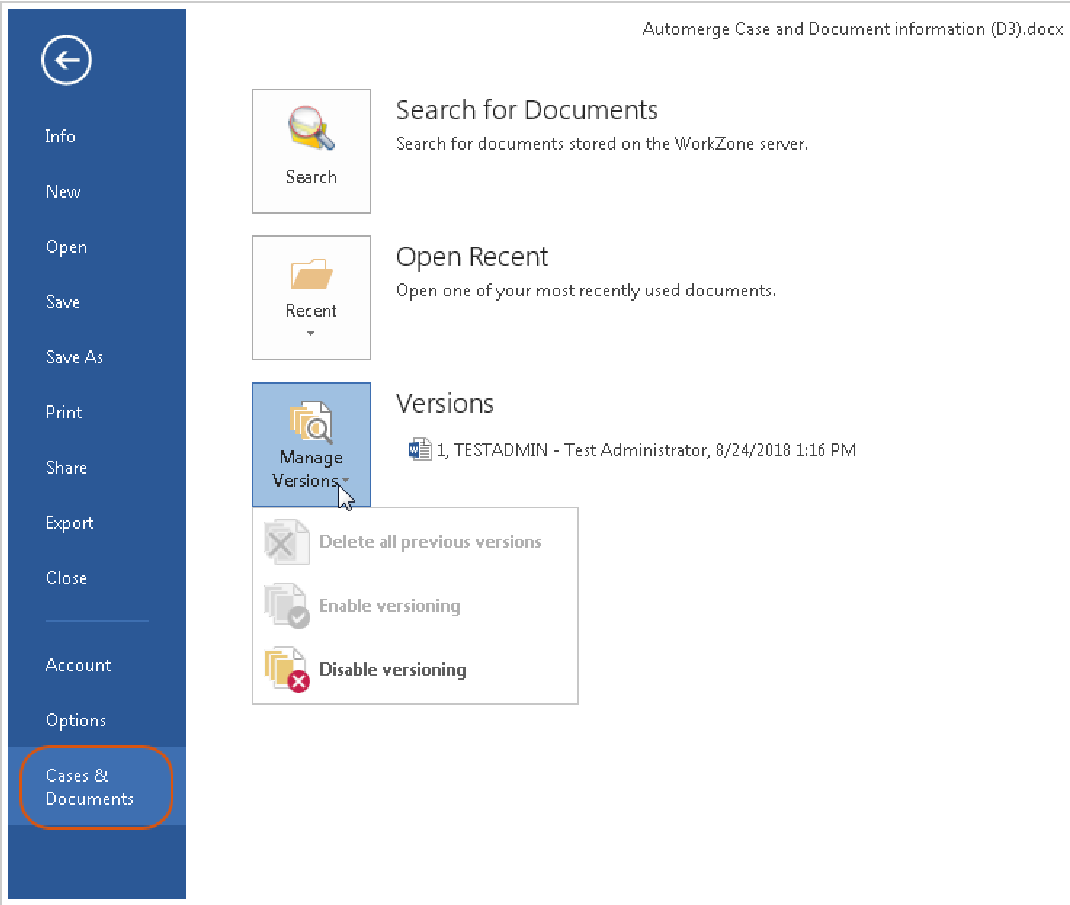
Prerequisite: To configure draft versioning, you must have the CONFIGADM access code.

About draft versioning

You can enable/disable version control of drafts for documents in WorkZone Client and WorkZone for Office. Versioning applies to documents with the state UÅ (Draft) or UP (Personal draft). By default, draft versioning is enabled and a maximum of 100 previous versions are kept for any document. Note that new documents are not automatically put under version control unless you specify it.

Tips:

- See Draft versioning in the User Guide for WorkZone Client.
- See Draft versioning in the User Guide for WorkZone for Office.
- In WorkZone for Office, users can only configure draft versioning when a document is saved on a case. This functionality must be configured on the **Cases & Documents** tab.

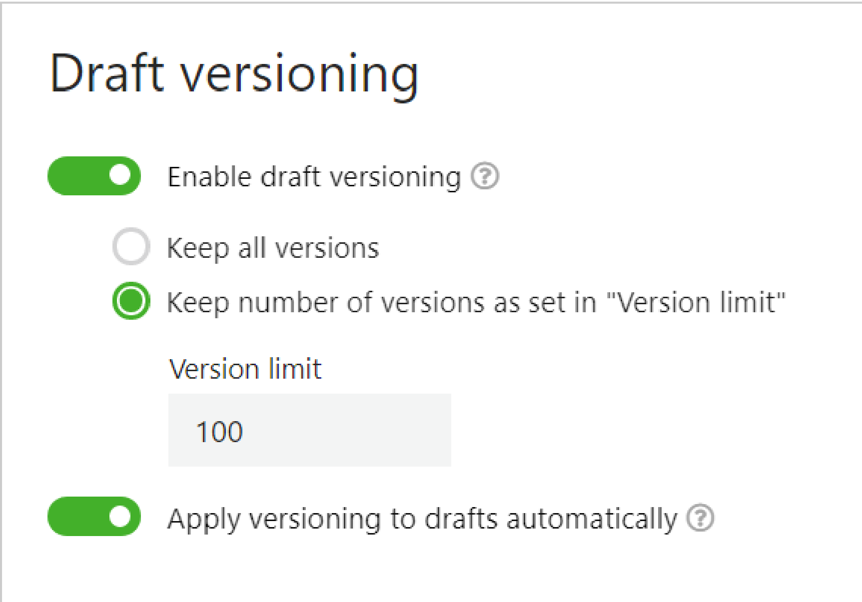


Configure draft versioning

1. On the start page, click **Document**.
2. Select the **Draft versioning** tab.
3. To allow users to activate the draft versioning functionality, enable the **Enable draft versioning** toggle button.
4. If you have enabled draft versioning, you can choose to:
    - **Keep all versions** – Keeps all versions of the drafts.
    - **Keep number of versions as set in 'Version limit'** – Keeps a limited number of versions (from 1 to 100). You can define the number in the **Version limit** field. If the limit is exceeded, the oldest versions are deleted automatically.

- **Apply versioning to drafts automatically** – Activates the draft versioning functionality for users automatically.

> **Notes:**
>
> - The new settings of **Apply versioning to drafts automatically** will take effect when the App Pool SjSvc is recycled on all web servers. You can recycle it manually, or it will be recycled automatically depending on the IIS settings. The default recycling period is 1740 minutes (29 hours).
> - Users must restart Microsoft Word.



When you make a change, it is saved automatically.

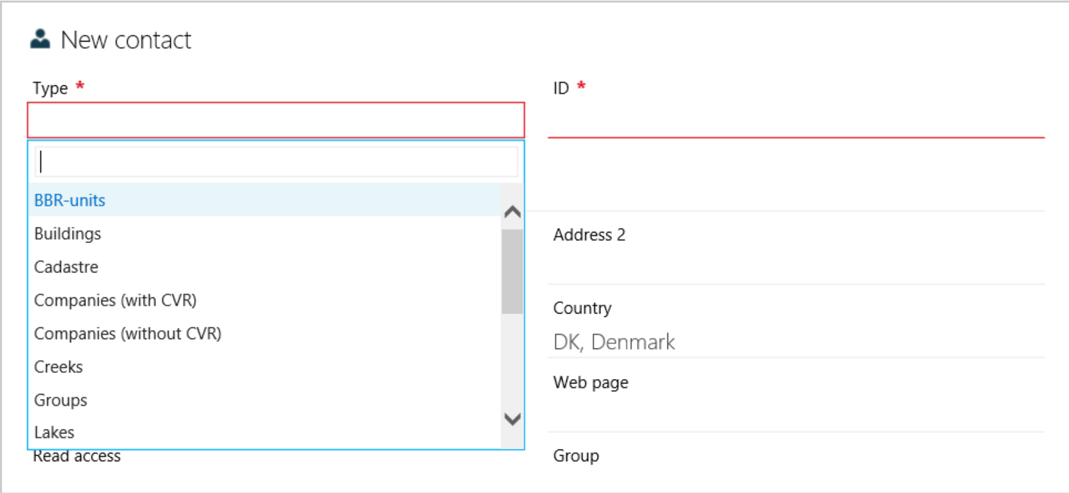
4.10 Contact types

Contact

> **Prerequisite:** To configure contact types, you must have the DATAADM access code.

About contact types

Contact type is a mandatory attribute of each WorkZone contact. Contact types help group contacts in the Contact register and define the contacts' ID format.



The individual contact type is identified by its unique ID. The ID is composed of a single letter/digit contact type and a code. The ID for a company, for instance, consists of the contact type C and the contact code (the code being a sequence number)

Example: C 3542, Cloak & Dagger Inc.

In this example, C is the contact type and the code is a sequence number 3542. For each contact type, you can specify the way it forms its code using a predefined set of algorithms.

Contact types reserved by the system

Four letters are reserved by the system:

- A – organizational unit
- M – employee
- K – municipality (local government)
- U – committee

> **Note:** The register of the contact types M and U deviates from all other contact types. Their data is automatically transferred from Active directory (AD), and therefore you can only maintain them in Active Directory.

In WorkZone Configurator, you can only view and edit contact types.

View contact types

1. On the start page, select **Contact**.
2. Select the **Contact types** tab. A list of existing contact types is displayed.

Code	Contact type (da-DK)	Contact type (en-GB)	Auto ID	Code validat...	Format	Access code	Start date	End date
A	Enhed	Unit	No					
C	Personer (med CPR)	Persons (with CPR)	No	2	XXXXXX-XXXX			
F	Virksomheder (uden CVR)	Companies (without CVR)	Yes					
I	Institutioner	Institutions	Yes			ALLEEMNER&...		
J	Virksomheder (med CVR)	Companies (with CVR)	No	4				
K	Kommuner	Municipalities	No	1				
M	Medarbejdere	Employees	No					

See Contact type meta data fields for more information.

Create a contact type

1. On the start page, select **Contact**.
2. Select the **Contact types** tab.
3. In the **Custom types** tab page, click **Create** to open the **Create contact type field** form.
4. In the **Create contact type** form, fill in relevant fields:
   - **Code** – Enter unique one-character identifier for this contact type.
   - **Contact type** – Provide default title for this contact type. If your system uses multiple languages, click **Localize label** and:

- In the **Label (da-DK)** field, enter a Danish label for the contact type, if you need to provide a Danish label.
- In the **Label (de-DE)** field, enter a German label for the contact type, if you need to provide a German label.
- In the **Label (en-GB)** field, enter an English label for the contact type, if you need to provide a specific English label. The users will see the English, Danish or German label, depending on which language is activated in WorkZone Client.

- **Code validation** (this option can only be enabled if **Auto ID** is selected as **No** or left blank) - Select the needed code validation option from the droplist. See Code validation algorithms.
- **Auto ID** - Enable this option to create contact type IDs as automatically generated sequence numbers.
- **Use CPR format** (this option can only be enabled if **Code validation** is selected as **6** (CPR number) - Enable this option to use the CPR number format (10 capital X's with the sequence number and the date of birth separated by a dash: XXXXXX-XXXX).
- **ID length** - Enter the number of digits (up to 4 digits) assigned to the ID number.
- **Last used ID** - Optionally, enter the last ID issued to this contact type.
- **Access code** - Select which access codes the users need to be assigned to see this contact type and create contacts with this contact type.
- **Start date** - Select the date from which this contact type is active.
- **End date** - Select the date from which this contact type is inactive.

5. Click **Save**.

Edit a contact type

1. On the start page, select **Contact**.
2. Select the **Contact types** tab.
3. Point to the contact type that you want to edit. A menu bar with action buttons appears.
4. Click **Edit**.
5. Edit the needed values in the **Edit contact type** dialog box.

   > **Note:** You can edit all values, except **Code**.

6. Click **Save**.

Delete a contact type

> **Note:** You can only delete a contact type, if no contacts of this contact type exist in the database.

1. On the start page, select **Contact**.
2. Select the **Contact types** tab.
3. Point to the contact type that you want to delete. A menu bar with action buttons appears.
4. Click **Delete** and then click **Delete**.

Contact type meta data fields

Data field	Description
Code	A one-character identifier of the contact type. Valid characters are letters from A to Z and numbers from 1 to 9 (both included).

Data field	Description
Contact type	Localized title of the contact type
Auto ID	Defines how the IDs are created: ◦ **Yes** – ID is an automatically generated sequence number. ◦ **No** – ID must be entered manually.
Code validation	Controls the format of IDs when **Auto ID** is set to **No**. There are 21 available options in the system. Each of them is marked with an integer number and represents a specific code check algorithm. See available Code validation algorithms for more information.
Format	The pattern of the IDs. For example, the format for the CPR number must be 10 capital X's with the birthday and sequence number separated by a dash: XXXXXX-XXXX.
Access code	Defines the access code which: • Will be automatically applied to all new contacts of this type • Users must possess to create new contacts of this type in WorkZone Client • Users must possess to view any contacts of this type, created after the **Access code** setup.
Start date	The date when the contact type becomes active. Before the start date, the contact type is invisible in the user interface.
End date	The date when the contact type is deactivated. After the end date, the contact type becomes invisible in the user interface.

Code validation algorithms

Code validation	Code check algorithm
0	Nothing
1	Numeric
2	CPR Number

Code validation	Code check algorithm
3	SE Number
4	External SE number
5	External CPR number
6	CPR number
7	Property number
9	CPR number (KU-Matrikel_Styrelsen)
10	Birthday and Sequence number
12	9 digit CPR number
13	CPR number (Færøerne)
14	CPR number (fictious)
15	Matrikel number
16	CVR number (Legal units)
17	CVR number (Production units)
18	CVR number (Legal and Production Units)
19	CPR number (No modulus 11 check)
20	CPR number (Færøerne, No modulus 11 check)

4.11 Text extraction

Document

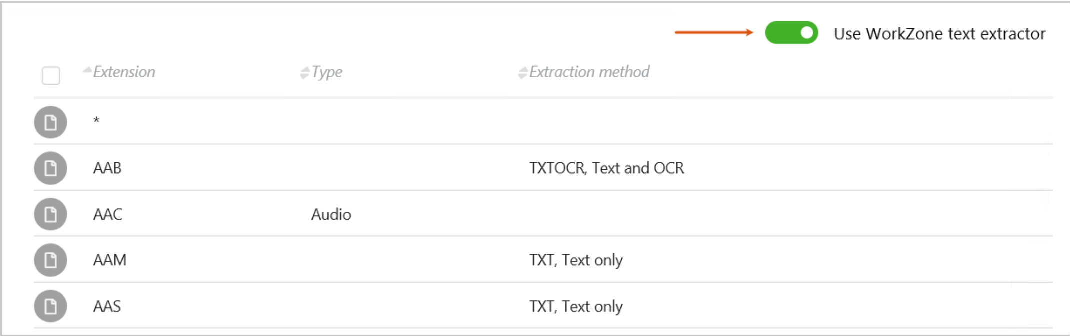
Prerequisite: To edit text extraction methods, you must have the CONFIGADM access code.

About text extraction

Text extraction is used in a WorkZone environment for extracting text from various types of documents, including OCR. The text is then used for the WorkZone search functionality.

You can select a text extractor among two options:

- Oracle text extractor.
- WorkZone text extractor. To use it, enable the **Use WorkZone text extractor** toggle key in the top-right corner.



Edit text extraction method

Note: You can edit text extraction methods only for the WorkZone text extractor.

1. On the main page, select **Document**.
2. Click the **Text extraction** tab.

Edit text extraction method for a single file extension

1. Point to the file extension that you need. A menu bar appears.
2. Click **Edit**.
3. In the **Edit text extraction method** dialog box, select a text extraction method:
   - **Text only** – Only extracts from text formats.
   - **Text and OCR** – Extracts from text formats and images, for example, scanned documents.
4. Click **Save**.

Edit text extraction method for multiple file extensions

1. Click the icon next to the file extension that you want to edit. The item is then selected.
2. Select other file types that you want to edit one by one.

> **Tip:** To select all file types, select the top check box in the column of icons.

3. Click **Edit** in the bottom-right corner of the page.
4. In the **Edit text extraction method** dialog box, select a text extraction method:
    - **<Empty>** – Clears the **Extraction method** cells for the selected extensions and applies the default text extraction method – **Text and OCR**.
    - **Text only** – Only extracts from text formats.
    - **Text and OCR** – Extracts text from text and images, for example, scanned documents.
5. Click **Save**.

5. Addresses

5.1 Custom fields

Case Document Contact Address

Prerequisite: To configure custom fields, you must have the DATAADM access code.

About custom fields

Along with the default WorkZone fields, you can define custom fields that are specific for your organization. You can add, edit, and delete custom fields for cases, documents, contacts and addresses. Custom fields can store one value per case, document or contact and can be displayed on the detail pages for cases, documents and contacts as well as added to the case, document and contact lists.

Note: Custom fields cannot be added to custom type lists. Instead, you must create custom type fields to populate custom types. See Actions on custom type fields.

Custom field types

When you create a custom field, you must define the custom field type. The custom field type determines what kind of data the field can store and how the input is interpreted.

There are 13 types of custom fields: text, unique, date, address, contact, employee, unit, case, document, custom type, decimal, integer, and droplist.

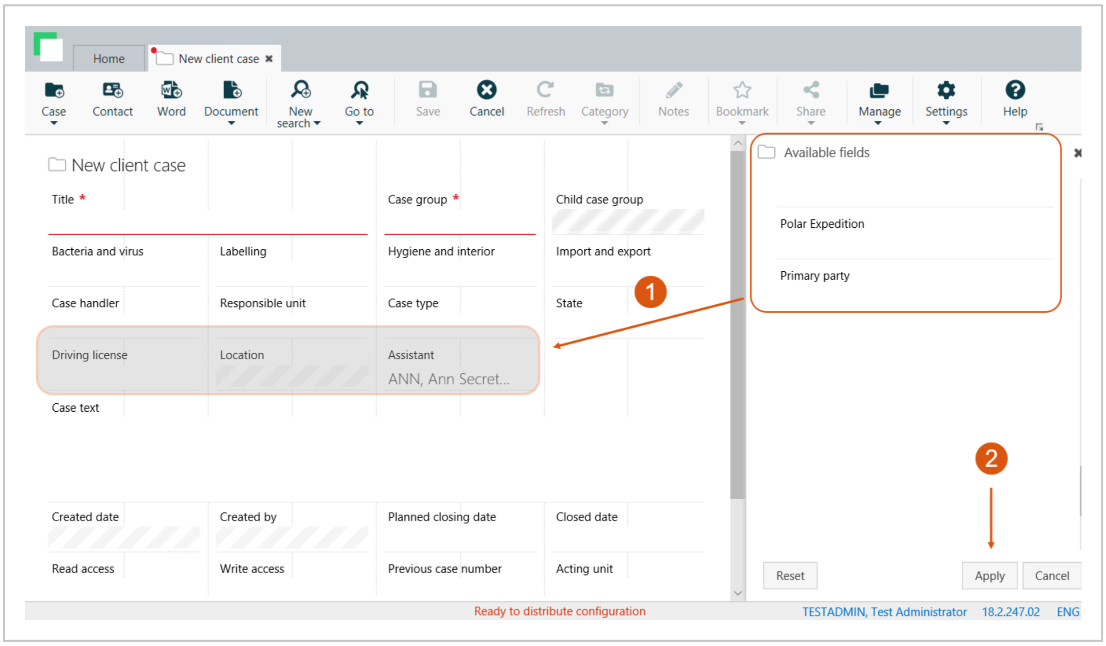
Note: The **Unique** custom field type is not supported for addresses.

Data type	Description
Text	Any characters including numbers can be entered and are considered text and not numbers. The content of this field cannot be used for subsequent calculations but can be validated using validation rules.
Unique	Any characters including numbers can be entered and are considered text and not numbers. The field will only accept unique values.
Date	A set of integers that are interpreted as a date. Values that cannot be interpreted into a date format cannot be entered. When selecting **Date** data type, a date selector will automatically be added to the field to enable a user to open a calendar-like form and select the date.
Address	Custom field value registered in the database as an **Address**.
Contact	Custom field value registered in the database as a **Contact**.
Employee	Custom field value registered in the database as an **Employee**.
Unit	Custom field value registered in the database as an **Organizational unit**.
Case	Custom field value registered in the database as a **Case**.
Document	Custom field value registered in the database as a **Document**.
Custom type	Custom type value registered in the database as a **Custom type**.
DateTime	A set of integers that are interpreted as a date and time. Values that cannot be interpreted into a date and time format cannot be entered. When selecting the **DateTime** data type, a date and Time selector will

Data type	Description
	automatically be added to the field to enable a user to open a calendar-like form , select the date and enter a time.
Decimal	All numbers, including fractional elements of a number. Negative values can be used.
Integer	All numbers, excluding fractional elements. Negative values can be used.
Droplist	A list of predefined values a user can chose from. Custom droplists can be created and maintained in **Global** > **Custom Droplists**.

In the following example, **Driving license**, **Location** and **Assistant** are custom fields. An administrator adds them from the **Available fields** list.

> **Tip:** You can define a default value for a custom field in WorkZone Client. In the following example, the administrator set *ANN* as a default contact for the **Assistant** field.



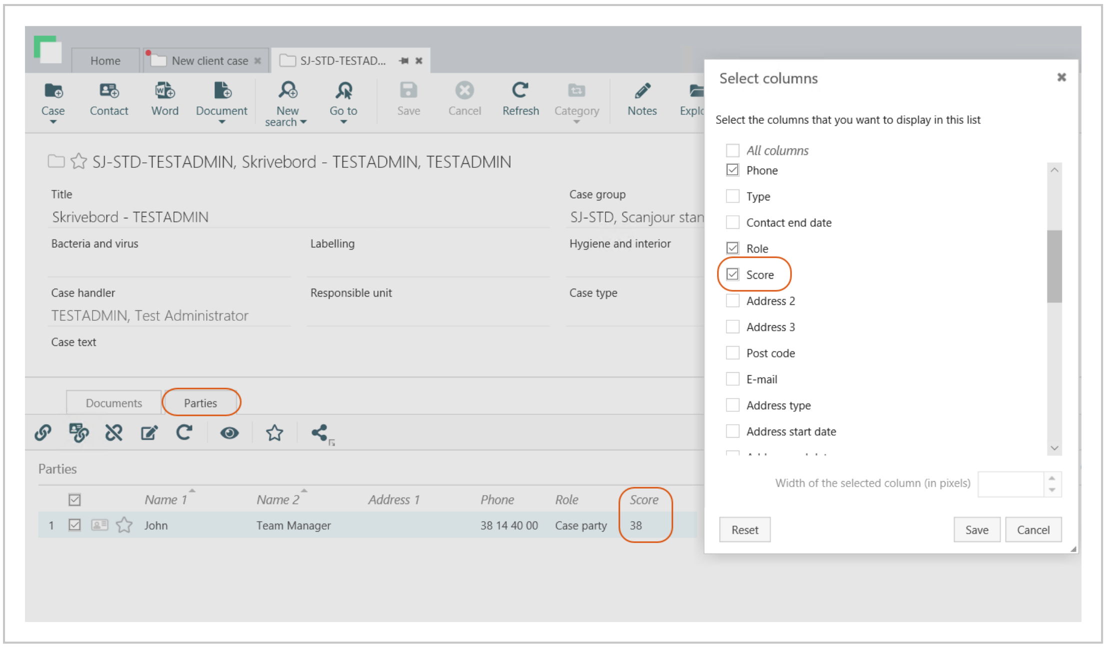
About case custom fields

In contrast with **Document** and **Contact** custom fields, **Case** custom fields are divided on two tabs:

- **Primary** – These custom fields are available everywhere where you can add case custom fields.
- **Case parties** – These custom fields are only available on the **Parties** tab on cases. Use these fields to define additional content that connects a specific case with a specific contact. To see a custom field in WorkZone Client, right-click the table headings and add a new column.

Example:

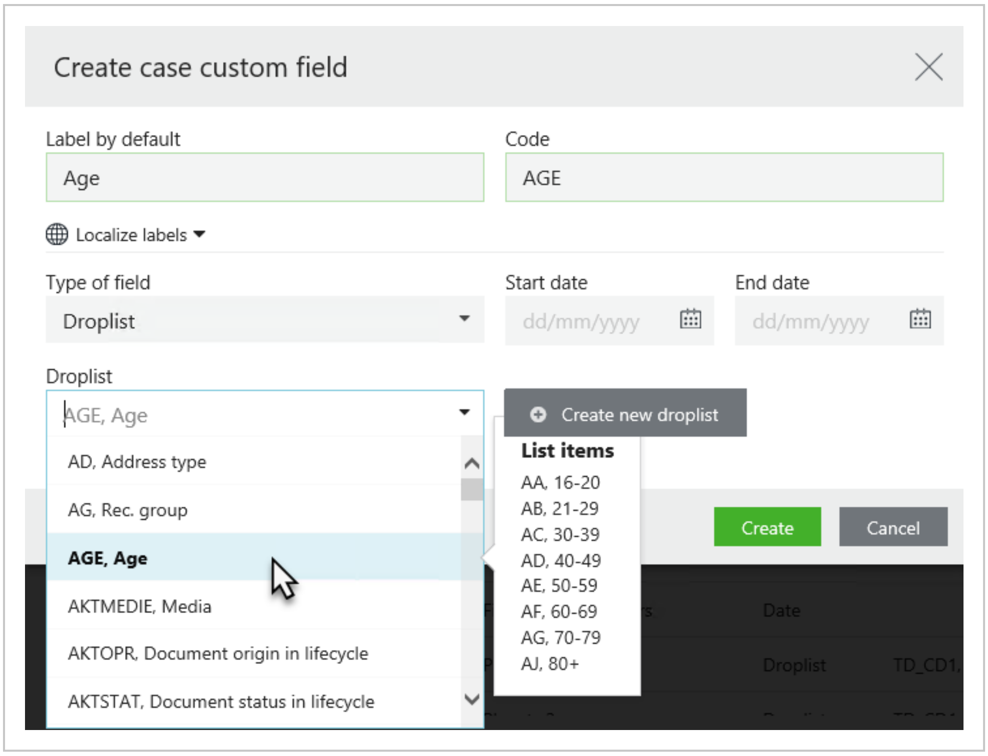
John applies to three faculties within the same university. In WorkZone Client, each faculty represents a separate case and each applicant represents a separate contact. John's admission scores differ for each faculty, therefore, this information cannot be added to John's contact information. Instead, you can add a new custom field named **Score** on the **Case parties** tab that will represent applicants' scores for a particular faculty. For example, John's admission scores are 38 for the first faculty, 41 for the second one, and 9 for the third one. In WorkZone Client, you can see John's admission scores for the first faculty if you add the **Score** table column on the **Parties** tab on the **First faculty** case.



Create a custom field

Create a custom field to make it available for the WorkZone Client users.

1. On the main page, select **Case**, **Document**, **Contact**, or **Address** depending on where to you want to add a custom field.
2. On the **Custom fields** tab, in the right bottom corner, click **Create**. The **Create custom field** dialog box opens.



3. Fill in the following fields to define properties of the custom field:

- **Label by default** – Default name that is visible for users.
- **Code** – The name of the custom field as it is registered in the database. The value in the **Code** field must be 11 characters or less.
- **Localize labels** – Optionally, specify names in other languages.
- **Type of field** – Data type for this field:
    - **Text** – string values;
        - **Validation rule** – Optionally, you can associate the custom field with the validation rule. The validation rule defines required text format. See how to configure validation rules.
    - **Date** – date values;
    - **Decimal** – floating-point numbers;
    - **Integer** – whole numbers;

        - **Droplist** – multiple values:
            - **Select droplist** – Select a droplist of a desired category. To view list items that are included in a list, point to the list name. See how to configure custom droplists.
            - **Create new droplist** – Click the button if you want to create a custom droplist that is relevant to your organization. You will be redirected to the Custom droplist page.
        - **Address** – custom field value registered in the database.
        - **Contact** – custom field value registered in the database.
        - **Employee** – custom field value registered in the database.
        - **Unit** – custom field value registered in the database.
        - **Case** – custom field value registered in the database.
        - **Document** – custom field value registered in the database.
    - **Start date** – The date when the custom field becomes active. Before the start date, the custom field is invisible in the user interface.
    - **End date** – The date when the custom field is deactivated. After the end date, the custom field becomes invisible in the user interface.
4. Click **Create**.

Edit a custom field

1. Open a list with the custom field that you want to edit and point to the field. A menu bar with action buttons appears.
2. Click **Edit**.

3. Apply the required changes in the **Edit custom field** dialog box.

   > **Note:** You cannot edit the **Label by default**, **Code** and **Type of field** values.

4. Click **Save**.

Delete a custom field

> **Note:** You can only delete custom fields that have no records in the database.

1. Open a list with the custom field that you want to delete and point to the field. A menu bar with action buttons appears.
2. Click **Delete** and then click **Delete**.

6. Taxonomy

6.1 Case number format

> **Prerequisite:** To configure case number format, you must have the DATAADM access code.

You can define the global case number format, as well as the case number format for individual case groups.

About case numbers

Case number is a unique identifier for each separate case. Case numbers are generated based on a case number mask that you define in WorkZone Configurator. A case number mask consists of different predefined components such as case group, CPR-number, sequence number and others. Case number components are not case-sensitive, except for l and L. See Components and syntax of case number mask.

Case number requirements

- The case number length cannot exceed 30 characters. All components are taken into account including separators.
- If the global case number mask does not include **g** = class or **u** = subnumber, you must use a hash symbol (#) before any other component(s).
- The component **L** or **l** = sequence number is mandatory.
- Ensure that the case number mask only includes components that are mandatory for case creation. If you want to include optional components, put them in brackets as a conditional information. Without brackets, the case with the skipped optional component will not be created.

Case numbers of failed cases

In rare situations, a case number may be skipped. This may happen, for example, if the case creation failed due to the transaction being rolled back. Even though the case is not created, the case number is generated and added to the log with skipped case numbers. You can find the log in the `file_numbering_error` table or through the register `file_numbering_error (OData: FileNumberingErrors)`. Consult the log if you suspect that a case has been lost.

Define global case number format

1. On the start page, click **Taxonomy**.
2. On the **Taxonomy** page, select the **Case number format** tab.
3. Define a case number mask. See Components and syntax of case number mask.
4. Click **Save**.

Define case number format for a case group

1. On the start page, click **Taxonomy**.
2. On the **Taxonomy** page, select the **Classification scheme** tab.
3. Select the case group you want to edit, and point to it. A menu bar with action buttons will appear.
4. Click **Define default values**.
5. Under **Case information** section, enter the needed **Case number format** value .
6. Click **Save**.

See Define default values for a case group.

Components and syntax of a Case number mask

You can build your own case number format by using the components listed in the table below

Important: Components are not case-sensitive (except for l and L. See table below).

Tip: Use predefined separators (hyphen, forward slash, and period) to make the case number readable and easily understandable.

Character	Meaning	Input requirements and examples

`a or A`	**Year** – The year when a case is created.	• **aa** – Use this to display the last 2 digits of the year.
		• **aaaa** – Use this to display all 4 digits of the year.
		`If the current year is 2017, then:`
		`aa = 17`
		`aaaa = 2017`

`g or G`	**Class** – The code of a **case group**.	• **g** – Use this to display the full code. You may enter more `g`s – this will not affect the case numbers.
		`If the code of a Class is 177, then:`
		`g = 177`
		`ggg = 177`
		`ggggg = 177`

`u or U`	**Subnumber** – The code of a	• **u** – Use this to display the full

Character	Meaning	Input requirements and examples

	case child group. To enable subnumbers, select the **Fixed SubNumber** check box in the classification scheme in WorkZone Configuration Management.	code. You may enter more `u`s – this will not affect the case numbers.
		`If the code of a Subnumber is 04, then:`
		`u = 04`
		`uu = 04`
		`uuuuu = 04`

`s or S`	**Responsible organizational unit** – The code of a responsible organizational unit.	• **s** – You can define the length of the responsible unit in case numbers. To display the full name of a responsible unit, ensure that you have included a sufficient number of `s` to the case number mask.
		`If the code of a Responsible organizational unit is IT01, then:`
		`s = I`
		`ssss = IT01`
		`sssss = IT01`

`t or T`	**Case type** – The domain of a case type.	• **t** – Use this to display the full domain. You may enter more `t`s – this will not affect the case numbers. `If the case type is PERSONNEL, then:`

Character	Meaning	Input requirements and examples

		`t = PERSONNEL`
		`ttttttttt = PERSONNEL`
		`tttttttttttttt= PERSONNEL`

`l` or `L`	**Sequence number** – The number of a case in a case sequence.	• **`l`** – Use the lower-case characters to apply regular sequence numbers.
		• **`L`** – Use the upper-case characters to apply sequence numbers with a fixed length. Digits will be preceded by zeros when the sequence number is lower than the allocated Ls.
		`If the Sequence number of a case is 222, then:`
		`l = 222`
		`lll = 222`
		`lllll = 222`
		`L = 222`
		`LLL = 222`
		`LLLLL = 00222`

`c or C`	**CPR-number** – The Danish personal identification number. It is a ten-digit number with the format `DDMMYY-SSSS`, where `DDMMYY` is the date of birth and `SSSS` is a sequence number.	• **`cccccc-cccc`** – This is the only acceptable format for the component. CPR-number is a ten-digit number with the format `DDMMYY-SSSS`, where `DDMMYY` is the date of birth

Character	Meaning	Input requirements and examples
		and SSSS is a sequence number.
z or Z	**Fictitious CPR-number** – This is normally used locally for persons without an officially generated CPR-number. Use the same format as for a regular CPR number: zzzzzz-zzzz.	• **zzzzzz-zzzz** – This is the only acceptable format for the component. A fictitious CPR-number is normally used locally for persons without an officially generated CPR-number.
– / .	You can use hyphen, slash, and period as **separators** for a case number.	
()	**Conditional information** – The part in brackets is only included in the case number if the related value exists in the database.	The case number mask designed as aaaa-gggg (/uuuu)-LLLL may generate the following case numbers: 2017-3720/555-0001 – if subnumbers are mandatory for the given class. 2017-2650-0001 – if subnumbers are not defined.
#	You can **adjust sequence numbering** by using the hash	See the Hash influence table.

Character	Meaning	Input requirements and examples
	symbol # before different components.	

Hash influence

Without a hash, new values of class and/or subnumbers initiate new separate numbering while other components do not. This fits to the most common scenario when each department (case group and child case group in the WorkZone terms) requires its own separate numbering of cases. However, WorkZone provides wide opportunities to adjust case numbering to any other scenario by using hash `#`. The hash changes the default behavior to the opposite one: new values of class and/or subnumbers do not initiate new separate numbering while other components do.

> **Tip:** Values in bold initiate new numbering.

Component	No hash	With hash
• Class (g) • Subnumber (u)	Class and/or subnumber initiate new numbering. If the case number mask is designed as `g.u/l`, it then generates the following case numbers: • 11.22/1 • 11.22/2 • **33**.22/1 • 33.**44**/1	With the hash, class and/or subnumber do not initiate new numbering. **Tip:** Add hash before class and subnumber for global numbering. If the case number mask designed as `g.#u/l`, it then generates the following case numbers: • 11.22/1 • 11.22/2 • **33**.22/1 • 33.44/2

<table>
<tr><th>Component</th><th>No hash</th><th>With hash</th></tr>
<tr><td>Responsible organizational unit (s)
Case type (t)
CPR-number (c)
Fictitious CPR-number (z)</td><td>The components do not initiate new numbering.
If the case number mask is designed as <code>cccccc-cccc/g/l</code>, it then generates the following case numbers:
240185-5555/11/1
240185-6666/11/2
240185-5555/33/1</td><td>With the hash, the components initiate new numbering.
If the case number mask is designed as <code>#cccccc-cccc/g/l</code>, it then generates the following case numbers:
240185-5555/11/1
240185-6666/11/1
240185-5555/33/1</td></tr>
<tr><td>Year (a)</td><td>Year does not impact numbering. You must set the hash to define the numbering.
If the case number mask is designed as <code>aaaa/l</code>, it then generates the following case numbers:
2017/1
2017/1
2017/1
2018/1</td><td>With the hash on the sequence number, the sequence number continues regardless of the change in year.
If the case number mask is designed as <code>aaaa/#l</code> for global numbering, it then generates the following case numbers:
2017/1
2017/2
2017/3
2018/4
With the hash on the year, the sequence number is automatically reset when the year changes.</td></tr>
</table>

Component	No hash	With hash
		If the case number mask is designed as `#aaaa/l`, it then generates the following case numbers: • 2017/1 • 2017/2 • 2017/3 • **2018**/1

6.2 Classification scheme

> **Prerequisite:** To configure case groups, you must have the DATAADM access code.

About the classification scheme

Traditionally, the case groups have been organized into 10 main classes. These are each divided into 10 divisions, and each division into 10 sections. This provides 10 main classes, 100 divisions and 1000 sections. The classification scheme is in many ways equivalent to the decimal classification systems employed by the public libraries, for example, the Universal Decimal Classification system.

The purpose of a classification scheme is to organize the cases handled in WorkZone Client.

About case groups

The *case groups* are the individual items that together constitute the classification scheme. The purpose of the case groups and the subdivision is to facilitate retrieval of the cases and the documents. Each case group has an identifier (usually it is a decimal number).

Often the case group is a part of the case number. The case groups are subdivided into as many levels as a case group's subject dictates. Cases are created on the lowest level on the most specific case group, representing the subject and content of the case matter.

Mandatory system-owned case groups

Some case groups are mandatory and system-owned. Do not remove these case groups.

- SJ-STD contains all desktop cases i.e. when a new user logs on to WorkZone Client for the first time a desktop case is created. The desktop case is named SJ-STD-<username> for example SJ-STD-ABC.
- SJ-TEST is used for test purposes.
- SJ-SYSTEM contains and owns SJ-STD and SJ-TEST.
- SJ-TEMP is used by WorkZone Explorer and WorkZone Meeting. SJ-TEMP can be used for creating cases (if the toggle button is enabled). In contrast to other system case groups, cases belonging to SJ-TEMP can be re-classified and placed in a new case group.
- SJ-AGENDA is used by WorkZone Meeting.

Child case groups

In WorkZone, *child case group* stands for subnumbers. It is an optional division for case groups that you can introduce, if needed. Subnumbers are not represented in the classification scheme. You can see a list of subnumbers on the **Subnumbers** tab. To connect a case group with subnumbers, you must create a subnumber type and select it in the **Subnumber type** field both on a case group and a subnumber.

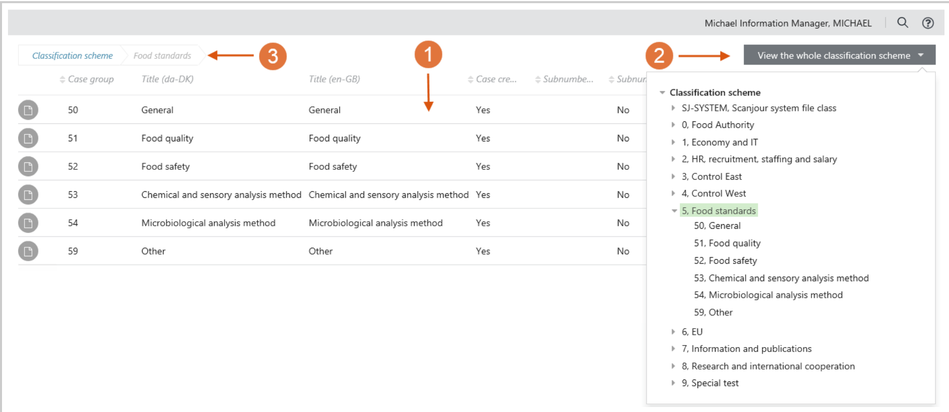
Create a case group

1. On the main page, select **Taxonomy**.
2. On the **Taxonomy** page, select the **Classification scheme** tab.

3. To create a new case group, click **Create** at the desired level.

> **Tip:** You can navigate classification scheme levels in different ways:

- double-click case groups **(1)**;
- click **View the whole classification scheme** to view its tree structure**(2)**;
- use a breadcrumbs trail **(3)**.



4. Fill in the following fields in the **Create case group** dialog box:

- **Title** – The default name that is visible for administrators and users.
- **Case group** – The code of the case group in the database.
- **Localize title** – Optionally, specify names in other languages.
- **Subnumber type** – Select a subnumber type to make specific child case groups available for this case group.
- **Case creation** – Enable this toggle button to make this case group selectable during case creation.
- **Subnumber required** – Enable this toggle bar to make child case groups mandatory for selection.
- **Start date** – The date when the case group becomes active.
- **End date** – The date when the case group is deactivated.

- **Access code** – Click 🔒 and list access codes that grant users to see and select this case group. If you leave the field empty, everyone who creates a case can select this case group.

  > **Note:** Privacy settings also apply to the **Classification scheme** report.

5. Click **Create**.

Edit a case group

1. Open classification scheme and select a case group that you want to edit.
2. Point to it. A menu bar with action buttons then appears.
3. Click **Edit**.
4. Apply the required changes in the **Edit case group** dialog box.

   > **Note:** You cannot edit the **Title** and **Case group** values.

5. Click **Save**.

Define default values for a case group

You can predefine default values for a new case. When a user creates a new case and selects a case group, fields that you define here will be filled in automatically. This saves users time and exempts them from the routine work. Users can change the default values at any time.

To define default values, complete the following steps:

1. Open classification scheme. Select a case group whose default values you want to edit.
2. Point to it. A menu bar with action buttons appears.

3. Click **Define default values**.

4. Apply the required changes for the current case group in the **Define default values** dialog box.

    - **Case information**

        - **Case type** – The default case type. The case types come from the custom droplist **ST, Case type**.
        - **Responsible unit** – The default responsible unit. You can also select **@Unit** to apply the user's unit.
        - **Acting unit** – The default acting unit. You can also select **@Unit** to apply the user's unit.
        - **Case handler** – The selected user is applied automatically as case handler. You can also select **@Me** to apply the current user who creates the case as case handler.
        - **Assistant** – The selected user is applied automatically as the case handler's assistant. You can also select **@Me** to apply the current user who creates the case as assistant.
        - **Case number format** – Specify the case number mask that is specific for cases in the current case group.
        - **Read access** – The default read access code that determines which users are permitted to see this case.
        - **Write access** – The default write access code that determines which users are permitted to edit this case.
        - **Classification code** – Specify the classification code to be assigned to documents that belong to cases from the current case group. If you leave this field empty, the default classification code will be applied.

- **Retention**
  - **Retention code** – Specify the default retention code for case in the current case group. Retention code defines conditions and time for a case deletion.
- **Reply time for documents**
  - **First document with record number** – Specify when the first archived document on a case must be replied.
  - **Following documents with record number** – Specify when the following archived documents on a case must be replied.

Example:

> A university announces a new applying period. There is a special case group for the applicants' cases. In WorkZone Configurator, administrator sets reply time in the current case group as 5 days for the first document and 14 days for the following documents. Ann applies to the university and sends required documents on the 1st of July. An officer creates a new case for Ann and saves her email with attachments on the case. At the same day the officer archives her email and the **Reply deadline** field is automatically set to 6th of July. The officer then archives attached documents and the **Reply deadline** fields are automatically set to 15th of July. This means that the officer must inform Ann that her letter was received by the 6th of July and other documents should be processed by 15th of July.

- **Draft versioning**
  - **Apply draft versioning automatically to this case group** – Enable this toggle bar to automatically activate the draft versioning functionality for the documents that belong to the current case group.

  > **Notes:**
  >
  > - To apply this setting, draft versioning must be enabled on the global level.
  > - Automatic applying of draft versioning on the case groups level has higher priority than the identical setting on the global level.

- **Filing period** – Enter information facilitating a shift from one classification period to another in this section.
  - **Upcoming case group** – The default case group in the next classification period.
  - **Upcoming subnumber type** – The default subnumber type in the next classification period.
  - **Disposal code** – A code that defines the preservation and disposal rules for the case group.
  - **Transfer code** – A code that defines how cases and documents in the current case group are transferred to the next classification period.

    > **Note:** The disposal and transfer codes are defined by each organization individually.

5. Click **Save**.

Define default references for a case group

You can define the following references for a case group:

- Information
- Dates
- Keywords
- Contacts

When users create new cases in WorkZone Client, they will see these default references on the relative detail tabs. This eases case registration and ensures its high quality.

To define default references, complete the following steps:

1. Open classification scheme. Select a case group whose default references you want to define or edit.
2. Point to it. A menu bar with action buttons then appears.
3. Click **Define default references**.
4. In the **Define default references** dialog box, select a desired tab and add or edit the references.

   > **Tip:** To delete a reference, click on the ✖ **Delete reference** icon that is located within the reference frame.

   Information:

   - **Information type** – Select a type of information. This drop-down list contains values defined on the Information types page on cases.
   - **Information** – Type an information or select it from a drop-down list, if defined.

   Dates:

- **Date type** – Select date type. This drop-down list contains values defined on the Date types page on cases.
- **Relative date stamp** – Define default value for a date. This can be the first day of a week, month, quarter, year or a current day towards the date when a user creates a new case.

Example:

> For the *Subscription* date type, you set **Relative date stamp** to *The first day of the month*. A user creates a new case on September, 15. The new case has a date reference *Subscription* with the value *September, 1*.

- **Modifier** – Adjust default value for a date. You can move the date to the past (use "-") or to the future (use "+") towards the date set in the **Relative date stamp** field.

Example:

> For the *Subscription* date type, you set **Relative date stamp** to *The first day of the month* and **Modifier** to *-2*. A user creates a new case on September, 15. The new case has a date reference *Subscription* with the value *July, 1*.

Keywords:

- **Keywords** – Start typing a desired keyword and select it from available options. A list of all options is defined on the Dictionary page.

Contacts:

- **Contact type** – Select a type of contact from the drop-down list.
- **Contact code** – Enter a unique code of contact. Depending on the contact type, it can be ID, CPR/CVR number or another code generated by WorkZone.
- **Role** – Select a role for the current contact from the drop-down list. The list consists of the **Case party roles** values defined on the Parties and references page.

5. Click **Save** to save data on all tabs and close the dialog box.

Delete a case group

You can only delete a case group if it meets these conditions:

- It does not have any records in the database.
- It is not a parent case group for case groups of lower levels.

1. Open classification scheme and select a case group that you want to delete.
2. Point to it. A menu bar with action buttons appears.
3. Click **Delete**, and then click **Delete**.

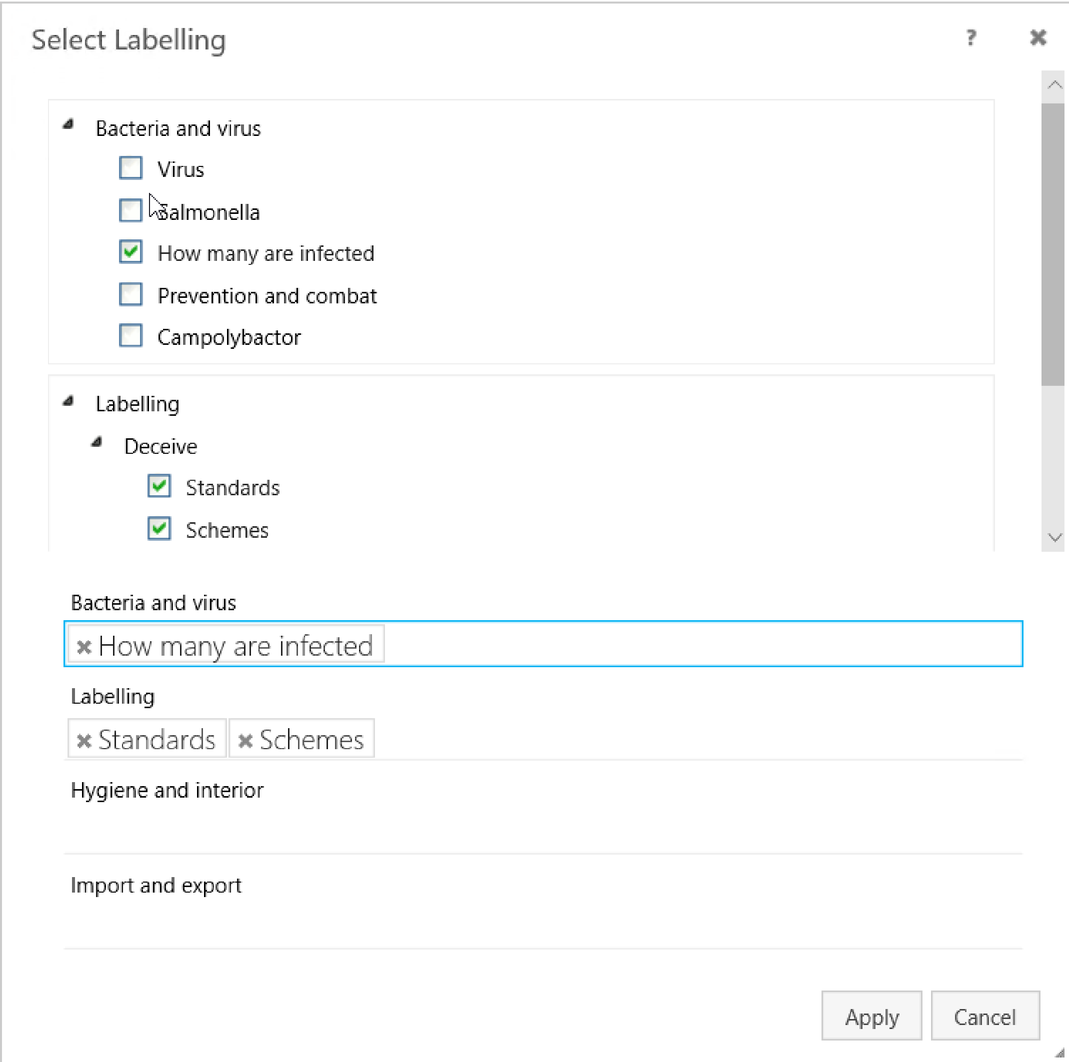
6.3 Facets

Prerequisite: To configure facets, you must have the DATAADM access code.

About facets

Facets represent case properties that are specific for an organization. Facets are used as a complimentary way to the Classification scheme to classify cases in WorkZone Client or WorkZone for Office. In contrast with case groups, users can select multiple facets for a case. Facets are defined by an administrator and then available on a case detail page.

Example of a facet classification in WorkZone Client:

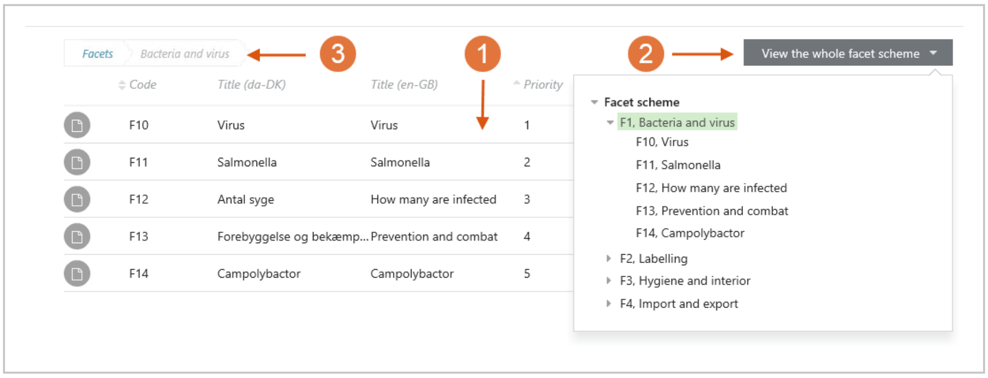


Create a facet

1. On the main page, select **Taxonomy**.
2. On the **Taxonomy** page, select the **Facets** tab.
3. To create a new facet, click **Create** at the desired level.

> **Tip:** You can navigate facet levels in different ways:

- double-click facets **(1)**;
- click **View the whole facet scheme** to view its tree structure**(2)**;
- use a breadcrumbs trail **(3)**.



4. Fill in the following fields in the **Create facet** dialog box:

   - **Title** – The default name that is visible for administrators and users.
   - **Code** – The code of the facet in the database. The facet code must be unique across the case groups and other facet codes.
   - **Localize labels** – Optionally, specify names in other languages.
   - **Priority** – Define the order of facets in the facet classification. You can enter an integer number starting from 1. A facet with priority 1 will be shown above other facets in the facet classification.

     > **Note:** Priorities do not affect each other. For example, if you have five facets with priorities 1, 2, 3, 4, 5 and then you add a new facet with priority 1, then facet priorities will be 1, 1, 2, 3, 4, 5 (not 1, 2, 3, 4, 5, 6).

   - **Case creation** – Enable this toggle button to make this facet selectable during case creation.
   - **Start date** – The date when the facet becomes active.
   - **End date** – The date when the facet is deactivated.

- **Access code** – Click and list access codes that grant users to see and select this facet. If you leave the field empty, everyone who creates a case can select this facet.

5. Click **Create**.

Edit a facet

1. Open facet scheme and select a facet that you want to edit.
2. Point to it. A menu bar with action buttons then appears.
3. Click **Edit**.
4. Apply the required changes in the **Edit facet** dialog box.

   > **Note:** You cannot edit the **Title** and **Facet code** values.

5. Click **Save**.

Delete a facet

You can only delete a facet if it meets these conditions:

- It does not have any records in the database.
- It is not a parent facet for facets of lower levels.

1. Open facet scheme and select a facet that you want to delete.
2. Point to it. A menu bar with action buttons appears.
3. Click **Delete**, and then click **Delete**.

6.4 Subnumber types

> **Prerequisite:** To configure subnumber types, you must have the DATAADM access code.

About subnumber types

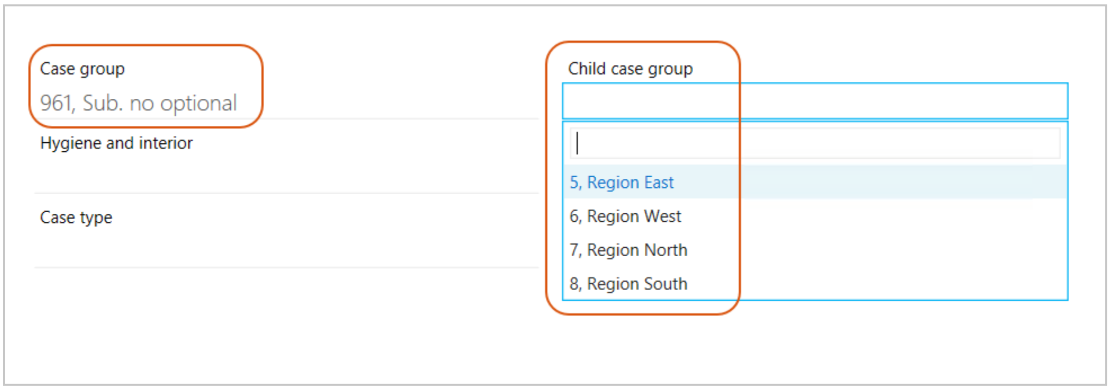
You can add, edit, and delete subnumber types in WorkZone Configurator. The **Subnumber type** is the connector between case groups and their child case groups.

Example:

You want to provide child case groups that divide cases by a region, for example, regions *East, West, North*, and *South*.

1. In WorkZone Configurator, you create the *REGION* subnumber type.
2. You create subnumbers *East, West, North,* and *South*, and select the *REGION* subnumber type for each of them.
3. When you then create a new case group, optionally, you can select the desired subnumber type for it. If you select *REGION*, the new case group will include four child case groups: regions *East, West, North*, and *South*.

In WorkZone Client, users only see case groups and their child case groups. The subnumber type functions as a connector, and it is not visible on the UI.



Create a subnumber type

1. On the main page, select **Taxonomy**.
2. On the **Subnumber types** tab, in the bottom-right corner of the page, click **Create**.
3. Fill in the following fields in the **Add subnumber type** dialog box:
    - **Label by default** – The default name that is visible for administrators.
    - **Code** – The code in the database.
    - **Localize labels** – Optionally, specify names in other languages.
    - **Selectable** - Disable to make this value non-selectable for the users in WorkZone Client or WorkZone 365.
    - **Start date** – The date when the subnumber type becomes active.
    - **End date** – The date when the subnumber type is deactivated.
4. Click **Save**.

Edit a subnumber type

1. Open a list with the subnumber type that you want to edit, and point to it. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit subnumber type** dialog box.

    > **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete a subnumber type

You can only delete a subnumber type that does not have any records in the database.

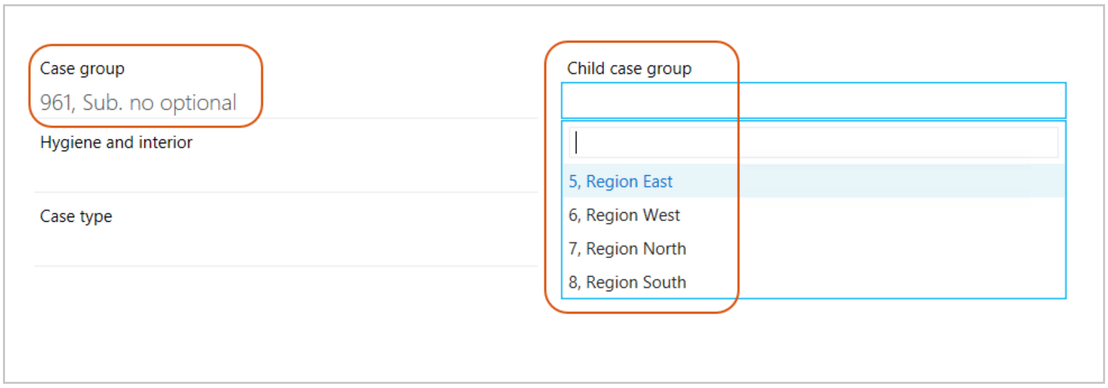
1. Open a list with the subnumber type that you want to delete, and point to it. A menu bar with action buttons appears.
2. Click **Delete**, and then click **Delete**.

6.5 Subnumbers

Prerequisite: To configure subnumbers, you must have the DATAADM access code.

About subnumbers

Subnumber stands for a **Child case group** in WorkZone Client and **Sub no.** in WorkZone for Office. You can add, edit, and delete subnumbers in WorkZone Configurator.



In this picture, *5, 6, 7, 8* are numbers of subnumbers, and regions *East, West, North*, *South* are texts.

Create a subnumber

1. On the main page, select **Taxonomy**.
2. On the **Subnumbers** tab, in the bottom-right corner of the page, click **Create**.

3. Fill in the following fields in the **Add subnumber** dialog box:
    - **Text** – The default name that is visible for users.
    - **Number** – The code in the database. The code will be also visible for users.
    - **Localize labels** – Optionally, specify names in other languages.
    - **Subnumber type** – Select a subnumber type to define a group to which the new subnumber must belong. See About subnumber types.
    - **In use** – Enable the toggle bar if you want to make the subnumber available for users. If you disable the toggle bar, users will not see this subnumber.
4. Click **Save**.

Edit a subnumber

1. Open a list with the subnumber that you want to edit, and point to it. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit subnumber** dialog box.

    > **Note:** You cannot edit the **Text** and **Number** values.

4. Click **Save**.

Delete a subnumber

You can only delete a subnumber that is not in used yet.

1. Open a list with the subnumber that you want to delete, and point to it. A menu bar with action buttons appears.

2. Click **Delete**, and then click **Delete**.

6.6 Dictionary and keywords

Prerequisite: To configure the dictionary, you must have the DATAADM access code.

About keywords and dictionary

Keywords are tags that users can assign to a desired case, document or contact. By assigning keywords, users classify cases, documents, and contacts in a convenient way, and users can then easily find the needed items. See Search using text fields.

There are two ways to define a new keyword:

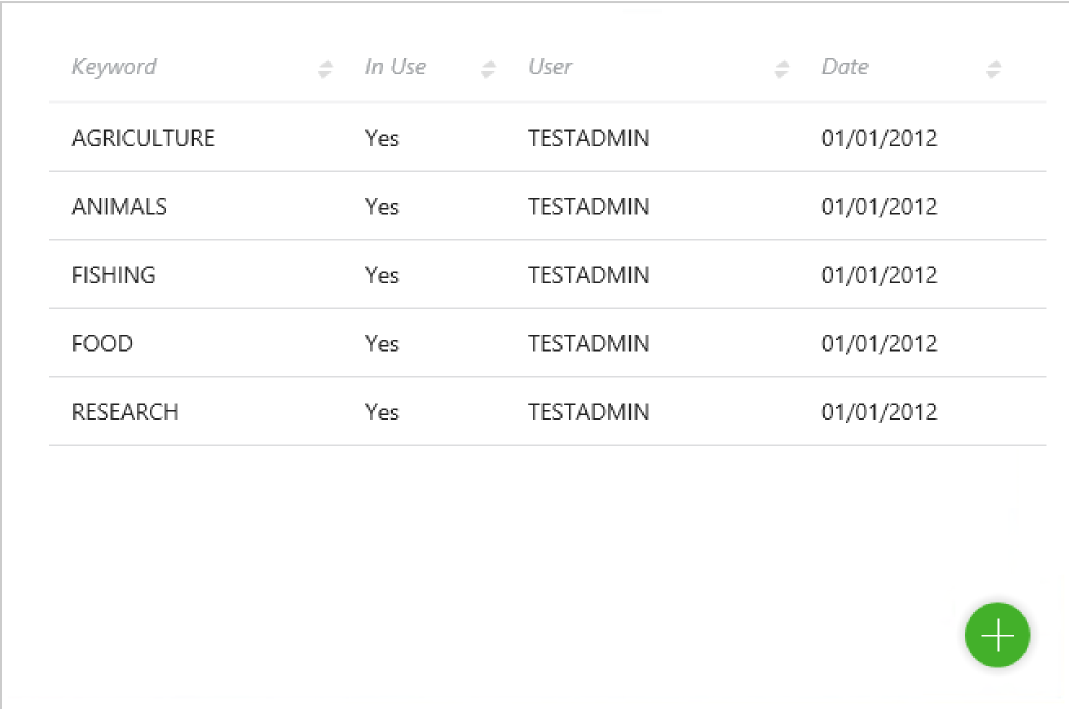
- An administrator creates the default *organizational* keywords. See Create a keyword.
- A user creates his or her *own* keyword in WorkZone Client. See Add or remove keywords.

The **Dictionary** is a set of keywords that is relevant to your organization.

In WorkZone Configurator, you can perform the following actions:

- Activate or deactivate the possibility for users to add their own keywords.
- Set prohibited characters for the users' keywords.
- Set the minimum length for a keyword. See Configure dictionary settings.

You can see the list of all available keywords from the dictionary on the **Dictionary** tab. The list represents keyword names and shows whether the keywords are currently available for users. The list also specifies who has created the keywords, and when the keywords were created.

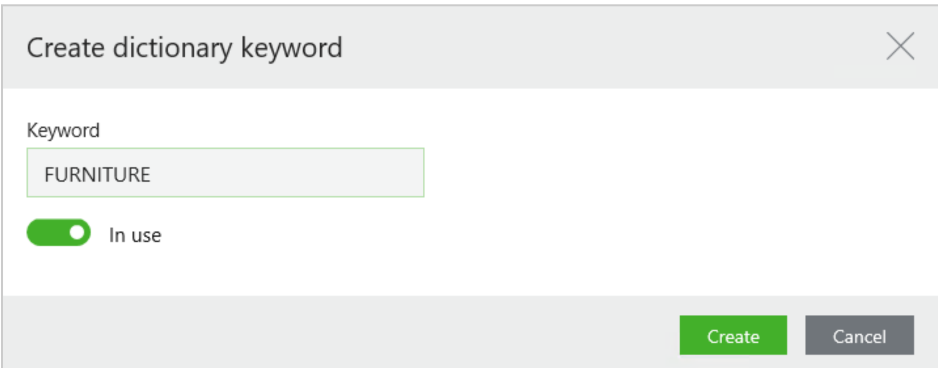


Keyword	In Use	User	Date
AGRICULTURE	Yes	TESTADMIN	01/01/2012
ANIMALS	Yes	TESTADMIN	01/01/2012
FISHING	Yes	TESTADMIN	01/01/2012
FOOD	Yes	TESTADMIN	01/01/2012
RESEARCH	Yes	TESTADMIN	01/01/2012

Create a keyword

Create a keyword to make it available for the WorkZone Client users.

1. On the main page, select **Taxonomy**.
2. On the **Dictionary** tab, in the right bottom corner, click **Create**. The **Create dictionary keyword** dialog box opens.



3. Specify the keyword, and enable the **In use** toggle bar if you want to make it available for the WorkZone Client users. If you disable the toggle bar, users will not see this keyword.

4. Click **Save**. Your name and the current date will be added to the database automatically.

Edit a keyword

You can only change the **In use** value.

1. Open a list of keywords from the dictionary. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit dictionary keyword** dialog box.
4. Click **Save**.

Delete a keyword

You can only delete keywords that have not been used by users yet.

1. Open a list with the custom field that you want to delete, and point to the field. A menu bar with action buttons appears.
2. Click **Delete**, and then click **Delete**.

Configure dictionary settings

1. On the start page, click **Taxonomy**.
2. On the **Taxonomy** page, select the **Dictionary settings** tab.
3. Configure the dictionary:
    - **Keywords from the dictionary are only permitted** – Activate this toggle button to allow users to use only the default organizational keywords from the dictionary. In other words, users cannot add their own keywords. If you deactivate this toggle button, users will be able to

use both organizational keywords and their own keywords.

- **Illegal characters** – Add prohibited characters that users cannot use in their keywords. Enter the characters without spaces and commas, unless you want to prohibit usage of spaces or commas.
- **Minimum length** – Specify the least number of characters for creating a new keyword. If a user enters a keyword with a fewer number of characters, the keyword will be rejected.

When you make a change, it is saved automatically.

7. Global settings

7.1 Feature settings

> **Prerequisite:** To configure feature settings, you must have the LICENSEADM access code.

All WorkZone features and modules are automatically installed during initial WorkZone installation and must be individually enabled or disabled when you configure your WorkZone installation for use. Some features and modules are enabled by default, while others must be enabled and configured manually.

On the **Feature settings** page, you can enable specific WorkZone features and their modules by selecting the feature and/or module. Disable an enabled feature or module by selecting the feature or module again, clearing the check box.

Color coding

Black features and modules can be edited (enabled or disabled) by license administrators, while light gray features and modules cannot be edited. The reason you cannot edit these features and modules is that in many cases, light gray features and modules are necessary parts of WorkZone and cannot be disabled without negatively impacting WorkZone functionality.

Upgrading

When upgrading your WorkZone installation, your feature settings will be saved and reinstated after the upgrade. You should double-check the feature settings after an upgrade to ensure the correct features and modules still are enabled as well as configure any new features and modules included in the upgrade.

Save your settings

Click the **Save** button to save your feature settings to the database.

7.2 Language settings

> **Prerequisite:** To configure language settings, you must have the CONFIGADM access code.

If your system uses multiple languages, you can activate or deactivate available language packs and set the default language, as well as to set different date and time format to use for each language in WorkZone Client.

> **Important:** Changing language settings requires the web server restart (IIReset).

Activate or deactivate language

1. On the start page, select **Global** and click the **Language settings** tab.
2. Under **Available language packs**, enable or disable the needed toggle buttons to activate or deactivate that language pack.

> **Note:** You cannot deactivate the language which is currently selected as the default language.

Set default language

1. On the start page, select **Global** and click the **Language settings** tab.
2. Click **Set default language**, select the needed language from the droplist.

Set date and time format for selected language

1. On the start page, select **Global** and click the **Language settings** tab.
2. Select the language for which you want to edit the date and time format, and click .
3. Enter the date and time format to use.

   You can use the following patterns:

   - yyyy - year
   - MM - month
   - dd - day
   - hh - hours
   - mm - minutes
   - ss - seconds

   You can use the following separators: . (period), - (hyphen), : (colon), and / (slash). You cannot use separators between the date and time values.

7.3 System messages

> **Prerequisite:** To view and configure system messages, you must have the CONFIGADM access code.

You can create system messages that will be displayed to the end users in the user interface of the WorkZone applications. For example, you can create a system message about planned maintenance hours during which your system will be down, or any other important information. You can assign a required access code to a system message, and thereby define whether this message will be displayed to all users or only to specific users and groups of users.

System messages are displayed prominently in the top right corner of WorkZone Client whenever the browser is loaded or re-loaded. With the **Always visible** option enabled, system messages cannot be closed, but are semi-transparent and can be clicked through. If not marked as **Always visible**, system messages can be closed by clicking the message (yet the message will be displayed again once the browser is reloaded or reopened).

Create a new system message

1. In WorkZone Configurator, click **Global** > **System messages**.
2. On the **System messages** page, click **Create** to open the **Create system message** form.
3. Fill in the following fields:
    - **Title** - Enter the message title (visible to users). Click **Localize title**, and:
        - In the **Label (da-DK)** field, enter a Danish label for the custom type if you need to provide a Danish label.
        - In the **Label (de-DE)** field, enter a German label for the custom type if you need to provide a German label.
        - In the **Label (en-GB)** field, enter an English label for the custom type if you need to provide a specific English label.
    - **Message text** - Enter the message text (visible to users). Click **Localize message**, and:
        - In the **Label (da-DK)** field, enter a Danish label for the custom type if you need to provide a Danish label.
        - In the **Label (de-DE)** field, enter a German label for the custom type if you need to provide a German label.

    - In the **Label (en-GB)** field, enter an English label for the custom type if you need to provide a specific English label.

> **Tip:** You can also use in your message text valid HTML code (incorrect code will be ignored) and SVG icons as a code (to obtain the code, open your SVG icon in any text editor, and copy the displayed code).

- **Scope** - From the droplist, select WorkZone applications in which this system message should be displayed. Currently, system messages can only be displayed in WorkZone Client.
- **Type** - From the droplist, select relevant type(s) of this system message. There are three types of system messages:
    - **Error**: The message is displayed in a red message field.
    - **Information**: The message is displayed in a blue message field.
    - **Warning**: The message is displayed in an orange message field.
- **Always visible** - Enable this option to prevent the message from being closed.
- **Start date** - The date when this system message becomes active. Before the start date, the message is invisible on the user interface.
- **End date** - The date when this system message becomes inactive. After the end date, the message becomes invisible on the user interface.
- **Access code** - If needed, select the required access code that users must have to see this system message.

4. Click **Create**.

Edit an existing system message

1. In WorkZone Configurator, click **Global** > **System messages**.
2. On the **System messages** page, hover the mouse over the system message you want to edit, and in the menu click **Edit**.
3. On the **Edit system message** form, change the field values and radio button settings and click the **Save** button to close the form and update the system message settings.

7.4 External databases

> **Prerequisite:** To configure external database, you must have the DATAADM access code.

WorkZone Client users might need to search and import documents from another database, for example, the historical one. To make it possible, you need to add and configure the external databases in WorkZone Configurator.

Add a database

1. On the start page, select **Global**.
2. On the **External databases** tab, click **Create**.
3. Fill in the following fields in the **Create external database** dialog box:
   - **Title** – The default name that is visible for users.
   - **Hostname** – Enter the hostname of the database.
   - **Description** – Optionally, enter the description and its localization.

- **Enabled** – Turn on to make the database available for users.

4. Click **Create**.

Edit a database

1. Select an external database that you want to edit.
2. Click **Edit**.
3. Apply the required changes in the **Edit external database** dialog box.
4. Click **Save**.

Delete a database

1. Select an external database that you want to delete.
2. Click **Delete**, and then click **Delete**.

7.5 OAuth2 settings

Prerequisite: To set up OAuth2, you must be assigned the OAUTH2ADM access code.

About WorkZone OAuth2

OAuth2 is an open standard authorization framework that allows users to grant applications temporary and limited access to their user account information on other websites without distributing sensitive information such as passwords. The OAuth2 framework delegates user authentication to the service that hosts the user account, and authorizes third-party applications to access the user account and is used by large internet-based companies to enable users to share information with third party applications or websites.

OAuth2 and WorkZone

The OAuth2 framework can be used in WorkZone to improve security and facilitate delegation of authorization between the WorkZone Content Server and external components or systems such as mobile devices or the WorkZone ClientWorkZone Content Server web application without exposing passwords or using "on-behalf-of" features.

The OAuth2 settings page

Use the **OAuth2 settings** page to set up, maintain and delete settings for using OAuth2 protocol for WorkZone.

Fields on the Create OAuth2 settings form

Field	Description
Client ID	Enter a unique ID of the client. You can use all characters in the client ID. • This is a mandatory field.
Client name	Enter a name for the client to provide an easier method of client identification. • This is a mandatory field.
Enabled	Enable the client for OAuth2 integration. • This option is enabled by default.
Allow access token via browser	Enable to receive access tokens via the browser. Disable this option to harden flows that allow multiple response types, for example, by disallowing a hybrid flow client that is supposed to use code id_ token to add the token response type and thus leaking the token to the browser.

Field	Description
	The access token is normally delivered with the redirect URI as query parameter, but in some scenarios it is not advisable to send the access token in this fashion and instead request the client and not the browser to retrieve the token from OAuth2 server. • This option is disabled by default.
Allow offline access	Enable the client to request refresh tokens by requesting the offline_access scope. • When this option is enabled: The client will receive a refresh token after the access token expires which enables the client to safely process requests offline and thereafter reconnect without requiring user authorization. • When this option is disabled: The client will not receive a refresh token after the access token expires, which will require the user to authorize the client again and repeatedly. This option is disabled by default.
Require proof key for code exchange	Enable to require the client utilizing an authorization code based grant type to send a proof key for code exchange. This is an additional mechanism to secure communication between the client and WorkZone. • This option is disabled by default.
Grant type	Select the **Grant type**, which specifies how a client is to interact with the OAuth2 IdentityServer. • This is a not a mandatory field, but if you want to use the OAuth2 framework for authentication, you must specify at least one grant type in this field. There are six types of available grant types:

Field	Description
	AUTHCODE (Authorization code): Originally specified by OAuth2. Provides a way to retrieve tokens on a back-channel as opposed to the browser front-channel. It also supports client authentication. **CLNTCRED** (Client credentials): Used for server-to-server communication. A token request is sent to the token endpoint and an access token that represents the client is returned. Tokens are always requested on behalf of a client and not a user. **DEVCODE** (Device code): Designed for browser-less and input constrained devices, where the device is unable to securely capture user credentials. The user authentication and consent is moved to an external device, for example a smart phone or tablet. **HYBRID** (Hybrid): A combination of the Implicit and Authorization code and uses a combination of multiple grant types. The identity token is transmitted via the browser channel and contains the signed protocol response along with signatures for other artifacts like the authorization code. **IMPLICIT** (Implicit): Optimized for browser-based applications. All tokens are transmitted through the browser but refresh tokens are not used. Implicit grant types are not recommended for JavaScript-based applications. **PASSWORD** (Password): Tokens are requested on behalf of the user. The user's name and password is sent to the token endpoint. You can select multiple grant types.
Client secret	Define one or more secrets that can authenticate the client (or API resource) to the OAuth2 server. In some situations clients need to authenticate with the OAuth2 Server and you can use the list of secrets for this authentication.

Field	Description
	• This is a not a mandatory field but if you want to use the OAuth2 framework for authentication, you must specify at least one secret in this field.
Redirect URI	Enter the URI the client is to be redirected to after successful OAuth2 authorization. • This is a not a mandatory field but if you want to use the OAuth2 framework for authentication, you must specify at least one redirect URI in this field.
Post logout redirect URI	Enter the URI the user is to be redirected to after successfully logging out the OAuth2 server. You can use this setting to specify a web page which will be displayed after the user has logged out from the OAuth2 server, for example, a web page displays a "You have been successfully logged out" message, prompt for a new log-in or perform a clean-up of used elements.

Creating, editing or deleting OAuth2 settings.

Create a new OAuth2 setting

1. In WorkZone Configurator, click **Global** > **OAuth2 Settings** to open the **OAuth2 settings** page.
2. On the **OAuth2 settings** page, click **Create** to open the **Create OAuth2 settings** form.

3. Fill in the following fields in the **Create OAuth2 settings** form:
   - **Client ID** - Enter a unique identifier for the client.
   - **Client name** - Enter a name for the client.
   - **Enabled** - Turn on to enable the client for using the OAuth2 framework for authentication.
   - **Allow offline access** - Turn on to enable the client to request refresh tokens from the OAuth2 server.
   - **Allow access token via browser** - Turn on to enable the client to receive access tokens via the browser.
   - **Require proof key for code exchange** - Turn on to require the client utilizing an authorization code based grant type to send a proof key for code exchange.
   - **Grant type** - Select which grant types to apply to the client.
   - **Client secret** - Select one or more secrets to use for additional authentication for the client.
   - **Redirect URI** - Select the URI the user is redirected to after authentication.
   - **Post logout redirect URI** - Select the URI the user is redirected to after logging off.
4. Click **Create** to close the form and create the OAuth2 setting.

Edit an existing OAuth2 setting

1. In WorkZone Configurator, click **Global** > **OAuth2 Settings** to open the **OAuth2 settings** page.
2. On the **OAuth2 settings** page, hover the mouse over the OAuth2 setting you want to edit, and click in the menu to open the **OAuth2 settings** form.

3. On the **OAuth2 settings** form, edit the values as needed.
4. Click **Save** to close the form and update the OAuth2 settings.

Delete an OAuth2 setting

1. In WorkZone Configurator, click **Global** > **OAuth2 Settings** to open the **OAuth2 settings** page.
2. On the **OAuth2 settings** page, hover the mouse over the OAuth2 setting you want to delete, and in the menu click **Delete** to open the **Delete OAuth2 settings** dialog.
3. In the **Delete OAuth2 settings** dialog, click **Delete** to delete the selected OAuth2 setting.

7.6 Agenda Management settings

> **Prerequisite:** To set up the integration to Agenda Management, you must be assigned the CONFIGADM access code.

The Ditmer Agenda Management module is installed automatically when WorkZone is installed, but integration to the module is not enabled by default.

Use the Agenda Management settings page to define the OAuth2 framework settings for integration to the Ditmer Agenda Management application.

> **Important:** The Ditmer Agenda Management module uses its own OAuth2 authentication framework to validate its own clients, where WorkZone is considered a client connecting to the Agenda Management module using the Agenda Management OAuth2 framework.
> This is not the same as using the WorkZone Content Server OAuth2 authentication

> framework for validation of WorkZone clients or other external devices when integrating to WorkZone.

All Agenda Management settings are mandatory and must be configured correctly.

If the settings are not configured correctly, the WorkZone product will not be authorized to access data from the Agenda Management module. In WorkZone Client, the **Case preparation** detail tab not be displayed and can therefore not be added to the Case detail page.

Field Descriptions

Field	Description
API Url	Enter the URL to the location of the API to the Ditmer Agenda Management module. The Agenda Management API is used by WorkZone Client to update and retrieve meeting data from the Agenda Management module. Only valid URLs can be saved.
App Url	Enter the URL to location of the Ditmer Agenda Management Application module. This setting is used to preview Agenda Management items in WorkZone Client. Only valid URLs can be saved.
Authentication URL	Enter the Agenda Management module's OAuth2 authentication endpoint URL. The **Authentication URL** and the **Token URL** settings are used to obtain the OAuth2 access token from the Agenda Management AOuth2 framework. Only valid URLs can be saved.
Token URL	Enter the Agenda Management module's OAuth2 token endpoint URL

Field	Description
	The **Authentication URL** and the **Token URL** settings are used to obtain the OAuth2 access token from the Agenda Management AOuth2 framework. Only valid URLs can be saved.
Client Secret	Define one or more secrets that can help authenticate WorkZone to the Agenda Management OAuth2 server.

7.7 Templafy settings

Prerequisite: To configure Templafy settings, you must have the CONFIGADM access code.

If your organization uses Templafy to store and manage its Microsoft Office templates, you can configure settings for the Templafy connection and be able to create documents (Word, Excel, or Powerpoint) in WorkZone Client based on the Templafy templates. For more information, see Create a document (Word, Excel or Powerpoint) from Templafy in WorkZone Client User Guide.

Set up Templafy connection

1. On the start page, select **Global** and click the **Templafy settings** tab.
2. Under **Templafy service URL**, enter the URL to your Templafy service, including your tennant ID, in the following format.

Tip: Use the following format: https://[tenantID].templafy.com/documents?ExternalSystemId=workzone

7.8 Access code filters

> **Prerequisite:** To configure access code filters, you must have the MEDARBADM, AFDADM, and STJERNEADM access codes.

The **Read access** and **Write access** fields in WorkZone Client display organizational units and individual users in the same drop-down list.

> **Tip:** Find more information about organizational access codes in WorkZone Client User Guide.

If there is no need to show both lists of access codes for users (organizational units and individual users), you can show only one of them or even none of them. To configure these settings, proceed with the following steps:

1. On the start page, select **Global** and click the **Access code filters** tab.
2. To show only access codes of individual users, activate **Hide organizational access codes**.
3. To show only access codes of organizational units, activate **Hide employee access codes**.

> **Tip:** If you activate both toggle buttons, none of these access code lists will be displayed.

7.9 Validation rules

> **Prerequisite:** To configure validation rules, you must have the DATAADM access code.

Validation rule is a regular expression that defines rules and limitations for the text custom fields. For example, if you create a custom field for emails, then you need to make the character @ mandatory and compose an error message if @ is missing. When the validation rule is created, associate it with the related custom field.

> **Note:** You can only associate a validation rule with the custom field that has type **Text** or **Unique**.

Create a validation rule

1. On the start page, select **Global**.
2. On the **Validation rules** tab, click **Create**.
3. Fill in the following fields:
    - **Name** – The unique name of the validation rule.
    - **Description** – Specify descriptive information about the validation rule.
    - **Validation rule** – Enter a regular expression to define the text pattern for custom fields.
    - **Error message** – Compose an error message. Users will see it if the entered text does not match to the defined pattern.
    - **Protocol** – Select a protocol. WorkZone Client then can use it to open the field input in a relative application, for example, mail agent or browser.
    - **Case-sensitive** – Turn it on if you want to validate the upper and lower case input. Turn it off to disregard the letter case input.
    - **Localize name and error message** – Expand to enter name and error message in other languages.
4. Click **Create**.

Edit a validation rule

1. Select a validation rule that you want to edit.
2. Click **Edit**.
3. Apply the required changes in the **Edit validation rule** dialog box.
4. Click **Save**.

Delete a validation rule

You can only delete a validation rule if it is not yet associated with a custom field.

1. Select a validation rule that you want to delete.
2. Click **Delete**, and then click **Delete**.

7.10 System droplists

> **Prerequisite:** To configure system droplists, you must have the DATAADM access code.

The system droplist is a custom droplist that is marked in the database as *System*. In contrast with regular custom droplists, you cannot create or delete a system droplist, but you can create and edit its values.

Create a droplist value

> **Tip:** Droplist values are sorted by codes. Order of creation is disregarded. Consider this characteristic if the order of values matters.

1. On the start page, select **Global**.
2. On the **System droplists** tab, select a droplist to which you want to add a value.
3. In the bottom-right corner of the page, click **Create**.
4. Fill in the following fields in the **Create system droplist value** dialog box:
   - **Label by default** – The default name that is visible for users.
   - **Code** – The code in the database.
   - **Localize labels** – Optionally, specify names in other languages.
   - **Rank** – An integer number that indicates value priority (1 has the highest priority). Priorities can be used later by WorkZone products or third party integrations.
   - **Selectable** - Disable to make this value non-selectable for the users in WorkZone Client or WorkZone 365.
   - **Start date** – The date when the droplist value becomes active. Before the start date, the droplist value is invisible on the user interface.
   - **End date** – The date when the droplist value is deactivated. After the end date, the droplist value becomes invisible on the user interface.
5. Click **Create**.

Edit a droplist value

Note: You cannot edit label by default and code.

1. Select a droplist on which you want to edit a value.
2. Point to the desired value, and click **Edit**.
3. Apply the required changes in the **Edit system droplist value** dialog box.
4. Click **Save**.

For another topic (validation):

- **Error message** – Compose an error message. Users will see it if the entered text does not match to the defined pattern.
- **Protocol** – Select a protocol. WorkZone Client can then use it to open the field input in a relative application, for example, mail agent or browser.

7.11 Custom droplists

Prerequisite: To configure custom droplists, you must have the DATAADM access code.

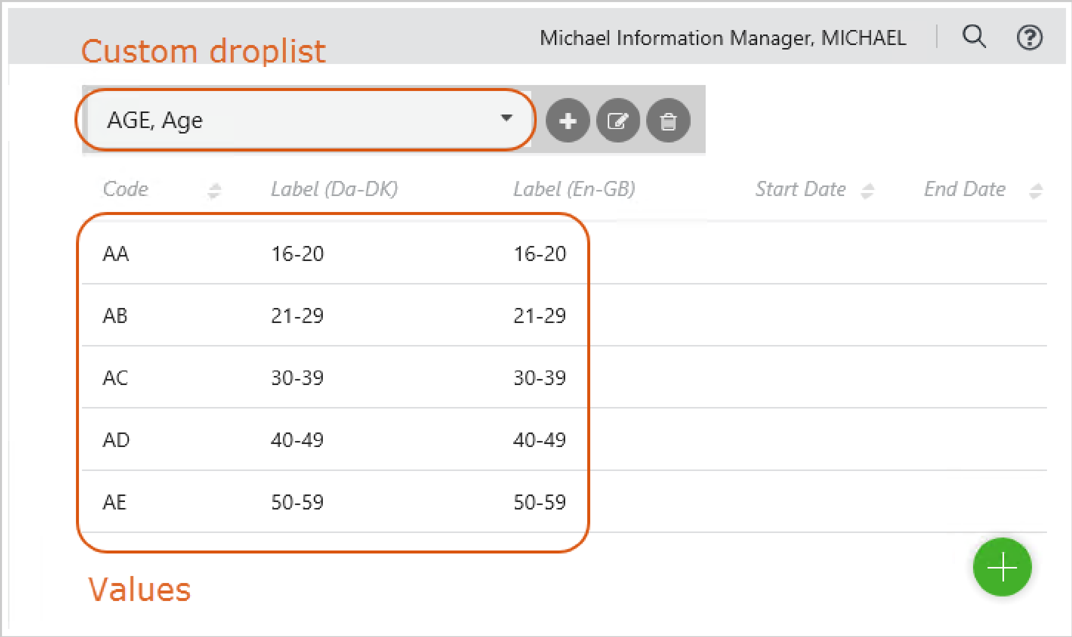
About custom droplists

There are five types of custom fields: text, date, decimal, integer, and droplist. In this section, you will learn how to create a new custom droplist that is relevant to your organization.

Each droplist must have at least one value. Therefore, you create a custom droplist, and then you create its values.

Important:

- To have a custom droplist as an additional available field on the WorkZone Client user interface, you must create a custom droplist, and then you must create a custom field. Only custom fields appear on the **Available fields** panel.
- Droplist values are sorted by codes. Order of creation is disregarded. Consider this characteristic if the order of values matters.



Create a custom droplist

1. On the start page, select **Global**.
2. On the **Custom droplists** tab, click **Create droplist**.
3. Fill in the following fields in the **Create custom droplist** dialog box:
    - **Label by default** – The default name that is visible when you add a new custom field.
    - **Code** – The code in the database.
    - **Localize label** – Optionally, specify names in other languages.
    - **Selectable** - Disable to make this value non-selectable for the WorkZone Client users.

    > **Note:** Non-selectable values can still be set as the default values and will be visible to the users in WorkZone Client, but users will not be able to select them (or to re-add them, if the user has changed the non-selectable default value to something else).

- **Start date** – The date when the custom droplist becomes active. Before the start date, the custom droplist is invisible on the user interface.
- **End date** – The date when the custom droplist is deactivated. After the end date, the custom droplist becomes invisible on the user interface.

4. Click **Save**.

Edit a custom droplist

1. Select a droplist that you want to edit from the drop-down list on the top.
2. Click **Edit droplist**.
3. Apply the required changes in the **Edit custom droplist** dialog box.

> **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete a custom droplist

You can only delete a droplist if it is not used in any custom field.

1. Select a droplist that you want to delete from the drop-down list on the top.
2. Click **Delete droplist**.

Create a droplist value

1. Select a droplist to which you want to add a value.
2. In the bottom-right corner of the page, click **Create**.

3. Fill in the following fields in the **Create custom droplist value** dialog box:

    - **Label by default** – The default name that is visible for users.
    - **Code** – The code in the database.
    - **Localize label** – Optionally, specify names in other languages.
    - **Rank** – An integer number that indicates value priority (1 has the highest priority). Priorities can be later used by WorkZone products or third party integrations.
    - **Selectable** - Enable to make this value non-selectable for the users.

      > **Note:** Non-selectable values can still be set as the default values and will be visible to the users in WorkZone Client or WorkZone 365, but users will not be able to select them (or to re-add them, if the user has changed a non-selectable default value to something else).

    - **Start date** – The date when the droplist value becomes active. Before the start date, the droplist value is invisible on the user interface.
    - **End date** – The date when the droplist value is deactivated. After the end date, the droplist value becomes invisible on the user interface.

4. Click **Save**.

Edit a droplist value

1. Select a droplist on which you want to edit a value.
2. Point to the desired value, and click **Edit**.
3. Apply the required changes in the **Edit custom droplist value** dialog box.

   > **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete a droplist value

You can only delete a droplist value if it has not yet been used by WorkZone Client users.

1. Select a droplist from which you want to delete a value.
2. Point to the desired value, and click **Delete**, and then click **Delete**.

7.12 Custom types

Case Document Contact

Prerequisite: To configure custom types, you must have the CONFIGADM access code.

Important: After deleting, editing or creating a custom type or a custom type field, you must update the custom types in use. If you do not update the custom types, your changes will not be displayed correctly.
To update all custom types, each user must reload the WorkZone Client.

About custom types

You can create custom types for specific type of projects or other data entities which do not fall under the case, document, address or contact category, yet which your users will need to view and edit from cases, documents, or contacts they work with.

Custom types are created by adding and configuring custom type fields to be displayed within this custom type, and then enabling a custom type for cases, documents or contacts. After that your WorkZone users will be able to add the existing custom types as a detail tabs on the case, document, or contact details page, and register or edit related information directly from the case, document or contact.

For example, you can create a custom type for "Budgets", define specific custom type fields you will need: a budget sum, accepted date, approval status, responsible contact, etc., and then enable your "Budgets" custom type for cases, documents, and contacts by adding to this custom type the **Case**, **Document**,and **Contact** custom type fields. After that any user in your organization will be able to add your "Budgets" custom type as a detail tab to the case, document or contact detail page in WorkZone Client and register or edit related budget information (defined by your custom type fields) directly from a case, document, or contact they work with.

- Custom types are created and set up by a system administrator in WorkZone Configurator, but once the they are created and enabled for cases, documents, or contacts, any WorkZone user can edit their configuration and add available custom types as a details tabs on the case, document or contact detail page in WorkZone Client. See Detail tabs in the WorkZone Client User Guide for more information about working with detail tabs in WorkZone Client.
- To enable a custom type for cases, documents, or contacts, add to this custom type the **Case**, **Document**, or **Contact** custom type field, respectively. See Actions on custom type fields. Global and departmental access are extensive rights that will allow the user to access sensitive information. Assign these rights only when needed.

  > **Important:** Until a custom type is enabled for cases, documents, or contacts, users will not see it in WorkZone Client (that is, users will not be able to add this custom type as a detail tab to a case, document, or contact detail page in WorkZone Client, or to search for this custom type in WorkZone Client).

- A custom type must contain at least one custom type field. Custom type fields resemble custom fields, but are data fields that can contain multiple data values per case, document or contact, as opposed to custom fields which only can contain one data value per case. Custom type fields can only be added to custom types and not to any other WorkZone elements. See Custom type fields for more information.

Localizing custom types

You can localize your custom types by providing an English, Danish and German label. The users will see the English, Danish or German label, depending on which language is activated in WorkZone Client.

> **Note:** Custom type label and name must be unique. You cannot use for a custom type a label or a name which are already used for another existing custom type.

Editing custom types

After you have created a custom type, you can edit it, changing certain properties such as labels and the activation period (start date and end date). You cannot edit the custom type's name or default label.

Activation period for custom types

You can define an activation period for an existing custom type by editing the custom type and entering the start and end dates of the activation period. An empty start date will activate the custom type. If the current date is later than the end date specified for the custom type, the custom type will be inactive.

Active custom types

Users can select any active custom type in the **Tabs selector** form in WorkZone Client and add it to the detail tabs of the case, document or contact details, as well as add case, document or contact information to any active custom type fields. See Detail tabs in the WorkZone Client User Guide for more information about working with detail tabs in WorkZone Client.

Inactive custom types

Inactive custom types are not displayed in the **Tabs selector** form in WorkZone Client.

Tips:

- You can activate or deactivate a custom type by changing its start and end dates.
- Custom type fields can be activated or deactivated in the same way as custom types.

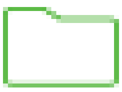
Deleting custom types

If you no longer need a custom type, you can delete it, but you cannot delete a custom type which contains fields that contain data. If you no longer need a custom type that contains data, deactivate this custom type instead.

Copying cases or documents with custom types

- Cases: When copying a case containing custom types, you can select to copy the case with or without case lists. If you copy the case with case lists, all custom types on this case with all the data will be copied to a new case. If you copy the case without case lists, all custom type tabs will be copied, but without any data.
- Documents: When copying a document containing custom types, all custom types on this document with all the data will be copied automatically.

7.12.1 Custom types



Case Document Contact

Prerequisite: To configure custom types, you must have the CONFIGADM access code.

Important: After deleting, editing or creating a custom type or a custom type field, you must update the custom types in use. If you do not update the custom types, your changes will not be displayed correctly.

To update all custom types, each user must reload the WorkZone Client.

About custom types

You can create custom types for specific type of projects or other data entities which do not fall under the case, document, address or contact category, yet which your users will need to view and edit from cases, documents, or contacts they work with.

Custom types are created by adding and configuring custom type fields to be displayed within this custom type, and then enabling a custom type for cases, documents or contacts. After that your WorkZone users will be able to add the existing custom types as a detail tabs on the case, document, or contact details page, and register or edit related information directly from the case, document or contact.

For example, you can create a custom type for "Budgets", define specific custom type fields you will need: a budget sum, accepted date, approval status, responsible contact, etc., and then enable your "Budgets" custom type for cases, documents, and contacts by adding to this custom type the **Case**, **Document**,and **Contact** custom type fields. After that any user in your organization will be able to add your "Budgets" custom type as a detail tab to the case, document or contact detail page in WorkZone Client and register or edit related budget information (defined by your custom type fields) directly from a case, document, or contact they work with.

- Custom types are created and set up by a system administrator in WorkZone Configurator, but once the they are created and enabled for cases, documents, or contacts, any WorkZone user can edit their configuration and add available custom types as a details tabs on the case, document or contact detail page in WorkZone Client. See Detail tabs in the WorkZone Client User Guide for more information about working with detail tabs in WorkZone Client.

- To enable a custom type for cases, documents, or contacts, add to this custom type the **Case**, **Document**, or **Contact** custom type field, respectively. See Actions on custom type fields. Global and departmental access are extensive rights that will allow the user to access sensitive information. Assign these rights only when needed.

  > **Important:** Until a custom type is enabled for cases, documents, or contacts, users will not see it in WorkZone Client (that is, users will not be able to add this custom type as a detail tab to a case, document, or contact detail page in WorkZone Client, or to search for this custom type in WorkZone Client).

- A custom type must contain at least one custom type field. Custom type fields resemble custom fields, but are data fields that can contain multiple data values per case, document or contact, as opposed to custom fields which only can contain one data value per case. Custom type fields can only be added to custom types and not to any other WorkZone elements. See Custom type fields for more information.

Localizing custom types

You can localize your custom types by providing an English, Danish and German label. The users will see the English, Danish or German label, depending on which language is activated in WorkZone Client.

> **Note:** Custom type label and name must be unique. You cannot use for a custom type a label or a name which are already used for another existing custom type.

Editing custom types

After you have created a custom type, you can edit it, changing certain properties such as labels and the activation period (start date and end date). You cannot edit the custom type's name or default label.

Activation period for custom types

You can define an activation period for an existing custom type by editing the custom type and entering the start and end dates of the activation period. An empty start date will activate the custom type. If the current date is later than the end date specified for the custom type, the custom type will be inactive.

Active custom types

Users can select any active custom type in the **Tabs selector** form in WorkZone Client and add it to the detail tabs of the case, document or contact details, as well as add case, document or contact information to any active custom type fields. See Detail tabs in the WorkZone Client User Guide for more information about working with detail tabs in WorkZone Client.

Inactive custom types

Inactive custom types are not displayed in the **Tabs selector** form in WorkZone Client.

> **Tips:**
>
> - You can activate or deactivate a custom type by changing its start and end dates.
> - Custom type fields can be activated or deactivated in the same way as custom types.

Deleting custom types

If you no longer need a custom type, you can delete it, but you cannot delete a custom type which contains fields that contain data. If you no longer need a custom type that contains data, deactivate this custom type instead.

Copying cases or documents with custom types

- Cases: When copying a case containing custom types, you can select to copy the case with or without case lists. If you copy the case with case lists, all custom types on this case with all the data will be copied to a new case. If you copy the case without case lists, all custom type tabs will be copied, but without any data.

- Documents: When copying a document containing custom types, all custom types on this document with all the data will be copied automatically.

7.12.2 Actions on custom types

Prerequisite: To configure custom types, you must have the CONFIGADM access code.

Important:

- After deleting, editing or creating a custom type or a custom type field, you must update the custom types in use. If you do not update the custom types, your changes will not be displayed correctly.
  To update all custom types, each user must reload the WorkZone Client.
- For the custom type to appear on a case, document, or contact, it must be assigned the **Case**, **Document** or **Contact** type, and added as a tab from the relevant detail page.

You can perform the following actions on custom types:

Create a custom type

1. On the start page, click **Global**.
2. Select the **Custom types** tab.
3. On the **Custom types** page, click **Create custom type** to open the **Create custom type** form.
4. In the **Create custom type** form:
    1. In the **Label by default** field, enter the default label for the custom type. This label will be displayed to users in the WorkZone Client if relevant localized label has not been defined.

2. In the **Name** field, enter a name for your custom type. This name will be used in the system but will not be displayed to users in the WorkZone Client. The name must be 11 characters or less.

   > **Note:** Custom type names must be unique. You cannot use for a custom type the same name which is already used for another existing custom type.

3. Click **Localize label** and:
   - In the **Label (da-DK)** field, enter a Danish label for the custom type if you need to provide a Danish label.
   - In the **Label (de-DE)** field, enter a German label for the custom type if you need to provide a German label.
   - In the **Label (en-GB)** field, enter an English label for the custom type if you need to provide a specific English label. The users will see the English, Danish or German label, depending on which language is activated in WorkZone Client.
4. In the **Type of field** dropdown, select type of the custom type.
5. Click **Create** to create the custom type and close the form.

Edit a custom type

> **Note:** You cannot change the **Name** or **Label by default** fields on an existing custom type.

1. On the start page, click **Global**.
2. Select the **Custom types** tab.

3. Select the custom type you want to edit and click **Edit custom type** to open the **Edit custom type** form.
4. In the **Create custom type** form, click **Localize label** and:
   - In the **Label (da-DK)** field, enter a Danish label for the custom type if you need to provide a Danish label.
   - In the **Label (de-DE)** field, enter a German label for the custom type if you need to provide a German label.
   - In the **Label (en-GB)** field, enter an English label for the custom type if you need to provide a specific English label. The users will see the English, Danish or German label, depending on which language is activated in WorkZone Client.
5. In the **Start date** and **End date** fields, enter the start and end dates of the activation period if you need to define an activation period for the custom type.
6. Click **Save** to save your changes and close the form.

Delete a custom type

> **Note:** You cannot delete a custom type that contains fields which contain information.

1. On the start page, click **Global**.
2. Select the **Custom types** tab.
3. Select the custom type you want to delete and click **Delete custom type** to open the **Delete custom type** form.
4. Click **Delete** to delete the custom type and close the form.

Add descriptive label to a custom type

You can add descriptive text to a custom type property, and have this text displayed in

WorkZone Client when users look up this custom type field value in a drop-down list, or when users analyze relevant custom type data displayed in the dashboard widgets. See Descriptive text on custom types in WorkZone Client User Guide for more information.

Important: Only fields with the **Text** type can be used as descriptive labels of custom types and only one field can be used as the descriptive label. If you select more than one text field to be used as the descriptive label, your last selected field will overwrite any previous selections.

1. On the start page, click **Global**.
2. Select the **Custom types** tab.
3. In the custom type droplist, select the custom type for which you want add a descriptive label.
4. On the **Custom types** tab page, hover the mouse over the **Action** button next to the custom type field you want to use as a descriptive label and select **Edit** in the action bar. The **Custom type field** form is opened with the selected custom type and custom type field in the title.
5. Enable **Use as entity description**.
6. Click **Save** to save your changes and close the form.

7.13 Custom type fields

Prerequisite: To configure custom type fields, you must have the CONFIGADM access code.

Custom type fields are input fields in a custom type. They can store information, much like custom fields. Custom type fields are set up similarly to custom fields but while custom fields are commonly displayed in the case, document or contact details tab page, custom type values can only be displayed in the custom type itself. Unlike custom fields, which can only store one value per case, document or contact, custom type fields can store multiple values per case, document or contact.

Custom type fields can be added to the case, document or contact searches. To do so, first display all fields in the search, and then select the custom type and define search criteria for each relevant custom type field.

> **Note:** You cannot reuse custom fields in custom types. Instead, you must create custom type fields to populate custom types.

The labels of custom type fields can be localized into English, Danish and German if required, like other customizable elements in WorkZone (custom types, custom fields, custom droplists).

When you create custom type fields, you must specify what kind of information the field can store (like custom fields). Unlike custom fields, custom type fields can also contain references to contacts, documents and other cases. See the **Address**, **Employee**, **Contact**, **Unit**, **Case** and **Document** data types in the table below.

> **Important:** After deleting, editing or creating a custom type or a custom type field, you must update the custom types in use. If you do not update the custom types, your changes will not be displayed correctly.
>
> To update all custom types, each user must reload the WorkZone Client.

> **Note:** Custom type field names must be unique. You cannot use for a custom type field a name which is already used by another existing custom type field.

Data type	Description
String	Any characters including numbers can be entered and are considered text and not numbers. The content of this field cannot be used for subsequent calculations.
Integer	All numbers, excluding fractional elements. Negative values can be used.

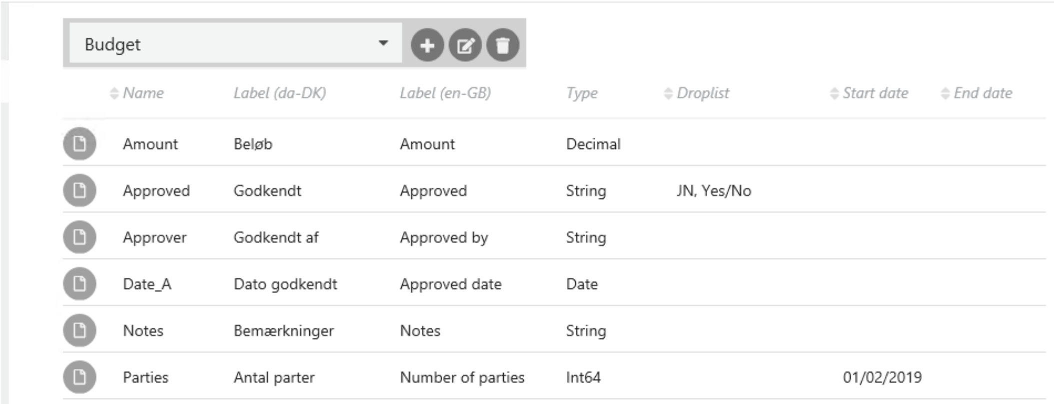
Data type	Description
Decimal	All numbers, including fractional elements of a number. Negative values can be used.
Date	A set of integers that are interpreted as a date. Values that cannot be interpreted into a date format cannot be entered. When selecting the **Date** data type, a date selector will automatically be added to the field to enable a user to open a calendar-like form and select the date.
DateTime	A set of integers that are interpreted as a date and time. Values that cannot be interpreted into a date and time format cannot be entered. When selecting the **DateTime** data type, a date and Time selector will automatically be added to the field to enable a user to open a calendar-like form , select the date and enter a time.
Droplist	A list of predefined values a user can chose from. The Droplist type is displayed as **String** in the **Type** column on the custom type page but the **Droplist** column will contain the selected droplist for the field. Custom droplists can be created and maintained in **Global** > **Custom Droplists**.
Address	A reference to a contact, displaying the **Name 1**, **Name 2** and **Address 1** All three fields can be filtered to locate the contact in question.
Contact	A reference to a contact, displaying the **Name 1**, **Name 2** and **Contact ID** fields. All three fields can be filtered to locate a contact.
Employee	A reference to an employee only, displaying the **Name 1**, **Name 2** and **Contact ID** fields.

Data type	Description
	All three fields can be filtered to locate a employee.
Unit	A reference to a unit only, displaying the **Name 1** field, which can be used to filter and locate a unit.
Case	A reference to a case, displaying the **Case number**, **Case title** and **Case handler** fields. All three fields can be filtered to locate a case.
Document	A reference to a document, displaying the document number, document title and Created date fields. All three fields can be filtered to locate a document.
Unique	Any characters including numbers can be entered and are considered text and not numbers. The field will only accept unique values.

Example of custom type fields

An organization wants to allow case workers to register an expected expense on related cases, documents, or contacts to easier facilitate approximation of the funds available for specific actions related to this type of expense. The case already contains a custom field with the total budget for the case but now needs a way to register other expense-related values directly from the related cases, documents or contacts.

The following custom type fields are created in WorkZone Configurator:



Budget

	Name	Label (da-DK)	Label (en-GB)	Type	Droplist	Start date	End date
	Amount	Beløb	Amount	Decimal			
	Approved	Godkendt	Approved	String	JN, Yes/No		
	Approver	Godkendt af	Approved by	String			
	Date_A	Dato godkendt	Approved date	Date			
	Notes	Bemærkninger	Notes	String			
	Parties	Antal parter	Number of parties	Int64		01/02/2019	

An expected expense is entered in the **Amount** field.

The officer who approves the expense must also update the **Approver** field, whether the expense is approved or not (the **Approved** field) and the date of the approval (the **Date_ A** field).

If there are any notes or comments that need to be added to the expense line, they are entered in the **Notes** field.

The **Parties** field reflects how many recipients of the expense are registered and is only to be used after February 1st, 2019.

Validation of custom type field input

When creating a custom type field, you can define a validation rule to apply to the field input if the data type of the custom type field is String. The validation rule is a regular expression and can assist you ensure data is entered in a format that can be processed by the system.

If you apply the validation rule after data has been entered in the field, existing data already stored in the field will not be validated unless the data is re-entered or edited in the field, activating the validation in the process.

Activation period for custom type field

Like custom fields, you can define an activation period for each custom type field by defining the start and end dates of the activation period. An empty start date will activate the field. If the current date is later than the end date specified for the custom type field, the field will be inactive.

Active custom type fields

If a custom type field is active, users can enter and edit data in WorkZone Client.

Inactive custom type fields

If a custom type field is inactive, the field will not be displayed in the **Tabs selector** form in WorkZone Client and users will not see existing data or enter new data in the field.

The activation period can be used to first create a structure for your custom types without disturbing daily operations and then deploy your changes at a specified date (the start date).

> **Note:** If you render a custom type field inactive, all existing data is still retained.

> **Tip:** You can activate or deactivate a custom type field by changing the start and end dates.

Editing custom type fields

After you have created a custom type field, you can edit the field, changing certain properties such as localization labels, validation rule and the activation period (Start date and End date). You cannot edit a custom type fields' name, type or default label.

> **Note:** You can change the droplist to another droplist, even of the field contains data. If you do this, all old data will be displayed with the ***_**Protected**_*** text in the field in WorkZone Client.

Deleting custom type fields

You can delete custom type fields you do not need, but like custom lists, you can not delete custom type fields if the field contains records in the database. If you need to remove access to these fields, you can render the fields inactive by setting an end date for the custom type field.

After deleting, editing or creating a custom type or custom type field, you must update the custom types in use. To update all custom types, each user must reload the WorkZone Client.

7.13.1 Custom type fields

> **Prerequisite:** To configure custom type fields, you must have the CONFIGADM access code.

Custom type fields are input fields in a custom type. They can store information, much like custom fields. Custom type fields are set up similarly to custom fields but while custom fields are commonly displayed in the case, document or contact details tab page, custom type values can only be displayed in the custom type itself. Unlike custom fields, which can only store one value per case, document or contact, custom type fields can store multiple values per case, document or contact.

Custom type fields can be added to the case, document or contact searches. To do so, first display all fields in the search, and then select the custom type and define search criteria for each relevant custom type field.

> **Note:** You cannot reuse custom fields in custom types. Instead, you must create custom type fields to populate custom types.

The labels of custom type fields can be localized into English, Danish and German if required, like other customizable elements in WorkZone (custom types, custom fields, custom droplists).

When you create custom type fields, you must specify what kind of information the field can store (like custom fields). Unlike custom fields, custom type fields can also contain references to contacts, documents and other cases. See the **Address**, **Employee**, **Contact**, **Unit**, **Case** and **Document** data types in the table below.

Important: After deleting, editing or creating a custom type or a custom type field, you must update the custom types in use. If you do not update the custom types, your changes will not be displayed correctly.
To update all custom types, each user must reload the WorkZone Client.

Note: Custom type field names must be unique. You cannot use for a custom type field a name which is already used by another existing custom type field.

Data type	Description
String	Any characters including numbers can be entered and are considered text and not numbers. The content of this field cannot be used for subsequent calculations.
Integer	All numbers, excluding fractional elements. Negative values can be used.
Decimal	All numbers, including fractional elements of a number. Negative values can be used.
Date	A set of integers that are interpreted as a date. Values that cannot be interpreted into a date format cannot be entered. When selecting the **Date** data type, a date selector will automatically be added to the field to enable a user to open a calendar-like form and select the date.

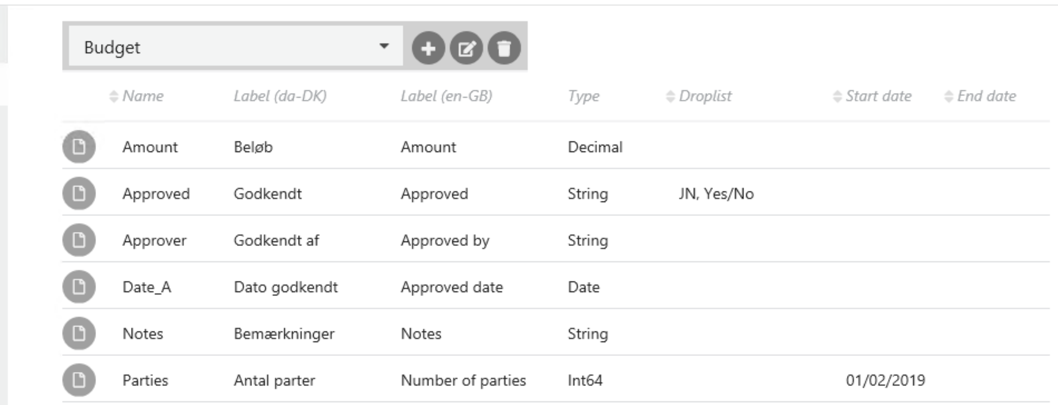
Data type	Description
DateTime	A set of integers that are interpreted as a date and time. Values that cannot be interpreted into a date and time format cannot be entered. When selecting the **DateTime** data type, a date and Time selector will automatically be added to the field to enable a user to open a calendar-like form , select the date and enter a time.
Droplist	A list of predefined values a user can chose from. The Droplist type is displayed as **String** in the **Type** column on the custom type page but the **Droplist** column will contain the selected droplist for the field. Custom droplists can be created and maintained in **Global** > **Custom Droplists**.
Address	A reference to a contact, displaying the **Name 1**, **Name 2** and **Address 1** All three fields can be filtered to locate the contact in question.
Contact	A reference to a contact, displaying the **Name 1**, **Name 2** and **Contact ID** fields. All three fields can be filtered to locate a contact.
Employee	A reference to an employee only, displaying the **Name 1**, **Name 2** and **Contact ID** fields. All three fields can be filtered to locate a employee.
Unit	A reference to a unit only, displaying the **Name 1** field, which can be used to filter and locate a unit.
Case	A reference to a case, displaying the **Case number**, **Case title** and **Case handler** fields. All three fields can be filtered to locate a case.

Data type	Description
Document	A reference to a document, displaying the document number, document title and Created date fields. All three fields can be filtered to locate a document.
Unique	Any characters including numbers can be entered and are considered text and not numbers. The field will only accept unique values.

Example of custom type fields

An organization wants to allow case workers to register an expected expense on related cases, documents, or contacts to easier facilitate approximation of the funds available for specific actions related to this type of expense. The case already contains a custom field with the total budget for the case but now needs a way to register other expense-related values directly from the related cases, documents or contacts.

The following custom type fields are created in WorkZone Configurator:


Budget

Name	Label (da-DK)	Label (en-GB)	Type	Droplist	Start date	End date
Amount	Beløb	Amount	Decimal			
Approved	Godkendt	Approved	String	JN, Yes/No		
Approver	Godkendt af	Approved by	String			
Date_A	Dato godkendt	Approved date	Date			
Notes	Bemærkninger	Notes	String			
Parties	Antal parter	Number of parties	Int64		01/02/2019	

An expected expense is entered in the **Amount** field.

The officer who approves the expense must also update the **Approver** field, whether the expense is approved or not (the **Approved** field) and the date of the approval (the **Date_A** field).

If there are any notes or comments that need to be added to the expense line, they are entered in the **Notes** field.

The **Parties** field reflects how many recipients of the expense are registered and is only to be used after February 1st, 2019.

Validation of custom type field input

When creating a custom type field, you can define a validation rule to apply to the field input if the data type of the custom type field is String. The validation rule is a regular expression and can assist you ensure data is entered in a format that can be processed by the system.

If you apply the validation rule after data has been entered in the field, existing data already stored in the field will not be validated unless the data is re-entered or edited in the field, activating the validation in the process.

Activation period for custom type field

Like custom fields, you can define an activation period for each custom type field by defining the start and end dates of the activation period. An empty start date will activate the field. If the current date is later than the end date specified for the custom type field, the field will be inactive.

Active custom type fields

If a custom type field is active, users can enter and edit data in WorkZone Client.

Inactive custom type fields

If a custom type field is inactive, the field will not be displayed in the **Tabs selector** form in WorkZone Client and users will not see existing data or enter new data in the field.

The activation period can be used to first create a structure for your custom types without disturbing daily operations and then deploy your changes at a specified date (the start date).

Note: If you render a custom type field inactive, all existing data is still retained.

Tip: You can activate or deactivate a custom type field by changing the start and end dates.

Editing custom type fields

After you have created a custom type field, you can edit the field, changing certain properties such as localization labels, validation rule and the activation period (Start date and End date). You cannot edit a custom type fields' name, type or default label.

Note: You can change the droplist to another droplist, even of the field contains data. If you do this, all old data will be displayed with the *****Protected**** text in the field in WorkZone Client.

Deleting custom type fields

You can delete custom type fields you do not need, but like custom lists, you can not delete custom type fields if the field contains records in the database. If you need to remove access to these fields, you can render the fields inactive by setting an end date for the custom type field.

After deleting, editing or creating a custom type or custom type field, you must update the custom types in use. To update all custom types, each user must reload the WorkZone Client.

7.13.2 Actions on custom type fields

Prerequisite: To configure custom type fields, you must have the CONFIGADM access code.

Important: After deleting, editing or creating a custom type or a custom type field, you must update the custom types in use. If you do not update the custom types, your changes will not be displayed correctly.

To update all custom types, each user must reload the WorkZone Client.

You can perform the following actions on custom type fields:

Create a custom type field

Note: Custom type field names must be unique. You cannot create a custom type field with the same name as another existing custom type field.

1. On the start page, click **Global**.
2. Select the **Custom types** tab.
3. In the custom type action bar, select the custom type to create a custom type field for.
4. In the **Custom types** tab page, click **Create** to open the **Create custom type field** form.
5. In the **Create custom type field** form:
    1. In the **Name** field, enter a name for the field. This is the name of the field in the database.
    2. In the **Label by default** field, enter a label for the field. This label will be used as a default name of the field in the WorkZone Client. Localized labels will override the default label.
    3. Click **Localize label** and:

- In the **Label (da-DK)** field, enter a Danish label for the custom type if you need to provide a Danish label.
- In the **Label (de-DE)** field, enter a German label for the custom type if you need to provide a German label.
- In the **Label (en-GB)** field, enter an English label for the custom type if you need to provide a specific English label.

6. In the **Type of field** field, select the data format the field can store.
7. In the **Start date**, and **End date** fields, enter the start and end dates of the activation period if you need to define an activation period for the field.
8. Click **Create** to create the field and close the form.

Edit an existing custom type field

> **Note:** You cannot change the **Name**, **Label by default** or **Type of field** fields on an existing fields.

1. On the start page, click **Global**.
2. Select the **Custom types** tab.
3. In the custom type action bar, select the custom type that contains the custom type field you want to edit.
4. In the **Custom types** tab page, hover the mouse over the **Action** button to display the action bar and select **Edit**. The **Custom type field** form is opened with the custom type and selected field in the title.

5. In the **Custom type field** form, click **Localize label** and:
    - In the **Label (da-DK)** field, enter a Danish label for the custom type if you need to provide a Danish label.
    - In the **Label (de-DE)** field, enter a German label for the custom type if you need to provide a German label.
    - In the **Label (en-GB)** field, enter an English label for the custom type if you need to provide a specific English label. Localized labels will override the default label.
6. In the **Start date**, and **End date** fields, enter the start and end dates of the activation period if you need to define an activation period for the field.
7. Click **Save** to save your changes and close the form.

Delete a custom type field

> **Note:** You cannot delete a custom type field that contains information.

1. On the start page, click **Global**.
2. Select the **Custom types** tab.
3. In the custom type action bar, select the custom type that contains the field you want to delete.
4. In the **Custom types** tab page, hover the mouse over the **Action** button to display the action bar and select **Delete** to open the **Delete custom type field** form.
5. Click **Delete** to delete the selected field and close the form.

Use custom type field as a descriptive label

You can add descriptive text to a custom type property, and have this text displayed in WorkZone Client when users look up this custom type field value in a drop-down list, or when users analyze relevant custom type data displayed in the dashboard widgets. See Descriptive text on custom types in WorkZone Client User Guide for more information.

> **Important:** Only fields of the **Text** type can be used as descriptive labels of custom types, and only one text field can be used as the descriptive label at once. If you enable more than one text field to be used as the descriptive label, your last selected field will overwrite any previous selections.

1. On the start page, click **Global**.
2. Select the **Custom types** tab.
3. In the custom type droplist, select the custom type for which you want add a descriptive label.
4. On the **Custom types** tab page, hover the mouse over the **Action** button next to the custom type field you want to use as a descriptive label and select **Edit** in the action bar. The **Custom type field** form is opened with the selected custom type and custom type field in the title.
5. Enable **Use as entity description**.
6. Click **Save** to save your changes and close the form.

7.14 Note types

> **Prerequisite:** To configure case number format, you must have the DATAADM access code.

When users create notes on cases, documents, or contacts, they can select note types to classify these notes. You can define note types in WorkZone Configurator.

Create a note type

1. On the start page, select **Global**.
2. On the **Note types** tab, click **Create**.
3. Fill in the following fields in the **Create note type** dialog box:
    - **Label by default** – The default name that is visible when users add a new note.
    - **Code** – The code in the database.
    - **Localize labels** – Optionally, specify names in other languages.
    - **Start date** – The date when the note type becomes active. Before the start date, the note type is invisible on the user interface.
    - **End date** – The date when the note type is deactivated. After the end date, the note type becomes invisible on the user interface.
4. Click **Create**.

Edit a note type

1. Select a note type that you want to edit.
2. Click **Edit**.
3. Apply the required changes in the **Edit note type** dialog box.

    > **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete a note type

You can only delete a note type if it is not used in any existing note.

1. Select a note type that you want to delete.
2. Click **Delete**, and then click **Delete**.

7.15 Chat settings

Prerequisite: To configure chat settings, you must have the CONFIGADM access code.

You can configure settings for your chats created in WorkZone Client. For more information about chats, see About WorkZone Chat in WorkZone Client User Guide.

Define retention period for not retained chats

1. On the start page, select **Global** and click the **Chat settings** tab.
2. Under **Retention period for chats**, enter the number of days after which the unretained inactive chats will be automatically deleted.

Notes: You can enter the number between 1 and 9999. By default, unretained inactive chats will be automatically deleted after 60 days.

Notes: Only inactive unretained chats will be automatically deleted after specified retention period. If new activity is registered on the chat, the retention period will be reset.

8. WorkZone for Office settings

8.1 Outlook configuration

Prerequisite: To configure the Outlook settings, you must have the CONFIGADM access code.

In WorkZone Configurator, you can define the default settings for Microsoft Outlook. This is the alternative way to making manual changes in `settings.xml` (see Configuring server settings).

1. On the start page, click **Office**.
2. Select the **Outlook configuration** tab.
3. Apply your changes.

When you make a change on the WorkZone Configurator UI, you update the settings in the database (table `wzo_configuration`). Users just need to restart Outlook and an updated configuration will then be available.

Field	Description

Default document type when saving an email on a case	Define the default document types when a user saves an incoming or outgoing email as a document on a case.
	`<RecordTypes><Incoming>`
	`<RecordTypes><Outgoing>`

Default case handler when saving an email on a case	Define the default behavior of how to assign a case handler to the new document when a user saves an email on a case: • **Inherits case handler from the case** – Select this to assign a case handler from the case. • **Registers the user who saves the email as case**

Field	Description
	handler – Select this to assign the current user as the case handler of the document. `<UseCurrentUserAsCaseHandler>`

Default party role when saving an email on a case	If a user saves an email on *any case*, then sender, recipients, and cc recipients are suggested for the new document as *document parties*. Each party may have a specific role. In the **Sender**, **Recipient**, and **Cc recipient** fields, you can define the default *document party roles* for sender, recipient, and cc recipient individually.
	If a user saves an email on *a new case*, then sender, recipients, and cc recipients are suggested for the case as *case parties*. In the **Case party** field, you can define the common default *case party role* for sender, recipients, and cc recipients.
	Note: If the user saves an email on an existing case, then sender, recipients, and cc recipients will not be suggested as case parties.
	`<PartyRoleKeys><Sender>`
	`<PartyRoleKeys><Recipient>`
	`<PartyRoleKeys><CcRecipient>`
	`<PartyRoleKeys><CaseParty>`

Allow suggesting organizational contacts	If a user saves an email and the system finds the organizational contacts that refer to the sender, you can define whether to show these organizational contacts among the suggested parties.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>As document parties when saving an email – Enable this toggle button to suggest organizational contacts as document parties.
As case parties when creating a case – Enable this toggle button to suggest organizational contacts as case parties.
Users can then decide whether to add or skip these suggested contacts.
<code><SuggestAnyContactWhenSavingEmail></code>
<code><SuggestAnyContactWhenCreatingCase></code></td></tr>
<tr><td>Select contact types to suggest contacts with these types as organizational</td><td>WorkZone considers a contact to be organizational if two conditions are met:
The email domain must be the same for the suggested organizational contacts and for a sender, recipient, or cc recipient. In other words, WorkZone finds contacts that belong to the same organization by checking their email domains.
The contact type of the found contacts must be specified in this field.
<code><ContactTypes><Company></code></td></tr>
<tr><td>Contacts whose email addresses contain domains from this list are not suggested as organizational</td><td>To avoid situations where contacts are suggested to be organizational just because their email addresses belong to a world-wide email service, such as <code>google.com</code>, <code>hotmail.com</code>, and others, add these email domains to this list. If the email address of a contact includes a domain from the list, the</td></tr>
</table>

Field	Description
	contact will not be suggested as organizational. `GlobalSuggestionsBlacklist`
When saving an email that includes a new email address	To add senders, recipients, and cc recipients as parties, they must exist in the system as contacts. • **Allow automatic creation of a new contact for the related email address** – If you enable this toggle button, the system will create the contacts automatically for each unknown selected email address. If the toggle button is disabled, users must create the contacts manually. `<AutoCreateMissingContact>`
Allow mass registration of emails	Enable the **Allow registering common metadata when saving multiple emails** toggle button to display the dialog for editing common meta data when saving more than one email at the same time.

Contacts that are suggested as document parties when a user saves an email:	• **Suggest the user who saves the email if he/she is among the recipients** – Enable the toggle button to include a recipient who saves an email to the suggested document parties.
	• **Suggest senders, recipients, and cc recipients if they do not exist as contacts yet** – Enable the toggle button to preselect check boxes of suggested parties if their email addresses do not exist in the system.
	`<RegisterSelfWhenSaveEmail>`
	`<CheckAllUnresolvedContacts>`

Field	Description
Do not suggest senders, recipients, and cc recipients if their email addresses include the following domains	If you do not want the contacts from a specific company to be saved as parties, add the email domains of the company to this list. When a user creates a new case or saves an email on a case in Outlook, contacts that belong to the specified email domain are not preselected for saving. The user can select them manually, if needed. **Tip:** Configure this functionality only if you have enabled the previous toggle button. `<CheckUnresolvedContactsBlackList>`

8.2 Office template path

Prerequisite: To configure the default path for Office templates, you must have the CONFIGADM access code.

You can define the default path to the folder that contains templates of your organization. When users create new documents in WorkZone Client, they see templates from this folder. Users can then navigate to another folder if needed.

Define Office template path

1. On the start page, click **Office**.
2. Select the **Office template path** tab.
3. Specify the default path in the field.

   There are three ways to define the path:

   - Absolute path

     Example:

```
D:\Documents\Templates
```

- Relative path

  Example:

  ```
  %appdata%\Templates
  ```

- UNC path

  Example:

  ```
  \\Server\Templates
  ```

4. Click **Save**.

> **Note:** If you have not defined the default Office template path, WorkZone Client users will see a folder defined in the local Office settings (`File > Options > Advanced > General > File locations...`).

8.3 Office Online Server

> **Prerequisite:** To configure the Office Online Server settings, you must have the CONFIGADM access code.

Office Online Server is a Microsoft product that enables WorkZone Client users to edit Word, Excel, and PowerPoint documents in a web browser. This is an alternative way to WorkZone for Office for editing content of Office documents. See About Microsoft Office Online Server.

1. On the start page, click **Office**.
2. Select the **Office Online Server** tab.
3. Configure the following settings:
   - **Allow usage of Office Online Server** – If activated, WorkZone Client users have the option to edit Office documents in a browser.

- **Office Online Server URL** – Enter the Office Online Server URL of your organization.

9. WorkZone Process settings

9.1 Case activities

Prerequisite: To view and manage case activities, you must have the PROCESSADM access code.

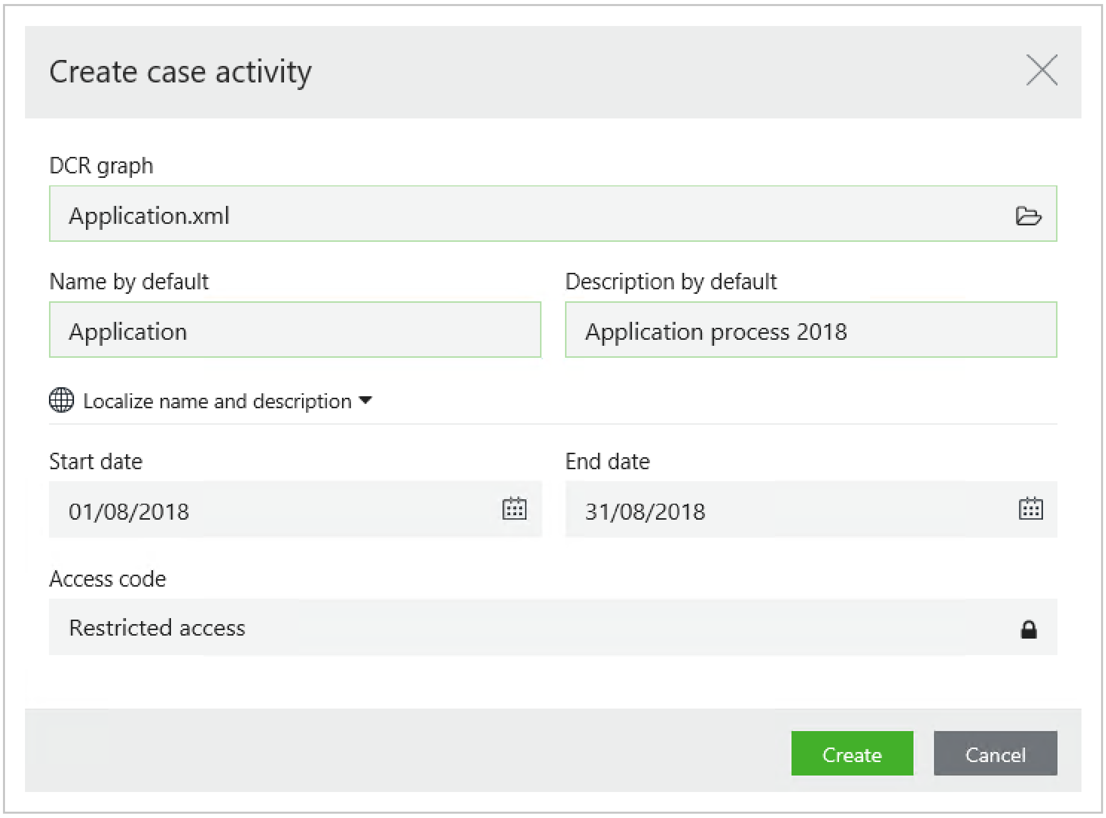
About case activities

Case activities is a task management feature. It enables you to create workflows with activities that are connected by a set of rules. The whole procedure of configuring case activities is the following:

1. You design activity rules on dcrgraphs.net and save them locally as XML file. For information about creating case activity graphs see DCR documentation and About case activities in the WorkZone Process Administrator Guide.
2. In WorkZone Configurator, you create a new case activity. To do this, you upload the XML file and set other settings. In the **Case activities** section, we describe step 2 in details.
3. In WorkZone Client, users follow the desired process by selecting it among available activities.

Create a case activity

Create a new value for the **Case activities** list.



1. On the main page, select **Process**.
2. On the **Case activities** tab, in the bottom-right corner of the page, click **Create**.
3. Fill in the following fields in the **Create case activity** dialog box:
   - **DCR graph** – Import the DCR graph in XML format. The graph must be designed on dcrgraphs.net preliminarily.
   - **Name by default** – The default name that is visible for WorkZone Client users.
   - **Description by default** – Description of the case activity that is visible for WorkZone Configurator users.
   - **Localize name and description** – Optionally, specify names and descriptions in other languages.
   - **Start date** – The date when the case activity becomes active. Before the start date, the case activity is invisible on the user interface.

- **End date** – The date when the case activity is deactivated. After the end date, the case activity becomes invisible on the user interface.
- **Access code** – Click and list access codes that grant users to start the case activity on a case. If you leave the field empty, everyone who has access to a case can start the case activity.

4. Click **Create**.

> **Note:** Once you click **Create**, you cannot delete the case activity.

Edit a case activity

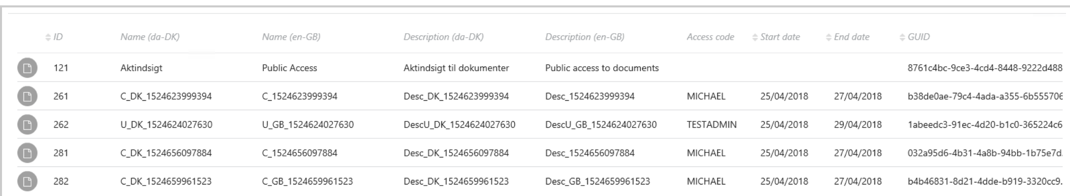
1. Point to the case activity that you want to update. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit case activity** dialog box.

> **Note:** You cannot edit the **Name by default** and **Description by default** values.

4. Click **Save**.

View case activities

To view the list of available case activities, click **Process** on the start page. Besides the settings that you set when you add a case activity, you also see two additional columns:



ID	Name (da-DK)	Name (en-GB)	Description (da-DK)	Description (en-GB)	Access code	Start date	End date	GUID
121	Aktindsigt	Public Access	Aktindsigt til dokumenter	Public access to documents				8761c4bc-9ce3-4cd4-8448-9222d488
261	C_DK_1524623999394	C_1524623999394	Desc_DK_1524623999394	Desc_1524623999394	MICHAEL	25/04/2018	27/04/2018	b38de0ae-79c4-4ada-a355-6b55570€
262	U_DK_1524624027630	U_GB_1524624027630	DescU_DK_1524624027630	DescU_GB_1524624027630	TESTADMIN	25/04/2018	29/04/2018	1abeedc3-91ec-4d20-b1c0-365224c6
281	C_DK_1524656097884	C_1524656097884	Desc_DK_1524656097884	Desc_1524656097884	MICHAEL	25/04/2018	27/04/2018	032a95d6-4b31-4a8b-94bb-1b75e7d.
282	C_DK_1524659961523	C_GB_1524659961523	Desc_DK_1524659961523	Desc_GB_1524659961523	MICHAEL	25/04/2018	27/04/2018	b4b46831-8d21-4dde-b919-3320cc9.

- **ID** – ID of the process inherited from WorkZone Process.
- **GUID** – Automatically generated globally unique identifier.

9.2 Processes

> **Prerequisite:** To view and edit processes, you must have the PROCESSADM access code.

About processes

WorkZone Process allows you to manage WorkZone documents in a workflow, have your work process documented automatically, and to track information. WorkZone Process includes a number of process packages that correspond to typical workflows in an organization. With the default installation of WorkZone Process, you get a WorkZone Process Basis package that includes a submission process and a hearing process. In addition to this package, your organization may have other packages installed. These packages are add-on packages:

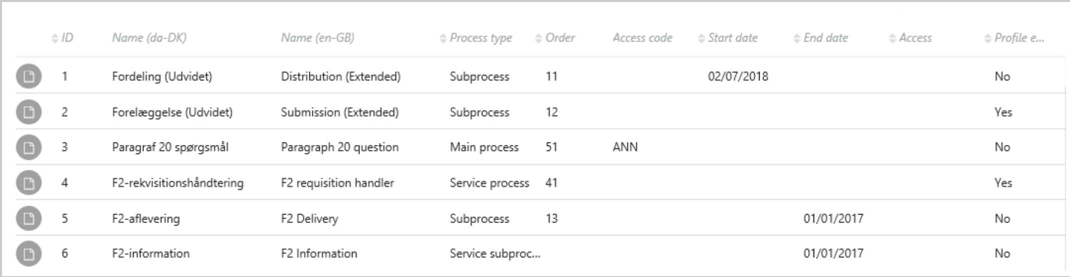
- Extended package
- Agency package
- SmartPost package
- Case Activities package
- F2 Integration package

For more information on processes, see About WorkZone Process.

See also how to configure Extended submission and Ministerial process.

View processes

To view the list of available processes, click **Process** on the start page and then the **Processes** tab. You see a list of all available processes.

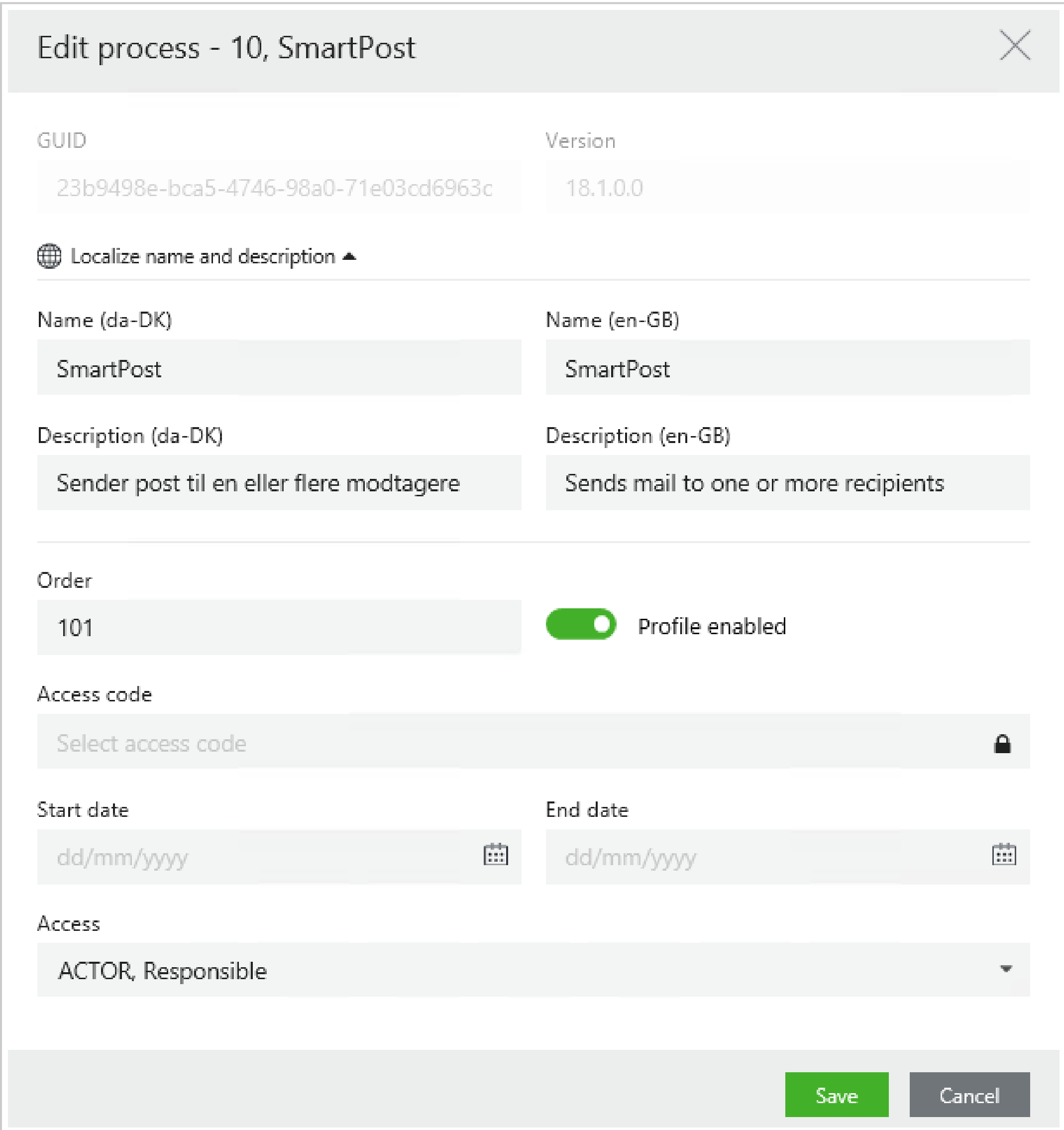


ID	Name (da-DK)	Name (en-GB)	Process type	Order	Access code	Start date	End date	Access	Profile e...
1	Fordeling (Udvidet)	Distribution (Extended)	Subprocess	11		02/07/2018			No
2	Forelæggelse (Udvidet)	Submission (Extended)	Subprocess	12					Yes
3	Paragraf 20 spørgsmål	Paragraph 20 question	Main process	51	ANN				No
4	F2-rekvisitionshåndtering	F2 requisition handler	Service process	41					Yes
5	F2-aflevering	F2 Delivery	Subprocess	13			01/01/2017		No
6	F2-information	F2 Information	Service subproc...				01/01/2017		No

- **ID** – Unique ID of the process.
- **Name** – The name of the process that is visible to users.
- **Process type** – The type of the process that defines how the process is used. See The Process Module.
- **Order** – Defines the display order of processes in different WorkZone clients. The process with the smallest number is displayed at the top of the Process menu.
- **Access code** – Click and select units and users who should be able to see and use the process.
- **Start date** – The date when the process is activated. As of this date the process will be available to users.
- **End date** – The date when the process is deactivated. As of this date the process will no longer be available to users.
- **Access** – Defines who can access the processes in the current environment.
    - ACTOR – Only the current user.
    - DELEGATE – The user who has access rights to WorkZone Process can delegate access rights to another user. See Work with delegates.
    - ALL – Access is not limited to a specific user.
- **Log profile** – The log profile limits the amount of log information that is written to the WZP_WORKFLOW_LOG table. In cases where you want to investigate problems, you can disable the log profile, and then get a complete log. See Logging in the WorkZone Operations Guide.

Edit a process

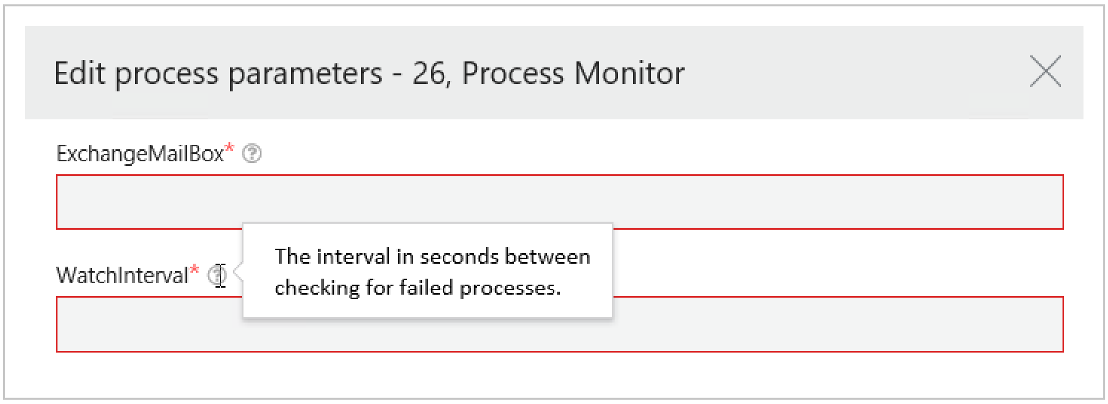
1. Point to the process that you want to update. A menu bar appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit process** dialog box. See filed descriptions in View processes.
4. Click **Save**.



Edit process parameters

Process parameters define process behavior for specific actions and conditions. Consequently, each process has own list of parameters relevant specifically to it.

1. Point to the process you want to update. A menu bar appears.
2. Click **Edit process parameters**.
3. Apply the required changes in the **Edit process parameters** dialog box:
   - Label stands for parameter's name in the database, for example, *ExchangeMailBox*.
   - Asterisk * notifies that the parameter is required to run the process correctly.
   - The question mark icon contains the parameter description. Point to it to view more information about the parameter.
   - Red frames inform you that parameter is mandatory and must be filled.
4. Click **Save**.



Edit process labels

Prerequisite: You can only edit labels of a copied process.

Process label is a process name visible to users. On this page, you can define labels for all supported languages. You can also view, add, and update labels for processes and process forms on the **Process Labels** tab. See Customize process labels.

1. Point to the process where you want to update labels. A menu bar appears.
2. Click **Edit process labels**.
3. Define the labels and click **Save**.

Copy a process

An easy way to create a new process is to copy an existing process. You can then modify name, description and parameters' settings for the new process according to the needs.

> **Note:** You cannot copy a copied process. Please find the original process to make a copy.

1. Point to the process that you want to copy. A menu bar appears.
2. Click **Copy process**.
3. Specify new name and description.
4. Click **Copy**.

You can find the process in the bottom of the list. Edit process parameters if required.

9.3 Service workflows

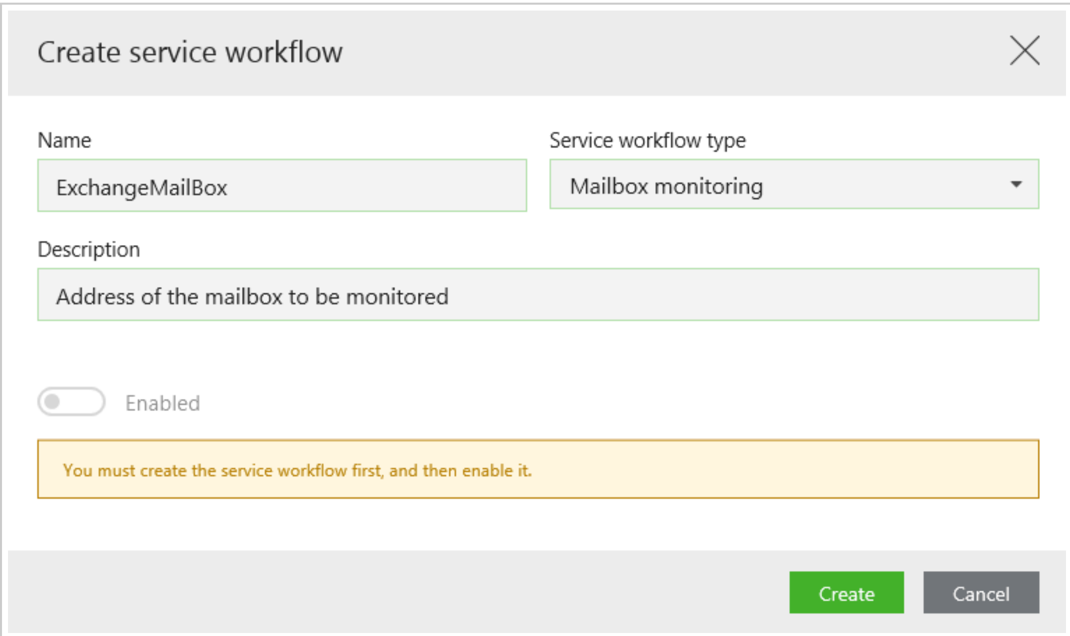
> **Prerequisite:** To view and configure service workflows, you must have the PROCESSADM access code.

About service workflows

A service workflow is a workflow that runs continuously in the environment where it is started. The service workflow can start any kind of workflow, based on the defined service parameters. One example of a service workflow is a workflow that monitors a mailbox, and starts workflows based on incoming mails.

For more detailed information on service workflows, see Service workflows in the WorkZone Process Administrator Guide.

Create a service workflow



1. On the main page, select **Process**.
2. On the **Service workflows** tab, in the bottom right corner of the page, click **Create**.
3. Fill in the following fields in the **Create service workflow** dialog box:
   - **Name** – Specify name of the service workflow that is visible for administrators.

- **Service workflow type** – Select a relevant service workflow type.
- **Description** – Enter the description.
- **Enabled** – Enables that the service is started and monitored by the Process Service Agent.

4. Click **Create**.

Edit a service workflow

1. Point to the service workflow that you want to update. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit service workflow** dialog box.

   > **Note:** You cannot edit the **Service workflow type** value.

4. Click **Save**.

Mass edit service workflows

You can enable or disable multiple service workflows at once.

> **Important:** You can only mass edit service workflows where mandatory process parameters are defined.

1. On the **Service workflows** tab, double-click all service workflows to select them for mass editing.

   > **Tip:** Select the checkbox above all service workflows icons to select all displayed workflows at once.

2. In the bottom right corner of the page, click **Edit**.

3. In the **Edit service workflow properties** dialog box, select **Enabled** from the **Select property to edit** droplist.
4. Turn the **Enabled** option under **Define property value** on or off, as needed.
5. Click **Save**.

Edit service parameters

Service workflow parameters define service workflow behavior for specific actions and conditions. Consequently, each service workflow has own list of parameters relevant specifically to it.

1. Point to the service workflow which parameters you want to update. A menu bar appears.
2. Click **Edit service parameters**.
3. Apply the required changes in the **Edit service parameters** dialog box:
    - Label stands for parameter's name in the database, for example, *ExchangeMailBox*.
    - The question mark icon contains the parameter description. Point to it to view more information about the parameter.
    - Red frames inform you that the parameter is mandatory and must be filled.
4. Click **Save**.

Delete a service workflow

1. Point to the service workflow that you want to delete.
2. Click **Delete**, and then **Delete**.

9.4 E-Boks materials

Prerequisite: To configure e-Boks materials, you must have the PROCESSADM access code.

About the e-Boks materials

Tip: See also Configure e-Boks materials in the Administrator Guide for WorkZone Process.

The e-Boks materials module is used to set up e-Boks materials that are used in the SmartPost process. An e-Boks material is a configurable item in e-Boks which describes what is communicated to the user. SmartPost needs to know the materials in order to send messages through e-Boks. The material determines whether the user can reply to a message.

Create an e-Boks material

1. On the main page, select **Process**.
2. On the **e-Boks materials** tab, in the bottom right corner of the page, click **Create**.
3. Fill in the following fields in the **Create e-Boks material** dialog box:
    - **Name** – Name of the e-Boks material that is visible to users.
    - **Localize name**– Specify names visible to users.
    - **e-Boks material ID** – The identifier of the material that the organization has created in the e-Boks Administration Portal.
    - **Order** – The order in which the materials will be shown in the **E-boks material** field in the **Send SmartPost** dialog box. Enter a number.

- **Start date** – The date when the e-Boks material becomes active. Before the start date, the e-Boks material is invisible on the user interface.
- **End date** – The date when the e-Boks material is deactivated. After the end date, the e-Boks material becomes invisible on the user interface.
- **Access code** – Click and select units and users who should be able to see and use the e-Boks material.

4. Click **Create**.

Edit an e-Boks material

1. Point to the e-Boks material that you want to update. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit e-Boks material** dialog box.

   Note: You cannot edit the **Name** value.

4. Click **Save**.

9.5 e-Boks mailbox mapping

Prerequisite: To view, add and edit e-Boks maibox mappings, you must have the PROCESSADM access code.

If your organization receives e-Boks messages that are sent to subunits (for example to different authorities or subdivisions), you can map these messages to specific WorkZone cases and units. That is, to configure the e-Boks message handler service workflow to save these messages on specific WorkZone cases that are mapped to the relevant WorkZone units.

You can view, add, and edit e-Boks mailbox mappings on the **e-Boks mailbox mappings** tab in the **Process** section.

View existing e-Boks mailbox mappings

1. On the start page, click **Process**.
2. Select the **e-Boks mailbox mappings** tab. A list of existing e-Boks mail mappings will be displayed.

Create new e-Boks mailbox mapping

1. On the start page, click **Process**.
2. Select the **e-Boks mailbox mappings** tab.
3. In the bottom right corner, click **Create** to open the **Create e-Boks mailbox mapping** form.
4. Fill in the following fields:
    - **Mailbox ID**: enter the mailbox ID.
    - **Mailbox name**: enter the mailbox name.
    - **Responsible unit**: from a droplist, select the relevant WorkZone unit.
    - **Case**: from a droplist, select the WorkZone case on which you want to save messages from this mailbox.

      > **Tip:** You can only select an open case.
5. Click **Create**.

Edit existing e-Boks mailbox mapping

1. On the start page, click **Process**.
2. Select the **e-Boks mailbox mappings** tab.
3. Point to the menu bar next to the mapping that you want to edit, and select **Edit**.
4. In the edit form, update the existing values as needed.
5. Click **Save**.

9.6 Process dispatchers

Prerequisite: To view and configure process dispatchers, you must have the PROCESSADM access code.

About process dispatchers

Dispatcher is a SmartPost functionality that represents a certain way for reaching the message's recipient. There are four standard dispatchers in WorkZone:

- **Straalfors** – The message is sent to Strålfors that handles the printing, enveloping, and handover to Post-Nord.
- **Local print** – The WorkZone user receives an email that includes the SmartPost messages in PDF format. The user handles printing, enveloping, and sending of the messages manually.
- **e-Boks** – The message is sent to the recipient's digital mailbox in e-Boks.
- **OneTooX** – The message is sent to KMD Print that handles the printing, enveloping, and handover to Post-Nord.

See also Configure dispatchers in WorkZone Process Administrator Guide.

Create a dispatcher

The creation of dispatchers differs from creation of other entities in WorkZone. First, you need just to create a new entity and you cannot edit it on this stage. When the dispatcher exists in the database, then you can set localized names, start and end dates, and other settings.

1. On the main page, select **Process**.
2. On the **Process dispatchers** tab, in the bottom right corner of the page, click **Create**.
3. Select a dispatcher from the drop-down list of available dispatchers.

   > **Tip:** You can see a version of the dispatcher next to it.

4. Click **Create**.

Edit a dispatcher

1. Point to the dispatcher that you want to update. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit dispatcher** dialog box:
   - **Localize name**– Specify dispatcher names visible to users.
   - **Description** – Provide the descriptive information about the dispatcher.
   - **Access code** – Click and select units and users who should be able to see and use the dispatcher.
   - **Start date** – The date when the dispatcher becomes active. Before the start date, the dispatcher is invisible on the user interface.

- **End date** – The date when the dispatcher is deactivated. After the end date, the dispatcher becomes invisible on the user interface.

4. Click **Save**.

Edit dispatcher parameters

Each dispatcher has its own list of parameters relevant specifically to it.

1. Point to the dispatcher whose parameters you want to update. A menu bar appears.
2. Click **Edit dispatcher parameters**.
3. Apply the required changes in the **Edit dispatcher parameters** dialog box:
   - Label stands for parameter's name in the database, for example, *SecurityProtocol*.
   - The question mark icon contains the parameter description. Point to it to view more information about the parameter.
   - Red frames inform you that the parameter is mandatory and must be filled.
4. Click **Save**.

9.7 Dispatch sequences

Prerequisite: To view and configure dispatch sequences, you must have the PROCESSADM access code.

About dispatch sequences

A dispatch sequence is a prioritized set of dispatchers that the SmartPost user can select in the **Send SmartPost** dialog box. For example, a user may select a sequence named

Send by digital mail or else remote print else local print. In this case, SmartPost tries to use e-Boks as the dispatcher to reach the recipient of a message. If the sending fails, SmartPost uses Strålfors instead, and finally if this sending also fails, SmartPost sends the message to local print.

The SmartPost package is configured with 4 standard dispatch sequences:

- Send by digital mail or else remote print or else local print
- Send by remote print or else local print
- Send by local print
- Send by digital mail or else local print

In WorkZone Configurator, you can configure standard and custom dispatch sequences and define which sequence to display to users.

See also Configure dispatch sequences in the Administrator Guide for WorkZone Process.

Create a dispatch sequence

Important: Be aware that you cannot delete a dispatch sequence. However, you can deactivate a dispatch sequence by setting the start date to a future date or end date to a past date.

1. On the main page, select **Process**.
2. On the **Dispatch sequences** tab, in the bottom right corner of the page, click **Create**.
3. Fill in the following fields in the **Create dispatch sequence** dialog box:
   - **Name** – Name of the dispatch sequence that is visible to users.
   - **Order** – The order in which the dispatch sequences will be shown to users in the **Send SmartPost** dialog box. Enter a number.

- **Access code** – Click and select units and users who should be able to see and use the dispatch sequence.
- **Start date** – The date when the dispatch sequence becomes active. Before the start date, the dispatch sequence is invisible in the user interface.
- **End date** – The date when the dispatch sequence is deactivated. After the end date, the dispatch sequence becomes invisible in the user interface.

4. Click **Create**.

Edit a dispatch sequence

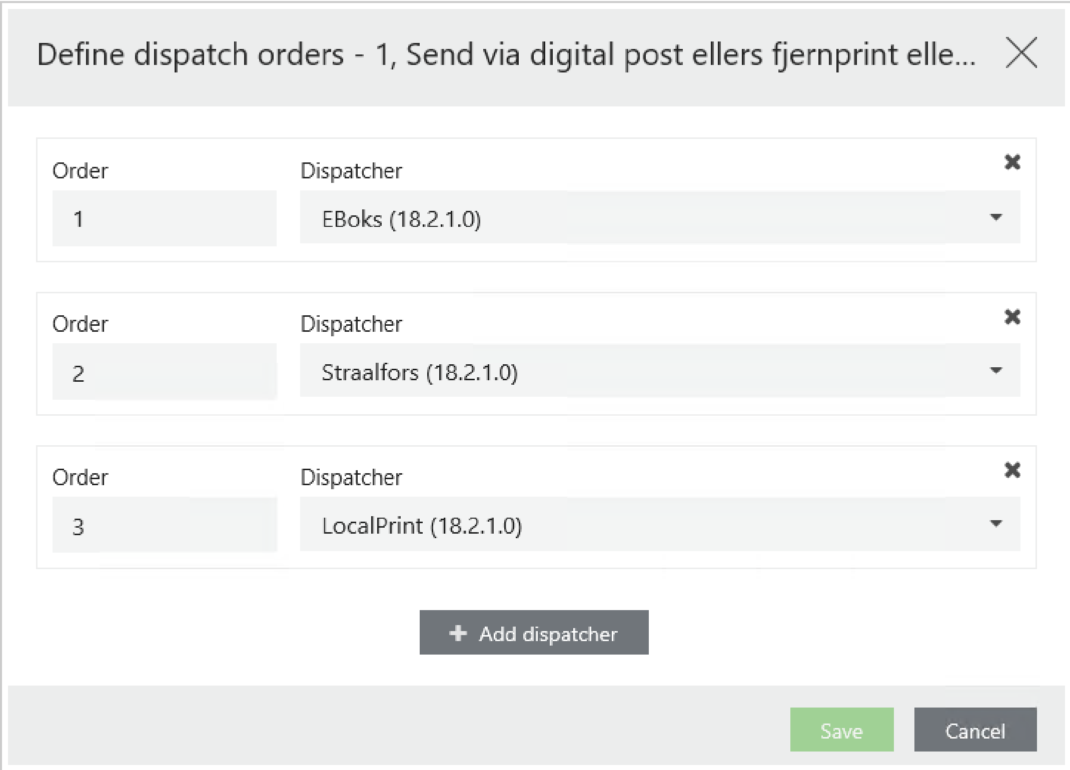
1. Point to the dispatch sequence that you want to update. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit dispatch sequence** dialog box.

> **Note:** You cannot edit the **Name** value.

4. Click **Save**.

Define dispatch sequences

Use this functionality to define a custom set of dispatchers and their order.



1. Point to the dispatch sequence where you want to define the dispatchers. A menu bar appears.
2. Click **Define dispatch sequence**.
3. In the **Define dispatch sequence** dialog box, apply the required configuration:
   - To add a new dispatcher, click **+ Add dispatcher**. Select a dispatcher from the **Dispatcher** list and define its place in the sequence.
   - To remove the existing dispatcher, click ✖ **Remove**.
4. Click **Save**.

9.8 Print types

Prerequisite: To view and configure print types, you must have the PROCESSADM access code.

About print types

A print type is a predefined configuration of how Strålfors prints and handles a dispatch. For example, a remote print type defines the size of the page and envelope, A or B mail, single-sided or double-sided, and so on.

For more detailed information on print types, see Configure remote print types in the WorkZone Process Administrator Guide.

Create a print type

1. On the main page, select **Process**.
2. On the **Print types** tab, in the bottom right corner of the page, click **Create**.
3. Fill in the following fields in the **Create print type** dialog box:
    - **Name** – Specify name of the print type that is visible for users.
    - **Localize name** – Expand to specify names in other languages.
    - **Order** – Defines the display order of print types in different WorkZone clients. The print type marked with the smallest number is displayed at the top of the **Remote print type** list.
    - **Access code** – Click and select units and users who should be able to see and use the print type.
    - **Start date** – The date when the print type is activated. As of this date the print type will be available to users.
    - **End date** – The date when the print type is deactivated. As of this date the print type will no longer be available to users.
4. Click **Create**.

Edit a print type

1. Point to the print type that you want to update. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit print type** dialog box.

    > **Note:** You cannot edit the **Name** field.

4. Click **Save**.

Edit print type parameters

Print type parameters help you configure print color, envelope type, and other settings.

1. Point to the print type whose parameters you want to update. A menu bar appears.
2. Click **Edit print type parameters**.
3. Apply the required changes in the **Edit print type parameters** dialog box:
    - Label stands for parameter's name in the database, for example, *PortoCategoryKey*.
    - The question mark icon contains the parameter description. Point to it to view more information about the parameter.
4. Click **Save**.

9.9 Process settings

> **Prerequisite:** To configure process settings, you must have the PROCESSADM access code.

On this page you can apply general settings to WorkZone Process.

1. On the start page, click **Process**.
2. Select the **Process settings** tab.
3. Apply your changes.

Section / Field	Description
Notifications	
Show / send notifications	Define which process notifications to send to the users: • Send smarttask as email • Send push notifications to user's mobile device • Send email notifications
Workflow host	
Access	Define who can access processes in the current environment.
Allow new instances in Active Directory	Turn on the parameter if you have selected `AllowNewInstances` in the Active Directory Replicator. See Configure the use of new name instances.
Watch delay	Controls the amount of time passed since the workflows should have been started. The default value is 30 minutes. See Configure workflow failover.
Watch interval	Controls intervals between checks. If a web server is unavailable, workflows are not reactivated. In order to avoid this, all workflow hosts periodically check for workflows that are overdue. The default value is 5

Section / Field	Description
	minutes. See Configure workflow failover.
Process history	
Document state	The document state of the process history document that is generated by processes. See Configure the process history document in the Administrator Guide for WorkZone Process.
Mass Dispatch settings	
Mass Dispatch service URL	Provide the URL to use for the Mass Dispatch module.
SmartPost settings	
Party identifier sources	Specifies where the SmartPostsending process looks up sender information such as CVR or CPR numbers. Change the XML element in this setting if the location of the CPR and CVR data has been customized. See Configure CPR and CVR.
Contact address key sources	Specifies where the SmartPost receiver process looks up sender addresses based on the CVR and CPR numbers provided by e-Boks. For example, for the purpose of linking the received documents to the addresses of the senders. Change the XML element in this setting if the location of the CPR and CVR data has been customized. See Configure CPR and CVR.

9.10 Rule sets for case monitor

Prerequisite: To view and manage process rule sets, you must have the PROCESSADM access code.

The Case monitoring service workflow can monitor newly created cases and start a case activity automatically. The case activity starts if the case fulfills a defined rule set. Rule sets are based on saved searches that users create in WorkZone Client or WorkZone QueryBuilder. See Case monitor in Administrator Guide for WorkZone Process.

You can define and configure rule sets and their rules in WorkZone Configurator.

Create a rule set

1. On the start page, select **Process**.
2. On the **Rule sets** tab, click **Create rule set**.
3. Fill in the following fields:

   > **Note:** ID of the rule set is generated automatically. You can see it in the list of the rule sets prior to the name.

   - **Name** – The unique rule set name.
   - **Description** – Specify the description.
   - **Start date** – The date when the rule set becomes active.
   - **End date** – The date when the rule set is deactivated.
4. Click **Create**.

Edit a rule set

1. From the drop-down list on the top of the screen, select a rule set that you want to edit.
2. Click **Edit rule set**.
3. Apply the required changes.
4. Click **Save**.

Delete a rule set

You can only delete a rule set if it is not yet attached to a service workflow.

1. From the drop-down list on the top of the screen, select a rule set that you want to delete.
2. Click **Delete rule set** and then **Delete**.

Create a rule

1. From the drop-down list on the top, select a rule set to which you want to add a rule.
2. In the bottom-right corner of the page, click **Create**.
3. Fill in the following fields:

> **Note:** ID of the rule is generated automatically. You can see it in the list of the rules.

- **Search** – Select a search that contains cases to which you want to apply the rule. You must create the search in WorkZone Client prior and then mandatory share it.
- **Process** – Select a process to associate the rule with. The list displays all existing case activities.
- **Priority** – Enter an integer number to specify the rule's priority. The higher priority, the sooner the rule is executed. The highest priority is 0.
- **Duration** – Specify the deadline for the process to be completed. Use format *number* + *time period*, for example, *+2D12H*. View the available time periods:

D	day
T or **H**	hour

> **Tip:** Time period is not case-sensitive.

- **Enabled** – Turn the rule on.

4. Click **Create**.

Edit a rule

1. Select a rule set on which you want to edit a rule.
2. Point to the desired rule, and click **Edit**.
3. Apply the required changes.
4. Click **Save**.

Delete a rule

1. Select a rule set from which you want to delete a rule.
2. Point to the desired rule, and click **Delete**, and then click **Delete**.

9.11 Customize process labels

> **Prerequisite:** To view, add and edit process labels, you must have the PROCESSADM access code.

After you have copied a process, you can customize any of its labels (including labels in the process forms and user tasks) displayed in WorkZone Client to adjust them per your needs and context of your copied process. For example, if you are using the copied process for some review, you can rename the "Deadline" label to "Reply deadline" or "Initial review deadline", or to use any specific terms related to your review process.

You can view, add, and edit process labels for your copied processes (and their forms) on the **Process labels** tab.

> **Important:** You can customize only labels for your own copied processes.

View existing process labels

1. On the start page, click **Process**.
2. Select the **Process labels** tab.
3. Select the needed copied process. A list of all labels for that process will be displayed.
4. If needed, select relevant process form of this process. A list of all labels used in this process form will be displayed.

Create new process label

1. On the start page, click **Process**.
2. Select the **Process labels** tab.
3. Select from a droplist the copied process for which you want to create a new process label.
4. In the right bottom corner, click **Create** to open the **Create process label** form.
5. Fill in the following fields in the **Create label** dialog box:
    - **Global label**: select from the droplist a global process to associate this process label with.

- **Default label text**: enter the default text to be displayed for this label in the WorkZone Client, if relevant localized label has not been defined.

6. Click **Localize label** and:
   - In the **Label (da-DK)** field, enter a Danish text for this label if you need to provide a Danish label.
   - In the **Label (de-DE)** field, enter a German text for this label if you need to provide a German label.
   - In the **Label (en-GB)** field, enter an English text for this label if you need to provide a specific English label.

   The users will see the English, Danish or German label, depending on which language is activated in WorkZone Client.

7. Click **Create**.

Edit existing process label

1. On the start page, click **Process**.
2. Select the **Process labels** tab.
3. Select from a droplist the copied process for which you want to edit an existing process label.
4. Point to menu bar next to the process label which you want to edit, and select **Edit**.
5. In the edit form, update the default label text and/or the localized labels as needed.

   > **Tip:** You can identify the needed label by its system name (**Name** column), or by the label text (**Label (da-DK), Label (de-DE)**, and **Label (en-GB)** columns) currently displayed in WorkZone Client.

6. Click **Save**.

Create new process form label

1. On the start page, click **Process**.
2. Select the **Process labels** tab.
3. Select from a droplist the needed copied process.
4. Select from a droplist the needed process form to associate the new process form label with.
5. In the right bottom corner, click **Create** to open the **Create label** form.
6. Fill in the following fields in the **Create process form label** dialog box:
    - **Global label**: select a global process label from the droplist
    - **Default label text**: enter the default label text to be displayed in the WorkZone Client, if relevant localized label has not been defined.
7. Click **Localize label** and:
    - In the **Label (da-DK)** field, enter a Danish text for this label if you need to provide a Danish label.
    - In the **Label (de-DE)** field, enter a German text for this label if you need to provide a German label.
    - In the **Label (en-GB)** field, enter an English text for this label if you need to provide a specific English label.

    The users will see the English, Danish or German label, depending on which language is activated in WorkZone Client.
8. Click **Create**.

Edit existing process form label

1. On the start page, click **Process**.
2. Select the **Process labels** tab.
3. Select from a droplist the needed copied process.
4. Select from a droplist the needed process form for this process.
5. In the right bottom corner, click **Create** to open the **Create label** form.
6. Point to menu bar next to the process form label which you want to edit, and select **Edit**.
7. In the edit form, update the default label text and/or the localized labels as needed.

   > **Tip:** You can identify the needed label by its system name (**Name** column), or by the label text (**Label (da-DK), Label (de-DE)**, and **Label (en-GB)** columns) currently displayed in WorkZone Client.

8. Click **Save**.

10. WorkZone PDF settings

10.1 PDF Crawler and Engine configuration

> **Prerequisite:** To configure the WorkZone PDF settings, you must have the CONFIGADM access code and WorkZone PDF must be installed.

About WorkZone PDF Crawler and Engine

The WorkZone PDF module is used to convert existing documents to PDF documents. The WorkZone PDF module consists of two sub-modules:

- WorkZone PDF Engine: A stateless web service that performs real-time conversions of files to PDF documents.
- WorkZone PDF Crawler: Used for deferred, asynchronous conversions of selected documents, either manually or with policies.

If an organization uses WorkZone PDF with policies, WorkZone PDF Crawler searches for documents that have not been converted, and match one of the policies that have been defined. When a document that matches a policy is found, it is converted and then saved back to the WorkZone Content Server as a PDF document.

For more detailed information, see WorkZone PDF Administrator Guide.

Configure WorkZone PDF

1. On the start page, click **PDF**.
2. Select the **Engine configuration** or **Crawler configuration** tab depending on your needs.
3. Apply your changes.

Field	Description	Notes
Conversion		
Bypass page bounds verification for files	Specify which file types are to be bypassed when boundaries of objects in the files are checked during PDF conversion. The default file extension is PDF, meaning that the check for out-of-bounds objects in PDF documents will be bypassed.	
Convert documents with their attachments	Enable to covert document attachments together with the document.	
Suppress content that exceeds page bounds	If deactivated, the document is converted even if the content exceeds the bounds of a document. If enabled, the content fails to convert. **Note:** Documents with the states UL (Locked), ARK (Archived), and AFS (Closed) will not be checked for content that is out of bounds even if the toggle button is enabled. Documents with these states are locked in their final state regardless of	

Field	Description	Notes
	content that exceeds the page bounds.	
Document processing retries	Specifies how many times WorkZone PDF Crawler tries to convert a document.	This setting is only available for WorkZone PDF Crawler
Document processing time-out	Specifies a time-out after which the WorkZone PDF Crawler stops waiting for conversion to be finished. If the conversion is not finished during the specified time-out, an error message is written to the dvs_render_info table.	This setting is only available for WorkZone PDF Crawler
For PDF documents		
PDF forms: • Flatten • Show	Select whether to include PDF forms as regular content or to show as review edits, when converting PDF documents. **Flatten**: PDF forms will be included to the final document as regular content (text and images). **Show:** PDF forms will be shown in the final document as review	

Field	Description	Notes
	edits (and will remain editable).	
Annotations: • Flatten • Show • Hide	Select whether to include annotations as regular content, show as edits, or hide completely, when converting PDF documents. **Flatten**: Annotations will be included to the final document as regular content (text and images). **Show:** Annotations will be shown in the final document as review edits. **Hide:** Annotations will be hidden (excluded) from the final document.	
For Word documents		
Show comments	Enable to show comments when converting Word documents	
Revisions: • Accept • Show • Reject	Select whether to accept, show or reject existing revisions, when converting Word documents	

Field	Description	Notes
For Excel documents		
Show comments	Enable to show comments when converting Excel documents	
Revisions: • Accept • Show • Reject	Select whether to accept, show or reject existing revisions, when converting Excel documents	
For PowerPoint documents		
Show annotations	Enable to show annotations when converting PowerPoint documents	
Show notes	Enable to show notes when converting PowerPoint documents	
Content settings		
Header	Define the content of the header. You can specify the header content as normal text or use the following Microsoft field codes: **{Title}:** The document title. **{Date}:** The current date	Custom header text example: `<setting name="Header" serializeAs="String"> <value> 'My Custom Header'</value>`

Field	Description	Notes
	based on defined culture settings. **{Page}:** The current page number in the document. **{NumPages}:** The total amount of pages in the document.	</setting> OpenField code header example: <setting name="Header" serializeAs="String"> <value>{page}</value> </setting>
Header styles	Define the default style of the header that will be used if the style is not specified in the request. This parameter must be in JSON format. You can specify the formatting of the header, for example, bold, italic, as well as which font to use. All parameters are optional.	Example of a header in bold using Arial as font: { "Bold": true, "Font": "Arial"}
Watermark	Specify the text to print as a watermark on each page.	
Watermark styles	Define the default style of the watermark. This parameter must be in JSON format. You can specify color, transparency, and font. All parameters are	Example of a watermark with red as the font color, medium transparency, and using Verdana as the font:

Field	Description	Notes
	optional. You specify them as follows: **Color:** Any valid html string format such as standard color name (e.g. red), hex value (e.g. #FF0000), and RGB colors (e.g. 255,0,0). **Transparency:** Transparency ranges from 0 to 100 where 100 represents full opacity. **Font**: A font name. **Note:** You do not need to specify font size. The watermark will be sized to fit the page automatically.	{ "Color": "Red", "Transparency": "55", "Font": "Verdana"}
Footer	Define the content of the footer. You can specify the footer content as normal text or use the following Microsoft field codes: **{Title}:** The document title. **{Date}:** The current date based on defined culture settings. **{Page}:** The current page number in the document.	Custom footer text example: <setting name="Footer" serializeAs="String"> <value> 'My Custom Footer'</value> </setting> Field code footer example: <setting

Field	Description	Notes
	{NumPages}: The total amount of pages in the document.	name="Footer" serializeAs="String"> <value> " Page {page} of {NumPages}"</value> </setting>
Footer styles	Define the default style of the footer that will be used if the style is not specified in the request. This parameter must be in JSON format. You can specify the formatting of the footer, for example bold, italic, as well as which font to use. All parameters are optional.	Example of a footer in bold using Arial as font: { "Bold": true, "Font": "Arial"}
Output settings		
Convert PDF output to archive format	Enable to convert to a PDF format that is used for long-term storage. Deactivate to convert to a PDF format for generic usage.	
Compress PDF output	Enable to reduce a size of the PDF output. This parameter is particularly important as large	

Field	Description	Notes
	documents may take a long time to download from a server.	
Optimize PDF output for the web	Enable to optimize the PDF output for the web. This parameter is particularly important as regards large documents that may take a long time to download from a server.	

10.2 Conversion policies

Prerequisites:

- To configure conversion policies, you must have the CONFIGADM access code.
- To configure these settings, WorkZone PDF must be installed.

About policies

You can configure policies to define which documents are to be converted to PDF and in which priority.

You can specify which documents to convert based on the following criteria:

- Document state (for example, Draft, Locked, Archived)
- Document type (for example, Incoming, Outgoing)
- Document group (for example, Decision, Hearing, Complaint, Minutes)
- Date of last change

For more detailed information, see WorkZone PDF Administrator Guide.

Policy priority

Policy priorities enables conversion of important (high priority) policies first and relegates conversion of less important (lower priority) policies later, when there may be vacant machine resources to convert documents of these policies. The highest priority is 0. You can assign as many priority values to the policies as you need, for example, 0, 1, 2, ... 10, 11 and so on.

Create a new policy

1. On the start page, click **PDF**.
2. On the **Conversion policies** tab, click **Create**.
3. Fill in the following fields:
    - **Name** – Enter a name for the new policy.
    - **Priority** – Enter an integer number that defines a priority.
    - **Enabled** – Turn it on to make the policy active.
    - **Document state**, **Document type**, **Document group** – Define the documents to which you apply the policy:
        - *<All>* – Apply the policy to documents of all states, types, and/or groups.
        - *Include* – Apply the policy to particular states, types, and/or groups only. You can use multiple selection for each field.
        - *Exclude* – Define which documents must be skipped by the policy. You can use multiple selection for each field.
    - **Document last updated** – Apply the policy to a document if:
        - *Greater than* – The document is updated after the selected day.
        - *Less than* – The document is updated before the selected day.

- *Greater than or equal* – The document is updated during the selected day or after.
- *Less than or equal* – The document is updated before or during the selected day.
- *<None>* – Ignore this setting.

> **Note:** This settings affects only documents whose content (body) was updated. The changes in the document's metadata is not considered as an update here.

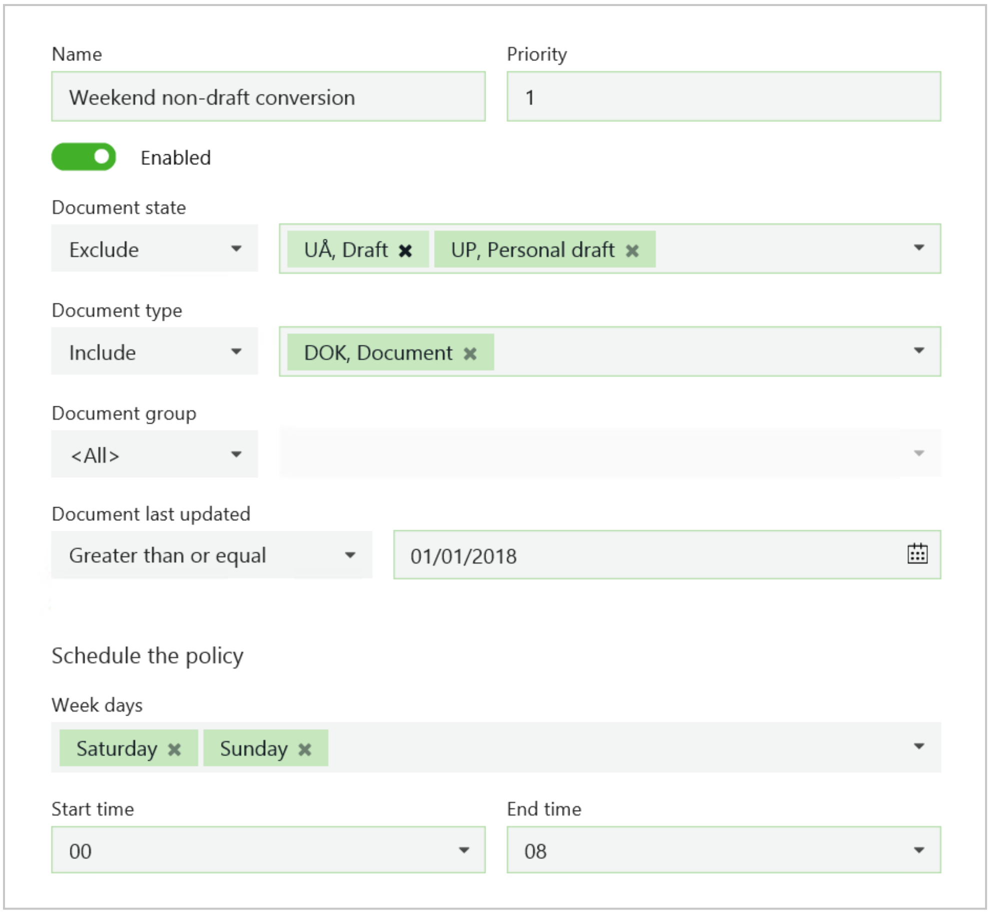
- **Week days** – Select the week days when the policy must apply. You can use multiple selection.
- **Start time** – Select an hour when the conversion must start.
- **End time** – Select an hour when the conversion must end.

> **Important:** You can only select hours within a single day. In other words, you cannot define the rule when the policy starts on one day, for example, at 21:00, and ends on the next day, for example, at 06:00. For your convenience, both values 00 and 24 are available while they mean the same.

4. Click **Create**. The policy is created. Its unique key is generated automatically.

Example:

> The policy converts all documents of the type DOKUMENT that are not drafts and have been changed within 2018 year. The conversion is scheduled on weekend nights to ensure that load on servers won't affect employees' regular work.



Edit a policy

1. Select a policy that you want to edit.
2. Click **Edit**.
3. Apply the required changes in the **Edit policy** dialog box.
4. Click **Save**.

Delete a policy

1. Select a policy that you want to delete.
2. Click **Delete**, and then click **Delete**.

11. WorkZone Explorer settings

11.1 Explorer configuration

> **Prerequisite:** To configure the WorkZone Explorer settings, you must have the CONFIGADM access code.

WorkZone Explorer uses WebDAV (Web Document Authoring and Versioning), which is a standard document protocol over HTTP. With WorkZone Explorer, users can manage cases and documents from File Explorer.

In WorkZone Configurator, you can define the default settings for WorkZone Explorer.

Configure WorkZone Explorer

1. On the start page, click **Explorer**.
2. Select the **Explorer configuration** tab.
3. Apply your changes.

When you make a change on the WorkZone Configurator user interface, you update the settings in the database (table `wz_explorer`). Users just need to refresh the file explorer and an updated configuration will then be available.

Field	Description	Notes
Set default case and document properties	Define the default property values for cases and documents created in WorkZone Explorer:	
	• Default case group	

Field	Description	Notes
• Default document type		
• Use letter date as document creation date		If activated, letter date of the document inherits the value from the creation date. If deactivated, letter date has no value.
Select properties to be inherited from parent:	Indicate properties that child cases must inherit from their parent cases:	
• Read access code		If deactivated, child cases have empty read access code and all users can view these cases.
• Case group		If deactivated, child cases have default case group.
• Case category		If deactivated, child cases have no case category.
Select information to be displayed as a part of folder or document name:	Indicate information that must be displayed in the case title:	
• Case number	The unique identifier of the case, generated based on the custom defined components in **Taxonomy** > **Case**	

Field	Description	Notes
	number format. The case number is displayed on many if not all user-oriented interfaces. It is also known as the File_No within the system.	
• Case ID	The unique identifier of the case, generated as a sequential number from the Oracle database. The Case ID is very rarely displayed to the users, but can sometimes be seen and referenced. It is also known as the system key or File_Key.	
• **Record number**	Select a place to display the ID number of the archived document:	
◦ N	Omit the record number in the title.	
◦ POST	Display record number in the beginning of the title.	
◦ PRE	Display record number in the end of the title.	
Hierarchy settings		
• Display child cases on the parent cases' level	Activate this toggle button to view parent and child cases on the same level. This gives you possibility to view all existing cases in a single	

Field	Description	Notes
	place and to easily find a needed child case. Note that child cases also will be duplicated on the original levels. Deactivate the toggle button to view cases in their original tree structure.	

12. Retention policies

12.1 Reasons for deletion

Prerequisite: To configure reasons for deletion, you must have the DATAADM access code.

About reasons for deletion

When WorkZone Client users delete cases, they must specify a reason for deletion. The reason can be an improvised explanation created by a user. Alternatively or in a additional to this, users can select a pre-defined reason for deletion from the drop-down list. The pre-defined reasons for deletion must be created in WorkZone Configurator on this page.

Create a reason for deletion

Create a new value for the **Reasons for deletion** list.

1. On the main page, select **Retention**.
2. On the **Reasons for deletion** tab, in the bottom-right corner of the page, click **Create**.
3. Fill in the following fields in the **Create reason for deletion** dialog box:
    - **Label by default** – The default name that is visible to users.
    - **Code** – The code in the database.
    - **Localize labels** – Optionally, specify names in other languages.
    - **Selectable** - Disable to make this value non-selectable for the users in WorkZone Client or WorkZone 365.

- **Start date** – The date when the reason for deletion becomes active. Before the start date, the reason for deletion is invisible on the user interface.
- **End date** – The date when the reason for deletion is deactivated. After the end date, the reason for deletion becomes invisible on the user interface.

4. Click **Create**.

Edit a reason for deletion

1. Point to the reason for deletion that you want to edit. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit reason for deletion** dialog box.

> **Note:** You cannot edit the **Label by default** and **Code** values.

4. Click **Save**.

Delete a reason for deletion

You can only delete a reason for deletion that does not have any records in the database.

1. Point to the reason of deletion that you want to delete. A menu bar with action buttons will then appear.
2. Click **Delete**, and then click **Delete**.

12.2 Retention policies

Prerequisite: To configure retention policies, you must have the RETENTIONADM access code. To define the default retention policy, you must have the DATAADM access code.

About retention policies

Retention policies define the life cycle of cases and documents. For example, some cases must be retained for 10 years after closure, while some cases can be deleted at any time – all these rules must be clearly defined and automated. Each retention policy has a retention code associated with it, and this retention code can be assigned to a case or to a document. You can create, edit, and delete retention policies and define the default retention policy for the whole organization in WorkZone Configurator.

Create a retention policy

1. On the main page, select **Retention**.
2. On the **Retention policies** tab, in the bottom-right corner of the page, click **Create**.
3. Fill in the following fields in the **Create retention policy** dialog box:
    - **Code** – The code in the database.
    - **Text** – The default name of the retention code.
    - **Description** – Specify the detailed description of the retention code functionality. Ensure that the description covers all possible scenarios and data will not be lost due to assigning a wrong retention code.
    - **Localize text and description** – Optionally, provide description in other languages.
    - **Relative retention period** – Specify the period when permanent deletion of a case is allowed. Use format *number + time period*, for example, *+1M*. View the available time periods:

Å or **Y**	year
M	month
U or **W**	week
D	day

Tip: Time period is not case-sensitive.

- **Purge period** – Specify the period after which all soft deleted items will automatically be purged (permanently deleted) from the system.
- **Automatic purging** – Enable to automatically purge (permanently delete) items after the purge period.
- **Delete comment required** – Enable to make **Description** of the reason for deletion mandatory for users. If the toggle button is not enabled, then filling the **Description** field will be optional for users.
- **Automatic soft deletion** – Enable to automatically soft delete items after the retention period.
- **Default update code** – Indicate units and users who can change the retention code of cases belonging to the current case group.
- **Start date** – The date when the retention policy becomes active.
- **End date** – The date when the retention policy is deactivated.

Important: For the automatic purging and automatic soft deletion to work, you must also set on your server a scheduled job for executing the Scanjour.autopurge.exe file. See Using the ScanJour.AutoPurge.exe program in the Operations Guide for more information.

4. Click **Create**.

Edit a retention policy

1. Point to the retention policy that you want to edit. A menu bar with action buttons appears.
2. Click **Edit**.
3. Apply the required changes in the **Edit retention policy** dialog box.

   > **Note:** You cannot edit the **Code** and **Text** values.

4. Click **Save**.

Delete a retention policy

You can only delete a retention policy that does not have any records in the database.

1. Point to the retention policy that you want to delete. A menu bar with action buttons appears.
2. Click **Delete**, and then click **Delete**.

Define default retention policy

You should define a default retention policy for your organization globally to better adhere to the GDPR rule set. The default retention policy will automatically be applied to all cases and documents if a different retention policy is not defined specifically.

1. On the main page, select **Retention**.
2. On the **Default retention policy** tab, select the desired retention policy from the drop-down list.

13. Security

13.1 Global and departmental access

Prerequisites:

- To configure global or departmental access, you must have the STJERNEADM and MEDARBADM access codes.
- To configure departmental access, you must have the corporate database setup.

You can grant specific users global or departmental access to allow these users view and edit items (cases, documents, contacts, meetings or actor sequences) protected by security access codes that the user is not a part of.

Important: Global and departmental access are extensive rights that will allow the user to access sensitive information. Assign these rights only when needed.

Tip: Find more information about access rights and codes in WorkZone Client User Guide.

- Global access: provides users with the full access to any items within your whole organization.
- Departmental access: provides users with the full access to any items within their department.

Configure global access

Configure global access

1. On the start page, click **Security**.
2. Select the **Global access** tab. A list of users who have global access is displayed.
3. Apply the required changes.

Grant global access to a new user

1. In the right bottom corner, click . The **Create global access** dialog box opens.
2. Enter name of the user you wish to grant the global access to.
3. Click **Create**.

Remove global access

1. Point to an existing user with the global access. A menu bar with action buttons appears.
2. Click , and then click **Delete**.

Configure departmental access

Configure departmental access

1. On the start page, click **Security**.
2. Select the **Departmental access** tab. A list of users who have departmental access is displayed.
3. Apply the required changes.

Grant departmental access to a new user

1. In the right bottom corner, click . The **Create departmental access** dialog box opens.
2. Enter name of the users you wish to grant the departmental access to.
3. Click **Create**.

Remove departmental access

1. Point to an existing user with the departmental access. A menu bar with action buttons appears.
2. Click , and then click **Delete**.

13.2 Users

Prerequisite: To access the list of all users in your WorkZone system, you must have the USERADM access code.

You can view a list of all users in your WorkZone system, and export this information to Excel for further processing. You can also check access codes applied to a specific user.

View list of all users

1. On the start page, click **Logs**.
2. Select the **Users** tab. A list of all users in your WorkZone system is displayed, showing each user's ID, full name, authority, user number, security code, UPN, and employee end date.

> **Tip:** By default, the users will be sorted by user ID. You can sort or filter the displayed user list in the same way as any other list. See Filter a list by values and Sort a list.

View access codes for a user

1. On the start page, click **Logs**.
2. Select the **Users** tab.
3. In the action bar for a user whose access codes you want to view, click **Info**. A list of all access codes applied to this user is displayed.

> **Tip:** Search within the displayed results by typing a title of the needed access code into the search field.

Export user list to Excel

> **Note:** The maximum number of rows to export to Excel is 1048576. If you exceed this number, filter the displayed log results to reduce the number of rows to export.

1. On the start page, click **Logs**.
2. Select the **Users** tab.
3. At the bottom right corner, click . The displayed logs will be exported to an Excel file.
4. Select the needed action (**Open**, **Save** or **Cancel**) for the exported Excel file.
5. Proceed with the Excel file as needed.

14. Logs

14.1 Deletion logs

Prerequisite: To access deletion logs, you must have the USERADM access code.

You can view the deletion logs for WorkZone cases, documents, or contacts to track who has soft-deleted and hard-deleted an item, when and why (the deletion reason), and export this information to Excel for further processing.

View deletion logs

1. On the start page, click **Logs**.
2. Select the **Deletion logs** tab. A list of existing deletion logs is displayed, providing deleted item's ID, deletion date, type and text of the deleted item, username of the employee who has soft-deleted the item, username of the employee who has hard-deleted the item, reason for deletion, and comment.

   Tip: You can sort or filter the displayed deletion logs in the same way as any other lists, if needed. See Filter a list by values and Sort a list.

Export deletion logs to Excel

Note: The maximum number of rows to export to Excel is 1048576. If you exceed this number, filter the displayed log results to reduce the number of rows to export.

1. On the start page, click **Logs**.
2. Select the **Deletion logs** tab.

3. At the right bottom corner, click . The displayed logs will be exported to an Excel file.
4. Select the needed action (**Open**, **Save** or **Cancel**) for the exported Excel file.
5. Proceed with the Excel file as needed.

14.2 Deletion log settings

Prerequisite: To edit the deletion settings, you must have the USELOGADM access code.

Include text values into deletion logs

You can select whether to include texts values, such as case, document or contact title or number, in the deletion logs.

Tip: The **Enable logging of text** option is enabled by default. Disable it, if you want to exclude these texts from the deletion logs (for example, if they may contain confidential information).

1. On the start page, click **Logs**.
2. Select the **Deletion log settings** tab.
3. Toggle the **Enable logging of text** button to include or exclude the text values, such as case/document title or number, in the deletion logs.

14.3 Use logs

Prerequisites: To access the use logs, you must have the USERADM access code, and have the use logs recording enabled for your organization.

You can view the use logs for WorkZone cases, documents, or contacts to track who has accessed an item, when and how (the search criteria), and export this information to Excel for further processing.

You can set up additional use logs settings (such as to start and stop recording the use logs, minimize the log level, and run the use log consolidation) on the **Use log settings** page (this requires the USELOGADM access code). See Use logs settings.

View use logs

1. On the start page, click **Logs**.
2. Select the **Use logs** tab. A list of existing use logs is displayed, providing accessed item's ID, type and system key, name and number of the user who has accessed the item, access date and time, user action, application and IP used for access, and search criteria.

   > **Tip:** By default, the use log will show entries from the latest 30 calendar days, with the most recent entries displayed first. You can sort or filter the displayed use logs in the same way as any other lists. See Filter a list by values and Sort a list.

   > **Tip:** When filtering logs by **Time**, you can specify not only date, but also time parameters, to see log entries within specific hours.

Column	Description
Time	Date and time that the user executed the action logged in the **Action** column.
User name	User who executed the action.
Action	Actions executed by the user: • **I** - Insert - an entity, for example a case, has been created.

Column	Description
	• **D** - Delete - an entity, for example a contact, has been deleted. • **U** - Update - an entity has been edited. • **S** - Search - a search has been executed. • **V** - Search Parameter - the search criteria used in the search. • **L** - Lock - a record has been locked, archived or terminated. • **P** - Print - a report has been printed. • **M** - Mail - an e-mail has been sent with a file or summary.
Register	The register or table where the action was executed. This column may also show **#document** for actions **I**, **U**, and **S**. This indicates that the user has created, updated, or searched for a document.
Key	The user key is the ID displayed for the user, for example, in WorkZone Client. While the system key for a case for instance could be 2740730, the user key of the same case could be 2015-10-0018. In WorkZone Client and Captia Web Client, the user key is called **Case Number**.
System key	The system key of a case could, for example, be 2740730, while the case number of the case could be 2006-10-0018.
Search criteria	The string of search criteria (the search expression).
IP	IP from which the action was executed.
Application	The application where the action was executed. For example, SomAspNet - captia (Captia Web Client) or WebDaV (WorkZone Explorer).
ID	Use log ID
User number	A system-generated number that identifies the user. It is automatically assigned to the user when the user is created (that is, when the user is replicated from Active Directory to the WorkZone database).

Export use logs to Excel

> **Note:** The maximum number of rows to export to Excel is 1048576. If you exceed this number, filter the displayed log results to reduce the number of rows to export.

1. On the start page, click **Logs**.
2. Select the **Use logs** tab.
3. At the right bottom corner, click . The displayed logs will be exported to an Excel file.
4. Select the needed action (**Open**, **Save** or **Cancel**) for the exported Excel file.
5. Proceed with the Excel file as needed.

14.4 Use log settings

> **Prerequisite:** To edit the use log settings, you must have the USELOGADM access code.

Start or stop recording the use logs

1. On the start page, click **Logs**.
2. Select the **Use log settings** tab.
3. Toggle the **Start use log** button to start or stop recording the use logs for your organization.

Consolidate the use logs

Once recording the use logs is enabled, recent use logs will be automatically consolidated with the monthly logs every night. You can also manually consolidate the use logs at any time to ensure that monthly use logs contain all recent entries.

Tip: You can see the date and time of the last use log consolidation under the **Run use log consolidation** button on the **Use logs setting** page.

1. On the start page, click **Logs**.
2. Select the **Use log settings** tab.
3. Click **Run use log consolidation** button to consolidate the recent use logs.

Important: It is recommended to run the use log consolidation outside work hours, because it impacts the database performance.

Log only main entities

You can minimize the number of your use logs by selecting to only log instances where users have accessed an entity (a case, a document, or a contact) directly. That is, to log the instances when the users were specifically searching for an item by its title or number, or have opened the item from a list or from another page, but not the instances when an item was displayed on a page or in a list, if the user did not access this item.

Tip: The **Log only main entities** toggle is enabled by default. Disable it, if you want to see the extensive logs (be aware that this will significantly (for up to 100 times) increase the number of your use logs).

1. On the start page, click **Logs**.
2. Select the **Use log settings** tab.
3. Toggle the **Log only main entities** button to enable or disable logging only directly accessed entities.

Tip: The updated log settings will apply, after the relevant application on the webserver/server is recycled or the Internet Information Service (IIS) is restarted. A common practice is to recycle automatically every 29 hours, but this can vary

> depending on your organization needs.To instantly apply the updated use logs settings, you can recycle the **SjSvc** application manually (in the **Application Pools**, select **SjSvc** and click **Recycle**).

14.5 Process logs

> **Prerequisites:** To access the process logs, you must have the PROCESSADM access code.

You can view process logs for a specific process instance to see additional information about it (for example, to troubleshoot a failed process). You can also export this information to Excel for further processing.

View process logs

1. On the start page, click **Logs**.
2. Select the **Process logs** tab.
3. Select a process instance ID from the droplist. A list of all process logs for this instance is displayed, where you can see the ID, server, process ID, time, instance, activity name and type, action, document type, and properties.

   > **Tip:** You can filter the displayed logs in the same way as any other lists. See Filter a list by values.

Export process logs to Excel

> **Note:** The maximum number of rows to export to Excel is 1048576. If you exceed this number, filter the displayed log results to reduce the number of rows to export.

1. On the start page, click **Logs**.
2. Select the **Process logs** tab.
3. At the right bottom corner, click . The displayed logs will be exported to an Excel file.
4. Select the needed action (**Open**, **Save** or **Cancel**) for the exported Excel file.
5. Proceed with the Excel file as needed.

15. Custom icons for WorkZone Client

15.1 Icons collection

> **Prerequisite:** To view, add, and edit custom icons for WorkZone Client, you must have the CONFIGADM access code.

You can add custom SVG icons for your organization to use in WorkZone Client, and then configure where and when these icons will be used. You can add custom icons either as files from your computer or as SVG code (the system will verify whether provided code can be properly rendered).

> **Important:** You can only use SVG files as custom icons in WorkZone Client.

View existing icons for WorkZone Client

You can view and edit existing icons on the **Icons collection** page.

1. On the start page, click **Client**.
2. Select the **Icons collection** tab. The list of custom icons currently added to WorkZone Client is then displayed.

Add a new custom icon

1. On the start page, click **Client**.
2. Select the **Icons collection** tab.
3. In the right bottom corner, click **Create**. The **Client icon** dialog box then opens.
4. Enter the **Icon name** for this icon. Icon names must be unique for each icon.
5. Add the SVG icon:

- Under **Icon from file**, select the SVG file from your file system. The selected icon will be automatically previewed.

  -Or-

- Under **Icon as SVG code**, enter the SVG code of your icon. To obtain the code, open your SVG icon in any text editor, and copy the displayed code.

6. Click **Create**.

Edit an existing custom icon

1. On the start page, click **Client**.
2. Select the **Icons collection** tab.
3. Point to the icon that you want to edit. A menu bar with action buttons then appears.
4. Click **Edit**.
5. Apply the required changes in the **Client icon** dialog box.
6. Click **Save**.

15.2 Custom icons assignments

Prerequisite: To view, create, and edit custom icon assignments, you must have the CONFIGADM access code.

Custom icons assignments allow you visually group or differentiate the WorkZone items, that you work with, according to your needs. For example, you can use specific icons or icon colors to mark the WorkZone items that require urgent handling, or are related to a particular project, or have any other common factor you want to highlight.

After adding custom icons, you can configure where and when they will be used. That is, you can assign the icon to a certain entity type (case, contact, document, and so on) and specify the start and end dates when it should be used. You can narrow down the icon's usage even further by adding specific conditions when this icon must or must not be used in WorkZone Client. Conditions can define existing entities of the selected property as **Equals**, **Does not equal**, **Contains**, **Starts with**, **Ends with** and support the following values: **@Me**, **@Unit**, **@Authority**, **@Day**, **@Week**, **@Month**, **@Quarter**, **@Year**. For the **@Day** value you can use numeric modifiers with **+** and **-**. For example: *@Day+1* (tomorrow), *@Day-1* (yesterday), *@Day+2m* (two months in the future), *@Day-3y* (three years in the past), and so on.

- You can combine several conditions for the same icon, as long as they do not contradict each other.
- If several icons match the same condition (or several conditions), the icon with the highest number of matching conditions will be used.
- Assignment criteria must be unique - you cannot use the same set of conditions for different icons, or assign the same icon to different entities without providing different conditions.
- Icons with no conditions in their assignments will be used as default icons for the selected entity type (displayed on widget headers, preview headers, and so on).
- The standard WorkZone installation provides a number of predefined icons (for example, icons for a locked case or contact). These are called system icons. You cannot delete a system icon or select another icon file for it. You can, however, deactivate a system icon by setting its **End date** to a past date, and assigning another icon to be used for the same entity type.

View existing icon assignments for WorkZone Client

You can view and edit existing icon assignments on the **Icon assignments** page.

1. On the start page, click **Client**.
2. Select the **Icon assignments** tab.
3. From the droplist at the top, select the entity type for which you want to view the existing icon assignments. The list of existing custom icons and their assignment details are displayed, including the icon name, assignment condition, start and end date, and indication if this is a system icon.

Add a new icon assignment

1. On the start page, click **Client**.
2. Select the **Icon assignments** tab.
3. From the droplist at the top, select the entity type for which you want to create icon assignments.
4. In the right bottom corner, click **Create**. The **Client icon assignment** dialog box opens.
5. Fill in the assignment fields:
    - **Icon name**: Select an existing icon from your icons collection.
    - **Add condition**: Optionally, add a specific condition:
        - From the droplist, select **Entity property** (this droplist is generated based on your **Entity type** selection).
        - From the droplist, select **Condition** to apply (**Equals**, **Does not equal**, **Contains**, **Starts with**, **Ends with**).
        - Enter the needed value (**@Me**, **@Unit**, **@Authority**, **@Day**, **@Week**, **@Month**, **@Quarter**, **@Year**).

          > **Tip:** For the **@Day** value you can use numeric modifiers with **+** and **-**. For example: *@Day+1* (tomorrow), *@Day-1*

> (yesterday), *@Day+2m* (two months in the future), *@Day-3y* (three years in the past), and so on.

- Optionally, select **Start date** and **End date**.

> **Note:** Icons with no conditions in their assignments will be used as default icons for the selected entity type (displayed on widget headers, preview headers, and so on).

6. Click **Create**.

Edit an existing icon assignment

> **Important:** You cannot delete a system icon or edit its icon file. You can, however, deactivate an existing system icon by setting its **End date** to a past date, and assigning another icon to be used for the same entity type.

1. On the start page, click **Client**.
2. Select the **Icon assignments** tab.
3. From the droplist at the top, select the entity type for which you want to edit an existing icon assignment.
4. Point to the icon that you want to edit assignments for. A menu bar with action buttons appears.
5. Click **Edit**.
6. Apply the required changes in the **Client icon assignment** dialog box.
7. Click **Save**.

16. Export and import WorkZone configurations

16.1 Export and import WorkZone configurations

Prerequisite: To export configurations, you must have the CONFIGADM access code. To import configurations, you must have the CONFIGADM and DATAADM access codes.

About WorkZone configurations

A configuration includes particular settings that administrator has applied for WorkZone products in WorkZone Configurator. Export and import functionality is designed to test any changes before applying them to real environments. Therefore, you can install WorkZone Configurator on the test environment, play with different settings, and test them with no risks. When you are sure that settings are correct, export them to the *.json file and import the file on the server with real WorkZone installations.

Export configuration

The full list of available settings to export is displayed on the **Export configuration** tab. This list will grow with each new release.

- Case configuration:
  - Custom fields
  - Custom fields for case parties
  - Case categories
- Document configuration:
  - Custom fields
  - Draft versioning

- Contact configuration:
  - Custom fields
- Office configuration:
  - Office configuration, Office templates path
- Address configuration:
  - Custom fields
- Custom types

To export the settings, proceed with the following steps:

1. On the start page, click **Export and Import**.
2. Select the **Export configuration** tab. You can see available settings grouped by case, document, contact, address and WorkZone products.
3. Select relevant check boxes to export settings to the *.json file.
4. Click **Export**.

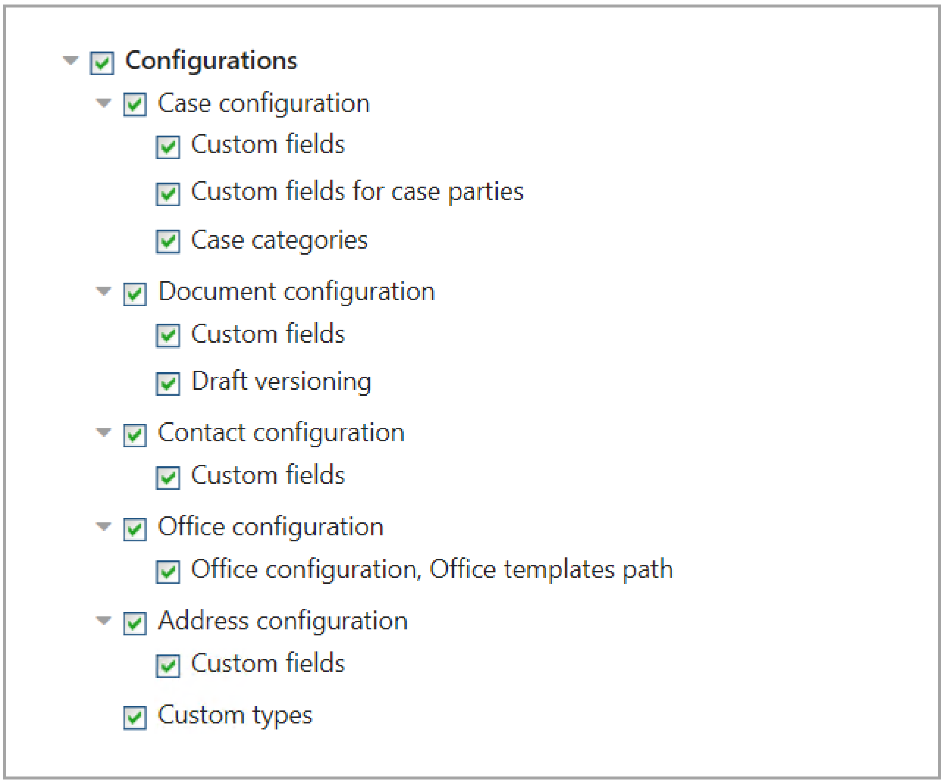
The *.json file is saved to the place defined in your browser settings.

Import configuration

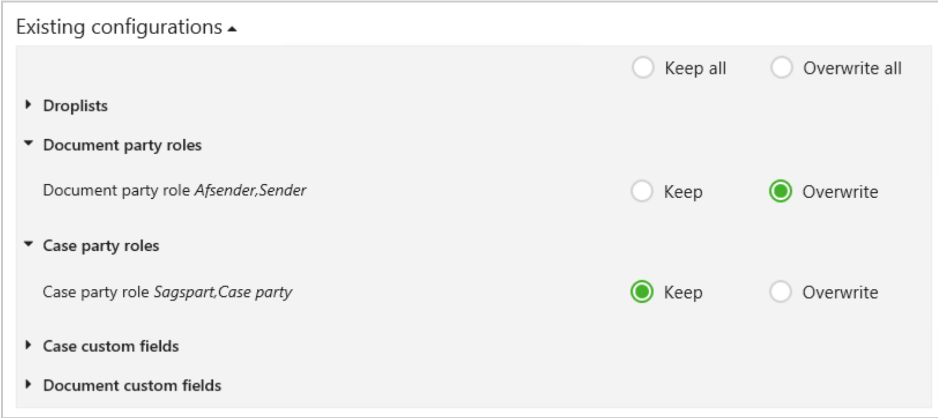
In WorkZone Configurator, importing configurations is very flexible. You can import configurations from the file fully or partially. Moreover, you can decide whether to keep the existing configuration or overwrite it with the configuration from the file for each individual element (for example, for a custom field).

1. On the start page, click **Export and Import**.
2. Select the **Import configuration** tab.
3. To select a file with configurations, click and double-click the needed *.json file.

4. The list of available configurations from the file is displayed. By default, all of them are selected. Clear check boxes if you don't want to import specific configurations.



5. Click **Verify** to ensure correct appliance of configurations. WorkZone Configurator compares existing configuration with the configuration from the file, applies genuine new configurations and suggests you to resolve conflicts, if any.
6. If you see a list of existing configurations, click **Keep** to remain the existing configuration, or click **Overwrite** to apply configuration from the file.



7. When you have made your choices, click **Import**. Selected configurations are then applied.
8. Optionally, click **View log** to see more detailed information on import.

17. Terms and conditions

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