



2021.1

User Guide





## Contents

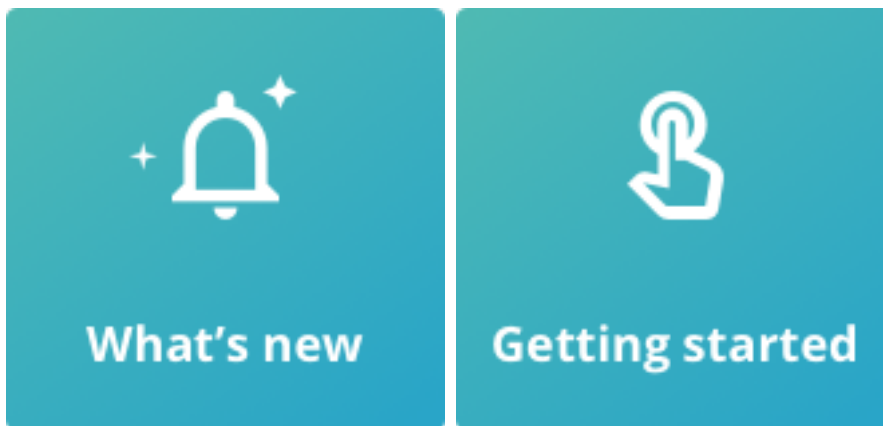
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<b>WorkZone Mobile 2021.1</b> .....	<b>4</b>
<b>What's new</b> .....	<b>6</b>
<b>General information</b> .....	<b>11</b>
Getting started .....	11
Use WorkZone Mobile .....	12
Log in and out .....	15
Work offline .....	16
Set up WorkZone Mobile .....	17
<b>Work with meetings</b> .....	<b>19</b>
<b>Work with tasks</b> .....	<b>23</b>
About task deadlines and priorities .....	30
<b>Work with WorkZone chats</b> .....	<b>32</b>
<b>Browse WorkZone cases and documents</b> .....	<b>38</b>
<b>Use PDF editor (iOS version)</b> .....	<b>42</b>
<b>FAQ</b> .....	<b>46</b>
<b>Terms and conditions</b> .....	<b>53</b>

# WorkZone Mobile 2021.1

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the  (iOS) and  (Android) icons.



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## FAQ

[What happens if I am working offline?](#)

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

## Related product documentation

- [WorkZone Process User Guide](#)
- [WorkZone for Office User Guide](#)
- [WorkZone Client User Guide](#)

## WorkZone links

- [WorkZone documentation](#)
- [WorkZone support](#)
- [WorkZone website](#)
- [WorkZone portal](#)



# What's new

## Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See [View details for chat documents and cases](#) and [View document details](#).

## Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See [Work with your delegated tasks](#).

## Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See [Filter your tasks using custom filters](#).

[This was new in WorkZone Mobile 2021.0](#)

## New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit selected documents (only editable documents). See [Browse WorkZone cases and documents](#).

## Chat enhancements

- You can now create new chats directly from the **Chats** module. See [Create a new chat \(without a task\)](#).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See [View details for chat cases and doc-](#)

[uments](#).

- You can edit documents on your chats. See [Edit a chat document](#).

## UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

## Chat enhancements

- You can now preview documents on your chats. See [Preview chat documents](#).
- You can view metadata for the documents on your chats. See [View chat documents metadata](#).
- You can see if the users in your chats are currently online or offline. See [View your chats](#).

## Editing WorkZone documents via Office 365 in Intune version (🍏)

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

## Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See [Log in and out](#).

## Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See [Work with chats](#).

## Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See [Annotate PDF documents](#).

This was new in [WorkZone Mobile 2020.1](#)

- Bug fixes.

This was new in [WorkZone Mobile 2020.0](#)

## Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See [Work with meetings](#).

## User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.
- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See [Set up WorkZone Mobile](#).

## Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in [WorkZone Mobile 2019.3](#)

## Improved navigation



- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

## Task view improvements

Select your operating system (below) to view relevant updates.

- Rank your tasks in the order you want them to be processed. See [Rank your tasks](#).
- Tap **Rank** at the top of your task list to sort tasks by their rank. See [Rank your tasks](#).
- Tap to view your task with its attached documents as a single PDF file. See [View task as a PDF](#).
- When viewing documents on a task, tap the **←** and **→** buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See [View documents](#).

This was new in WorkZone Mobile 2019.2

## Bug fixes

You can define number of lines to display titles of meetings and tasks. See [Set up WorkZone Mobile](#).

This was new in WorkZone Mobile 2019.1

## Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

## Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See [Log in and out](#).

## Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

### This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See [Work with tasks](#).
- Performance improvements.
- Bug fixes.

### This was new in WorkZone Mobile 2018.1

- Bug fixes.

### This was new in WorkZone Mobile 2018

Select your operating system (below) to view relevant updates.

- Add photos from the photo library on your device to a task. See [Add or remove documents](#).
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.



# General information



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## Getting started


Log in and out on WorkZone Mobile.




- View your upcoming WorkZone [meetings](#) (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to [deadlines and priorities](#).



On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- [View](#) documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (.). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- [Export](#) documents to other apps for editing. In the document viewer, tap **Share** ( on , or on ), and select an app.
- Work [offline](#).

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
-  only: [View](#) task with its attached documents in a single PDF file. In the task, tap .

- [View](#) the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- [Export](#) documents to other apps for editing. In the document viewer, tap **Share** ( on , or on ), and select an app.
- See who did what and when under **Process log**.
- [Respond](#) to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work [offline](#).
-  only: Receive [notifications](#) when a task has changed or you get a new task.

**Note:** You may need to download and install a document viewer from App Store (for ) or Google Play (for ) to view certain document formats.

Set up WorkZone Mobile.

View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See [Work with WorkZone chats](#).



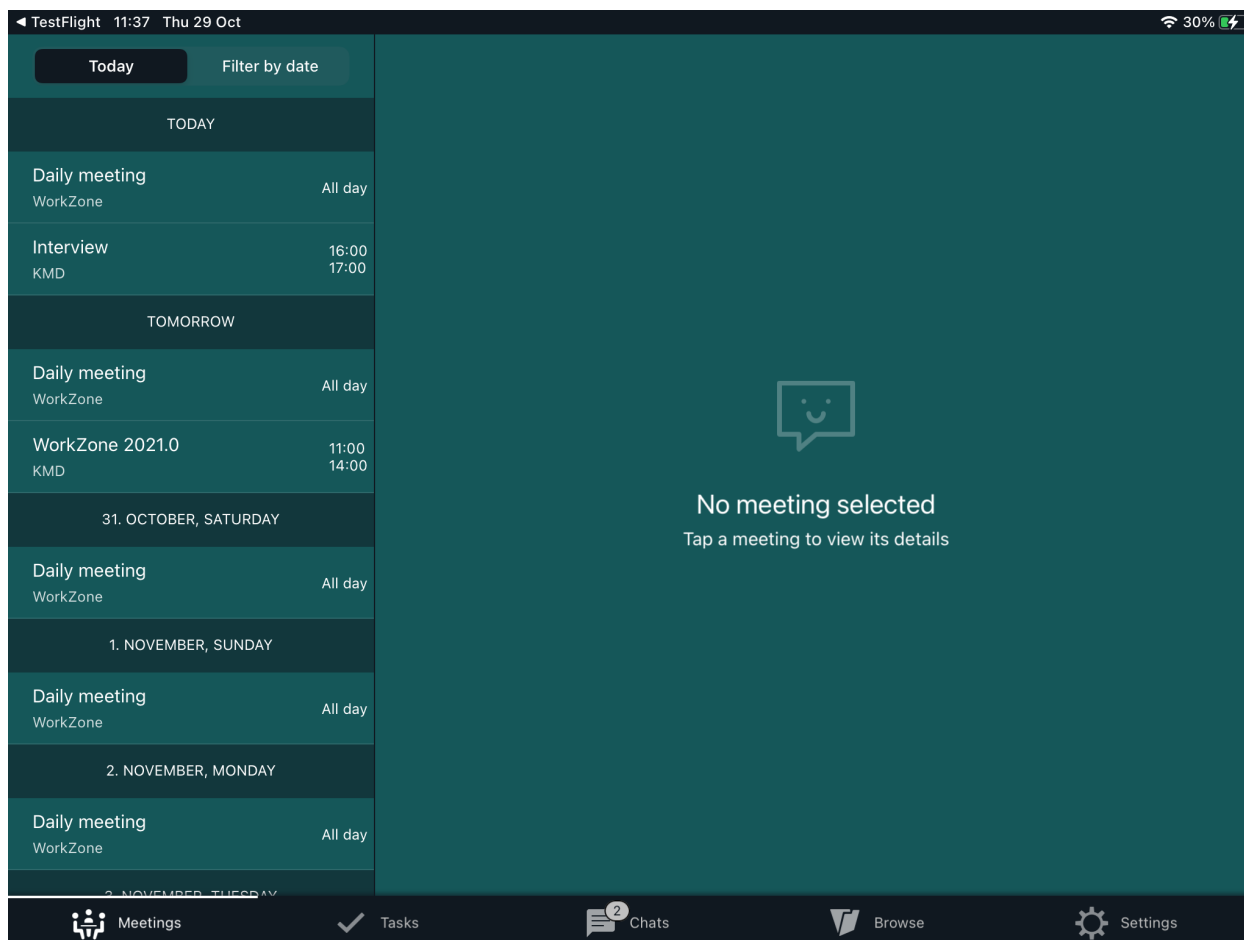
## Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

Select your operating system below, and then tap relevant question from a list.

[How do I navigate?](#)

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



### How do I refresh lists?

Pull down to refresh the meeting and task lists.

### How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see [About task notifications](#) in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

**Prerequisites:**

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See [Process notifications](#) in the WorkZone Process Administrator Guide.
- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Notifications are not available for the WorkZone Meeting module.

## Log in and out

Select your operating system below, and then tap relevant action from a list.

### Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.
1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
  2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings > WorkZone**, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings > WorkZone > Settings** under **MOBILE APPLICATION MANAGEMENT**.

### Password expiration

#### At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

## While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

### Log out

1. Tap **Settings**.
  2. Tap **Log out**.
- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.



## Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

## Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

## Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

## Changed connection state while working on a task



If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.



## Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

### [View release and login information](#)

On the settings page, you will find information about WorkZone Mobile release number and login information.

If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

### [Automatic error reporting](#)

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

### [Share analytics](#)



Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

### [Edit meeting documents](#)

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

### [Number of lines displayed in title](#)

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

#### [Show upcoming tasks](#)

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

#### [Show closed tasks](#)

Select if you want to see the closed tasks in your task list. This option is enabled by default.

#### [Keep closed tasks](#)

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

#### [View online help](#)

Click **Help** to open the WorkZone Mobile User Guide.



# Work with meetings

WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

Select your operating system (below) to view guidelines for your device.

## View documents

WorkZone PDF.

Meetings may have documents attached to the agenda items.





- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

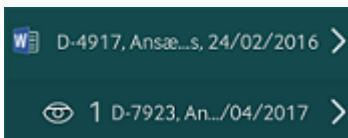
## Edit Microsoft Office documents ()


Microsoft Office 365 must be installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap  to return to the meeting.
  - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap  to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The  icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights](#) in the WorkZone Client User Guide.

**Notes:**

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also [You cannot edit Office documents - Office 365 apps do not open the documents.](#)

### Annotate PDF documents

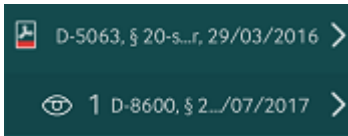
You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See [WorkZone Client User Guide](#) for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
  - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
  - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See [Use PDF editor \(iOS version\)](#).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.



You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights](#) in the WorkZone Client User Guide.

### Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** ( on , or on  ), and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

# Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

Select your operating system (below) to view guidelines for your device.

## View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

## Respond to a task

These are examples of how you can respond to tasks of various process types.

### Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

### Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

### Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

### Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

### OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

## Other actions on a task

These are examples of actions you can perform on a task.

### Filter your tasks using custom filters

#### Prerequisites:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator > Global > Feature Settings > WorkZone Mobile > Task > Custom filters**). See [Feature Settings](#) in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.



**Important:** A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

## WorkZone OData QueryBuilder

Saved Query  
ID:  Name: My\_tasks1, Owner:

Endpoint:

Entity:

---

Filter:

---

Select:





---

Expand:

---

Order by:

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries](#).

- By default, no filters are applied.
  - If there are no filters available to you, the  button will not be displayed.
1. Tap  at the top of the task list.
  2. From a list of available custom filters, tap the filter you want to apply.
- Or-
- To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.



**Important:** You will only see the tasks assigned to you.

[Work with your delegated tasks](#)

**Prerequisites:**

- The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator > Global > Feature Settings > WorkZone Mobile > Task > Delegated tasks**). See [Feature Settings](#) in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about [delegates](#).

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
  - The **My tasks** option will only appear, if you are a delegate for at least one user.
1. Tap **My tasks** at the top of the task list.
  2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.
- Or-
- To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.


[Rank your tasks](#)

WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See [WorkZone Client User Guide](#) for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

**Important:** You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap  next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

[View task as a PDF \(\)](#)

#### Prerequisites:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See [Supported document formats](#).
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.


- This PDF view is read-only.



[View task documents](#)

WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.


: The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See [Supported document formats](#)

- From the document view, tap  and  at the top to open the previous or the next document on this task, or swipe to open the previous or next page of the document.

### Add or remove documents

1. Tap **Edit**, and then tap:





<b>Search</b>	Search in all documents on the current case and add documents.
<b>Add</b>	<p>Add a document from your device. You can:</p> <ul style="list-style-type: none"> <li>• Browse and add documents from the device.</li> <li>• Add photos from your photo library.</li> <li>• Take a photo or record a video with your camera and add this photo or video to the task.</li> </ul> <p>You can only add documents when you are online.</p>
<b>Filter</b>	<p>Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your <b>Favorite documents</b>, they will appear when you apply this filter. Note that this option only applies to extended processes.</p>
<b>Delete</b>	Remove documents from the task.

2. Tap  to return to the task, and then save or cancel your changes.

### Edit Microsoft Office documents ()

You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap  to close the document. Then tap  to return to the task.
  - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap  to close the document, and tap  to return to the task.


If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See [Share documents using other apps](#).

See also [You cannot edit Office documents - Office 365 apps do not open the documents](#).



### Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See [WorkZone Client User Guide](#) for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See [Use PDF editor \(iOS version\)](#).
4. : Add your annotations, and then tap **Save**.

### Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** ( on , or on ), and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

### Add or remove actors

1. Tap **Edit**, and then tap:

<b>Search</b>	Search for employees and units that have email information registered, and add them as actors.
<b>Actor sequence</b>	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
<b>Delete</b>	Remove actors.

2. Tap to return to the task and save or cancel your changes.

### Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.



## About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

### Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

### Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

Only extended processes can have priorities.

# Work with WorkZone chats

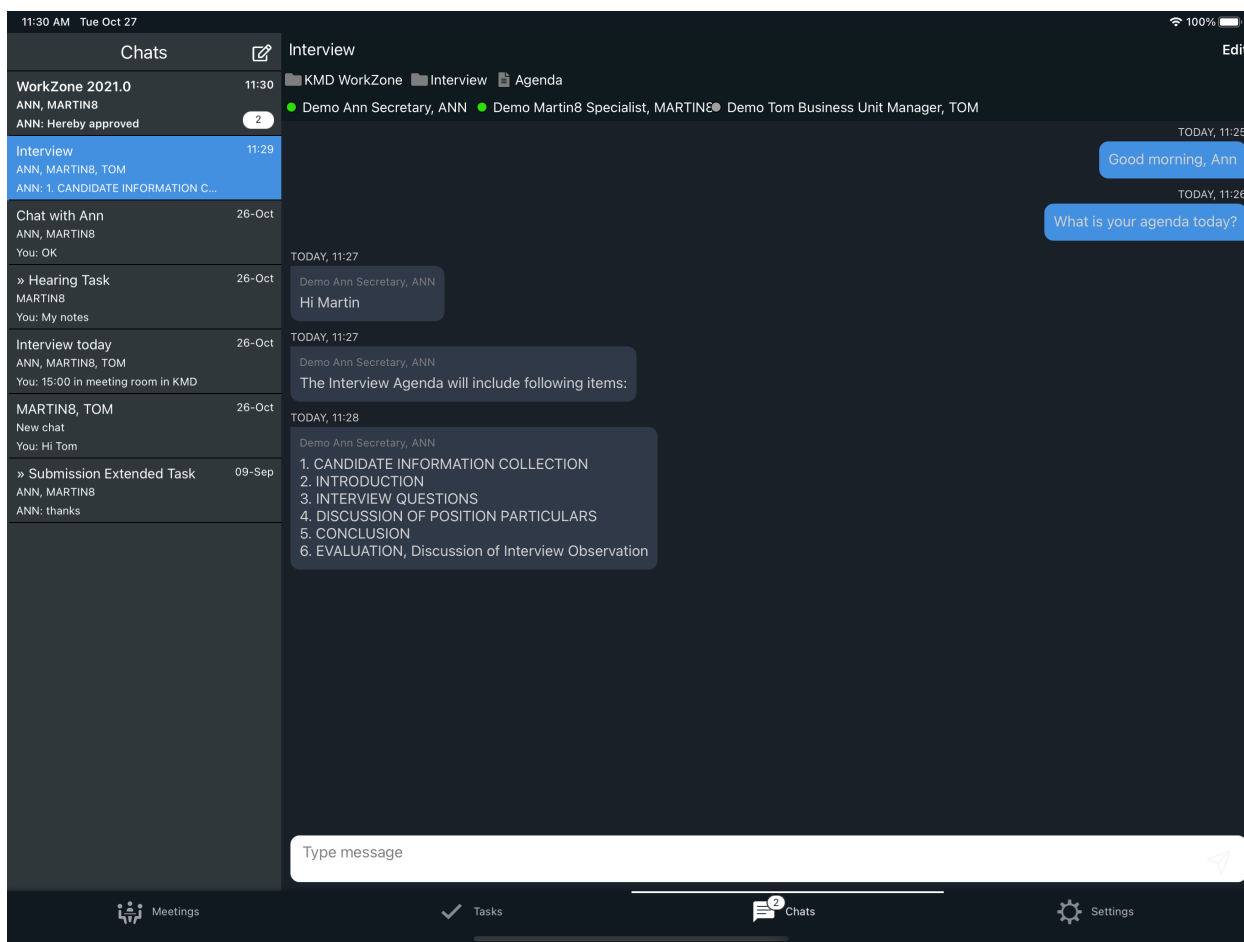
## Prerequisites:

- Chat functionality is supported from WorkZone Mobile version 2020.2 and forward.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator > Global > Feature Settings > WorkZone Client > Chat**) and WorkZone Mobile (**Configurator > Global > Feature Settings > WorkZone Mobile > Chat**). See [Feature Settings](#) in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See [WorkZone Client User Guide](#) for more information about chats.

Select your operating system (below) to view guidelines for your device.






## View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

### Tips:


- A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
- A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
- A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

## Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap  () or ().


You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

#### Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap  at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.





#### Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap  in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.

4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.



### Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.
1. Tap the chat in which you want to add or remove documents, cases, or participants.
  2. Tap **Edit** under the chat title.
  3. Select the case, document, or user you want to add or remove.
    - To add: Tap  **Add participant**,  **Add document**, or  **Add case**, and then type the name of the case, document, or user to add.
    - To remove: Tap  next to the existing case, document, or user to remove them from the list.
  4. Tap **DONE**.

### Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

Tap  and  at the top to open the previous or the next document on this chat, or swipe to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

### Edit a chat document

- You must be online to edit chat documents.
1. Tap the chat with the document you want to edit.
  2. Tap the document title.

3. Tap  at the top right corner to edit this document.

You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

#### [View details for chat documents and cases](#)

You can view details of the documents and cases on your chats.





1. Tap the chat with a document or a case.

- For documents:

- a. Tap the document title to open it in a preview mode.

[Tap and !\[\]\(aa53ad6fea213b8b2226d3077e30533a\_img.jpg\) at the top to view the previous or the next document on this chat.](#)

- b. Perform the needed action:

- To view document metadata: Tap  at the top right corner. Document metadata is displayed. Tap  to return to the document preview.
- To edit this document: Tap  at the top right corner.
- To view related case: Tap  at the top right corner. Tap **Back** to return to the opened document.

- For cases:

- a. Tap the case title to open its details.

Tap **Previous** and **Next** at the top to view the previous or next case on this chat.

- b. Under **Documents**, you can view documents on this case (if there are any).

Tap a document to preview it, edit it, or view its metadata.

-Or-

Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.



# Browse WorkZone cases and documents

## Prerequisites:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0 and following versions.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator > Global > Feature Settings > WorkZone Mobile > Browse**). See [Feature Settings](#) in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

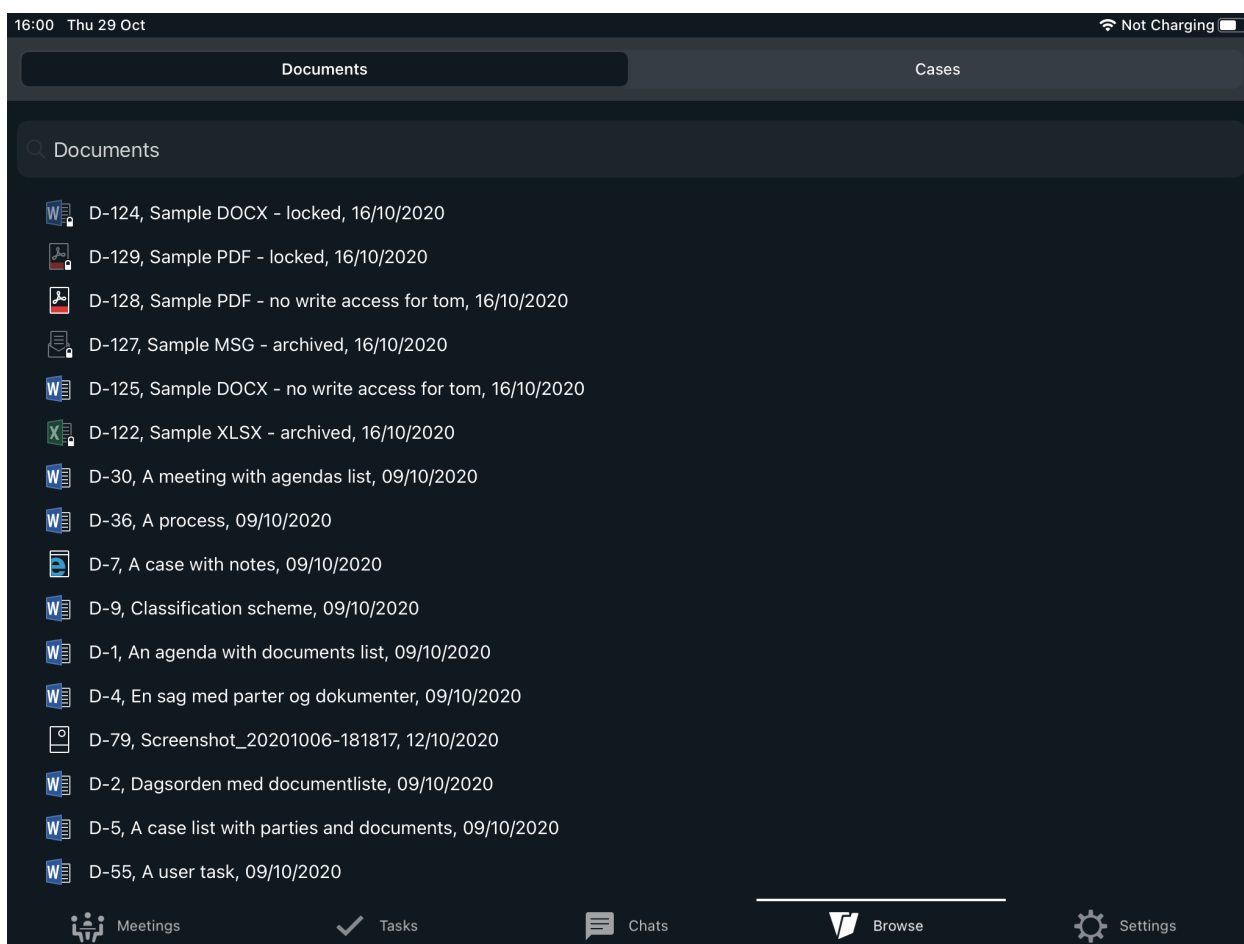
You can quickly search for cases or documents available to you in WorkZone and view their details.

For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.

For documents: You can preview or edit the documents (if they are editable) and view their metadata, and navigate to the related cases and view their details and metadata.

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.

Select your operating system (below) to view guidelines for your device.



## Search for cases and documents

You can search for WorkZone cases and documents that are available to you, and view their details.

1. Tap **Browse** in the navigation pane.
2. Select the needed tab (**Documents** or **Cases**). A list of all WorkZone documents or cases (depending on the tab you selected) available to you is then displayed. The list is sorted by your most recently viewed documents.
3. Type the title of a document or a case in the search field, and the most relevant suggestions will appear.

**Note:** Searches are based on your tab selection. You cannot search for cases from the **Documents** tab or for documents from the **Cases** tab.

4. Tap the needed item.

### View case details

You can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone cases that are available to you is then displayed. The list is sorted by your most recently viewed cases.
3. Tap the needed case. Search for cases and documents, if needed.
4. Under **Documents**, you can see all documents (available to you) on this case.

Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.

-Or-

Tap **Metadata** to view the metadata of this case.





5. Tap **Back** to return to the **Cases** tab.

### View document details

You can preview WorkZone documents that are available to you, edit them (if documents are editable) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone documents that are available to you is then displayed. The list is sorted by your most recently viewed documents.
3. Tap the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:



- To view metadata of this document: Tap  at the top right corner. Tap  to return to the document preview.
- To edit this document (if the document is editable): Tap  at the top right corner.  
You might need to install a relevant Office app to edit some document formats.
- To navigate to the related case and view its details and metadata: Tap  at the top right corner.

5. Tap **Back** to return to the **Documents** tab.



# Use PDF editor (iOS version)

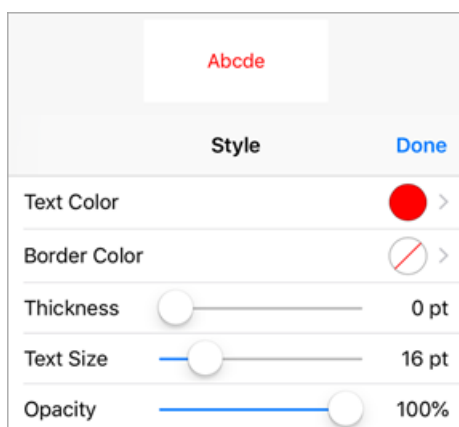
You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

You can search for text in the document and see the outline and annotations for quick navigation.



Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.




---

Add a sticky note.

---

Highlight the selected text. Tap and drag over the text to highlight it.

---

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

1. Tap an existing signature to use.  
-Or-
2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

Erase previous free hand drawing or text marking.

---

Add text.

- Double-tap to edit text color, border color, thickness, text size, and opacity settings.

---

Draw arrows.

- Double-tap to edit arrow color, thickness, and opacity settings.

---

Draw straight lines.

- Double-tap to edit line color, thickness, and opacity settings.

---

Draw rectangles

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

---

Draw ellipses

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

---

Draw polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

---

Draw cloud-like polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

---

Draw polylines.

1. Tap the edit icon.
  2. Select stroke color, fill color, thickness, and opacity settings.
-

3. Tap **Done** to start drawing.

---

#### Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

---

#### Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

---

#### Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

---

#### Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

---

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

---

Close the annotation toolbar.

---

# FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Select your operating system below, and then tap relevant question from a list.

## [Meeting synchronization does not work](#)

### **Workaround**

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

## [Cannot open Office documents for editing](#)

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

### **Workaround**

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

## [WorkZone Mobile app for Intune stops connecting \(🍏 for Intune\)](#)

After some time the WorkZone Mobile application stops connecting, returning the "Not connected/Ikke tilsluttet" error message. Attempts to restart the application result with the "Connect/Tilslut" error message.

### **Workaround**

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

## Navigation tabs disappear (🍏 version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

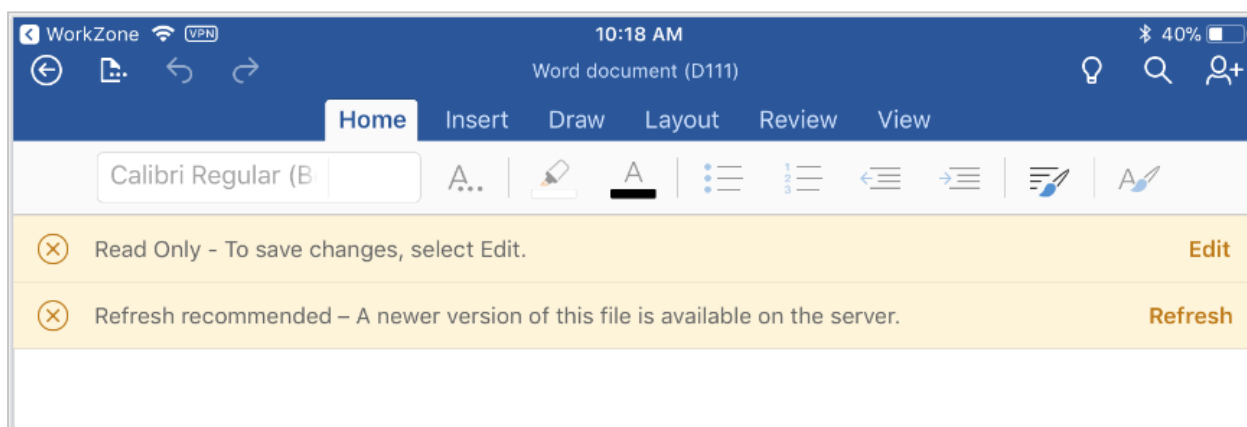
## Workaround


Uninstall and completely reinstall the app from the Secure Hub.

## Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

### Example: Office messages in Word



- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

[Refresh recommended - A newer version of this file is available on the server](#)

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

## How to continue

Tap **Refresh** to see the latest changes.

### Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

## How to continue

Please don't reboot your phone and don't close the Office mobile app.

When you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

### Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See [Edit document state](#) in the WorkZone Client User Guide.

## How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

### Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

## How to continue



You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

#### [This version of Excel can't run with VBA macros](#)

You have opened an Excel document that contains macros. Office 365 does not support macros.

### How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

#### [This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them](#)

You are trying to open a Word document that contains macros. Office 365 does not support macros.

### How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

#### [Allow file conversion?](#)

You are trying to open a document in Excel but Excel does not support this file format.

### How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

#### [Can't open file. This file type is unsupported by this version of Office](#)

You are trying to open a document in Excel but Excel does not support this file format.

### How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

[Read Only – To save changes, select Edit](#)

On mobile devices, the message is shown every time you open a document.

### How to continue

Tap **Edit** in the message to open the document for editing.

[Read Only - Someone else has this file open. You can save changes to a copy or open the file later](#)

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

### How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

[Read Only – This is an older file format. Changes can only be saved to a copy of the file](#)

You are trying to edit a document with an old document format that is not supported by Office 365.

### How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

### How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

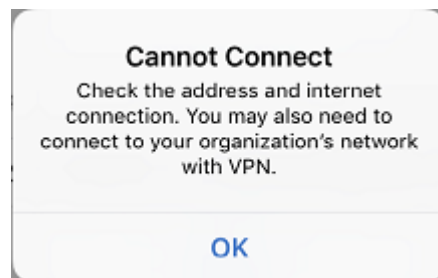
### How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

**Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings > Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open > Add a place > SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example `https://MyCompanySite/Explorer/`.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in**.

The log-in will fail with this message:



However, your credentials are saved, and now you should be able to edit Word documents.

7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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