



2021.2  
User's Guide

Contents

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<b>User's Guide for WorkZone Explorer 2021.2</b> .....	<b>3</b>
<b>What's new</b> .....	<b>4</b>
<b>Getting started</b> .....	<b>8</b>
<b>About the folders</b> .....	<b>12</b>
<b>Working with cases</b> .....	<b>17</b>
<b>Working with documents</b> .....	<b>19</b>
About documents .....	21
<b>Search for cases and documents</b> .....	<b>25</b>
Supported search tags .....	39
<b>FAQs</b> .....	<b>44</b>
<b>Information for administrators</b> .....	<b>47</b>
<b>Terms and conditions</b> .....	<b>48</b>

# User's Guide for WorkZone Explorer 2021.2

## Related product documentation

- [WorkZone Client Online Help](#)
- 

## WorkZone links

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

# What's new

## WorkZone Explorer 2021.2

No changes in this release.

## [WorkZone Explorer 2021.1](#)

No changes in this release.

## [WorkZone Explorer 2021.0](#)

No changes in this release.

## [WorkZone Explorer 2020.3](#)

### **If your organization is using OAuth2 for user authentication**

Performing case and document searches directly from File Explorer is not supported in a cloud setup as OAuth2 authentication is not supported by Windows Federated Search.

See [Supported Authentication Protocols \(External link\)](#)

## [WorkZone Explorer 2020.2](#)

No changes in this release.

## [WorkZone Explorer 2020.1](#)

No changes in this release.

## [WorkZone Explorer 2020.0](#)

WorkZone Explorer can now be activated and deactivated from WorkZone Configurator > **Global > Feature settings > Client > Explorer**.

- If WorkZone Explorer is activated, the **Explore** button in the main ribbon in WorkZone Client will be displayed and the WorkZone Explorer feature will be accessible.
- If WorkZone Explorer is deactivated, the **Explore** button in the main ribbon in WorkZone Client will not be displayed and the WorkZone Explorer feature will be inaccessible.

## [WorkZone Explorer 2019.3](#)

No changes in this release.

### [WorkZone Explorer 2019.2](#)

No changes in this release.

### [WorkZone Explorer 2019.1](#)

No changes in this release.

### [WorkZone Explorer 2019.0](#)

No changes in this release.

### [WorkZone Explorer 2018.2](#)

No changes in this release.

### [WorkZone Explorer 2018.1](#)

No changes in this release.

### [WorkZone Explorer 2018.0](#)

- You can configure the WorkZone Explorer from the WorkZone Configurator instead of the Web.config file. The configuration settings are stored in the WorkZone database instead of the WorkZone Explorer Web.config file. For this reason, the Web.Config file should not be used to configure the WorkZone Explorer.

### [WorkZone Explorer 2017](#)

You can now delete empty documents directly from File Explorer.

Note that you still need to move documents with content to the **Recycle Bin** first and then delete them. See [Delete and restore documents](#).

### [WorkZone Explorer 2016 R2](#)

No changes in this release.

### [WorkZone Explorer 2016](#)

- The Search for cases and documents topic has been extended to include more examples.


### [WorkZone Explorer 2014 R2](#)

## Flat case folder hierarchy

You can now change the setup of WorkZone Explorer to display child cases in lists as in WorkZone Client and Captia Web Client. Parent and child cases are now displayed in a flat hierarchy in the lists. By default, WorkZone Explorer does not display child case folders in lists in File Explorer.

For information on changing the setup, see [Configuring WorkZone Explorer](#) in the WorkZone Content Server Installation Guide.

### Shortcut to immediate parent case in search results

When you perform a free text search on cases using the **WorkZone Cases** search connection, and you double-click on a case in the search results, you can see whether the case is a child case if the folder contains this shortcut: . Next to the shortcut, the name of the immediate parent case is shown. Double-click the shortcut to open the immediate parent case in File Explorer.

Name



Pdf



...(2014-001485) Parent case



= Open Case in Captia

See [Search for cases and documents](#).

### Danish search tags

You can now filter search results using Danish search tags in the Danish version of Microsoft Windows. See [Filter search results using search tags](#).

### WorkZone Explorer 2014

#### New folders

The following folders are new:



Changed cases



Changed documents



Shared lists



Unanswered documents



Unclassified cases

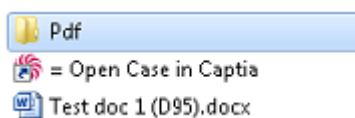
See Folder types.

## Child cases inherit the case class and access code of the parent case

When you create a new folder in a case folder, the new folder becomes a child case, and the child case inherits the case class and access code of the parent case. See Create child cases.

## PDF sub folder in case folders

A new PDF sub folder in the Case folders has been added. The PDF sub-folder contains PDF versions of documents on the case. See PDF versions of documents.

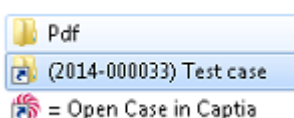


## Letter date is displayed as Date Modified in File Explorer

The letter date entered in WorkZone Client or Captia Web Client is now shown in the **Date Modified** column in File Explorer.

## Shortcut to next child case folder appears when the path in File Explorer is very long

If your case folder hierarchy is deep, the path in File Explorer becomes very long, and at some point the maximum limit set by Microsoft Windows is met. This means that you cannot browse to the next child case folder using the arrow buttons in File Explorer. In this case, a shortcut to the next child case folder in the hierarchy appears. Double-click the shortcut to open the next child case folder, and you can then continue using the arrow keys to browse further through the folder hierarchy.



## Shorter case folder names

The consecutive case number has been removed from the case folder names to shorten the name. An example of a case folder is: (2014-000005) Test case.

# Getting started

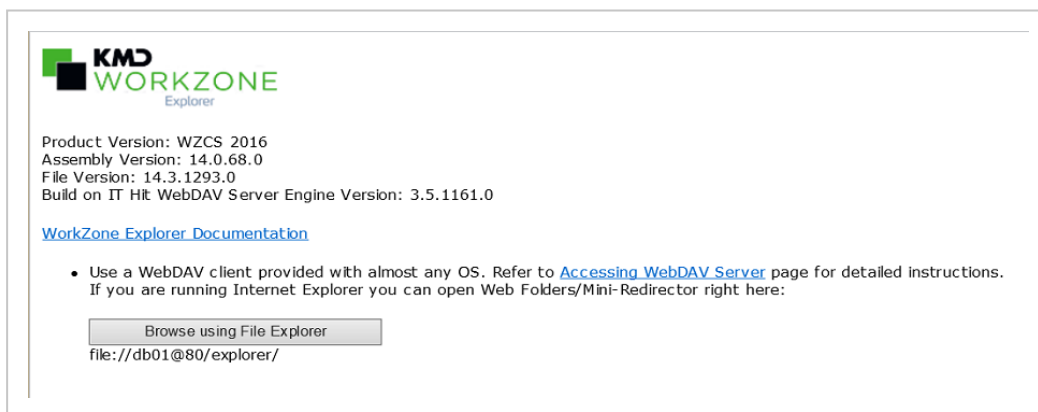
WorkZone Explorer uses WebDAV (Web Document Authoring and Versioning), which is a standard document protocol over HTTP. WebDAV can also run over HTTPS as well. With WorkZone Explorer, you can manage cases and documents from File Explorer. You can perform common operations on cases and documents such as creating and renaming cases and documents as well as opening, editing, and saving documents directly into the WorkZone archive from a document editor that supports the WebDAV protocol, for example, Microsoft Office or Notepad.

WorkZone Explorer is part of the WorkZone Content Server installation. Note that it is not required to install a client, such as WorkZone Client.

## Start WorkZone Explorer

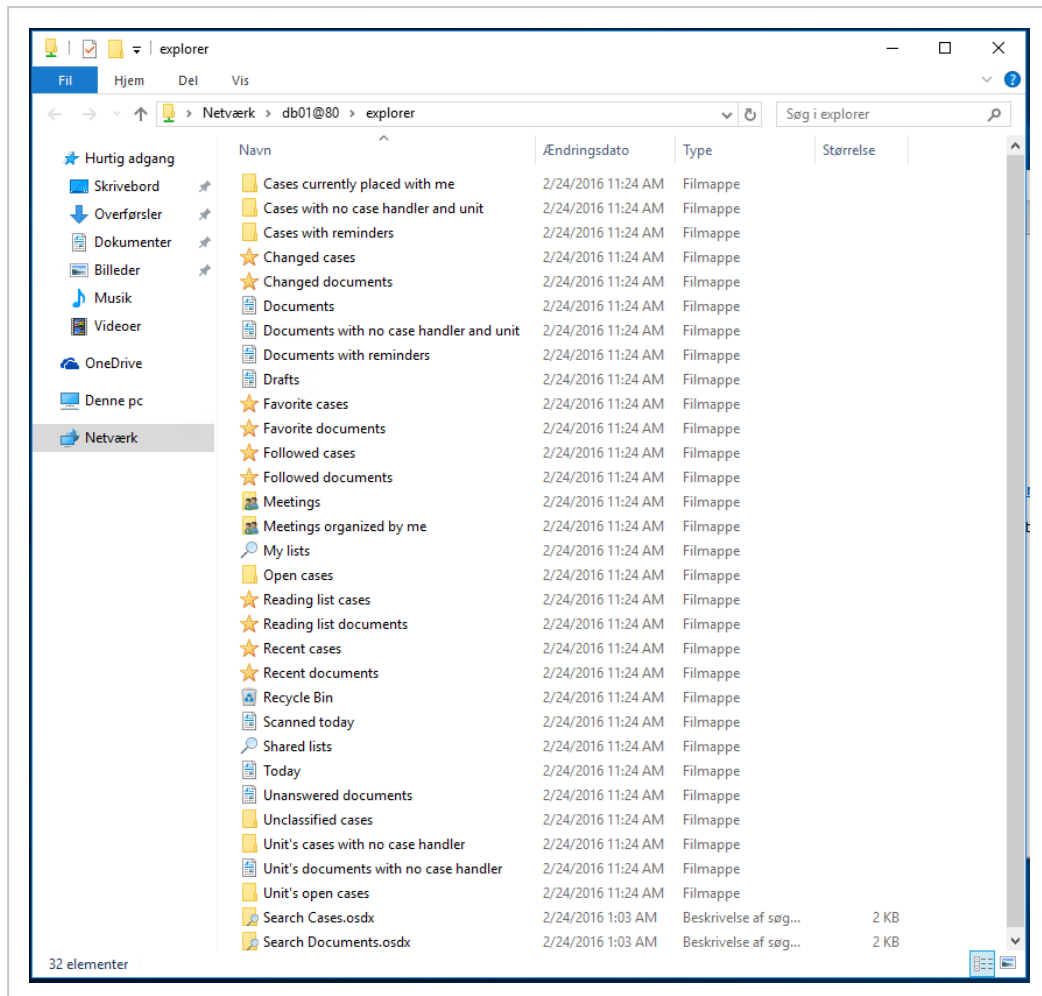
1. Enter this URL in your browser: `https://<host>/explorer` - for example `https://db01/explorer`.

A welcome page is displayed:



2. Click **Browse using Windows Explorer** to open File Explorer:





3. If you are using the OAuth2 authentication framework, you must select the **Keep me signed in** check box to ensure continued integration with Windows File Explorer under the OAuth2 framework. You must do this from

Microsoft Windows Internet Explorer.



In File Explorer, you can also access the database directly by typing `\\<host>\-explorer` in the address bar.

WorkZone Explorer now displays folders in File Explorer that represent the standard case and document lists. See About the folders .

**Tip:**

You can map a point in the folder structure to a network drive in File Explorer. Right-click on **Network**, click **Map network drive**, and then browse to select the folder that you want to map.

## Multiple databases

If more than one WorkZone Content Server database was specified during installation of the WorkZone web server, you open them in separate File Explorer windows.

## Learn how to work with cases and documents in File Explorer

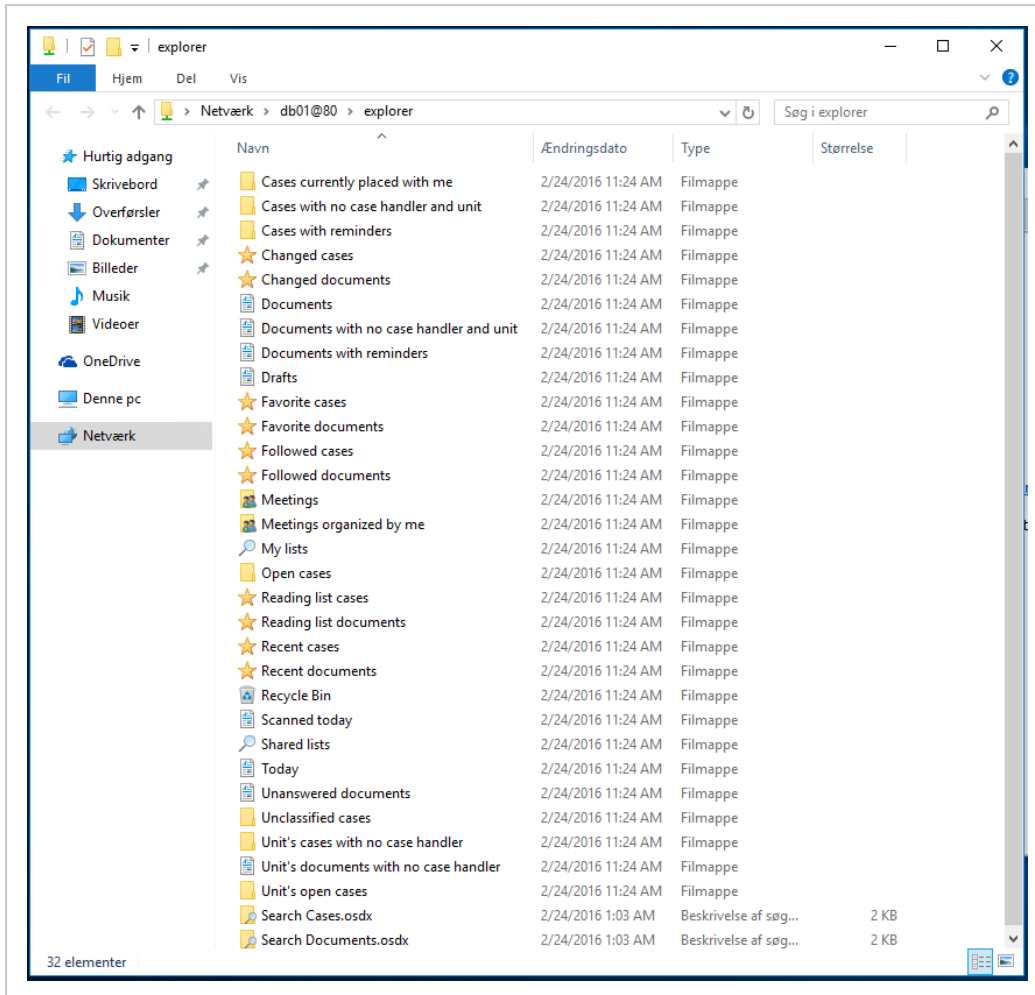
To learn more about the type of folders shown in File Explorer, see [About the folder structure](#).

To learn more about working with cases and documents, see [Working with cases](#) and [Working with documents](#).

**Important:** You can optimize the performance of WorkZone Explorer by changing a couple of Internet Explorer settings. See Information for administrators.




# About the folders




















WorkZone Explorer gives you access to folders in File Explorer that represent standard case and document lists, for example, **Drafts**, **Open Cases**, and so on. Additionally, you can also access search connectors and a **Recycle Bin** folder from the WorkZone Explorer.















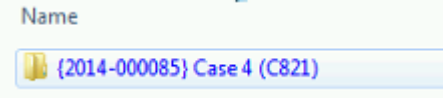





## Folder types

The table below gives you an overview of the types of folders that you see in File Explorer:

Folder type	Description
 Case lists	Folders that represent standard case lists, such as: <ul style="list-style-type: none"> <li> Open cases</li> <li> Cases currently placed with me</li> </ul>

Folder type	Description
	<ul style="list-style-type: none"> <li> Cases with no case handler and unit</li> <li> My case reminders one week ahead</li> <li> Cases on Units with no case handler</li> <li> Open Cases on Units</li> </ul>
 Document lists	<p>Folders that represent standard document lists, such as:</p> <ul style="list-style-type: none"> <li> Documents</li> <li> Drafts</li> <li> Document reminders</li> <li> Documents with no case handler and unit</li> <li> Scanned today</li> <li> Today</li> </ul>
 Meeting lists	<p>Folders that represents meeting lists, such as:</p> <ul style="list-style-type: none"> <li> Meetings</li> <li> Meetings organized by me</li> </ul>
 Case folders	<p>Folders that represent specific cases in the database. A folder represents one case and contains all the documents of that specific case. It may also contain child cases. Child cases are shown as sub folders.</p> <div style="border: 1px solid #ccc; background-color: #f9f9f9; padding: 5px; margin: 10px 0;">  - {2014-000080} Case 1 -   {SJ-TEMP-000082} Child case (C921)         </div> <p>The case number is displayed in brackets in the folder name, for example, {2014_000005} Test case.</p> <p>If the case folder has the icon , the case is closed.</p> <p>Each case folder contains a shortcut to open the case. Double-click the  shortcut to open the case in WorkZone Client.</p>

Folder type	Description
 My lists	This folder contains searches that you have saved to the database from WorkZone Client. Sub folders in the <b>My lists</b> folder correspond to saved searches.
 Shared lists	This folder contains lists that other users or your organization have shared with you. <div data-bbox="612 573 1476 701" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Note:</b> You can only share lists from WorkZone Client.</p> </div>
 Recent cases  Recent documents	The folders contain the latest cases and documents you have opened, so that you can quickly open them again.
 Favorite cases  Favorite documents	The folders contain the cases and documents that you have marked as favorites in WorkZone Client or dragged and dropped to the favorite folders in File Explorer. See Add or remove cases to the Favorite cases folder and Add or remove documents in the Favorite documents folder.
 Followed cases  Followed documents	The folders contain cases and documents that you have marked as followed and that you want to be able to find quickly. For example, you might want to follow cases and documents of another case handler. Drag and drop the cases and documents that you want to follow to either the <b>Followed cases</b> or <b>Followed documents</b> folders.
 Changed cases  Changed documents	The folders contain cases and documents that have been changed by other users since you last viewed them. The blue color indicates that a case or document has been changed.
 Reading list cases  Reading list documents	The folders contain lists of cases and documents that you want to remember to read. You add cases and documents by dragging and dropping them in the reading list folders. Sometimes, cases and documents are also added to the reading lists automatically. For example, if a document has

Folder type	Description
	<p>been changed by someone else, or if you have been added as a case handler on a case, this case or document will be marked in blue.</p>  <p>Once you have opened the cases or documents, they are automatically removed from the reading list folders. You do not have to open the cases or documents from the reading lists; you can also open them from any other folders.</p>
 Unclassified cases	<p>This folder contains cases with you as a case handler that have not been classified yet. An unclassified case is a case in the case group named SJ-TEMP. SJ-TEMP is the default case group used when creating cases from WorkZone Explorer. See <a href="#">Create case</a>.</p>
 Unanswered documents	<p>This folder contains documents with reply deadlines that you have not yet replied to.</p>
 All unsuccessful PDF documents	<p>The folder contains all the documents that have not been converted successfully to PDF and that you have access to view.</p>
 My unsuccessful PDF documents	<p>The folder contains your documents that have not been converted successfully to PDF.</p>
 Recycle Bin	<p>The <b>Recycle Bin</b> contains documents that you have moved from other folders in order to delete them. The <b>Recycle Bin</b> folder also contains a folder named <b>Restore</b>, The <b>Restore</b> folder enables you to restore a deleted document to the case folder where it was originally saved. See <a href="#">Delete and restore documents</a>.</p>

**Important:** WorkZone Explorer displays the 1000 most recent entries in a folder. For documents, the most recent entry date refers to the last document update and not the

last change of the document meta data. For cases, most recent entry date refers to the last meta data change on the case.



# Working with cases

You can perform the following actions on cases in File Explorer:

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## Create case

You can create new cases in File Explorer by creating new subfolders in the following folders:

- **Open cases**
- **Unclassified cases**
- **Case folders**

When you create a new case through WorkZone Explorer, the case is automatically created in a temporary case group named SJ-TEMP. You can change the case group and other required information later by using WorkZone Client. Cases that are created in SJ-TEMP are automatically added to the **Unclassified cases** folder regardless of where they were created.

**Note:** If your organization only uses facets and not case classes, you can configure WorkZone Explorer to add a specific case class as the default case class.

**Important:** The create case functionality is not available by default. Case creation must be enabled on the SJ-TEMP case class in WorkZone Configuration Management.

## Create child cases

You can create child cases in File Explorer in two ways:

- Move a case folder to another case folder. The case folder that you move becomes a child case.
- Create a new folder in a case folder. The new folder becomes a child case. The child case inherits the file class and access code of the parent case.

## Rename cases

You can rename a case by renaming the case folder.

## Add or remove cases to the Favorite cases folder

You add cases to the **Favorite cases** folder by dragging and dropping case folders into the **Favorite cases** folder.

To remove a case from the **Favorite cases** folder, drag and drop the case folder into the **Recycle bin** folder.

**Note:** The case is not deleted. It is only removed from the **Favorite cases** folder.

## Date Modified on Cases

The **Date Modified** field for a case is updated automatically in File Explorer when documents on the case are changed or when documents are added to or removed from the case.

**Note:** Sometimes, it may look as if a user has updated a case without having correct access rights. This happens when the user has access to a document on the case but not to the case itself, for example, when a user edits a document that is not protected by the case and the user does not have update access to the case. This is standard behavior and does not represent a security issue.

# Working with documents

You can perform the following actions on documents in File Explorer using WorkZone Explorer:

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## Create new documents

You can create new documents directly in File Explorer or by selecting **Save As** from a document editor.

You can only create new documents in case folders. You cannot create a new document directly in, for example, the **Drafts** folder, because the WorkZone system requires a case in order to place the document correctly in the system.

You can also create a new document by copying it from another location to a case folder. In this case, the read-only state of the document is kept in WorkZone Explorer. It will be created with the state **UÅ** (Draft) or **UL**(Locked) depending on the read-only file property of the new document. The document will be created with little meta data, the file name will be used as the document title, the state from the read-only attribute will be used as the state, and the document type will be set as **N** (Internal).

The system automatically appends the Document identifier when refreshing File Explorer. You can open the document using either the file name supplied by the client (without the Dxxxxx identifier), as long as the document remains on the same case and is not further renamed, or you can use the file name with the Dxxxxx identifier.

## Rename documents

You can rename documents from File Explorer. The new name replaces the document title in the WorkZone system. The (Dxxxxx) identifier is automatically appended when refreshing File Explorer. The (Dxxxxx) identifier does not become part of the document title in the WorkZone system, and you do not have to keep the (Dxxxx) identifier in the new name; it will automatically be appended upon refresh of File Explorer. You can open the document with and without the (Dxxxxx) identifier in the file name.

## Work with documents offline

If you have taken a document offline, for example, copied it to the Windows Desktop or to a USB stick, you can copy it back into the WorkZone database. This means that the document is updated in the database, provided that you have not changed the (Dxxxx) part of the file name. When you copy the document back, File Explorer displays a message asking if you want to replace the existing version, keep both versions, or cancel. If you copy to a case folder, you can choose between all three options. However, if you copy the document to a folder that represents a standard list, for example, the **Drafts** folder, you can only choose between replace and cancel.

**Note:** If you save the document with a new name when working offline and then copy the document back to the WorkZone database, you will be prompted to either replace the existing document or keep both versions. If you replace the document, it will be copied back to the database with the original name. If you want to use a new name, you must rename the document in File Explorer.

## Move documents

You can move documents from one case to another provided that the state of the document in the WorkZone system allows it. You can move documents using drag and drop or cut and paste.

## Copy documents

You can copy documents from one case to another case within the same database. When you copy a document, a copy of the document and its meta data is created.

## Delete and restore documents

It is not possible to delete documents directly from folders, but you can move documents to the **Recycle Bin** and then delete it. The **Recycle Bin** is personal, which means that you only see the documents that you have moved there. The **Recycle Bin** contains a **Restore** folder. If you drag a document from the **Recycle Bin** to the **Restore** folder, the document will be moved back to the case folder where it was originally placed. You can restore a recycled document and assign it to another case by moving it from the **Recycle Bin** to the desired case folder.

## Add or remove documents in the Favorite documents folder

You can add documents to the **Favorite documents** folder by dragging and dropping the documents on the folder.

To remove a document from the **Favorite documents** folder, press the **Delete** button. A message with the text "Are you sure you want to permanently delete this file?" is displayed. Click **Yes** to remove the document from the list.

**Note:** The document is not deleted but only removed from the **Favorite documents** folder.

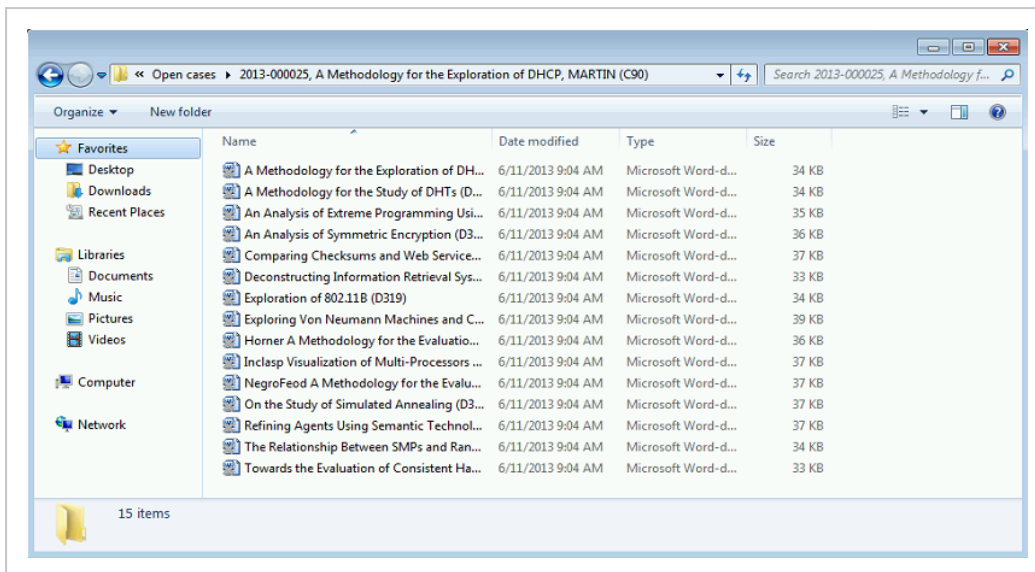
## PDF versions of documents

All case folders contain a PDF folder for PDF versions of documents that are created on a case. The PDF folder contains the PDF versions that you have created from WorkZone Client.

## About documents

You can open and edit all documents from any type of folder provided that you have the corresponding application installed. Note that the same document may appear in several folders. For example, a draft document is located in both the **Drafts** folder and in the case folder where it belongs. You can open and edit the document from either folder. The changes you make are updated in both locations. If you open a document from the **Recycle Bin**, the document opens in read-only mode.

The example below shows the documents on a specific case:



**Note:** The WorkZone Explorer server does not expose cases with the state “O” (so-called "information cases"), as they represent metadata without a document, which is not relevant for WorkZone Explorer.

## Read-only documents

Read-only documents are documents that have the states **UL** (Locked ), **ARK** (Archived), or **AFS** (Closed). Documents with these states cannot be edited. Microsoft Office products recognize the state and open the documents in read-only mode.

Document state	Possible actions
<b>UL</b> (Locked)	It is a read-only document. You can move and rename the document.
<b>ARK</b> (Archived) or <b>AFS</b> (Closed)	It is a read-only document. You can rename the document.

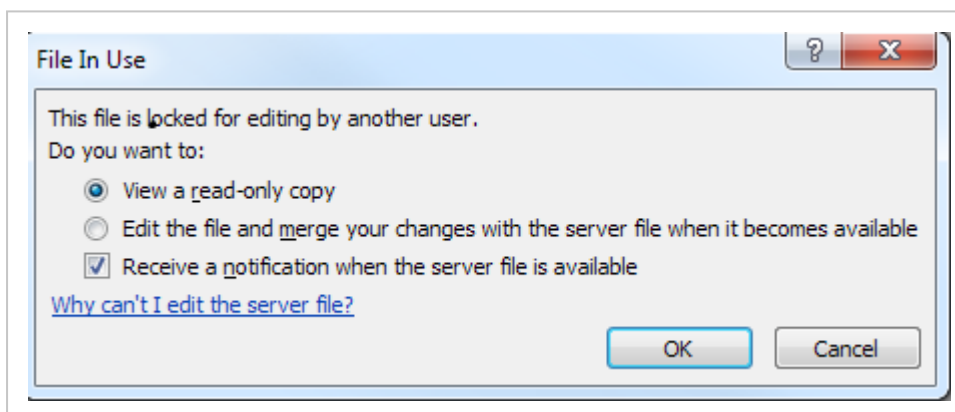
You can change a non-read-only document to read-only in the **File Properties** dialog box. If you do so, you change the document state to **UL**, a locked draft. You cannot remove the read-only attribute as the system does not allow this. If you try to change the attribute, it will have no effect.

See also [Document attributes and document states](#).

## Check-out

Microsoft Office products automatically lock editable documents when they are opened, for example documents check out in WorkZone. This prevents two users from editing the same document at the same time, or the same user from editing the same document from different folders at the same time. Additionally, Microsoft Office has a feature that notifies the second user who opens a document when the document becomes available for editing. Microsoft Office can also allow editing from both users at the same time and automatically merge the changes. This feature works automatically with WorkZone Explorer.

The Microsoft Office dialog box below is displayed when a second (or third) user opens a document already being edited by someone else:



**Note:** Some documentation editors, for example Notepad, only locks (checks out) the document when saving. This means that the last edit is always applied.

## Document identifier

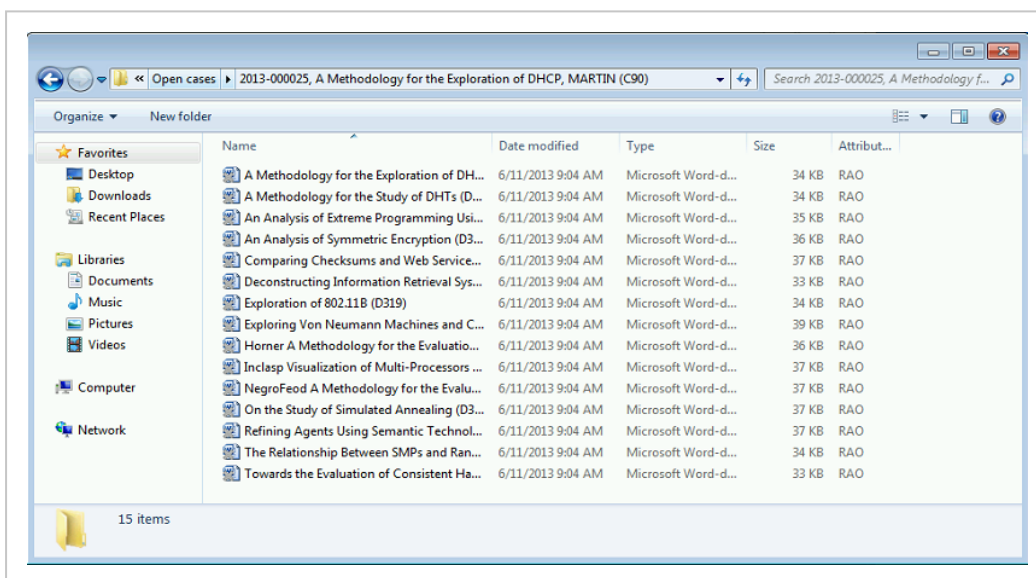
All documents have a document identifier (Dxxxx) as part of the file name.

## Draft Versioning

If Draft Versioning is enabled in WorkZone Configuration Management, new versions of a document are created automatically. Draft Versioning applies to documents with the state **UÅ** (Draft) or **UP** (Personal draft).

## Document attributes and document states

In the example below, the **Attributes** column is added to the folder view in File Explorer. In this column, you can see the different file attribute combinations that can be exposed from the system.



### Attribute Document state and possible actions

- A An editable document with the state **UÅ** (Draft) or **UP** (Personal draft). You can edit, move, rename, and change the document to read-only.

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- RAO A read-only document with the state **UL** (Locked). You can move and rename the document.

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- RO A read-only document with the state **ARK** (Archived) or **AFS** (Closed). You can rename the document.



# Search for cases and documents

You can search for cases and documents directly from File Explorer. Before you start a search, you must enable searching by adding two search connectors, one for cases and one for documents.



**Note:** If your organization is using OAuth2 for user authentication

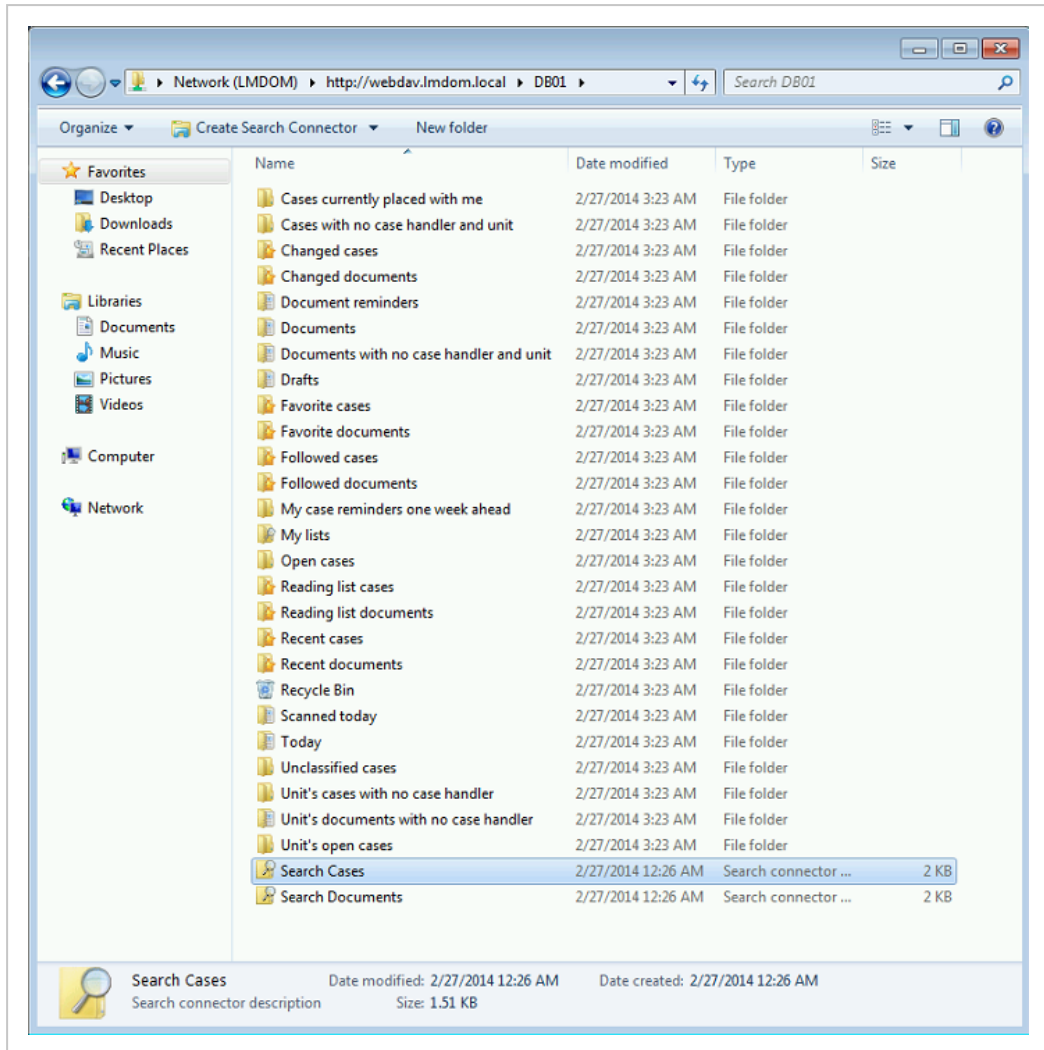
Performing case and document searches directly from File Explorer is not supported in a cloud setup as OAuth2 authentication is not supported by Windows Federated Search. See [Supported Authentication Protocols \(External link\)](#)

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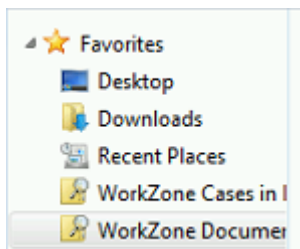
**Supported search tags** ..... **39**

## Enable free text search on cases and documents

1. In File Explorer, double-click the  **Search Cases.osdx** search connector or the  **Search Documents.osdx** search connector.



2. In the **Add Search Connector** dialog box, click **Add** to add the WorkZone Cases and WorkZone Documents search connectors to File Explorer. The search connectors **WorkZone Cases in [database]** and **WorkZone Documents in [database]** are added to **Favorites**.



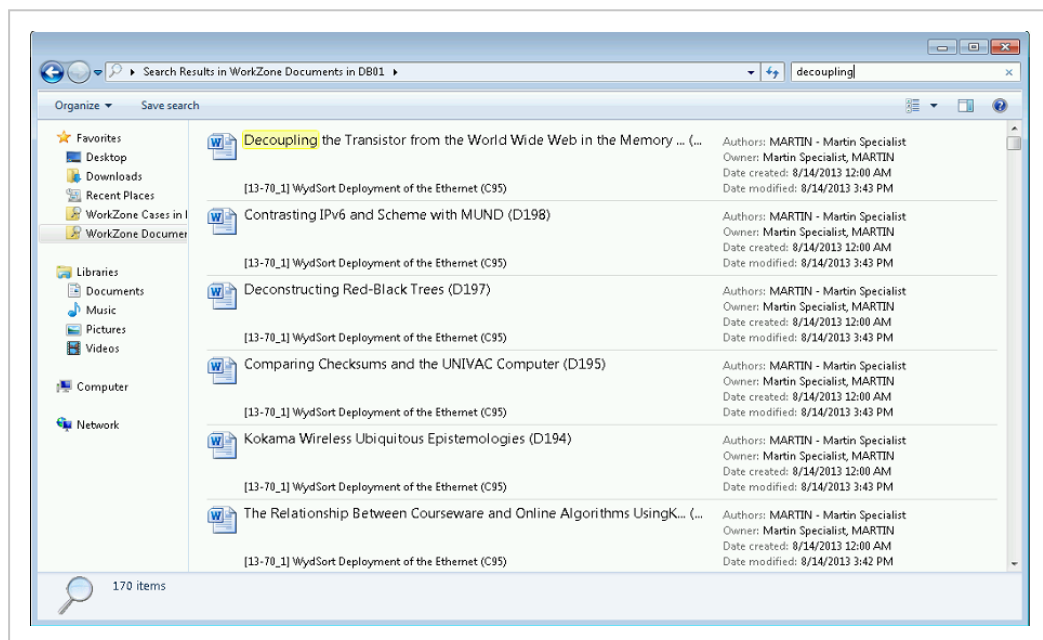
- 3.

Search for cases and documents

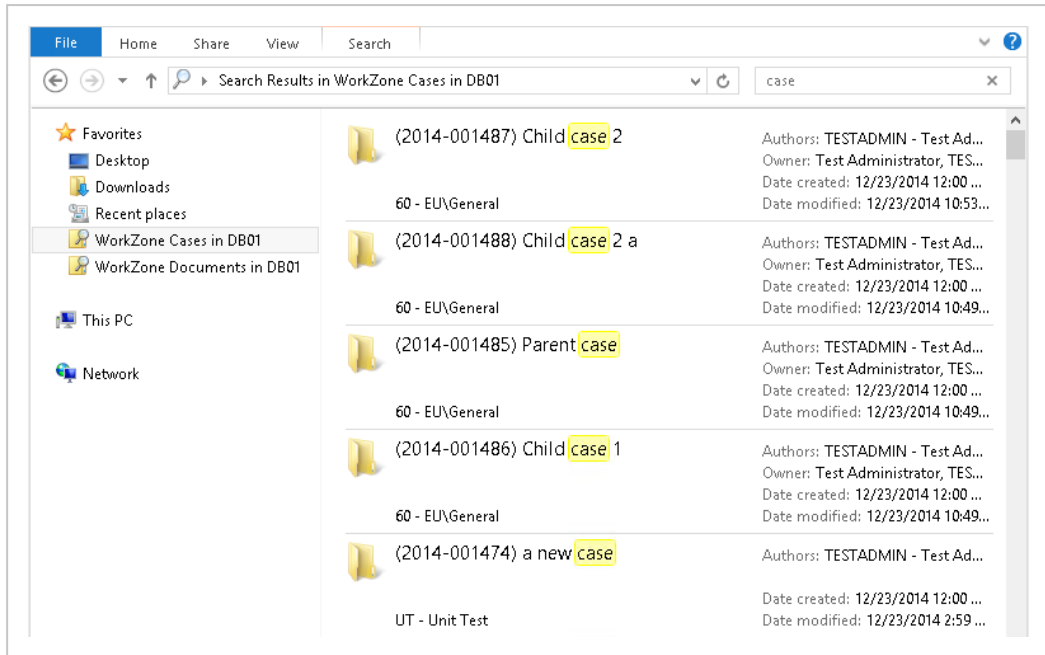
1. Double-click the **WorkZone Cases** or the **WorkZone Documents** search connector, depending on what you want to search for.
2. Enter a search term in the **Search** field, and press ENTER to display the search result.


The search results display a maximum of 1000 hits. The most recent cases and documents are shown in the search result.

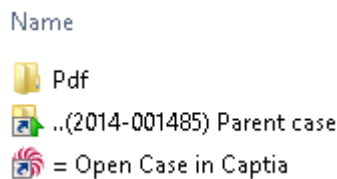
An example of a document search result is shown below:



An example of a case search result is shown below:



If you double-click a child case in the search results, you can double-click the  shortcut to open the parent case in File Explorer.



3. Double-click the case or document to open it.

**Important:** The search in WorkZone Explorer should not be confused with the free text search in File Explorer. The File Explorer searches in file names.

## Filter search results using search tags

When you search using search connectors, you can use search tags to filter the search results for a better overview. The search tags filter the current search results based on the text that you enter. Case folders and documents with properties that match the search tags will be displayed as search results.

## Example: Document search

You want to search for a document with a specific text in the document title, for example, "wide-area networks".

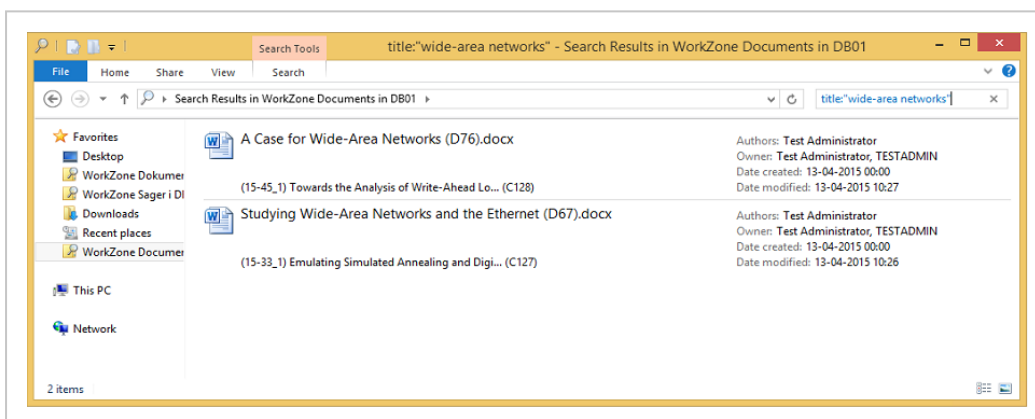
In the search box, enter:

title:"wide-area networks"

or

title:(wide-area networks)

**Note:** If you omit the quotes or the brackets, you search for "wide-area" AND "networks".



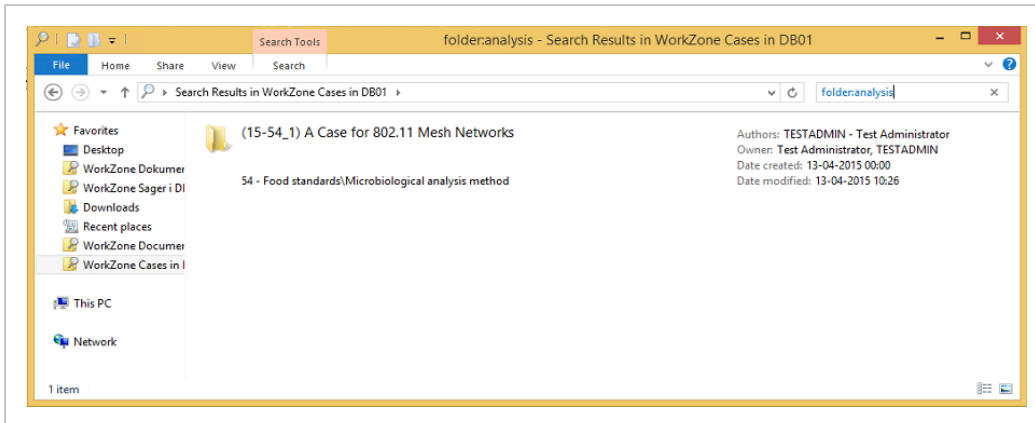
The search result displays two documents on two different cases.

## Example: Case search

You want to search for cases in a specific case group. You know that the case group contains the text "analysis". In WorkZone Explorer, the case group is shown as a folder in a path.

In the search box, enter:

folder:analysis



The search result shows one case where the case group contains the word "analysis".

## Filter using dates, date ranges, and date and size expressions

You can use dates, date ranges, and date and time expressions with some of the search tags. You can, for example, filter cases and documents by the point in time when they were created, modified, due, or closed.

### Date

Use these date formats to filter based on a date:

- dd-MM-yyyy
- yyyy-MM-dd
- dd/MM-yyyy

#### Example: Filter based on date

You want to view cases that were modified on a specific date. In the search box, enter:

`datemodified:15-01-2015`

**Note:** To search by date, the Windows date format must be dd-MM-yyyy. To verify the Windows date format, click **Control Panel > Clock, Language, and Region > Change date, time, or number formats > Short date field**.

### Date range

Use this format to create a filter interval.

- dd-MM-yyyy .. dd-MM-yyyy

#### Example: Filter interval

You want to view cases that were modified during the first two weeks of January.

In the search box, enter:

```
datemodified:01-01-2015 .. 15-01-2015
```

## Date expressions

You can use the following date expressions with search tags:

- today
- yesterday
- this week
- last week
- this month
- last month
- this year
- last year

#### Example: Filter using date expressions

You can, for example, create a filter to find cases or documents that were modified today.

In the search box, enter:

```
modified:today
```

## Size expressions

You can use the following size filters with the search tag:

- empty
- tiny
- small
- medium
- large

- huge
- gigantic

**Example: Filter using size expressions**

You want to view large documents.

In the search box, enter:

size:large

**Combine search tags**

You can combine search tags to narrow down your search results even more. Separate the search tags with a space.

**Example: Combine search tags**

You want to search for a document where the text "research" is part of the document title and where the case group contains the text "laws".

In the search box, enter:

title:research folder:laws

**More search tag examples**

Below, you can find examples of how to use search tags to search for cases and documents.

Search tag	Using search tags to search for cases	Using search tags to search for documents
created:	created:15-01-2015 created:today	created:15-01-2015 created:today
	Lists cases created on a specific date or today.	Lists documents created on a specific date or today.
datecreated:	datecreated:15-01-2015	datecreated:15-01-2015
	Lists cases created on a specific date.	Lists documents created on a specific date.



Search tag	Using search tags to search for cases	Using search tags to search for documents
date:	created:15-01-2015  Lists cases created on a specific date.	created:15-01-2015  Lists documents created on a specific date.
modified:	modified:this week  Lists cases that were modified this week.	modified:this week  Lists documents that were modified this week.
datemodified:	datemodified:yesterday  Lists cases that were modified yesterday.	datemodified:yesterday  Lists documents that were modified yesterday.
due:	due:01-01-2015 .. 15-01-2015  Lists cases that are due within a certain period of time.	due:01-01-2015 .. 15-01-2015  Lists documents that are due within a certain period of time.
completed:	complete:this month  Lists cases that were closed within a certain period of time, for example, this month.	complete:this month  Lists documents that were closed within a certain period of time, for example, this month.
folder:	folder:laws  Lists cases with specific case groups, for example, cases with case groups that contain the word "laws".	folder:2015-000174  Lists documents from a case folder with a specific case number.  folder:Methodologies

Search tag	Using search tags to search for cases	Using search tags to search for documents
------------	---------------------------------------	-------------------------------------------

Lists documents from case folders where the case title contains the word "Methodologies".

folder:Martin

Lists documents from case folders that were created by the case handler named Martin.

**Note:** This search is performed on information in auto completion fields on the case detail page in WorkZone Client. You can search by using case number, case title, and case handler.

folderpath: folderpath:food

See the folder: search tag for documents above.

Lists cases with case groups that contain the word "food" in the case group hierarchy, for example:

00 - Food Authority\Laws and circulars

32 - Control East\Food Quality

Search tag	Using search tags to search for cases	Using search tags to search for documents
	<p><b>Note:</b> This search is performed on cases with a case group that contains a specific word as part of the case folder path (case group hierarchy).</p>	
open:	<p>open:false</p> <p>Lists only closed cases.</p> <p>open:true</p> <p>Lists only open cases.</p>	<p>open:false</p> <p>Lists only closed documents.</p> <p>open:true</p> <p>Lists only open documents.</p>
end:	<p>end:today</p> <p>Lists cases with a specific planned completed date, for example, today.</p>	<p>end:today</p> <p>Lists documents with a specific reply deadline, for example, today.</p>
owner:	<p>owner:Martin</p> <p>Lists cases assigned to a specific case handler, for example, "Martin".</p>	<p>owner:Martin</p> <p>Lists documents assigned to a specific case handler, for example, "Martin".</p>
author:	<p>author:mar</p> <p>Lists cases created by a specific employee. You want to search by</p>	<p>author:mar</p> <p>Lists documents created by a specific employee. You want to search by using</p>



Search tag	Using search tags to search for cases	Using search tags to search for documents
	<p><b>Tip:</b></p> <p>To search for an exact phrase in a title, enclose your search terms in quotes or brackets, for example, title:"research center" or title:(research center).</p> <p>The search result includes cases with the same words in the same order as inside the quotes or brackets.</p>	<p><b>Tip:</b></p> <p>To search for an exact phrase in a title, enclose your search terms in quotes or brackets, for example, title:"research center" or title:(research center).</p> <p>The search result includes documents with the same words in the same order as inside the quotes or brackets.</p>
name:	name:research	name:research
	Performs the same search as above.	Performs the same search as above.
filename:	filename:hearing	filename:hearing
	Lists cases that contain a specific text in the file name, for example, "hearing".	Lists documents that contain a specific text in the file name, for example, "hearing".
person:	person:nielsen person:anne-lise	
	Lists cases with a specific party assigned, for example, "Anne-lise Nielsen".	

Search tag	Using search tags to search for cases	Using search tags to search for documents
	<p><b>Note:</b> This is a combined search using first and last name.</p>	
to:	to:Marcus	to:Marcus
	Lists cases with a specific party with the role <b>Recipient</b> .	Lists documents with a specific party with the role <b>Recipient</b> .
	<p><b>Note:</b> This is a free text search using either Name 1 or Name 2 in WorkZone Client.</p>	<p><b>Note:</b> This is a free text search using either Name 1 or Name 2 in WorkZone Client.</p>
from:	from:filippa	from:filippa
	Lists cases with a specific party with the role <b>Sender</b> .	Lists documents with a specific party with the role <b>Sender</b> .
	<p><b>Note:</b> This is a free text search using either Name 1 or Name 2 in WorkZone Client.</p>	<p><b>Note:</b> This is a free text search using either Name 1 or Name 2 in WorkZone Client.</p>
cc:	cc:marie	cc:marie
	Lists cases with a specific party with the role <b>Copy recipient</b> .	Lists documents with a specific party with the role <b>Copy recipient</b> .

Search tag	Using search tags to search for cases	Using search tags to search for documents
	<b>Note:</b> This is a free text search using either Name 1 or Name 2 in WorkZone Client.	<b>Note:</b> This is a free text search using either Name 1 or Name 2 in WorkZone Client.
size:		size:large  Lists large documents.
extension:		extension:xlsx  Lists documents of a specific file type, for example, Microsoft Excel sheets.

See Supported search tags for a list of search tags. The list includes field names that can be searched in WorkZone Content Server.

## Supported search tags

The table below lists the search tags that you can use to filter the search results of the **WorkZone Cases in [database]** and **WorkZone Documents in [database]** search connectors. The table lists the search tags and the case and document fields in WorkZone Content Server that the search applies to.

Search tag	Case fields	Document fields	Accepts	Notes
created:	created	created	Date Date range Time expressions	
date-	created	created	Date	

Search tag	Case fields	Document fields	Accepts	Notes
			Date range Time expres- sions	
<b>created:</b>				
<b>date:</b>	created	created	Date Date range Time expres- sions	
<b>modified:</b>	updated	doc_time	Date Date range Time expres- sions	
<b>date- modified:</b>	updated	doc_time	Date Date range Time expres- sions	
<b>due:</b>	current_remind- er:reminder_date	current_remind- er:reminder_date	Date Date range Time expres- sions	
<b>completed:</b>	closed	record_closed	Date	



Search tag	Case fields	Document fields	Accepts	Notes
			Date range Time expressions	
<b>folder:</b>	<code>file_class</code> or <code>file_class/path</code>	<code>file_elab</code>	string	<p>For case search:</p> <p>Use <code>folder:=file_class</code> to search the <code>file_class</code> (Case group). For example, <code>folder:=54</code> will find all cases where the case group is equal to 54.</p> <p>User <code>folder:=file_class</code> to search the <code>file_class</code> path. For example, <code>folder: analysis</code> will find all cases where the case group contains the word "analysis".</p> <p>In WorkZone Explorer, the</p>

Search tag	Case fields	Document fields	Accepts	Notes
				case group is shown as a folder in a path.
<b>folderpath:</b>	file_class or file_class/path	file_elab	string	For case searches: See folder: notes.
<b>open:</b>	closed	locked (meaning UL, ARK or AFS)	Bool (true or false)	
<b>end:</b>	plan_completed	reply_time_limit_date	Date Date range Time frames	
<b>owner:</b>	officer	officer	string	
<b>author:</b>	create_user	create_user	string	
<b>authors:</b>	create_user/note	create_user/note	string	
<b>title:</b>	title	title	string	
<b>name:</b>	elab	title	string	
<b>filename:</b>	title	title	string	
<b>person:</b>	party/- name/register_text: t:register_txt	party/- name/register_text: t:register_txt	string	Free text.
<b>to:</b>	party/- name/register_text: t:register_txt	party/- name/register_text: t:register_txAt	string	Free text. Only parties with role/- custom_label = Modtager is

Search tag	Case fields	Document fields	Accepts	Notes
				searched.
<b>from:</b>	party/- name/register_text: t:register_txt	party/- name/register_text: t:register_txt	string	Free text. Only parties with role/- custom_label = Afsender is searched.
<b>cc:</b>	party/- name/register_text: t:register_txt	party/- name/register_text: t:register_txt	string	Free text. Only parties with role/- custom_label = Kopimodt is searched.
<b>size:</b>	NA	doc_length	size filters	
<b>extension:</b>	NA	record_ext:extension	string	
<b>[default]</b>	register_text: t:register_txt	register_text: t:register_txt	string	Free text search.

# FAQs

This section contains a list of frequently asked questions on the functionality of WorkZone Explorer. Click any question below to see the answer.

## Why do i get an unclear error messages?

Sometimes File Explorer does not show user friendly and descriptive error messages from the WebDAV server. When you perform an illegal operation, for example, try to move an archived document to another case, you will only see a general error message such as: *Cannot read from source or disk*. Some of the Windows error messages that you might run into are explained in the FAQ items below.

## Why do I get an error message when I try to add a document to the **Drafts** folder?

You can only create new documents in specific case folders. You cannot, for example, create a new document directly in the **Drafts** folder, because WorkZone requires a case in order to place the document correctly in the system. If you try to add a document to the **Drafts** folder, the following error message will appear, depending on where you try to add it from:

*A device attached to the system is not functioning.*

- or -

*Can't read from the source file or disk.*

## Why do I get an error message when I try to create a new case folder?

By default, WorkZone Explorer is not configured to allow creation of new cases. Case creation must be enabled on the SJ-TEMP class in the file class system. You apply this configuration by using WorkZone Configuration Management. If you try to create a new case, the following error message will appear:

*Unable to create the folder "New folder" - File system error*

## Why do I get an error message when I try to create a new case folder?

Some folders do not allow case creation. You can create new cases in the **Open cases** folder, the **Unclassified cases** folder, and in specific case folders. If you try to create a new case folder in a folder which does not allow case creation, the following Windows error message will appear:

*Unable to create the folder 'New folder' - File system error*

See also Create case.

### Why do I get an error message when I try to move a document from one folder to another?

You are probably trying to:

- Move a document from one standard list to another.
- Move a document from a case folder to a standard list, for example, to the **Open cases** folder.
- Move a document to a closed case.
- Move a document that is archived or closed.

This is not possible. In these cases, following Windows error message will appear:

*Can't read from the source file or disc.*

### Why are folders not deleted when they seem to be?

It is not possible to delete folders by using WorkZone Explorer although it may look so in File Explorer. If you try to delete an empty folder, it will look as if the folder is successfully deleted, but if you press F5 to refresh, the folder reappears. If you try to delete a folder with content, nothing happens after you have confirmed the deletion. File Explorer does not display any error message in this case.

### Why do I get an unclear error message when I try to rename a document?

There are several renaming scenarios where the following Windows error message appears:

*Can't read from the source file or disk*

For example, if you try to:

- Change the document ID (DXXX) in the document name. It is not possible to change the ID; only the document name can be changed.
- Rename a document that is saved on a closed case. This is not possible.
- Rename a document in File Explorer, but the document is opened in WorkZone Client. This is not possible.

### Why are documents not shown in File Explorer after moving?

In File Explorer, if the same document is placed in different folders, each document is considered a unique and distinct document. In WorkZone Explorer, the same document can be displayed in different folders, each folder representing one way of accessing the document and referencing the same document - for example, a document might be placed in the case folder and the Favorites folder as well as appearing in a list or search.

File Explorer can only contain Folders or Documents while WorkZone Explorer can display documents, cases, searches, favorites, lists, etc. Since

File Explorer uses WorkZone Explorer functionality to display and represent WorkZone documents and elements, this means folders in File Explorer must be used to represent all non-documents (Cases, searches, favorites, lists, etc).

When documents are moved between folders using the File Explorer drag-and-drop, WorkZone Explorer and File Explorer must synchronize data on how documents are placed and represented and sometimes File Explorer has difficulty updating document locations to represent the same document being represented in multiple folders.

This usually manifests in either an error message or the document disappearing from the folder it is moved from. You can press the **F5** key to refresh the explorer or wait for about a minute for the File Explorer to update correctly.

#### [Why is the full document title not shown in the file name?](#)

File Explorer can display a maximum of 260 characters in paths. Therefore, if a WorkZone path exceeds the maximum number of characters, the document file names are shortened. If you open the document in WorkZone Client, you will see the full document title.

#### [Why can't I download files larger than 50 megabyte or upload large files when the upload requires more than 30 minutes?](#)

The default values of the WebDav extension to the http or https protocol for Windows 7 and Windows 10 are causing these issues. You can edit the default values to enable better management of large files.

For more information, see [customize the web client in the registry](#) (external link to Microsoft support).

# Information for administrators

The topics in the WorkZone Installation guide below are targeted at administrators of WorkZone Explorer.

[Optimizing performance and user experience](#)

[Advanced features](#)

[Troubleshooting](#)

# Terms and conditions

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