



2021.3  
Administrator Guide

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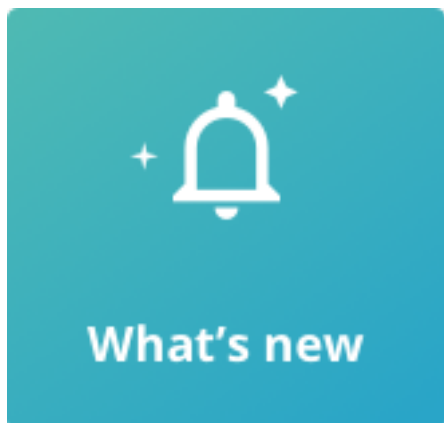
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# Administrator Guide for WorkZone Client 2021.3



## Most used topics

- [Support Matrix](#)
- [WorkZone Installation Guide](#)
- [Work with WorkZone Client configurations](#)
- [Troubleshooting](#)

## Related product documentation

- [WorkZone Client User Guide](#)

## WorkZone links

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

# What's new in WorkZone Client

## WorkZone Client 2021.3

No new features in this release.

## [WorkZone Client 2021.2](#)

### Custom types can inherit the referenced case or contact's access rights

Custom types that reference a case or contact can be protected by the access codes of the referencing case or contact. If a custom type contains multiple custom type fields that reference a case or contact, the custom type will inherit the access codes of all the referenced cases and contacts that inheritance has been enabled for, similar to WorkZone access code functionality.

Select the **Protect by** option on the custom type field parameters form to enable Access code inheritances for the custom type. The **Protected by** option is only accessible for custom type fields that reference cases or contacts.

Only custom type fields referencing cases and contacts can inherit the referenced case or contact's access right. Custom type fields referencing document cannot not inherit the referenced document's access rights.

### Manually assign access rights to custom types

WorkZone users can also manually assign apply access codes to custom type records.

A system administrator must select the **R/W Access code** option in the properties of the custom type to enable users to set access rights on the custom type.

Access rights inherited by or assigned to custom types are applied throughout WorkZone, for example to search results performed in WorkZone QueryBuilder.

### Improved security for WorkZone Client configuration data

Access codes have been added to the tables storing WorkZone configuration data so configuration data can only be updated by properly authenticated users.

## WorkZone Client 2021.1

### Ribbon configuration

Customized ribbon button labels can be created by users for all supported languages in WorkZone. When a display language in WorkZone is selected, any customized button labels will be displayed instead of the default button labels for the selected language. If custom button labels have not been created for the selected language, the default button labels will be used instead.

New button labels can be up to 256 characters long, but it is recommended to use short labels as a long label text may not be correctly displayed in the ribbon.

Users can freely create custom button labels for their own personal configuration, but must be assigned the CONFIGADM access code to edit and save configurations other than their own Personal configuration.

Custom button labels are part of the ribbon configuration and can therefore also be distributed to other users, units or to the entire organization as a part of a customized WorkZone configuration.

Users can export the customized button labels of a language in the configuration they are working on and only the customized button labels for that particular language. In this way, only customized button labels will be exported and as a result, only customized button labels will be imported by other users, enabling users to distribute only customized button labels to other users.

### Hidden custom fields and customizing detail pages

Custom fields can be marked as hidden when creating or updating the custom field in WorkZone Configurator. Hidden custom fields are not displayed in the **Available fields** pane when customizing the respective detail pages or when customizing searches and can therefore not be selected or added to detail pages or searches. Hidden custom fields are also not displayed when selecting **Show all fields** in searches, when displayed in lists or when used in **Group by** or **Aggregate by** fields in dashboard widgets.

If custom fields that already are displayed in their respective detail pages are hidden, WorkZone Client must be closed and reopened to hide the custom field. If a custom field was set as mandatory and then hidden, the field will no longer be mandatory.

Hidden custom fields can still retain data and can still be referenced by scripts and calculations.

## Hiding a custom field

The **Selectable** radio button in the custom field parameters form in WorkZone Configurator is used to display (On) or hide (Off) the custom field.

[WorkZone Client 2021.0](#)

## The Label control

A new Label control has been introduced for the page designer and can be used to display a text on the detail page, either as a normal caption or as a header text.

Other field controls can be placed under the header, creating the illusion of field groupings on the detail page.

The label control parameters can be used to define the text to be displayed as well as how the text is displayed in the label control.

## Custom icons

System administrators can add customized icons to WorkZone and assign them to case, document or contact elements as well as assign them to custom types in WorkZone.

Custom icons can be used to either replace the existing standard WorkZone icons, for example replacing the standard WorkZone icon for a document with another icon more relevant for your organization. You can also use custom icons to visually represent specific conditions relevant for your organization, work process or goals, for example changing the standard WorkZone icon for a case with a nearly identical icon, only colored yellow and applied to all cases 7 days short of their deadlines.

Custom icons can be added to WorkZone in **WorkZone Configuration Management > Client > Icon collections** and assigned to WorkZone elements (Case, Document, or Contact) in **WorkZone Configuration Management > Client > Icon assignments**.

Icon assignments can be removed and icons can be deleted, as long as there are no current assignments on the icon to be deleted.

**Note:** Only Scalable Vector Graphic images (.SVG) can be used as custom icons.

## [WorkZone Client 2020.3](#)

### **Validation rules on Webpage and Email fields**

Standard WorkZone validation rules are now applied to input on the **Webpage** and **Email** fields on the contact detail pages. Previously, both these fields contained their own validation rules which were not always aligned with the standard field validation rules used in WorkZone Configurator when creating custom fields.

### **New advanced PDF viewer and editor**

The Advanced PDF viewer, a 3<sup>rd</sup> party PDF reader and editor, can be enabled and made available to users who wish to edit PDF documents more extensively. The advanced PDF viewer is installed but not enabled during initial installation of WorkZone. In addition to enabling the advanced PDF viewer in WorkZone Configurator > **Global Feature settings** > **Client** features, WorkZone Client configurations must also be edited to make the viewer functionality available to users. The advanced PDF viewer can be set up to be the default PDF viewer in WorkZone Client.

The advanced PDF viewer uses the PDFTron viewer engine to edit and save PDF documents.

### **System Messages**

System administrators can create, edit, maintain and delete system messages. System messages are message fields or display boxes that are displayed prominently to all WorkZone users in either WorkZone Client only or in all other WorkZone products.

System messages can also be targeted specific users, based on the assigned access codes of the users, and can be limited by date and time as well as made persistent so users can't close them. System message texts (title and content) can be localized to the supported languages in WorkZone and can be deleted when no longer needed.

## [WorkZone Client 2020.2](#)

## WorkZone Configurations

### Streamlined and simplified configuration editing

The functionality for editing and deploying (previously called distributing) WorkZone configurations has been simplified and streamlined. The functionality, menu options and user interface texts have been re-done for improved usability and ease-of-use.

Users assigned the CONFIGADM access code can edit and reset their own and other users' configurations as well as Unit and Organizational configurations.

Configurations are no longer distributed to users, but saved as another user's configuration, saved as a Unit configuration or saved as an Organizational configuration. Configurations that contain customizations are suffixed with a gear icon. Saving configurations in this fashion overwrites the original configuration and automatically makes the configuration available to the user, unit or entire organization, depending on the configuration type.

The Import/Export menu option is not accessible if you are currently editing a configuration. You must import/export the configurations first and then edit each configuration (if necessary).

As a result of the changes to configuration editing, the **Clear distributed configuration** and **Import user configuration** menu options have been removed and their functionality replaced with the new configuration editing functionality. The contents of WorkZone configurations, priority and merging rules as well as importing/exporting configurations as files have not been changed.

### Filtered tabs and the default dashboard

Filtered tabs and the default dashboard cannot be removed (meaning deleted from the configuration). You can choose not to display a filtered tab or the default dashboard, but you cannot remove them.

### Lock Main ribbon elements

When editing configurations, users assigned the CONFIGADM access code can lock changes made to the Main ribbon. This allows administrators to single out and prevent user access to specific Main ribbon elements - for example updating the Unit configuration to only display the creation of certain case types to unit members.

Locked Main ribbon elements cannot be unlocked by users that are not assigned the CONFIGADM access code even though all users can edit their Private configuration's main ribbon.

## Change the display order of the menu options in the Main menu

Administrators can change the display order the menu options in the Main menu when editing WorkZone configurations by dragging the menu items to new positions. This enables administrators to fine-tune the main menu to better reflect the every-day workflows by manually grouping and placing the most used menu items in logical positions in the menu.


## Custom Types


Custom types can now be connected to other custom types as well as to a case, document, contact, unit, employee or address. Custom types can also be created independent of any connections and can thereby be used to create a detail page - detail tab structure similar to the detail page - detail tab structure for cases, documents and contacts.

## Custom detail pages

Custom types now have their own detail page where users can create new records in the custom type the same way new cases, contacts or documents are created. If a custom type is connected to another custom type, a custom type detail tab on the custom type detail page will be displayed once the main custom type record has been created.


The custom type detail tab can be configured like any WorkZone detail tab - meaning additional tabs can be added or removed and columns (fields) can be displayed or hidden from

view. The custom type detail page is opened from the main ribbon >  **More** button.

The  **More** button is a new addition to the main ribbon and displays all created and active custom types. It is used to open the custom type detail page for the selected custom type


where users can enter data. The  **More** button is not displayed by default and must be




enabled manually by editing the main ribbon. The  **More** button is also locked for editing by default.

## Custom type searches

You can create and save custom type searches similar to other searches and the saved custom type searches can be used to create lists or generate data for widgets in the dashboard.

Custom type searches can be accessed from the main ribbon by clicking **Search** >  **More**.

The  **More** search menu option is not displayed by default and must be enabled manually by editing the main ribbon. The menu option is also locked for editing by default.

## Descriptive text in custom types

Custom types cannot by default display a description or label in connection with the record number, unlike cases for example, which can be displayed by a number of meta data such as Case ID, Case number, Case title, Case handler and/or Case type. When referring to a record made in a custom type, only the record ID is by default displayed in widgets and in drop-down lists in fields.

You can add a description to the custom type ID which will be displayed when users look-up a custom type field value in a drop-down list in a detail field or search field or when users analyze custom type data displayed in dashboard widgets.

## Custom types and performance

Custom types should not contain large amounts of data and are not architecturally designed to do so.


If large amounts of data is stored in custom types, either in one custom type that contains large amounts of data or many custom types each with significant amounts of data, overall system performance may be noticeably reduced. The specific amounts of data that will cause

reduced performance will depend on the hardware, software, network configuration and work policies implemented in your organization.

**Important:** As a consequence of the changes made to custom types, you must re-apply all custom types used as tabs in the case, document and contact-based detail pages if you have updated your WorkZone installation from a previous version to WorkZone 2020.2.

If you have adjusted any columns (fields) in the custom tab, you must manually configure the list again.

If you have added or removed fields in the corresponding **Add new record** form in the custom tab, you must manually configure the form again.

The **Add new record** form is opened by clicking the  **Add** button in the detail ribbon.

### WorkZone Process notification settings for Units

WorkZone Process notification settings can be defined for WorkZone units on the unit detail page and can be used to customize which WorkZone Process notifications are received by a unit.

Units are considered a separate contact with their own WorkZone Process notification settings and in some situations, their own email account. Users can therefore receive notifications to their email account based on their user notification settings as well as receive notifications to their unit's email account based on the notification settings of the unit.

Like the user WorkZone Process notification settings, the notification settings of the unit will override the organization's global WorkZone Process notification settings.

### [WorkZone Client 2020.1](#)

No changes in this release

### [WorkZone Client 2020.0](#)

## Custom types

The Custom case lists that were introduced in WorkZone 2019.2 have been expanded to cover contacts and documents as well and renamed to Custom types.

Custom types are collections of customized fields which can be used to store additional data on cases, documents or contacts. They can be considered to be an extra database table associated with a case, document or contact, enabling an additional level of data to be stored for cases, documents or contacts. Custom types can be defined specific to your organization's requirements and are created and set up by a system administrator in WorkZone Configurator.

## Custom Contact lists

Custom case lists have been renamed to Custom types and have been expanded from being able to create custom fields can now be created for Contacts as well as Cases and applied to WorkZone configurations. Custom Case lists were introduced in WorkZone 2019.2.

## Define filter on Custom contact fields

A filter to the custom contact field can be defined when creating a WorkZone configuration to limit the number and type of contacts a user can define in the field. This helps the user to locate and select the relevant and correct contacts. The types of contacts the field can accept as valid entries must be defined for the filter. Previously, when a user entered a new value in a custom contact field , all existing contacts were present in the droplist and could be selected. This resulted in very large droplists as well as illogical options, such as selecting a building for a field intended to contain persons.

## Global access rights (\*) and assigning access rights to others

The global access code (\*) now enables you to assign access codes to another employee, department, or unit that you are not assigned rights to. Previously, in addition to the global access code (\*), you also had to be assigned sufficient access rights to the department or unit you were assigning rights to for other employees.

[WorkZone Client 2019.3](#)

## Unique custom field type

You can use the new custom field type called Unique to create case, document or contact fields that can only contain one value, for example if you are registering a case per car registration number or car chassis number or each contact must contain a unique employee number.

## New custom field types

The following types have been added to the custom fields in WorkZone:

- Address
- Case
- Document
- Contact
- Employee

## Change the sort order of Case category, Case types and case states

Organizations can change the sort order of the items in the drop-down lists in the following Case fields:

- Case category
- Case types
- Case states

The default sorting order in these drop-down lists is by descending alphabetical order, but system administrators can change the sorting order by defining a new sort order (called Rank) in **WorkZone Configurator > Cases > Properties** for a specific case category, case type and/or case state. All items assigned an identical rank will be sorted in a descending alphabetical order.

This also affects the drop-down list in the **Case** button in the main ribbon, enabling an organization to display cases which are created more often than other cases first in the lists.

[WorkZone Client 2019.2](#)

## Installing WorkZone Client

All WorkZone Client features are now installed automatically when you install WorkZone Client. You still have to manually set up database access during installation. The installed WorkZone Client features can be individually activated or deactivated in WorkZone Configurator.

If you uninstall WorkZone Client, all WorkZone Client features will also be uninstalled automatically.

Installation information moved

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

See [WorkZone Installation Guide](#).

[WorkZone Client 2019.1](#)

## Ribbon configuration


You can apply ribbon customizations to the current ribbon you are configuring or distribute the changes to all major ribbons. Only changes made to global ribbon options can be distributed to all major ribbons. Changes to local ribbon options can only be applied to the ribbon you are currently configuring.

To facilitate this, the ribbon options have been divided into two types: global ribbon options and local ribbon options.

Global ribbon options (displayed with a **G**) enable you to deploy your customized ribbon configuration to all major ribbons while local ribbon options (all other ribbon options) enable you to deploy your customized ribbon configuration to the current ribbon only.


You can also reset the current ribbon configuration, removing all customizations and reverting to the default ribbon configuration. If you have distributed your ribbon customization to all major ribbons, you can likewise reset all ribbon configurations for major ribbons, removing all customizations and reverting to the default ribbon configuration.

## Configurable WorkZone controls (fields) are clearly displayed

When defining a WorkZone configuration, all configurable WorkZone controls (fields) are displayed with the  **Configure control** icon in the upper right-hand corner of the control. This enables you to quickly gain an overview of which controls can be edited on a detail tab page.

**Note:** The **Available fields** pane must be opened in order to see the configurable

controls.

If you click the  **Configure control** icon, a menu is displayed, listing the menu options relevant for the active control, for example **Default**, **Required**, **Read-Only** and/or **Advanced**. Previously, you had to right-click the control to open the menu and the configurable controls were not clearly displayed.

## Access codes

The **Read access** and **Write access** fields for the case and document detail pages can be customized to display the read or write access code applied to the case or document instead of the access code text. The access code text is still displayed by default.

If you want to display the access codes only, edit your configuration and select the **Display access code only** check box.

### WorkZone Client 2019.0

- List selectors for the Case, Document and Contact detail pages can be customized, adding, re-arranging, and removing search fields for the searches for the following detail tab pages:
  - Parties
  - Case references
  - Document references
  - Child cases
  - Parent cases

For more information, see *Working with WorkZone Client configurations*

- Multiple contact types can be defined for the **Primary party** field on the case detail tab page when customizing the configuration. This enables you to broaden the selection list of values for the **Primary party** field from only one contact type to many contact types.

For more information, see *Working with WorkZone Client configurations*

### WorkZone Client 2018.2

**Office Online Server support:** WorkZone supports Office Online Server which enables a user

to use Office Online products to create read, edit and save office documents (Word, Excel, Powerpoint and OneNote) internally on the company's own internal network without having to access the internet and without having a local Microsoft Office suite installed on each machine. Multiple users can work concurrently on a document and each can save their changes concurrently. For more information, see [The Microsoft Office Online Server](#)

### WorkZone Client 2018.1

- The MULTIEDIT access codes has been added. The access code contains rights that enable a user to edit up to 500 items in a list at a time.
- The CONFIGADM access code has been updated and now contains rights that enable a user to edit report templates as well as distribute WorkZone Client configurations.
- The DATAADM access code has been updated and now contains rights that enable a user to define or edit the default retention policy.
- The PROCESSADM access code has been updated and now contains rights that enable a user to configure WorkZone processes and service workflows.
- Custom fields with integer and decimal values can be added to the case, document, and contact detail pages. See how to configure custom fields in [WorkZone Configurator](#).
- If you want to import the organizational configuration, but it is located below numerous personal and unit configurations, start typing "Organizational" or "Organisatorisk" to quickly find it.

### WorkZone Client 2018:

- A new option to export WorkZone Client configurations has been added. Now you can export configurations only of selected users or units.
- A new option to import WorkZone Client configurations has been added. Now you can choose whether to merge the new and existing configurations or to apply the new configuration only (the existing configuration then be fully disregarded).

### WorkZone Client 2017 SP1:

- The Case activities module has been added to the WorkZone Client Setup wizard.

### WorkZone Client 2017

- A new [Working with WorkZone Client configuration](#) section has been added. This

section provides guidelines on how to create, import, configure, distribute, and reset WorkZone Client configurations for individual users, units, or for the whole organization.

- The Installing WorkZone Client section has been updated and extended with additional information such as silent installation.

### WorkZone Client 2016

No updates in this version.



# Working with WorkZone Client configurations

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## Working with WorkZone Client configurations

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**Important:** Before you change configurations for users, units, or for the organization, ensure that you are aware of types, priorities, and merging rules of configurations. See [About WorkZone Client configuration](#)

**Important:** WorkZone Client configurations created in WorkZone Client 2017 or earlier versions are no longer possible to migrate, and they will be lost when you upgrade WorkZone Client to version 2021.3. This is a consequence of the fundamental dashboard improvement and new functionality introduced in WorkZone 2018 and later. WorkZone Client configurations created in WorkZone Client 2018.0 can be migrated after an upgrade to a newer version of WorkZone except dashboard and navigation pane settings. This is a consequence of the multiple dashboard functionality introduced in WorkZone 2018.1.

**Prerequisite:** To manage and distribute configurations, you must be assigned the CONFIGADM access code.

## What is a WorkZone configuration

WorkZone configurations are collections of user-interface elements (dashboards, lists, widgets, etc) that can be customized and applied to either a single user, a unit or the entire organization. Organizational configurations are available to all users in the organization while Unit configurations are available to members (users) of that unit only. User configurations are only available to the user the configuration is applied to.

Typically, an administrator customizes the configurations and applies them to users, units and/or the organization, but users can customize their own configuration, with some limitations. Administrators can also reset configurations, effectively removing all customizations and restoring a configuration to the standard configuration supplied by default when WorkZone is initially installed.

Configurations can be exported to a file, either to create back-ups of the configurations or as a means to transfer configurations from one WorkZone installation to another.

Users and Administrators both can access an overview of all the changes to the configurations that have been applied to and are available to the current user. The overview lists the changes to the configurations by type and also by configuration type (User, Unit and Organizational). While the list of changes is somewhat technically detailed, a rough understanding can be made about the scope and depth of any potential changes to the configurations a user might be affected by.

## Access rights and the configuration

The actions you can perform on a configuration depend on your access rights:

- If you are not assigned the CONFIGADM access code, you can:
  - Create or edit your own WorkZone Client configuration.
  - Import someone else's configuration.
  - Reset your personal configuration.
- If you are assigned the CONFIGADM access code, you can:
  - Create a new configuration or adjust an imported configuration.
  - Distribute a configuration to selected users, units, or to your whole organization.
  - Save configurations of all users to a configuration file.
  - Apply configurations to all users from a saved configuration file.
  - Withdraw configurations that were previously distributed to a user, unit, or organization.
  - Add custom fields to the case, document or contact detail pages.

## What a configuration includes

When a configuration is customized, you create or change one of more aspects of the WorkZone Client user interfaces, for example when you add, remove, reorder, or resize the following elements:

- Dashboard items
  - The default dashboard cannot be removed (meaning deleted from the configuration). You can chose not to display the default dashboard, but you cannot remove it.
- Widgets
- Lists (columns, order of columns, sorting)
- Tabs
  - Filtered tabs cannot be removed (meaning deleted from the configuration). You can chose not to display a filtered tab, but you cannot remove it.
- Panes and panels
- Fields and drop-down lists
- Case, document and contact detail pages
- Ribbons
- Custom fields and custom types

## Configuration types and priorities

There are four types of WorkZone Client configurations, listed here by priority , highest to lowest:

1. **Personal:** A configuration where you have applied your personal customizations. The Personal configuration contains customizations of your views, dashboard, changes made to lists (for example switching columns or adding/removing columns in a list), adding tabs to detail tab pages and adding lists to navigation. Personal configurations can be edited by any user and are available to the user when it is saved.  
You can reset your personal configuration.

2. **User:** A configuration that an administrator has customized and made available to a user, including the same administrator. User configurations are also displayed in the user interface as Default configurations. The User configuration is identical to the Personal configuration but also includes changes to fields in the detail tab pages.  
User configurations can be edited by any user assigned the CONFIGADM access code and is available that user or other users when it is saved.  
User configurations can be overwritten with another user configuration.
3. **Unit:** A configuration an administrator has customized and distributed to an organizational unit. The composition of a Unit configuration is identical to the User configuration. Unit configurations can be overwritten with another Unit configuration.
4. **Organizational:** A configuration an administrator has customized and distributed to the entire organization. The composition of an Organizational configuration is identical to the User configuration. Organizational configurations cannot be saved to as a Unit or User configuration.  
Organizational configurations can be overwritten with another Organizational configuration.

## Determining the configuration type

When you create or edit a configuration, you must select which type you want to edit. The configuration type determines which configurations can be selected for editing.

## The Private configuration

There is a Priority 0 configuration called a Private configuration. Private configurations cannot be opened, or edited by any user and contain user-defined filter settings and stored field values, much like a hidden layer of default field values.

The values in a Private configuration are only updated when a user updates default, filter, and/or search field values through normal operations in WorkZone.

## Configuration names

WorkZone configurations are named automatically cannot be renamed by WorkZone users.

- Organizational configurations are simply named *Organizational*.
- Unit configuration names consist of *Unit ID, Unit name (Unit)*.
- User configuration names consist of named *User Id, User name (Employee)*.

## How configurations merge

When more than one configuration exists for a user or a unit, the configurations are merged.

- If there are no conflicts between settings of applied configurations, they are all applied. For example, if a user adds the **Changed contacts** list to the navigation pane and an administrator adds the **Followed contacts** list to the same location. In this case, both lists will be displayed on the user's navigation pane.
- If there is a conflict between settings of saved configurations, the settings of the configuration with higher priority will be applied. In the following example, the widget size for the **Open cases** list has conflicting configurations:
  - Personal: Display 20 rows.
  - Distributed-to-user: Display 5 rows.
  - Organizational: Display 10 rows.

In this example, the **Open cases** list will display 20 rows. If the user resets the Personal configuration, the settings with 5 rows are applied. If the administrator resets or clears the configuration for the user, the settings with 10 rows are applied.

- The Saved search list is only visible for the user who creates it. The search lists cannot be distributed or imported together with a configuration created by someone else.

## Editing WorkZone configurations

If you are an administrator, you can edit, update, export/import, configure and reset WorkZone Client configurations for yourself as well as other users, organizational units or for the entire organization.

When you open a configuration to edit it, the configuration is displayed as it would look if you had opened the configuration normally, meaning all changes to all underlying configurations (Organizational, Unit and/or User) will be displayed. These changes will also be subject to the configuration merging rules described above so a change in the Organizational

configuration might not be displayed in the Unit or User configuration since these two configurations have a higher priority than the Organizational configuration.

When you save another user's configuration, the changes will only take effect after the user has updated the browser.

**Note:** The **Import/Export** menu option becomes inaccessible when you open a configuration for editing. You cannot import an external configuration file into WorkZone or export a configuration to an external file when editing configurations.

## Editing your own configuration

If you, as an administrator, want to configure your personal WorkZone Client configuration, you must follow the same steps as a regular end user. See [WorkZone Client User Guide](#).

## Reset your own User configuration

You can always update or reset your own User configuration. When you reset your own configuration, all your customizations and changes are removed and the standard User configuration will be restored.

If you only want some of your customizations to be restored and the rest kept, you should not reset your configuration as it will remove all customizations. Instead, you should manually remove the customizations you no longer need and then save the configuration.

To reset your User configuration

In the Home ribbon, click **Settings > Reset configuration** to display the **Confirm** dialog and click **Yes** to reset your personal configuration.

To edit your User configuration

Every time you customize your views, your dashboards or make changes to your lists, add or remove tab to detail tab pages and add or remove lists to your navigation panes, you are editing and saving your personal configuration. The changes are saved automatically and you are ready for you to use immediately. Your changes are also available to you if you log on to WorkZone from a different machine.

## Reset an Organizational, Unit, or User configuration

When you reset an Organizational, Unit or User configuration, you must first load the configuration into WorkZone, then reset the configuration and finally save the configuration as the original Organizational, Unit or User configuration.

1. In the Home ribbon, click **Settings > Edit configuration** to open the **Edit configuration** form.
2. In the **Edit configuration** form > **Search in** field, select which type of configuration you want to reset.
3. In the **Edit configuration** form > **Select configuration to edit** field, select the specific configuration you want to reset. Configurations that contain changes are displayed with a small gear icon (\*). You can filter the drop-down list by entering filter criteria in the field.
4. In the Home ribbon, click **Settings > Reset configuration** to open the **Confirm** dialog.
5. In the **Confirm** dialog:
6. Click **Yes** to reset the selected configuration and exit configuration editing
7. Click **No** to return to configuration editing
8. Save your changes on the current configuration:
  1. In the Home ribbon, click **Settings > Save configuration** and in the **Confirm** dialog, click **Yes** to save your changes and exit configuration editing.
9. Save the configuration as another user's configuration:
  1. In the Home ribbon, click **Settings > Save configuration as** to open the **Save configuration as** form.
  2. In the **Save configuration as** form, > **Search in** field, select which type of configuration you want to save your configuration as.
  3. In the **Save configuration as** form > **Save current configuration as** field, select the specific configuration you want to overwrite. Configurations that contain changes are displayed with a small gear icon

- (\*) . You can filter the drop-down list by entering filter criteria in the field.
- 4. Click **Save** to open the **Confirm** dialog and click **Yes** to save your changes and exit configuration editing.

## Edit a User, Unit, or Organizational configuration

1. In the Home ribbon, click **Settings > Edit configuration** to open the **Edit configuration** form.
2. In the **Edit configuration** form > **Search in** field, select which type of configuration you want to edit.
3. In the **Edit configuration** form > **Select configuration to edit** field, select the specific configuration you want to edit. Configurations that contain changes are displayed with a small gear icon (\*). You can filter the drop-down list by entering filter criteria in the field.
4. Click **Edit** to start editing the selected configuration. The configuration you are currently editing is displayed in an orange message bar is displayed on the page.
5. When you are done editing the configuration, click **Settings > Save configuration** to open the **Confirm** dialog.
6. In the **Confirm** dialog:
  - Click **Yes** to save the selected configuration and exit configuration editing.
  - Click **No** to return to configuration editing.

## Save a configuration as another configuration

You can save changes made to the current configuration to another configuration, effectively overwriting another user's or unit's configuration.

1. In the Home ribbon, click **Settings > Edit configuration** to open the **Edit configuration** form.



2. In the **Edit configuration** form > **Search in** field, select which type of configuration you want to base the new configuration on.
3. In the **Edit configuration** form > **Select configuration to edit** field, select the specific configuration you want to base the new configuration on. Configurations that contain changes are displayed with a small gear icon (\*). You can filter the drop-down list by entering filter criteria in the field.
4. Click **Edit** to start editing the selected configuration. The configuration you are currently editing is displayed in an orange message bar is displayed on the page.
5. When you are done editing the configuration, click **Settings** > **Save configuration as** to open the **Save configuration as** form.
6. In the **Save configuration as** form, > **Search in** field, select which configuration you want to save your configuration as.
7. In the **Save configuration as** form > **Save current configuration as** field, select the specific configuration you want to overwrite. Configurations that contain changes are displayed with a small gear icon (\*). You can filter the drop-down list by entering filter criteria in the field.
8. Click **Save** to open the **Confirm** dialog.
9. In the **Confirm** dialog:
  - Click **Yes** to save the selected configuration and stop configuration editing.
  - Click **No** to return to configuration editing.

## Exit configuration editing

If you need to, you can discard all changes you just have made to the current configuration and exit configuration editing without saving the configuration you are working on.

1. In the Home ribbon, click **Settings** > **Exit configuration editing** to open the **Confirm** dialog.
2. In the **Confirm** dialog,
  - Click **Yes** to discard all changes to the selected configuration and stop configuration editing.

- Click **No** to return to configuration editing, keeping all changes.

## View configuration changes

You can open a view of the current configuration to gain an overview of any changes made to the configuration compared to a standard configuration. You can only see configurations that contain customizations which affect the current configuration. Customized configurations that affect other users or units are not displayed. Open and view another user's configuration to display changes to configurations that affect that user.

1. In the Home ribbon, click **Settings > View configuration** to open the **Effective configuration** form.
2. The **Effective configuration** form only displays configurations that contain customizations which affect you. Customized configurations that affect other users or units are not displayed.
3. In the **Effective configuration** form, expand the nodes for each listed configuration to navigate to each changed element.
4. Double-click the element to open the **Changes applied by selected configuration** form, where the customizations that have been applied to the configuration are displayed.


## Import and export configurations

You can export WorkZone Client configurations and save them to a single JSON file. The JSON file can be placed locally or stored centrally as well as sent to other users for later import.


For the export, you can select only specific configurations or all configurations that exist in your organization.

When you import the JSON file, you can apply the configurations to a user, unit or entire organization. This is a useful option if you want to have a backup of configurations.

## Export configurations to a file

1. In the main ribbon, click  **Settings** > **Import/Export** > **Export to file**.
2. Select the **Export all configurations** check box to export all existing configurations;  
- Or -  
Start typing user's or unit's name in the **Export selected configurations** field to export only specific configurations. Repeat this step until you select all configurations which you want to export. Configurations that are suffixed with the specific language and culture code, for example da-DK or en-GB, will only contain customized label text and do not contain any other customizations.
3. Click **Export**. The file with configurations is saved to **Downloads**.

## Import configurations from a file

1. In the main ribbon, click  **Settings** > **Import/Export** > **Import from file** to open **Import from file** dialog.
2. Select the configuration file you want to import.
3. Select a way of how to apply new configurations:
  - **Merge with existing configurations** - Select this option to merge new and existing configurations. See How configurations merge for an overview of the configuration merge rules.
  - **Drop existing configurations** - Select this option to overwrite existing configurations with the configurations from the import file.
4. Click **Import**, and then click **Yes** to confirm the import.

**Example:** Import configurations with **Merge with existing configurations** and **Drop existing configurations** options

There are two existing configurations in WorkZone Client:

- AAA
- BBB

The import file contains two configurations - here marked with a \*

- AAA\*: An edited version of AAA
- DDD\*: A new configuration.

When importing and selecting **Merge with existing configurations**, the results is as follows in WorkZone Client after the import:

- AAA: Merge between AAA and AAA\*
- BBB: As is - no import.
- DDD: Imported from file as is.

When importing and selecting **Drop existing configurations**, the results is as follows in WorkZone Client after the import:

- AAA\*: AAA\* is imported, replacing the existing AAA configuration.
- BBB: No import. BBB will remain with no changes
- DDD\*: Imported. There is no matching configuration therefore no need to drop the import.

## Customize the Main ribbon

You can customize the Main ribbon, defining which buttons and/or button options to be displayed or hidden on the ribbon as well as changing the display order of the menu options and define your own labels for the ribbon buttons. Ribbon customizations are stored in the user configuration, so your ribbon customizations can be accessed by you from any machine. You can also reset any changes you have made to the ribbon and revert to the default ribbon configuration.

Lock main ribbon changes

When editing configurations, you can lock changes made to the Main ribbon. This enables you to single out and prevent user access to specific Main ribbon elements - for example updating the Unit configuration to only display the creation of certain case types to unit members.

Locked Main ribbon elements cannot be unlocked by users that are not assigned the CONFIGADM access code even though all users can edit their Personal configuration's main ribbon.

## Button options

There are two types of button and button options you can configure in the ribbon:

- Global options
- Local options

## Global ribbon options

Global ribbon options enable you to automatically deploy your customized ribbon configuration to all major ribbons.

Global ribbon options are identified by a capital G in the right column of the **Configure ribbon** form. If a ribbon option does not contain a capital G, it is a local ribbon option.

There are following global ribbon buttons and options:

- Case
- Contact
- Word
- Document
- New Search

## Local ribbon options

Local ribbon options enable you to deploy your customized ribbon configuration to the current ribbon only. If you want to apply the same local ribbon options for other ribbons, you must configure these ribbons individually.

## Major and minor ribbons

Only major ribbons can be automatically updated with changes to the global ribbon options and contain the **Save globally** option on the **Save** button of the **Configure ribbon** form.

Minor ribbons can only be updated with local changes and do not contain the **Save globally** option on the **Save** button of the **Configure ribbon** form.

The following ribbons are major ribbons :

- The home page and home page lists opened in new tabs
- All Case detail pages
- All Document detail pages
- All Meeting detail pages
- All Contact detail pages
- The Actor sequences page
- All Search pages

All other ribbons are considered minor ribbons.

## The Configure ribbon form

The Configure ribbon form is used to configure the ribbon configuration of the current ribbon and to distribute changes to global ribbon options to all other major ribbon configurations.

The **Configure ribbon** form is opened from the ribbon on the current detail page by clicking **Configure ribbon** in the **Help** button.

**Note:** **Configure ribbon** is always present in the ribbon and not connected to the **Help** button. If you hide the **Help** button, you can still access the **Configure ribbon** dialog by pressing **Configure ribbon**.

## Ribbon options

Global ribbon options are identified by a capital G in the right column of the **Configure ribbon** form. If a ribbon option does not contain a capital G, it is a local ribbon option.

## Buttons

The **Configure ribbon** form also contains the following **Save** and **Reset** button options:

Button	Type	Description
<b>Save</b>	Button	All changes to local and global ribbon options are saved to the current ribbon configuration only.
<b>Save globally</b>	Button option	All changes to local and global ribbon options are saved to the current ribbon configuration. Additionally, all changes to global ribbon options are applied to all other major ribbon configurations.  Changes to local ribbon options are not applied other ribbon configurations.
<b>Reset</b>	Button	Removes all changes to local and global ribbon options for the current ribbon configuration only, reverting the current ribbon configuration to the default ribbon configuration.
<b>Reset globally</b>	Button option	Removes all changes to local and global ribbon options for the current ribbon configuration, reverting the current ribbon configuration to the default ribbon configuration. Additionally, all changes to global ribbon options are removed from all major ribbon configurations.  Changes to local ribbon options are not removed from other ribbon configurations.





## Change the order of the Main menu options

The Main menu options are by default displayed in alphabetical order, but you can customize the order by dragging and dropping the individual menu options in the **Configure ribbon** form. Adjusting the display order of the menu options enables you to better reflect the workflows of your organization.

## How to customize and save a ribbon configuration

### To customize the current ribbon configuration




1. After you have opened the configuration for editing<sup>1</sup>, navigate to the detail page you want to change the ribbon configuration for.

2. In the Main ribbon, click  **Configure ribbon** in the **Help** button to open the **Configure ribbon** form.
3. In the **Configure ribbon** form:
  - Select the check box for each button and/or menu option to be displayed in the menu.
  - Clear the check box for each button and/or menu option to be hidden in the menu.
4. Click the unlocked padlock (  ) to lock the ribbon element. To unlock a locked main ribbon element, click the locked padlock (  ).
5. To change the display order of menu options, click  to expand the menu title then drag each menu option to its new position.
6. Click **Save** to save your changes and exit the **Configure ribbon** form.
7. Save the configuration you are editing<sup>1</sup>.

<sup>1</sup>See **See Also** section below.

#### To distribute global ribbon option changes to all major ribbons

Changes made to global ribbon options can only be distributed to major ribbons. Any changes made to local ribbon options are applied to the current ribbon configuration only.

1. After you have opened the configuration for editing<sup>1</sup>, navigate to the detail page you want to change the ribbon configuration for.
2. In the Main ribbon, click  **Configure ribbon** in the **Help** button to open the **Configure ribbon** form.
3. In the **Configure ribbon** form:
  - Select the check box for each button and/or menu option to be displayed in the menu. Global ribbon options are displayed with a capital G.
  - Clear the check box for each button and/or menu option to be hidden in the menu.
4. Click the unlocked padlock (  ) to lock the ribbon element. To unlock a locked main ribbon element, click the locked padlock (  ).



5. Click **Save globally** to save your changes and exit the **Configure ribbon** form.
6. Save the configuration you are editing<sup>1</sup>.

<sup>1</sup>See **See Also** section below.

## Customizing ribbon button labels



You can create your own customized ribbon button labels for all supported languages in WorkZone. When you select a display language in WorkZone, any customized button labels will be displayed instead of the default button labels for the selected language. If you have not defined any custom button labels for the selected language, the default button label will be used instead.

New button labels can be up to 256 characters long, but it is recommended to use short labels as a long label text may not be correctly displayed in the ribbon.

**Note:** The button labels of locked ribbons cannot be changed.

You can create custom button labels for your own personal configuration freely, but you must be assigned the CONFIGADM access code to edit and save configurations other than your own Personal configuration.

### Create a custom ribbon button label

1. In the Main ribbon, click  **Configure ribbon** in the **Help** button to open the **Configure ribbon** form.
2. In the **Configure ribbon** form, locate the button you want to customize the label of and click  **Rename** to open the **Rename <button label> button** form<sup>1</sup>.
3. In the **Rename <button label> button** form<sup>1</sup> > **Button name (<Language>)** field<sup>2</sup>, enter the new button label for each language.
4. Click **Save** to save your changes and close the **Rename <button label> button** form<sup>1</sup>.
5. In the **Configure ribbon** form, click **Save** to save your changes to the active ribbon only or in the **Save** button, select **Save globally** to apply your changes to all major ribbons that contain the button.

<sup>1</sup> where <button label> is the label of the currently selected button.

<sup>2</sup> where (<Language>) is one of the supported languages in WorkZone.

#### Casing and button label texts



You can use lower and upper case characters as label text but if you only change existing default labels to upper case, for example changing *Document* to *DOCUMENT*, the default label (*Document*) will be displayed in the ribbon even though the *DOCUMENT* text is displayed in the **Button name (<Language>)** field in the **Rename <button label> button** form.

If you create a new label (create a label that is different from the default label text, disregarding all casing), the new label is displayed in upper case, lower case or any combination of the two, for example changing *Document* to *DOCUMENT New*.

#### Restore the default ribbon button labels

If your customized button labels no longer are required, you can restore your custom button label to the default values. Each custom button label must be manually restored to its default label.

#### Restore default button labels

1. In the Main ribbon, click  **Configure ribbon** in the **Help** button to open the **Configure ribbon** form.
2. In the **Configure ribbon** form, locate the button you want to restore the label default to and click  **Rename** to open the **Rename <button label> button** form<sup>1</sup>.
3. In the **Rename <button label> button** form<sup>1</sup>, clear the **Button name (<Language>)** field<sup>2</sup> of all values for the language you want to restore the label default for. The *Use default label* text will be displayed in the field.
4. Click **Save** to save your changes and close the **Rename <button label> button** form<sup>1</sup>.
5. In the **Configure ribbon** form, click **Save** to save your changes to the active ribbon only or in the **Save** button, select **Save globally** to apply your changes to all major ribbons that contain the button.


<sup>1</sup> where <button label> is the label of the currently selected button.

<sup>2</sup> where (<Language>) is one of the supported languages in WorkZone.

### Exporting and importing custom button labels

You can export the customized button labels of a language in the configuration you are working on. You must select the configuration suffixed with the specific language and culture code (for example da-DK or en-GB )when you export the configuration.

Configurations that are suffixed with the specific language and culture code will only contain customized label text and do not contain any other customizations. In this way, only customized button labels will be exported and as a result, only customized button labels will be imported by other users, enabling you to distribute only customized button labels to other users.

Configurations suffixed with the specific language and culture code are exported and imported as any other configuration - by using the  **Settings > Import/Export > Export to File or Import from file** options in the main ribbon.

### Resetting the ribbon configuration

Reset the configuration to quickly remove all your changes to the ribbon configuration and apply the default ribbon settings.

If you have changed any global ribbon options, you can reset the current ribbon configuration by pressing the **Reset** button or reset all your major ribbon configurations by selecting the **Reset globally** button option.

If you have changed local ribbon options, only the current ribbon configuration can be reset, regardless of which button (**Reset** or **Reset globally**) you press.


#### Manually reset the current ribbon configuration

You can also reset a current ribbon configuration by manually selecting all the ribbon options in the **Configure ribbon** form.

#### To reset the current ribbon configuration

If your ribbon configuration contains global ribbon options, any changes will only be applied to the specific ribbon configuration and not to all ribbon configurations.


1. After you have opened the configuration for editing<sup>1</sup>, navigate to the detail page you want to reset the ribbon configuration for.

2. In the Main ribbon, click  **Configure ribbon** in the **Help** button to open the **Configure ribbon** form.
3. In the **Configure ribbon** form, click **Reset** to open the **Confirm** dialog.
4. In the **Confirm** dialog
  - Click **Yes** to reset the ribbon configuration and exit the **Configure ribbon** form or
  - Click **No** to return to the **Configure ribbon** form.
5. Save the configuration you are editing<sup>1</sup>.

<sup>1</sup>See **See Also** section below.

#### To reset all ribbon configurations

You can only reset changes to global ribbon options for all major ribbon configurations. Any changes to local ribbon options must be reset for each specific ribbon configuration.

1. After you have opened the configuration for editing<sup>1</sup>, in the Main ribbon, click  **Configure ribbon** in the **Help** button to open the **Configure ribbon** form.
2. In the **Configure ribbon** form, click **Reset globally** to open the **Confirm** dialog.
3. In the **Confirm** dialog:
  - Click **Yes** to reset all ribbon configurations and exit the **Configure ribbon** form or
  - Click **No** to return to the **Configure ribbon** form.
4. Save the configuration you are editing<sup>1</sup>.

<sup>1</sup>See **See Also** section below.

## See Also

Edit a User, Unit, or Organizational configuration

Save a configuration as another configuration

# About detail page customization

**Prerequisite:** You must be assigned the CONFIGADM access code to configure detail pages.

You can customize case, document, or contact detail pages to suit your organization's needs, work processes and goals, re-sizing the detail page, adding, moving, or removing existing fields and adding new fields. The new fields you can add can be either existing but not currently displayed WorkZone fields, custom fields, created by administrators for your organization, or specialized controls such as the Empty control and the Label control in the page designer.

All fields and controls can be re-ordered and re-arranged to create a detail page to better visually and structurally fit your organization's requirements and work flow for handling cases, managing documents and using contacts.

When you are finished, you can distribute the configuration to yourself or others by saving the configuration to a user, unit or organization.

## Case and contact detail pages


Each contact and case type has its own configurable detail page enabling you to configure different contact and case detail pages for each relevant contact or case type. If you want to configure the detail page for all contact or case types, for example if you want to add the same custom property to all contact detail pages, you must configure each contact detail page for each contact type.

For case detail pages and contact detail pages, you can also configure field settings such as defining the default value of the field, making the field mandatory and rendering the field read-only. For some fields that contain advanced settings, you can also define a filter which limits the values a user can select for the field.

**Note:** Controls are synonymous with fields in the tab pages.


## Configure a detail page


**Prerequisite:** You must be assigned the CONFIGADM access code to configure detail pages.

When editing a configuration and displaying the **Available fields** pane, all configurable WorkZone controls (fields) are displayed with the  **Configure control** icon in the upper right-hand corner of the control. This enables you to quickly gain an overview of which controls can be edited on a detail tab page.

### To configure a detail page

The procedure below describes how you configure a case detail page. If you want to configure a document detail page or a contact detail page, make your changes on the document detail page or the contact detail page, respectively.

1. When editing a configuration, click  **Case** in the main ribbon and select the case type to create to open a new case detail page in the page designer.
2. In the upper-right corner of the **New Case** field, click  **Configure page** to open the **Available fields** pane.

The **Available fields** pane displays all controls that can be used to customize detail tab pages, including custom fields were defined in WorkZone Configurator. All configurable WorkZone controls (fields) are displayed with the  **Configure control** icon in the upper right-hand corner of the control.

If the custom field you are looking for is not displayed in the **Available fields** pane, it may be a hidden custom field.

3. You can do the following with the fields in the tab page:
  - Drag and drop the fields to new positions to reorder them.
  - Double-click the existing fields to remove them from the detail page. You can also drag and drop the fields to the **Available fields** pane to remove them.

- Double-click the fields in the **Available fields** pane to add them to the detail page, or drag and drop the fields from the **Available fields** pane to the tab page.
  - Re-size the fields by dragging their right corner.
  - Add an empty control as a placeholder. Fields on the detail page will automatically be arranged and you can use the empty controls as placeholders to ensure the placement of your fields in the page.
  - Click **☰ Configure control** on a field to open the configure menu and select the setting to change:
    - **Default:** Enter a default value in the field. Default values can be overwritten by users.
    - **Required:** Required fields must contain values and the detail page cannot be saved until all mandatory fields contain values.
    - **Read-only:** Users cannot edit the value in the field. The field can be for informational purposes only or set to only contain one default value which cannot be changed.
    - **Advanced:** Define a filter which limits the values a user can select for the field. Some fields will not contain the **Advanced** setting.  
You can change your own or another user's settings for a control, but you cannot override the system settings.
4. Click **Apply** to save your changes.

**Tip:** Click **Reset** to restore the default configuration of the detail page.

## Reordering the fields and controls

When configuring a detail page, you can add and remove standard WorkZone fields, custom fields and specialized controls from the page, but you can also move fields and controls on the page, rearranging their location to adjust the detail page layout to the workflows of your organization.

### Detail page sections

The detail page is divided into sections, where each section by default can contain one field or control. When you add a new field or control to the page, it is automatically added to a vacant location in the page but you can drag the field to a starting location and re-size the field or control as you need.

Fields or controls can be re-sized to cover more than one section, for example the Case text field in a case detail page covers multiple sections.

### Move a field or control

To move a field or control to a new position, drag the field to the new position.

### Automatic ordering

The page designer automatically re-arranges all controls placed on the page in a left-to-right reading direction, starting at the top left corner and continuing down the page.

When you move fields or controls, you must take into consideration this automatic rearranging of fields and place the field or control so the automatic re-arranging will result in the correct placement of the field.

If you need to add spacing to the fields, use the Empty control to occupy a section or more and you can add texts and headings to the detail page by using the Text control.

## The Empty Control

The Empty control on the page designer is used as filler to create a space to the next control in the page designer.

The page designer automatically re-arranges all controls placed on the page and the Empty control enables you to create spaces on the page which the automatic re-arrangement of controls will respect.

**Tip:** On the page designer, double-click on a control to remove the control from the page and return it to the **Available fields** pane.



## The Label control

The Label control is used to display a text on the detail page, either as a normal caption or as a header text. Other field controls can be placed under the header, creating the illusion of field groupings on the detail page.

The Label control is be dragged on the page from the **Available fields** pane.

You can define Label control parameters, setting how the text is display in the control.

### Define parameters for a Label control

On the Label control, click  **Configure control** > Advanced to open the **Label parameters** form.

### Advanced parameters

Parameter	Description
Label text	<p>The text to the displayed in the control.</p> <p>The text is mandatory.</p>
Display as header	Select this check box to display the text as a header. Headers are displayed in a larger font size and with a horizontal line under the text.
Align text horizontally	<p>Select how the text is horizontally aligned in the control:</p> <ul style="list-style-type: none"> <li>• Left</li> <li>• Center</li> <li>• Right</li> </ul>
Align text vertically	<p>Select how the text is vertically aligned in the control:</p> <ul style="list-style-type: none"> <li>• Top</li> <li>• Middle</li> <li>• Bottom</li> </ul>

**Tip:** On the page designer, double-click on a control to remove the control from the page and return it to the **Available fields** pane.

## Configure party role and type on a case detail page

You can limit which party role and type can be selected as available values for new cases by defining the role and type in the **Primary Party** field.

1. Double-click (or drag and drop) the **Primary Party** field in the **Available fields** pane to add it to the case detail page.
2. Set party type and party role:
  - a. Right-click the **Primary Party** field, and select **Advanced** to open the **Set default party values** dialog.
  - b. Select values for **Type** and **Party role**, and then click **Apply**.  
You can add multiple types, enabling you to expand the list in the field from different types, for example selecting **Companies (with CVR)** and **Companies (without CVR)** will enable a user to select a primary party from both types.
3. Optionally, make other changes to the **Party** field. For example, select a default party value, or change the required settings of the fields in the same way as you change any other field.
4. Click **Apply** to save your changes.

# About custom fields

Custom fields are fields defined by your organization which can store one value per case, document or contact and can be displayed on the detail pages for cases, documents and contacts as well as added to the case, document, contact and addresses lists.

Custom fields can also be added to searches, including saved searches, that correspond to the type of custom field (Case, Contact, Document or Address)

Custom fields are created, defined and maintained in WorkZone Configurator on the Case, Document or Contact pages.

## Hidden custom fields

Custom fields can be marked as hidden when creating or updating the custom field in WorkZone Configurator. Hidden custom fields are not displayed in the **Available fields** pane when customizing the respective detail pages or when customizing searches and can therefore not be selected or added to detail pages or searches. Hidden custom fields are also not displayed when selecting **Show all fields** in searches, when displayed in lists or when used in **Group by** or **Aggregate by** fields in dashboard widgets.

If you hide custom fields that already are displayed in their respective detail pages or saved searches, WorkZone Client must be closed and reopened to hide the custom field. If a custom field was set as mandatory and then hidden, the field will no longer be mandatory.

Hidden custom fields can still retain data and can still be referenced by scripts and calculations. They are just not displayed in the normal user interface.

## To hide a custom field

When you create a custom field in WorkZone Configurator, in the custom field parameters form, toggle the **Selectable** radio button to Off, to hide the custom field. Toggle the **Selectable** radio button to On, to display the custom field again.

## The types of custom fields

There are four types of custom fields:

- Custom document fields
- Custom contact fields
- Custom case fields
- Custom address fields

## Custom document fields

Custom document fields can be added to the Documents detail page as well as added to document lists and tabs in the document detail page.

## Custom contact fields

Custom contact fields can be added to all 17 types of Contact detail pages as well as added to contact lists and tabs in the contact detail page.

## Custom case fields

Custom case fields can be added to all 5 types of Case detail pages as well as added to case lists and tabs in the case detail page.

In contrast to custom document and custom contact fields, custom case fields are sub-divided into two sub-types:

- Primary: Available everywhere.
- Case parties: Only available on the **Parties** tab on the cases detail page. Custom Case parties fields can be used to define additional content that connects a specific case with a specific contact, often designated a case party.

## Custom address fields

Custom address fields can only be added to the Addresses list and the Addresses tab on the Contact detail page.

# About custom types

Custom types are collections of customized fields (called Custom type fields) that can be used to store additional data on cases, documents or contacts as well as units, employees and addresses by referencing these entities. Custom types can also be created to be independent of any references and can be made to reference another custom type, creating a detail page - detail tab structure similar to the detail page - detail tab structure for cases, documents and contacts.

Custom types can be defined specific to your organization's requirements and are created and set up by a system administrator in WorkZone Configurator. Once the custom types are created, any user can edit their configuration and add or remove any available custom types to the detail tab of a detail page.

Custom types can be considered to be an extra database table that can be connected to a case, document, contact, unit, employee or address that enables an additional level of data to be stored for the connected entity.

**Important:** Custom type names must be unique.

## Custom type fields

Custom type fields resemble custom fields, but are data fields that can contain multiple data values as opposed to custom fields which only can contain one data value. Custom type fields can only be added to custom types and cannot be added to other WorkZone elements. Like custom fields, you can attach a validation rule to a custom type field and if the field is configured as a droplist, define which droplist to use in the field.

**Important:** Both the custom type field names and labels must be unique within the custom type.

## Custom type reference fields

Custom type fields can also contain references to cases, documents, contacts, units, employee and addresses as well as to another custom type. These reference fields are used to connect the custom type to the main entity. If the reference field is not used to connect to the main entity, it contains a link to the specified case, document, contact, address, unit, employee or custom type.

## Selecting connectors

A custom type can contain many reference fields and can be used to connect to a case, a document and a contact at the same time as well as contain references to other cases, documents, contacts, units, employees and addresses. The user must select which reference field to use as a connector when adding a custom type to the detail tabs in the **Tab selector** form.

When adding a custom type with reference fields to a detail tab, all reference fields that can be used as connectors to the entity in question (case, documents or contact) will be displayed in parentheses in addition to the name of the custom type itself. This enables the user to select the exact reference field to use as a connector but can be confusing and overwhelming if there are many reference fields relevant to the entity in question on the custom type. If there is only one custom type field that can be used as a reference, the name of the field will not be displayed.

To help users, you can specify the custom type and which reference field is to be used as a connector when instructing users how to add custom types to their detail tabs.

## Custom types and access rights

Access rights can be assigned to custom types in two ways:

- **Manually assigning:** Users can manually assign read and/or write access rights on the custom type.
- **Inheritance:** Custom type fields that reference cases or contacts can inherit the access rights of the referenced case or contact.

In both situations, you must first enable the assignment of access rights to custom types either on the custom type or the custom type field.

## Manually assigning access rights to a custom type

WorkZone users can assign access codes to a custom type in the same fashion as access codes can be assigned to cases, documents and contacts in WorkZone.

You must select the **R/W Access code** option on the custom type properties for the specific custom type to enable users to manually assign access codes to the custom type.

## Inherit a referenced case or contact's access rights

Custom types that reference a case or contact can be protected by the access codes of the referencing case or contact. If a custom type contains multiple custom type fields that reference a case or contact, the custom type will inherit the access codes of all the referenced cases and contacts that inheritance has been enabled for, similar to WorkZone access code functionality.

Custom type fields referencing documents cannot inherit the referenced document's access rights.

You must select the **Protect by** option on the custom type field's parameter form to enable access code inheritances. The **Protected by** option is only accessible for custom type fields that reference cases or contacts.

## Access rights

All access rights accumulate, meaning it is the combination of all access rights that are applied. A user must be assigned all the required access codes to be able to interact with the custom type.

Access rights inherited by or assigned to custom types are applied throughout WorkZone, for example to search results performed in WorkZone QueryBuilder.


The special \* access code assignments to users is also honored on custom types.

## Custom type detail pages

All custom types can be opened in their own detail page where users can directly create new records on the custom type. If the custom type is connected to another custom type, a custom type detail tab on the custom type detail page will be displayed once the main custom type


record has been created. This detail page - detail tab structure is similar to the detail page - detail tab structure for cases, documents and contacts.

Custom type detail tabs can be configured like any standard WorkZone detail tab - additional tabs can be added or removed and columns (fields) can be displayed or hidden from view.

The custom type detail page is opened from the Main ribbon >  **More** button.

## The **More** button

The **More** button displays all created and active custom types. The button is used to open the custom type detail page for the selected custom type where users can enter data.

**Note:** The  **More** button is not displayed by default and must be enabled manually by editing the main ribbon. The **More** button option is also locked for editing by default and must be unlocked by a system administrator if users are to be permitted to make changes to the button and its underlying menu options.

## Custom types and WorkZone performance

Custom types should not contain large amounts of data and are not architecturally designed to do so.

If large amounts of data are stored in custom types, either in one custom type that contains large amounts of data or many custom types each with significant amounts of data, overall system performance may be noticeably reduced. The specific amounts of data that will cause reduced performance will depend on the hardware, software, network configuration and work policies implemented in your organization.

## Reload WorkZone Client

After adding, removing or editing a custom type or custom type field, reload the WorkZone Client to update the custom type in use. If you do not reload the WorkZone Client, any changes made to the custom type or custom type fields will not be displayed correctly.






## Searches

Custom type fields can be added as search criteria to any general or type-specific searches and are saved like any other field based search criteria when the search is saved. The custom types are displayed in the **Available fields** pane when configuring a search page and you must click the.

### Custom type specific searches

Searches based on independent custom types (custom types that are not connected to another entity) can also be generated, saved and shared to other users. Like all other saved searches, the saved custom type searches can be used to create lists for the custom type or generate data for dashboard widgets.

Custom type searches can be accessed from the main ribbon by clicking  **New search** >  **More**.


**Note:** The  **More** search menu option is not displayed by default and must be enabled manually by editing the main ribbon. The search menu option is also locked for editing by default and must be unlocked and made available by a system administrator if users are to be permitted to make changes to the button and its underlying menu options.

For more information, see [Configure a search page](#) (link to WorkZone Client online help)

## Create a custom type

**Prerequisite:** You must be assigned the CONFIGADM access code to configure (create, edit and delete) custom types.

## To create a new custom type


1. In WorkZone Configurator > **Global** > **Custom types**, click  **Create custom type** to open the **Create custom type** form.
2. In the **Create custom type** form:
  1. In the **Name** field, enter a unique name for the custom type.
  2. In the **Label by default** field, enter a unique label for the custom type. This is the default label which will be displayed if a localized label field is empty and the user selects the respective language as the WorkZone display language. The default label only refers to the custom type name and not to any underlying custom fields.
3. (Optional) To add localized labels, expand the Localize label section:
  1. In the **Label (da-DK)** field, enter a user-friendly label of the custom type that will be displayed when Danish is selected as the WorkZone display language.
  2. In the **Label (de-DE)** field, enter a user-friendly label of the custom type that will be displayed when German is selected as the WorkZone display language.
  3. In the **Label (en-GB)** field, enter a user-friendly label of the custom type that will be displayed when English is selected as the WorkZone display language.
4. Define start and end dates for the custom type:
  1. In the **Start date** field, define when the custom type is to be available to users and open for data insertion. If the **Start date** field is empty, the custom type will be available immediately after creation.
  2. In the **End date** field, set the expiry date of the custom type. If the **End date** field is empty, the custom type will never expire.
5. Select the **R/W Access code** option to enable users to specify Read and/or Write access codes for the custom type.
6. Click the **Create** button to save your changes and close the form.

## Edit an existing custom type

**Prerequisite:** You must be assigned the CONFIGADM access code to configure (create, edit and delete) custom types.

You cannot change an existing custom type name or default label.

### To edit an existing custom type

1. In WorkZone Configurator > **Global** > **Custom types**, select the custom type you want to edit from the drop-down list in the menu bar and click  **Edit custom type** to open the edit form.
2. (Optional) To add localized labels, expand the Localize label section:
  1. In the **Label (da-DK)** field, enter a user-friendly label of the custom type that will be displayed when Danish is selected as the WorkZone display language.
  2. In the **Label (de-DE)** field, enter a user-friendly label of the custom type that will be displayed when German is selected as the WorkZone display language.
  3. In the **Label (en-GB)** field, enter a user-friendly label of the custom type that will be displayed when English is selected as the WorkZone display language.
3. Define start and end dates for the custom type:
  1. In the **Start date** field, define when the custom type is to be available to users and open for data insertion. If the **Start date** field is empty, the custom type will be available immediately after creation.
  2. In the **End date** field, set the expiry date of the custom type. If the **End date** field empty, the custom type will never expire.


4. Select the **R/W Access code** option to enable users to specify Read and/or Write access codes for the custom type.
5. Click the **Save** button to save your changes and close the form.

## Delete a custom type

**Prerequisite:** You must be assigned the CONFIGADM access code to configure (create, edit and delete) custom types.

If you no longer need a custom type, you can delete it, but you cannot delete a custom type which contains fields that contain data. If you no longer need a custom type that contains data, deactivate this custom type instead by defining a value in the **Edit date** field.

### To delete an existing custom type

- In WorkZone Configurator > **Global** > **Custom types**, select the custom type you want to delete from the drop-down list in the menu bar and click  **Delete custom type**
- In the **Delete custom type** dialog, click **Delete** to delete the custom type and close the dialog.

## Descriptive text on custom types

'Custom types cannot by default display a description or label in connection with the record number, unlike cases for example, which can be displayed by a number of meta data such as Case ID, Case number, Case title, Case handler and/or Case type.

When referring to a record made in a custom type, only the record ID is by default displayed in widgets and in drop-down lists in fields. Displaying custom type records by ID only makes quick identification of which custom type record users are currently working on or looking at difficult.

## Adding descriptive text to a custom type

You can manually add a description to the custom type ID which will be displayed when users look-up a custom type field value in a drop-down list or when users analyze custom type data displayed in dashboard widgets.

The descriptive text of a custom type is retrieved from the value of a specially designated custom type text field. Only text fields can be used as descriptions of custom types and only one text field can be used as the description. If you select more than one text field to be used as the description of the custom type, only the last selected text field will be applied.

### To add a descriptive label to a custom type

1. In WorkZone Configurator > **Global** > **Custom types**, select the custom type you want to add a descriptive label to.
2. For an existing custom type text field:
  1. In the custom type field list, select the custom type text field you want to use as the description of the custom type and select **Edit** to open a form where you can edit the custom type text field.
  2. In the form, select the **Use as entity description** parameter
  3. Click **Save** to save your changes and exit the form.
3. Creating a new custom type text field:
  1. In the custom type field list, click **Create** to open the **Create custom type field** form
  2. In the **Create custom type field** form:
  3. In the **Name** field, enter a unique name
  4. In the **Label by default**, enter a user-friendly label to the custom type text field.
  5. (Optional) In the **Label (da-DK)** field, enter a user-friendly label of the custom type text field that is displayed when Danish is selected as the WorkZone display language.

6. (Optional) In the **Label (de-DE)** field, enter a user-friendly label of the custom type text field that is displayed when German is selected as the WorkZone display language.
7. (Optional) In the **Label (en-GB)** field, enter a user-friendly label of the custom type text field that is displayed when English is selected as the WorkZone display language.
8. In the **Type of** field, select **Text**.
9. Select the **Use as entity description** parameter to use values in this custom type text field as the descriptive text for the custom type field.
10. Click **Save** to save your changes and exit the form.

To add a dashboard widget that displays the custom type ID and the description

**Prerequisite:**

- A main custom type that contains a custom type text field used as the custom type description and a secondary custom type.
- A saved custom type search for the secondary custom type.

To add a dashboard widget for a customtype

1. In the dashboard, click **Personalize** to open the **Dashboard configuration** form and drag the saved custom type search for the secondary custom type into the dashboard as a widget.
2. Place and re-size the widget in the dashboard if necessary.
3. Change the widget type to a Bar chart and in the **Group by** field, select to group the secondary custom type by the main custom type.
4. Select the **Display legend** check box and click **Apply** to save your changes and close the form.
5. In the **Dashboard configuration** form, click **Save** to save your changes and close the form.

**Tip:** If you have a main custom type and one or more secondary custom types connected to the main custom type (much like a case and its case detail tabs), make sure to create a description text field on the main custom field. This helps you create more user-friendly legends in dashboard widgets using the secondary custom types as well as displays the custom type description in any drop-down lists that reference the custom type.

## Custom types, example

A custom type called CasePrices has been created in WorkZone Configurator with the idea of adding different sales price tags to the case. The custom type contains the following custom type fields:

Name	Default label	Field type	Note
CaseNo01	Case Number 01	Case	Used as a connector to the Case detail tab.
CaseNo02	Case Number 02	Case	Used as a reference to a potentially similar case.
ConNo01	Main Contact	Contact	Used as a connector to the Contact detail tab.
ConNo02	Secondary Contact	Contact	Used as a reference to a secondary contact.
DocNo01	Document	Document	Used as a connector to the Document detail tab.
DocNo02	Document	Document	Used as a reference to another document contain additional information.
Empl01	Main employee	Employee	Used to register the employee who will be handling the cost pricing.
Empl02	Backup Employee	Employee	Used to register a back-up employee.
Unit01	Employee unit	Unit	Used to register the WorkZone unit.
Addr01	Referral address	Address	Used to register a different address than the main contact, if necessary.

Name	Default label	Field type	Note
Desc01	Description	Text	Used to specify additional notes.
Price01	Price of admittance	Decimal	Used to specify the price of the service.
Date01	Price date	Date	Used to contain the date from which the price is valid.

## Adding the custom type to a case

If the user adds the CasePrices custom type to a case detail tab, the following information is displayed in the **Tab selector** pane:

- CasePrices(CaseNo01)
- CasePrices(CaseNo02)

If the user selects CasePrices(CaseNo01) as the connector, the custom tab will display all the custom type fields listed above, apart from the CaseNo01 field, which is used as a connecting field.

## Adding the custom type to a contact

If the user adds the CasePrices custom type to a contacts detail tab, the following information is displayed in the **Tab selector** pane:

- CasePrices(ConNo01)
- CasePrices(ConNo02)

If the user selects CasePrices(ConNo01) as the connector, the custom tab will display all the custom type fields listed above, including CaseNo01 and CaseNo02 but not from the ConNo01 field, which is used as a connecting field.

## Adding the custom type to a document

Finally, if the user adds the CasePrices custom type to a documents detail tab, the following information is displayed in the **Tab selector** pane:





- CasePrices(DocNo01)
- CasePrices(DocNo02)


If the user selects CasePrices(DocNo01) as the connector, the custom tab will display all the custom type fields listed above, including ConNo01 and ConNo02 but not from the DocNo01 field, which is used as a connecting field.

**Note:** Users can also freely select the CaseNo02, ConNo02 or DocNo02 custom type fields as connectors in the three descriptions above, which will may lead in confusing results.

## Add a custom type to a detail tab

The procedure below describes how to add a custom type as a case detail tab. The same procedure is applicable if you want to add a custom type to document detail tabs or contact detail tabs.



1. Custom types can be added to case, document or contact detail tabs as any other detail tab.
2. Open a detail page, for example, the case detail page.
3. In the detail ribbon, click  **Select tabs to view** to open the **Tab selector** pane. The available tabs are displayed in the left pane and the tabs in use are displayed in the right pane.
4. In the left tab of the **Tab selector** pane, locate the custom types you want to add to the case detail page. Custom types are displayed by name with any relevant custom type reference fields in parentheses. If there is only one custom type field that can be used as a reference, the name of the field will not be displayed.
5. Select the custom type with contains the case reference field you want to use as a connector to the case and drag it to the desired position in the right pane. You can also click  **Select item** to add it to the right pane.

6. If you want to rename the tab that contains the custom type, click  **Rename** next to the current tab title and enter a new name. This name will be displayed for this tab only and other users can enter their own names for their tabs.
7. Click **Save** to save your changes and close the **Tab selector** pane.

## Remove a custom type from a detail tab

The procedure below describes how to remove a custom type tab as a case detail tab. The same procedure is applicable if you want to remove a custom type to document detail tabs or contact detail tabs.

Removing a custom type only prevents users from accessing the existing data and prevents creation of new data. Existing data will not be removed unless specifically deleted on the database.

1. Open a detail page, for example, the case detail page.
2. Point the mouse on the tabs, and click  **Select tabs to view** to open the **Tab selector** pane. The available tabs are displayed in the left pane and the tabs in use are displayed in the right pane.
3. In the right tab of the **Tab selector** pane, locate the tab for the custom type you want to remove from the case detail page and drag it to the desired position in the right pane. You can also click  **Deselect** item to add it to the right pane.
4. Click **Save** to save your changes and close the **Tab selector** pane.

## Reorder custom type fields

The fields in a custom type are by default displayed by alphabetically field name (not field label) in the detail list as well as in the **Add new <Custom type name> record** or **Edit <Custom type name> record** forms. You can change the order of the custom type fields in the detail list and the two forms for your own or other configurations.

**Note:** The custom type field name is not the same as the custom type field label. The

name is the unique system name of the field and is not language dependent while the field label is the display name of the field in the tab and is language dependent.

Users can also rearrange the columns (fields) in the detail list of their own configuration by dragging the columns in question to new locations. Users can also right-click the individual columns and select to hide or display the column.


## Rearrange custom type fields (as well as other detail tab fields)


The columns (fields) in the detail list are by default displayed by field name but this order can be changed to reflect the work processes of your organization.

If you want to hide, display, or change the order of the columns in the detail tab for other configurations, you must edit and distribute your local configuration or (if you are assigned the CONFIGADM access code) other users' configuration.

### To hide, display, or rearrange detail list columns

If the custom type or detail tab is already displayed , you can skip steps 2 to 8.

1. In the Home ribbon, click **Settings > Edit configuration** to open the **Edit configuration** form.
2. In the **Edit configuration** form > **Search in field**, select which type of configuration you want to edit.
3. In the **Edit configuration** form > **Select configuration to edit** field, select the specific configuration you want to edit. Configurations that contain changes are displayed with a small gear icon (⚙). You can filter the drop-down list by entering filter criteria in the field.
4. Click **Edit** to start editing the selected configuration. The configuration you are currently you are editing is displayed in an orange message bar is displayed on the page.
5. In the **Home** tab > **Open cases** list select a case to open the case detail page.
6. In the Case detail page, click  **Select tabs to view** to open the **Tabs selector** form.

7. In the left (red) pane of the **Tab selector** form, drag the custom type to the right (green) pane. You can also click  **Select item** to add the tab to the right (green) pane.
8. Click **Save** to save your changes and close the form.
9. In the custom type or detail tab, right-click a column heading to either hide or display columns. Select each column you want to display and clear the column to hide it.
10. In the custom type or detail tab, drag the displayed columns to new locations as required.
11. When you are done editing the configuration, click **Settings > Save configuration** to open the **Confirm** dialog.
12. In the **Confirm** dialog:
  - Click **Yes** to save the selected configuration and exit configuration editing.
  - Click **No** to return to configuration editing.

## Reorder custom type fields in the Add new record or Edit record forms






The fields in the **Add new <Custom type name> record** or **Edit <Custom type name> record** forms are by default displayed by field name but this order can be changed to reflect the work processes of your organization.

If you want to change the order of the custom type fields in the Add and/or Edit forms, you must edit and distribute your local configuration or (if you are assigned the CONFIGADM access code) other users' configuration.

### [To change the order of custom type fields in the Add and/or Edit forms](#)

If the custom type or detail tab is already displayed, you can skip steps 2 to 8.

1. In the Home ribbon, click **Settings > Edit configuration** to open the **Edit configuration** form.
2. In the **Edit configuration** form > **Search in field**, select which type of configuration you want to edit.

3. In the **Edit configuration** form > **Select configuration to edit** field, select the specific configuration you want to edit. Configurations that contain changes are displayed with a small gear icon (\*). You can filter the drop-down list by entering filter criteria in the field.
4. Click **Edit** to start editing the selected configuration. The configuration you are currently editing is displayed in an orange message bar is displayed on the page.
5. In the **Home** tab > **Open cases** list select a case to open the case detail page.
6. In the Case detail page, click  **Select tabs to view** to open the **Tabs selector** form.
7. In the left (red) pane of the **Tab selector** form, drag the custom type to the right (green) pane. You can also click  **Select item** to add the tab to the right (green) pane.
8. Click **Save** to save your changes and close the form.
9. In the case detail page, select the tab containing the custom type and click   
Add or  **Edit** to open the **Add new <Custom type name> record** or **Edit <Custom type name> record** form.
10. In the **Add new <Custom type name> record** or **Edit <Custom type name> record** form, click the  **Configure page** to open a page where you can configure the order of the custom type fields.
11. Drag and drop the displayed fields to change the order of the fields. You can also hide fields from the list by dragging a field into the **Available fields** pane.
12. Click **Apply** to save your changes and close the form.
13. When you are done editing the configuration, click **Settings > Save configuration** to open the **Confirm** dialog.
14. In the **Confirm** dialog:
  - Click **Yes** to save the selected configuration and exit configuration editing.
  - Click **No** to return to configuration editing.

# Advanced PDF editor

WorkZone includes an embedded PDF reader called PDF Viewer which is the default PDF reader used to display documents as PDF files in WorkZone Client, for example when a user clicks **Preview** in the **Documents** detail tab on the case details page.

WorkZone also includes a more advanced PDF option called Advanced PDF. Advanced PDF uses the PDFTron engine to display, edit and save changes to PDF documents. The PDFTron engine, a 3<sup>rd</sup> party PDF reader and editing program, contains a large set of user-enabled options for annotating, redacting and editing PDF documents.

## Advanced PDF features

Advanced PDF enables WorkZone users to do the following on a PDF document

- Add advanced annotations such as highlights, notes, callouts, apply text formatting such as striking out, underlining or marking text, adding text boxes and free hand drawings.
- Search for and mark terms for redaction
- Preview text marked for redaction before applying the redactions as well as sending the redaction-marked document for review before redaction is applied.
- Rotate, move or delete pages
- Insert new pages to or extract existing pages
- Add, remove or edit bookmarks
- Add a watermark

Separate Advanced PDF licenses are required to annotate, redact and edit PDF documents.

A free version of Advanced PDF is available and installed by default however the free Advanced PDF can only be used to read PDF documents.

## Advanced PDF Licenses

The Advanced PDF license consists of three tiers. The first tier is installed by default and is free of charge. The second tier includes annotation and redaction features while the third tier contains annotation, redaction and advanced PDF editing features. Licensed versions of Advanced PDF must be enabled in WorkZone Configurator while the free version is enabled by default.

PDF Viewer is still available by default and enabled for use.

## Configure the Preview pane

Both the **Advanced PDF** and **PDF Viewer** panes are opened from the **Preview** pane. By default, the **Preview** pane contains the **PDF Viewer** pane, which is used to display PDF documents out-of-the-box. The **Preview** pane must be configured to also display the **Advanced PDF** pane and you can make **Advanced PDF** the default PDF reader/editor by dragging it above the **PDF Viewer** pane when adding it to the **Preview** pane.

You can also remove the **PDF Viewer** pane from the **Preview** pane, making **Advanced PDF** the only PDF reader/editor available.

### Redaction search rules

Redaction search rules make it easier for users to search for and mark specific text snippets for redaction, for example email addresses, web addresses, CPR numbers, and CVR numbers (the four search rules provided by default.)

In **WorkZone Configurator > PDF > Search rules**, system administrators can create a set of customized search rules which users can apply to their searches when using the redaction options in **Advanced PDF**.

Creating customized own search rules helps users search for other types of specific text snippets that are relevant to their organization, workflows or legislation such as social security numbers, titles, specific addresses, phone numbers or other texts that are to be redacted.

Search rules are formulated using regular expressions and can be used by all users once a rule has been saved and **WorkZone Client** refreshed.

The search rules are only available to users if **Advanced PDF** is used to search for text to mark for redaction in PDF documents.

## Installation and activation

Both **PDF Viewer** and **Advanced PDF** are installed during initial installation of **WorkZone**. No further installation is required. **PDF Viewer** and the free version of **Advanced PDF** are also enabled by default in **WorkZone Configurator** and are available in the **Preview** pane of **WorkZone Client**.

The **PDF Viewer** pane is by default displayed to users in the **Preview** pane but **Advanced PDF** is not. If **Advanced PDF** is to be used to read or edit PDF documents, the **Preview** pane must be edited to also display the **Advanced PDF** pane to users.

If the licensed versions of Advanced PDF is purchased , you must first enable the licensed version in WorkZone Configurator, enabling the relevant feature settings (Annotations, Redaction and/or Advanced Editing) and then adjust the WorkZone Client configurations for users who are to employ Advanced PDF by changing the settings of the **Preview** pane to display the Advanced PDF pane.

Feature	Feature Setting	License	Displayed by default in Preview pane
PDF Viewer	No feature setting	Free	Yes
Advanced PDF	Advanced PDF	Free	No
Advanced PDF	Annotations	Annotations and Redaction	No
Advanced PDF	Redaction	Annotations and Redaction	No
Advanced PDF	Advanced Editing	Advanced Editing	No

**Note:** The Annotations and Redaction license for Advanced PDF has been split into two features settings in WorkZone Configurator:

- **Annotations:** Enables users to add, edit and manage comments to PDF documents.
- **Redaction:** Enables users to redact PDF documents.



## Enabling and disabling Advanced PDF

**Prerequisite:** You must be assigned the LICENSEADM access code to enable or disable WorkZone features.

### Enable licensed versions of Advanced PDF

In WorkZone Configurator > **Global** tab > **Feature settings**, > **Advanced PDF**, select the features settings that correspond to the purchased license.

- Annotations
- Redaction
- Advanced Editing

### Disable licensed versions of Advanced PDF

In WorkZone Configurator > **Global** tab > **Feature settings** > **Advanced PDF** clear the feature setting you no longer want to use.

Clearing the feature settings does not invalidate the purchased license, it only makes the functionality of the feature settings unavailable to users.

**Note:** You cannot clear the Advanced PDF feature setting (the free license version) but you can remove it from the **Preview** pane.

## Editing the Preview pane

The **Advanced PDF** pane is not displayed in the **Preview** pane by default, and must be made accessible to users manually. To do this, you must edit the configurations for users who are to employ Advanced PDF.

**Prerequisite:** You must be assigned the CONFIGADM access code to edit, manage and distribute configurations,

1. Open a configuration in editing mode and open the preview pane from the **Documents** detail tab in the case detail page.
2. In the preview pane, click **⚙️ configure pane** to display to panes: **Available panes** (the red left hand pane) and the panes currently displayed. (the green right hand pane)
3. Select the **Advanced PDF** pane in the **Available panes** and click **+ select item** to add it to the displayed panes.
4. (Optional) Drag the **Advanced PDF** pane to a new location in the displayed panes.
5. Click **Apply** to apply the changes to the **Preview** pane.

#### Change the default PDF reader option

The first PDF reader option in the list in the **Preview** pane will always be used as the default when the **Preview** button is clicked for a PDF document in WorkZone Client. If there are no PDF reader options in the list in the **Preview** pane (both **PDF Viewer** and **Advanced PDF** panes are not in the list), the preview pane will be empty when the **Preview** button is clicked for a PDF document in WorkZone Client.

- In the preview pane, drag the **Advanced PDF** pane to a location above the **PDF Viewer** pane to make the **Advanced PDF** pane the default PDF reader.

Users can still access the **PDF Viewer** pane as long as the pane is still available in the **Preview** pane.








#### Restore the standard PDF Viewer as the default PDF reader option

- Drag the **PDF Viewer** pane to a location above the **Advanced PDF** pane to make it the default PDF reader.

Users can still access the **Advanced PDF** pane as long as the pane is still available in the preview pane.

# Customized icons

Many WorkZone elements, such as cases, documents and contacts in WorkZone Client are displayed with default icons where they are presented, for example in lists, detail pages, or detail tab rows.

Cases are displayed with the case icon () , contacts are displayed with the contact icon () , and documents are displayed with the icon that best represents the format of the particular document - for example  for Microsoft Word documents,  for Microsoft Excel documents,  for Microsoft Power Point documents,  for text files and even for images ().

Many standard WorkZone icons are stored in the WorkZone program and cannot be edited or overwritten, but some standard icons are directly accessible for removal or re-assignment and you can also create and use your own custom icons for cases, documents and contacts instead of the standard icons.

Custom icons allow you to create a visual reference directly on the case, document or contact for the combinations of conditions which are important for the goals, processes or work procedures of your organization and thereby help users visually orient themselves in the program.

You can assign custom icons to either replace the existing standard WorkZone icons, for example replacing the standard WorkZone icon for a document with another icon more relevant for your organization, or you can use custom icons to visually represent specific conditions relevant for your organization, work process or goals, for example changing the standard WorkZone icon for a case with a nearly identical icon, only colored yellow and applied to all cases 7 days short of their deadlines.

Custom icons do not change any data registered on the case, document or contact and only function as visual depictions of the element. Similarly, you cannot search for a specific icon in WorkZone Client but must instead search for the special conditions (if any) that result in the display of the custom icon.

## Adding custom icons

Before you can start using custom icons, you must first add them to WorkZone to make them available for assignment. Adding custom icons is done in **WorkZone Configuration Management > Client > Icon collections**.

The **Icon collections** page contains all icons currently in WorkZone, including standard WorkZone icons that are installed when WorkZone is installed. Only standard WorkZone icons accessible in the icons collection list can be reassigned and removed. Other standard icons are stored elsewhere in WorkZone cannot be reassigned or removed.

Icons can be added by selecting the physical.SVG image file or by entering the SVG code in the **Icon as SVG code** field. The icon will be displayed to the right of the **Icon from file** field. If the icon is not displayed, something is wrong with the.SVG image file or the SVG code, and the icon will not be rendered in WorkZone Client.

**Note:** Only Scalable Vector Graphic images (.SVG) can be used as custom icons.

## Assigning custom icons

When the custom icons you want to use have been added to WorkZone, you can assign an icon to cases (File entity), documents (Record entity) and contacts (Contact entity) in general, for example to all cases or all documents.

You can also define one or more assignment conditions to a custom icon, for example assigning an icon to all cases of a particular type (i.e. the case type equals a specific value) or to all documents that have been closed (i.e. the closed date of the document is not empty).

Additionally, custom icons can be defined with start and end dates, enabling you to utilize special custom icons in a narrow, predefined period of time.

Finally, you can assign custom icons to your custom types, adding a visual element to your custom types.

Assigning icons to entities and defining assignment parameters (conditions and start/ end dates) is done in **WorkZone Configuration Management > Client > Icon assignments**.

## Icon assignment notes

- **Cases and meetings:** When you assign an icon to cases, WorkZone meetings will also be displayed with the same icon as WorkZone meetings are considered cases in the WorkZone architecture.
- **Contact references:** Contact references in some forms and dialogs will still use standard WorkZone icons, for example the Contact references in the **Add contact references** form as the Address entity is used in these dialogs and forms. The **Contact references** tab itself is based on the Contact entity and will display any changes to the contact icons.

## Removing icon assignments

The assignment of a custom icon can likewise be removed or replaced with another icon by editing the icon assignment parameters.

## Deleting custom icons

Custom icons can be deleted from WorkZone but you cannot delete a custom icon currently assigned to a case, document or contact, regardless of whether there are any cases, documents or contacts that currently display the icon - for example if the conditions for icon display are not currently met.

If you want to delete an icon from WorkZone, remove any assignments defined for the icon first in **WorkZone Configuration Management > Client > Icon assignments** and then delete the icon in **WorkZone Configuration Management > Client > Icon collections**.

## Backing up your icons

If you remove an icon from the icons collection list, including standard WorkZone icons, you will not be able to reinstate it unless you have a back-up copy of the icon.

To backup an icon, you can either physically copy the icon itself (the \*.svg file) using standard file back up procedures or you can copy the SVG code from the **Icon as SVG code** field and save the text somewhere safe. For standard WorkZone icons, you may be prevented from accessing the physical \*.SVG image location on the server machine, but you can still copy and save the SVG code of the icon.

## See Also

[Icons collection](#) (in WorkZone Configurator help)

[Icons assignment](#) (in WorkZone Configurator help)

# Configure list selectors

Each customized tab in the detail pages is based on a search or filter which populates the customized tab with the results of the search. You can use the standard values of the searches or you can define your own search criteria in order to display search results more relevant for your requirements.

The search criteria consist of a number of search fields (Simple and Advanced) displayed in a list selector. You can adjust these search fields, adding new ones, removing search fields you do not need as well as re-arranging the fields in the list selector itself to better fit your work process.

If you customize the list selector, the changes are saved in the your configuration and can either be distributed to others (if you have sufficient rights to do so) or applied to your own configuration only.

You can configure list selectors used in the Case, Document and Contact detail pages for the following detail tab pages:

- Parties
- Case references
- Document references
- Child cases
- Parent cases

The following search fields can be added to list selectors:

Cases	Documents	Contacts
<ul style="list-style-type: none"> <li>• State</li> <li>• Case category</li> <li>• Case group</li> <li>• For Documents</li> <li>• Responsible Unit</li> </ul>	<ul style="list-style-type: none"> <li>• State</li> <li>• Letter date from/to</li> <li>• Reply deadline from/to</li> </ul>	<ul style="list-style-type: none"> <li>• Email</li> <li>• Phone</li> <li>• Mobile</li> </ul>

## Rearranging the displayed search fields in the list selector

The left pane of the **Add...references** form in customization mode is displayed with a grid overlay which helps placement and re-ordering of search fields. The grid also functions as a guide when evaluating the size and space requirements of search fields.

The **Add...references** form in customization mode automatically orders the placement of search fields in the left pane and some adjustment may be necessary to customize the placement of search fields for your requirements.


You can add **Empty control** search fields from the **Available fields** pane as placeholders in order to force the automatic re-ordering of the displayed search fields.

The horizontal dividing line in the left pane splits the list selector into Simple (above the line) and Advanced (below the line) search fields.

- If you drag a search field in the left pane over the dividing line, the field will be displayed as a Simple search field.
- If you drag a search field below the dividing line, the field will be displayed as an Advanced search field.

### To add a new search field to the list selector


1. When editing a configuration, open a Case, Document or Contact detail page.

If the detail tab pages mentioned above are not displayed, click  **Select tabs to view** in the detail ribbon to open the **Tab selector** form and add the tab or tabs you want to display.

2. Select the detail tab page containing the list selector you want to customize and

click  **Add** to open the **Add...references** form.

The **Add...references** form title contains the title of the tab the list selector is opened from.

3. In the **Add...references** form, click  **Configure page** to open the **Add...references** form in customizable mode.

4. In the **Add...references** form in customization mode, double-click or drag a new search field from the **Available fields** pane and place it in the left pane.


5. Click the **Apply** button to save the current customizations and close the **Add...references** form in customization mode.

or




6. Click the **Cancel** button to close the **Add...references** form in customization mode without saving the current customizations.

#### To remove a search field from the list selector


1. When editing a configuration, open a Case, Document or Contact detail page. If the detail tab pages mentioned above are not displayed, click **Select tabs** to view in the upper right-hand corner of the lower half of the detail page and add the tab or tabs you want to display.
2. Select the detail tab page containing the list selector you want to customize and click  **Add** to open the **Add...references** form. The **Add...references** form title contains the title of the tab the list selector is opened from.
3. In the **Add...references** form, click **Configure page** to open the **Add...references** form in customizable mode.
4. In the left pane of the **Add...references** form in customization mode, double-click or drag a search field to the **Available fields** pane.
5. Click the **Apply** button to save the current customizations and close the **Add...references** form in customization mode.  
or
6. Click the **Cancel** button to close the **Add...references** form in customization mode without saving the current customizations.

#### To re-arrange the search fields in the list selector

1. From the distribution mode, open a Case, Document or Contact detail page. If the detail tab pages mentioned above are not displayed, click **Select tabs** to view in the upper right-hand corner of the lower half of the detail page and add the tab or tabs you want to display.
2. Select the detail tab page containing the list selector you want to customize and click  **Add** to open the **Add...references** form. The **Add...references** form title contains the title of the tab the list selector is opened from.

3. In the **Add...references** form, click **⚙️ Configure page** to open the **Add...references** form in customizable mode.
4. In the left pane of the **Add...references** form in customization model, select and drag a search field to a new location.
5. Click the **Apply** button to save the current customizations and close the **Add...references** form in customization mode.  
or
6. Click the **Cancel** button to close the **Add...references** form in customization mode without saving the current customizations.

#### To clear all customizations from the lists selector and restore the default list selector

1. From the distribution mode, open a Case, Document or Contact detail page. If the detail tab pages mentioned above are not displayed, click **⚙️ Select tabs** to view in the upper right-hand corner of the lower half of the detail page and add the tab or tabs you want to display.
2. Select the detail tab page containing the list selector you want to customize and click  **Add** to open the **Add...references** form.  
The **Add...references** form title contains the title of the tab the list selector is opened from.
3. In the **Add...references** form, click **⚙️ Configure page** to open the **Add...references** form in customizable mode.
4. In the **Add...references** form in customization mode, click the **Reset** button to restore the default list selector, clear all customizations and close the **Add...references** form in customization mode.

# Display access codes

The access codes for a case and a document are by default displayed as texts and not the actual code itself as the access code is often expressed as an acronym and not easily readable. You can change the display parameters of the Read access and Write access fields for cases and documents to display the access code instead of the access code text.



## To display the Read and/or Write access code for a case type

1. In the Home ribbon, click **Settings > Edit configuration** to open the **Edit configuration** form.
2. In the **Edit configuration** form > **Search in** field, select which type of configuration you want to edit.
3. In the **Edit configuration** form > **Select configuration to edit** field, select the specific configuration you want to edit. Configurations that contain changes are displayed with a small gear icon (\*). You can filter the drop-down list by entering filter criteria in the field.
4. Click **Edit** to start editing the selected configuration. The configuration you are currently editing is displayed in an orange message bar is displayed on the page.
5. In the Main ribbon, click **Case** and select the case type you want to edit the detail tab page for to open the case detail page<sup>1</sup>.
6. In the case detail page, click \* **Configure page** in the right-hand corner of the detail tab page to open the **Available fields** pane.
7. The **Available fields** pane is open on the right side of the screen.  
In the case detail page:
  - In the **Read access** field, click ≡ **Configure control** and select **Advanced** to open the **Set control parameters** form.
  - In the **Set control parameters** form, select the **Display access code only** check box and click **Apply** to save your changes and close the form.
  - In the **Write access** field, click ≡ **Configure control** and select **Advanced** to open the **Set control parameters** form.
  - In the **Set control parameters** form, select the **Display access code only** check box and click **Apply** to save your changes and close the form.

8. In the case detail page > **Available fields** pane, click **Apply** to save your changes and close the form.
9. When you are done editing the configuration, click **Settings** > **Save configuration** to open the **Confirm** dialog.
10. In the **Confirm** dialog:
  - Click **Yes** to save the selected configuration and exit configuration editing.
  - Click **No** to return to configuration editing.

<sup>1</sup> If you want to edit the case detail tab page for other case types, you must repeat this procedure for each case type.

#### To display the Read and/or Write access code for documents

1. In the Home ribbon, click **Settings** > **Edit configuration** to open the **Edit configuration** form.
2. In the **Edit configuration** form > **Search in field**, select which type of configuration you want to edit.
3. In the **Edit configuration** form > **Select configuration to edit** field, select the specific configuration you want to edit. Configurations that contain changes are displayed with a small gear icon (\*). You can filter the drop-down list by entering filter criteria in the field.
4. Click **Edit** to start editing the selected configuration. The configuration you are currently you are editing is displayed in an orange message bar is displayed on the page.
5. In the Main ribbon, click **Document** > **Import from file** system to open the document detail page.
6. In the document detail page, click  **Configure page** in the right-hand corner of the detail tab page to open the **Available fields** pane.
7. The **Available fields** pane is open on the right side of the screen. In the case detail page:
  - In the **Read access** field, click  **Configure control** and select **Advanced** to open the **Set control parameters** form.

- In the **Set control parameters** form, select the **Display access code only** check box and click **Apply** to save your changes and close the form.
  - In the **Write access** field, click **☰ Configure control** and select **Advanced** to open the **Set control parameters** form.
  - In the **Set control parameters** form, select the **Display access code only** check box and click **Apply** to save your changes and close the form.
8. In the document detail page > **Available fields** pane, click **Apply** to save your changes and close the form.
  9. When you are done editing the configuration, click **Settings > Save configuration** to open the **Confirm** dialog.
  10. In the **Confirm** dialog:
    - Click **Yes** to save the selected configuration and exit configuration editing.
    - Click **No** to return to configuration editing.

# Define and broadcast system messages

System administrators can use WorkZone Chat to communicate with individual WorkZone users or multiple users. WorkZone Chat is a good channel for direct communication or tailor-made messages to specific users, but if you need to broadcast a message to all WorkZone users and have the message clearly displayed to all users, you can create and define a system message instead, for example broadcasting a message about planned maintenance hours during which your system will be down or issuing a warning about recent hacking or phishing threats to your organization.

You can also broadcast a system message to an individual WorkZone user or to specific batches of users based on their assigned access codes.

## Displaying and closing messages

System messages are displayed prominently in the upper right-hand corner of WorkZone Client whenever the browser is loaded or re-loaded. System messages can be closed by clicking the message, but the message will be displayed again when the browser is re-loaded or opened again.

You can also define a system message which cannot be closed. System messages that cannot be closed are semi-transparent and can be clicked through, but not clicked on.

## Message types

There are three types of system messages:

- **Error:** The message is displayed in a red message field.
- **Information:** The message is displayed in a blue message field.
- **Warning:** The message is displayed in an orange message field.

## The System messages page

**Prerequisite:** You must be assigned the CONFIGADM access code to access the System messages page in WorkZone Configurator.

System messages are created, edited and maintained on the **System messages** page in WorkZone Configurator > **Global**.

When you create a new system message, you must define the title, message text as well as the scope and type of message. The rest of the message parameters are optional.

### Define message content

When you create a system message, you can define the title and the content of the message in the **Title** and **Message** fields.

Both texts can be localized in the **Localize title** and **Localize message** groups, so when a user changes the display language in WorkZone Client, the message text and title corresponding to the selected language will be displayed.

If you do not specify any localized titles or messages, the values in the **Title** and **Message** fields will be applied to all empty localized title and message fields.

### Define message parameters

After you have written the message title and content, you can define any relevant message parameters.

### Message scope

In the **Scope** field, you must define in which WorkZone products the system message is to be displayed: WorkZone Client only or globally across all WorkZone products features in the list. Currently, system messages can only be displayed in WorkZone Client.

## Message type

You must also select the type of message you want to display: Error, Information, or Warning in the **Type** field. The three types of system messages differ only in the color of the message box. (See *Message types* in the section above)

## Start and/or end date

If necessary, define a time interval to display the system message by setting the start date and time as well as the end date and time of a message in the respective fields (the **Start date** and **End date** fields).

If you set an end date that has occurred, you can effectively pause displaying the message.

## Prevent message from being closed

Select the **Always visible** option if you want to prevent the message from being closed.

## Display message to specific users only

If you specify one or more access codes in the **Access code** field, the message will only be displayed to users that are assigned the specified access codes.

## See Also

[System messages](#) (in WorkZone Configurator help)





# View WorkZone user information

## Display a list of WorkZone users

If you are assigned the USERADM access code, you can display a list of all users in WorkZone in WorkZone Configurator > **Security** > **Users** and export the list to Microsoft Excel for further processing. You can sort or filter the user list to better gain an overview of the users.

## View access codes for a specific user

You can see which access codes are assigned to a specific user.

In WorkZone in WorkZone Configurator > **Security** > **Users**, click  **Actions** for a specific user and then click  **Edit** to display all access codes assigned to that user.

## See Also

[Users \(WorkZone Configurator help\)](#)

# Creating lists from queries

You can create saved search list based on a saved query, add it to your dashboard and navigation pane and distribute the dashboard as part of a WorkZone configuration.

Queries you create and save in WorkZone QueryBuilder are available to you in the **My Lists** group in the **Dashboard Configuration** form and in the **Navigation Configuration** form.

## Creating a query in WorkZone QueryBuilder

**Important:** While using WorkZone QueryBuilder does not require any special access rights, you must have a technical understanding of the database structure in WorkZone as well as a working knowledge of the names and relationships of the underlying WorkZone database tables and fields.

Using WorkZone QueryBuilder is usually a task for system administrators, database technicians or very experienced super-users.

In WorkZone QueryBuilder, create a query and define all relevant query parameters such as the query endpoint, which entity to query and which filters to apply, the select and expand statements as well as apply a sorting order of the results and define aggregate functions if desired.

Click **Search** to test the query and click **Save Query** to save the query. The saved query will then be available to you in WorkZone Client.

## Sharing saved lists

You can also share your saved list with other users, enabling them to access the list and add it to their customized navigation panes or include the list in their personalized dashboards. Sharing lists this way enables system administrators to distribute specific lists to relevant users, ensuring all users have the same list as a base to work from and base their decisions on.

Saved or shared lists are not automatically added to the WorkZone Client. Users must reload the WorkZone Client page to update the WorkZone Client with any newly created or shared lists.



# Change the sort order of case fields

You can change the sort order of the items in the drop-down lists in the following case fields:

- Case category
- Case types
- Case states



The default sorting order in these drop-down lists is by descending alphabetical order, but system administrators can change the sorting order by defining a new sort order (called Rank) in **WorkZone Configurator > Cases > Properties** for a specific case category, case type and/or case state.

All items assigned an identical rank will be sorted in a descending alphabetical order.

This also affects the drop-down list in the **Case** button in the main ribbon, enabling an organization to display cases which are created more often than other cases first in the lists.

## Change the sort order of the Case category field

1. In **WorkZone Configurator > Cases > Properties > Case categories** tab, select the case category you want to change the sort order for.



2. Hover the mouse over the  icon to open the icon menu and click  **Edit** to edit the settings.

3. In the **Rank** field, enter a new rank for the case category and click **Save** to save the new sort order and close the form.

**Note:** The settings for **Standard** cases are not accessible in WorkZone Configurator and are displayed always displayed first in the case category drop-down list.

## Change the sort order of the Case type and State field

For the case state field, replace Case type with Case state in the procedure below.

1. In **WorkZone Configurator > Cases > Properties> Case type** tab, select the case type you want to change the sort order
2. Hover the mouse over the  icon to open the icon menu and click  **Edit** to edit the settings.
3. In the **Rank** field, enter a new rank for the case type and click **Save** to save the new sort order and close the form.

# The Microsoft Office Online Server

The Microsoft Office Online Server is a server-based application that can be installed locally on a company's servers and made available for users on the company network only. This enables users to utilize the browser-based web service programs for Word, Excel, Powerpoint and OneNote internally instead of using the internet-based versions. Using the Office Online Server, an organization can reduce the number of locally installed office installations as users can create, read, edit and save their documents online through the company's local intranet.

The Office Online Server also enables users to concurrently edit a document and all users can see what each other is adding to the document as it happens.

Simply put, the Office Online Server allows multiple users access to Office Online products concurrently without exposing their network to the external internet.

The browser-based web-service programs are basic versions compared to the fully-featured locally installed Microsoft Office programs, but sufficient features and functionality to satisfy most users working on typical day-to-day tasks. For example, Word Online does not have the References and Mailings features compared to the Word program in the Office 365 Suite.

The Office Online Server also contains a free version which allows users to view the documents but not make changes to them. If users want to create, edit and save the documents, a full license is required.

The Office Online Server must be installed on its own dedicated server and integration to WorkZone must be set up after installation.

## Configure Office Online Server

If you want to utilize the Microsoft Office Online Server in your organization, you must configure your WorkZone installation to integrate with the Office Online Server.

### To configure WorkZone for Office Online Server integration

**Prerequisite:** You must be assigned the CONFIGADM access code in order to configure the Office Online Server settings.

1. Open the WorkZone Configurator and select **Office > Office Online Server** to open the **Office Online Server** tab
2. In the **Office Online Server** tab
  1. Select the **Allow usage of Office Online Server** toggle key to enable integration with the Office Online Server.
  2. In the **Office Online Server URL** field, enter the internal URL to the Office Online Server.

## Test the Office Online Server connection

You can test if the specified address points to a valid Office Online Server by opening the `<OOS_Server_URL>/hosting/discovery` page where `<OOS_Server_URL>` is the URL specified in the **Office Online Server URL** field

When the discovery page is opened in Internet Explorer, an XML file will be opened containing multiple XML tags.

Locate the `urlsrc` attributes in the XML and investigate if the `urlsrc` attributes all point to the same Office Online Server URL. These urls are used when WZC interacts with the Office Online Server. The Office Online Server URL address defined in the WorkZone Configurator is used by WorkZone Content Server to obtain the Office Online Server discovery XML information.

## Common Office Online Server integration errors

Be aware of these potential errors that might occur during configuration or installation of the Office Online Server.

### Incorrect Office Online Server URL address in the Office Online Server URL field

If the Office Online Server URL address in the **Office Online Server URL** field is incorrect, `<oos_server_url>/hosting/discovery` XML will be unavailable and WorkZone Client will not be able to access the Office Online Server.

## **Invalid -InternalURL setting**

If the Office Online Server was originally set up with an invalid -InternalURL setting, the <oos\_server\_url>/hosting/discovery XML will be available but WorkZone Client will not be able to access the Office Online Server.

## **Testing integration from WorkZone Client to the Office Online Server**

You can test the integration from WorkZone Client to the Office Online Server by previewing and editing all three main Office Online file types (Word, Excel and Powerpoint) from WorkZone Client.



# Hidden entities

## About hidden entities

Hidden entities are cases, documents and/or contacts that cannot be displayed because the owner/user has been disabled in the Microsoft Active Directory, for example, if the user has left the organization.

When a user is disabled in the Microsoft Active Directory, all entities with the user's personal access code will become inaccessible for other users and are thereby considered hidden as these items cannot be displayed normally.

## Work with hidden entities

### Add hidden lists to the navigation pane

The following lists are available in the navigation pane in WorkZone Client:

- **Hidden cases**
- **Hidden documents**
- **Hidden contacts**

You can add the hidden lists to the navigation pane if you have the LOSTANDFOUND access code.

To add the lists, follow the steps in section [Manage lists](#) in WorkZone Client.

### Edit hidden elements

You can edit the hidden elements on the item's detail pages. Change the access code and assign another case handler to make the entities accessible to other users.

Note that hidden elements might contain access codes that limit access to these hidden elements - preventing these elements from being displayed, opened or edited. If you do not have these access codes, but you have the \* access code, you then can still view and edit the hidden elements.

# Automatic deletion of cases and documents

You can configure WorkZone to automatically send cases and documents with expired retention periods to the recycle bin and, after a predefined grace period, permanently delete them, without any user interaction or initiation. WorkZone contacts cannot be automatically deleted.

Automatic deletion of cases and documents are parameter settings of the retention policy assigned to cases and documents and you can therefore create retention policies without automatic deletion and retention policies that contain automatic deletion.

WorkZone items that are automatically sent to the recycle bin can be restored manually if necessary. Cases and documents to be deleted permanently can be displayed in specific lists in WorkZone Client and can also be manually restored from the recycle bin.

All deleted items can be tracked in the WorkZone Deletion log, which provides a log listing of all delete actions performed in WorkZone, including automatic deletions.

The WorkZone job (**ScanJour.AutoPurge.exe**) that performs the automatic deletion of case and documents in the recycle bin is a scheduled task on the WorkZone server and by default runs once every 24 hours. You can adjust the job to run more frequently or less frequently as well as set the time when the job is scheduled to run, customizing the automatic deletion process to the organization's requirements and work schedules.



**Important:** Items deleted from the recycle bin are deleted permanently. Items that are permanently deleted cannot be restored.

## Automatically delete expired cases or documents

Cases or documents with expired retention periods can be automatically sent to their respective recycle bins. Cases and documents automatically sent to the recycle bin can be manually deleted or restored by users if necessary.

You can combine the **Relative retention period** and **Automatic soft delete** parameter to define a set of conditions for each retention policy that will can be used to manage automatic deletion of expired cases or documents.

### Set up WorkZone to automatically delete expired cases or documents



1. In WorkZone Configurator > **Retention** > **Retention policies**, select the retention policy you want to set up automatic deletion for.
2. Hover the mouse over the  icon to open the icon menu and click  **Edit** to edit the settings.
3. In the retention policy settings form > **Relative retention period** field, define a relative retention period for the retention policy or make sure the defined retention period is correct.
4. In the retention policy settings form, enable the **Automatic soft deletion** parameter.
5. Click **Save** to save your changes and exit the form.

## Automatically permanently delete cases or documents

Cases or documents in their respective recycle bins can be automatically deleted permanently after a predefined grace period. The grace period (called the Purge period) is defined as number of days after the case or document has initially been sent to the recycle bin.

A user can still manually delete or restore cases or documents from their respective recycle bins before they are automatically deleted.

### Set up WorkZone to automatically permanently delete cases or documents from the recycle bin

1. In WorkZone Configurator > **Retention** > **Retention policies**, select the retention policy you want to set up automatic deletion for.
2. Hover the mouse over the  icon to open the icon menu and click  **Edit** to edit the settings.
3. In the retention policy settings form > **Purge period** field, define a grace period for the retention policy or make sure the defined Purge period is correct.

4. In the retention policy settings form, enable the **Automatic purging** parameter.
5. Click **Save** to save your changes and exit the form.

**Note:** If the **Purge period** field is empty or if the **Automatic purging** setting is disabled, automatic deletion will not be performed for the retention policy.

## Locating items to be automatically deleted

Cases and documents that are to be permanently deleted from the recycle bin will contain a date in the **Purge date** field in the respective recycle bin lists: **Recycle bin - Cases** for cases and the **Recycle bin** for documents on the Home page as well as the **Recycle bin** tab in the Case details page.



The **Purge date** field value can also be displayed using queries built in WorkZone QueryBuilder and standard Oracle SQL scripts and statements.

## Prevent automatic deletion of cases or documents

### Prevent sending expired cases and documents to the recycle bin

Expired cases and documents will not be automatically sent to their respective recycle bins if the **Automatic soft delete** retention policy parameter has been disabled.



#### Disable automatic deletion of expired cases or documents

1. In WorkZone Configurator > **Retention** > **Retention policies**, select the retention policy you want to disable automatic deletion for.
2. Hover the mouse over the  icon to open the icon menu and click  **Edit** to edit the settings.
3. In the retention policy settings form, disable the **Automatic soft deletion** parameter.
4. Click **Save** to save your changes and exit the form.

## Prevent deleting cases and documents from the recycle bin

Cases and documents will not be automatically deleted from the recycle bin if the **Purge period** field is empty or if the **Automatic purging** retention policy setting has been disabled.

### Disable automatic permanent deletion of cases or documents from the recycle bin

1. In WorkZone Configurator > **Retention** > **Retention policies**, select the retention policy you want to disable automatic deletion for.
2. Hover the mouse over the  icon to open the icon menu and click  **Edit** to edit the settings.
3. In the retention policy settings form > **Purge period** field, delete all values, leaving the field empty  
- Or -  
In the retention policy settings form, disable the **Automatic purging** parameter.
4. Click **Save** to save your changes and exit the form.

## The Delete Log

When a WorkZone item (case, contact or document) is deleted, either permanently or just sent to the recycle bin, a log of the delete action is created in order to document the deletion for later control and registration. The item, type of action, type of item, date and time of deletion and the user who deleted the item are registered in the Delete log.

If a case or document was deleted automatically, the user who deleted the item will be registered as the system user SJPURGEUSER.

# Define WorkZone Process notification settings

**Prerequisite:** You must be assigned the AFDADM access code to edit units in WorkZone.

WorkZone Process notification settings determine how and if a user, unit or the entire organization is to receive notifications concerning events and information triggered from WorkZone Process.

The following notification settings can be defined:

- **Send Smarttasks as emails:** Emails that contain a task with response buttons.
- **Send Email notifications:** Emails sent when a task is changed, for example, a task has been updated by another user.
- **Send Push notifications:** Notifications sent to a mobile device when a task has changed.

WorkZone Process notification settings for units and users will override any global WorkZone Process notification settings defined in WorkZone Configurator.

## WorkZone Process notification settings - Users

Users can define their own notification settings in their **Personal settings** pane on their user profile in WorkZone Client or you can define the settings for them.


## WorkZone Process notification settings - Units

**Prerequisite:** You must be assigned the AFDADM access code to edit units in WorkZone.

WorkZone Process notification settings can be defined for WorkZone units on the unit detail page and can be used to customize which WorkZone Process notifications are received by a unit.

Units are considered a separate contact with their own WorkZone Process notification settings and in many cases, own email account. Users can therefore receive notifications to their email account based on their user notification settings as well as receive notifications to their unit's email account based on the unit's notification settings.

Like the user WorkZone Process notification settings, the notification settings of the unit will override the organization's global WorkZone Process notification settings.

In WorkZone Client, click the  **Open** button in browser tab page area and select a unit to open the unit detail page.

You can also create a contact search for the unit you want to edit and open the unit detail page from the search results.

## WorkZone Process notification settings - Organization

WorkZone Process notification settings can be defined for the entire organization in WorkZone Configurator > **Process** > **Process settings** > **Notifications**.

**Prerequisite:** You must be assigned the PROCESSADM access code to configure process settings

# Set up Microsoft Excel to import data from WorkZone

WorkZone uses the Microsoft Excel Power Query to manage data transfer from WorkZone to Excel and this means that when exporting data from WorkZone to Microsoft Excel, either exporting the results of a query from WorkZone QueryBuilder or exporting a list, chat or notes from WorkZone Client, each user must first set up the Power Query connection in Microsoft Excel as well as define the privacy levels of the connection and the current spreadsheet.

## Define privacy levels

To set up the Excel connection, the user must define the privacy level for the current spreadsheet as well as for the actual Power Query connection used to integrate Excel with WorkZone in the **Privacy Level** form.

- **Private:** Your spreadsheet and connection will not be able to communicate with each other or other spreadsheets.
- **Organization:** Your spreadsheet and connection will only be able to communicate with other spreadsheets with the Organization privacy level.
- **Public:** Your spreadsheet and connection can communicate with all other spreadsheets.

**Note:** Once a user has set up the connection, only the privacy level for the current spreadsheet must be specified the next (and every) time WorkZone data is exported to Excel. The connection privacy levels as well as authentication settings are saved for the user in Excel.

**Tip:** To disable future prompts for privacy levels, select the **Always ignore Privacy Level settings** radio button in the **Query Options** form > **Privacy** tab.

The **Query Options** form is opened in Excel > **Data** > **Get & Transform Data** group > **Get Data** > **Query Options**.



## Define authentication procedure and OData-feed settings

After privacy levels have been defined for the data, the user must define how to authenticate access to the data source.

1. In the **Access Web content** form, select **Windows** and then **Use my current credentials** as the authentication procedure
2. Click **Connect** to create the connection and open the the **OData-feed** form
3. In the **OData-feed** form, select **Windows** and then **Use my current credentials** as the authentication procedure
4. Click **Connect** to create the connection and import WorkZone data.

## Updating the spreadsheet

To update refresh an Excel spreadsheet with the latest data from WorkZone , in Excel, click **Data > Queries and Connections** group > **Update all**.

## Viewing data sources

In Excel, click **Data > Queries and Connections** to open the **Queries and Connections** panel and see the data sources used for the export:

- **OdataMetadataAndType:** The spreadsheet's own data source - more specifically the data in the hidden **Connection (Do Not Delete)** worksheet.
- **Source:** The actual results of the query.
- **Schema:** The Odata metadata specifications, for example the localized labels and data types of the columns (fields).
- **WorkZone OData:** The output that is displayed in the spreadsheet once the export has completed. You can right-click the WorkZone OData data source and select **Edit** to edit and manipulate the displayed columns.

**Tip:** When exporting query results from WorkZone QueryBuilder, the query itself as well

as other general query information (for example the language settings used in Query-builder and the type name used) is stored in the spreadsheet in a hidden worksheet called **Connection (Do Not Delete)**. You can display the worksheet to view the query information.

## Deleting or editing the connection settings

Users can edit or delete the connection privacy levels as well as authentication settings in the **Data source settings** form which is opened in Excel > **Data** > **Get & Transform Data** group > **Get Data** > **Data source settings**. Note that the WorkZone data sources are **Global permissions**.

# Troubleshooting

Click an issue below to see the solution or workaround.

When you configure a case detail page, if you set the Party field to be required and then define a role and a type for the Party field, the required setting resets to default.

Setting additional parameters for the **Party** field, such as type and role, always resets the field to default. When you configure the **Party** field, you must define a role and a type first and then select the **Required** setting.

If you distribute a configuration with case, document, or contact lists incorrectly placed on the Navigation pane (for example, if you have placed case lists under the Documents or Contacts panels, or if you have placed document lists under the Contacts or Cases panels) to someone, the user who has received this distributed configuration cannot remove such lists from the Navigation pane.

In such cases, you need to either clear a distributed configuration for that user or to distribute a new, corrected configuration.

Some saved searches with information or date criteria created in WorkZone Client 3.0 cause errors in WorkZone Client 2014 R2 (3.1). Saved searches created in WorkZone Client 3.0 with one or more of the following criteria: Information type = @Exists, @Doesn't exist, or type2, Date type = @Exists, @Doesn't exist, or type 2 do not work in WorkZone Client 2014 R2 (3.1).

This happens due to the changes of information and date search criteria in WorkZone Client 2014 R2 (3.1). Before you install version 2014 R2 (3.1), you need to delete the saved searches with the information or date criteria mentioned above in version 3.0 and then create these searches from a new in version 2014 R2 (3.1).

No e-mails are received from subscriptions to searches with @me or @my unit criteria. If you subscribe to a search with @me or @my unit criteria, no e-mails are received.

Select your user name or the name of your unit as a criteria instead of @me or @my unit.

You cannot create a new document because the buttons Word, Excel, PowerPoint, Export to Excel are not available.

You cannot see the buttons when there is no connection between WorkZone Client and WorkZone for Office. To establish connection, activate ActiveX in Internet Explorer. See [Check the key default settings](#) to get the detailed instructions on how to do this.

In Windows 7 and Windows 10, a Microsoft Office application runs without any document. An error message appears immediately in Windows 7 and after 10 minutes in Windows 10.

This happens when you have enabled Protected mode in the Internet Explorer settings. To disable Protected mode, follow the instructions in [Check the key default settings](#).

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