KMD WORKZONE _Mobile

2021.3

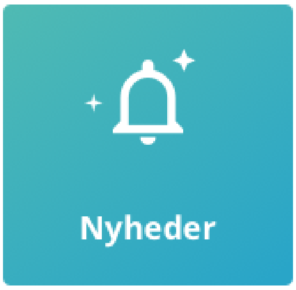
Brugervejledning

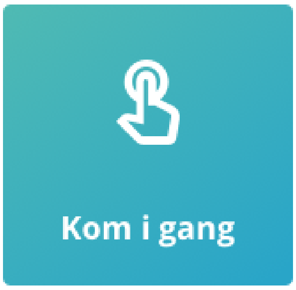
Indhold

WorkZone Mobile 2021.3

Med WorkZone Mobile kan du tilgå WorkZone-sager, -dokumenter, -opgaver og møder på din mobile enhed. Denne Brugervejledning dækker både iOS- og Android-versionen af WorkZone Mobile.

Retningslinjer, der kun gælder for enten iOS- eller Android-versionen, markeres med ikonerne (iOS) og (Android).





Ofte stillede spørgsmål

Hvad sker der, hvis jeg arbejder offline?

Du kan udføre en opgave, selvom du er offline. Den slags opgaver gemmes under **Usendte opgaver**. Når du igen er online og trækker for at opdatere, sendes dine usendte opgaver.

Relateret produktdokumentation

- WorkZone Process Brugervejledning
- WorkZone for Office Brugervejledning
- WorkZone Client Brugervejledning

WorkZone-links

- WorkZone-dokumentation
- WorkZone-support
- WorkZone-websted
- WorkZone-portal

Nyheder

Der er ingen ændringer i denne release.

Det var nyt i WorkZone Mobile 2021.2

Gennemse med dine WorkZone-lister

Du kan nu navigere i modulet Gennemse med dine foruddefinerede og brugerdefinerede WorkZone-lister og omarrangere dem, så de passer dine behov. Se Tilpas dine viste lister og Søg på sager og dokumenter.

Det var nyt i WorkZone Mobile 2021.1

Naviger til en sag fra et dokument

Du kan nu navigere fra dokumenter, som du har åbnet i modulet Gennemse eller fra en chat, til deres tilknyttede sag og her se dagens oplysninger. Se Se oplysninger om chat-dokumenter og -sager og Se dokumentoplysninger.

Arbejde med dine stedfortræderopgaver

Hvis du er stedfortræder for en bruger, kan du nu skifte til denne brugers opgaveliste og arbejde med deres opgaver. Se Arbejde med dine stedfortræderopgaver.

Brugerdefinerede filtre for opgaver

I din opgaveliste kan du nu anvende brugerdefinerede filtre, som er tilgængelige for dig. Brugerdefinerede filtre er gemte søgerlister, der er oprettet i WorkZone OData QueryBuilder. Se Filtrér dine opgaver med brugerdefinerede filtre.

Det var nyt i WorkZone Mobile 2021.0

Modulet Gennemse

- Du kan nu gennemse alle sager og dokumenter, der tilgængelige for dig i WorkZone fra din mobile enhed. Du kan søge efter sager eller dokumenter, se deres metadata, se eksisterende dokumenter på den valgte sag, forhåndsvise og

redigere valgte dokumenter (hvis de er redigerbare). Se Gennemse WorkZone-sager og -dokumenter.

Chatforbedringer

- Du kan nu oprette nye chats direkte fra **Chats**-modulet. Se Opret en ny chat (uden en opgave).
- Du kan nu se og redigere sagsdokumenter (hvis de er redigerbare), og se sags-metadata for sagerne på dine chats. Se Vis oplysninger for chatsager og chat-dokumenter.
- Du kan redigere dokumenter i dine chats. Se Rediger et chatdokument.

Forbedringer i brugergrænsefladen

- Knappen **Hjælp** findes nu under **Indstillinger**.

Det var nyt i WorkZone Mobile 2020.3

Chatforbedringer

- Du kan nu se en forhåndsvisning dokumenter i dine chats. Se Forhåndsvisning af chatdokumenter.
- Du kan se metadata for dokumenterne i dine chats. Se Vis metadata for chat-dokumenter.
- Du kan se om brugerne i dine chats er online eller offline. Se Vis dine chats.

Rediger WorkZone-dokumenter via Office 365 i Intune-versionen ( )

- WorkZone Mobile-versionen til Intune understøtter nu redigering af WorkZone-dokumenter med Microsoft Office 365.

Det var nyt i WorkZone Mobile 2020.2

Log ind på WorkZone Mobile via OAuth2

Hvis din organisation bruger OAuth2 til brugergodkendelse, kan du logge ind på WorkZone Mobile ved brug af OAuth2. Se Log ind og ud.

Arbejde med WorkZone-chats

I WorkZone Mobile kan du se dine eksisterende chats og besvare dem, oprette nye chats om eksisterende processer fra de tilknyttede opgaver og tilføje eller fjerne deltagere i en chat. Se Arbejde med chats.

Meddelelser om dokumentkonflikt, når PDF-dokumenter redigeres af flere brugere samtidigt

Hvis flere brugere redigerer i det samme PDF-dokument samtidigt, vil den anden bruger modtage en meddelelse om dokumentkonflikt, hvor brugeren kan vælge at kassere ændringerne eller at overskrive den anden brugers ændringer. Se Annoter PDF-dokumenter.

Det var nyt i WorkZone Mobile 2020.1

- Fejlrettelser.

Det var nyt i WorkZone Mobile 2020.0

Forbedret synkronisering for WorkZone-møder

- WorkZone Mobile afspejler nu aflysninger af møder, der er foretaget i Outlook via WorkZone Meeting eller WorkZone 365 (Både i skrivebords- og webapplikationen).
- WorkZone Mobile afspejler nu ændringer, der er blevet foretaget på dagsordenspunkter i Outlook via WorkZone Meeting eller WorkZone 365 (Både i skrivebords- og webapplikationen).

Se Arbejde med møder.

Forbedringer af brugerindstillinger

- Du kan bruge de nye indstillinger **Vis kommende opgaver** og **Vis afsluttede opgaver** til at indstille om du ser kommende og afsluttede opgaver i din opgaveliste.
- Aktivér den nye indstilling **Share Analytics** for at tillade indsamling af brugeres fejllogs for WorkZone Mobile, såsom systemoplysninger om netværksfejl, fejl i hentning af filer i baggrunden og lignende fejlhændelser. Indsamlede fejllogs indeholder ingen personhenførbare data.

Se Konfigurer WorkZone Mobile.

Forbedringer i sikkerhed

- Indhold i WorkZone Mobile skjules, hvis en brugers adgangskode ikke længere er gyldigt.

Det var nyt i WorkZone Mobile 2019.3

Forbedret navigation

- Navigationsruden vises nu i bunden af skærmen. Tryk på et modul for at arbejde med det.
- Knappen **Log ud** findes nu under **Indstillinger**.
- Dokumenter åbner nu i fuld skærm.

Forbedringer i forhåndsvisning af opgaver

- Arranger dine opgaver i den rækkefølge, du ønsker de skal behandles i. Se Arranger rækkefølge på dine opgaver.
- Tryk **Rangorden** øverst i din opgaveliste for at sortere efter rangorden. Se Arranger rækkefølge på dine opgaver.
- Tryk for at se din opgave med vedhæftede dokumenter som en samlet PDF-fil. Se Vis opgave som PDF.

- Når du viser dokumenter på en opgave, tryk på knapperne og for at åbne det tidligere eller det næste dokument på opgaven, eller stryg til højre/venstre for at se den tidligere/næste side i dokumentet. Se Vis dokumenter.

Det var nyt i WorkZone Mobile 2019.2

Fejlrettelser.

Du kan nu definere antal linjer, der skal vises i møde- og opgavetitler. Se Konfigurer WorkZone Mobile.

Det var nyt i WorkZone Mobile 2019.1

Fejlrettelser.

- Appen stopper med at fungere, når du forsøger at åbne den efter, du har opdateret til en ny release - Dette er nu rettet.
- Forkerte beskeder åbnes på siden **Log ind**, når du trykker **Retur** i felterne **Server** og **Brugernavn**, når du bruger tastaturet - Dette er rettet.

Det var nyt i WorkZone Mobile 2019.0

Support ved ændring af kodeord

Hvis dit kodeord udløber mens du arbejder i WorkZone, vil siden **Log ind** åbne, og du kan først gentage dit arbejde, når du har indtastet dit kodeord. Se Log ind og ud.

Performanceforbedringer

Den tid, det tager at hente aktiver, opgaver og dokumenter, er blevet reduceret med 30%.

Det var nyt i WorkZone Mobile 2018.2

- Når du har besvaret en opgave, bliver den næste vist automatisk. Se Arbejde med opgaver.
- Performanceforbedringer.
- Fejlrettelser.

Det var nyt i WorkZone Mobile 2018.1

- Fejlrettelser.

Nyheder i WorkZone Mobile 2018

- Føj billeder fra fotobiblioteket på din enhed til en opgave. Se Tilføj eller fjern dokumenter.
- Tag et billede eller optag en video og føj billedet eller videoen til en opgave med det samme.
- Performanceforbedringer.
- Bedre brugergrænseflade på iPhone X.

Generel information

Kom godt i gang

Log på og log af på WorkZone Mobile.

- Se dine kommende WorkZone-møder (Oprettes i Outlook via WorkZone for Office eller WorkZone 365).
- I navigationsruden, tryk på et modul, du vil arbejde med. For eksempel, tryk **Opgaver** for at se en opgaveliste. Opgaverne er markeret i forhold til frister og prioriteter.

På et møde kan du:

- Tryk på et møde for at se mødets detaljer.
- I mødetaljerne, se oplysninger om dato og tid, placering, deltagere, dagsordenspunkter og vedhæftede filer.
- Se dokumenter, der er vedhæftet på et møde. Tryk på et dokument i mødetaljerne for at se det.
- Rediger Microsoft Office-dokumenter (). Tryk på **Rediger** i dokumentfremviseren for at redigere dokumentet.
- Annoter PDF-dokumenter, for eksempel PDF, MSG, PNG og JPG i PDF-format. Tryk på **Rediger** i dokumentfremviseren for at redigere dokumentet.
- Eksportere dokumenter til andre apps. I dokumentfremviseren, tryk **Del** og vælg en app.
- Arbejde offline.

På en opgave kan du:

- Trykke på en opgave under **Usendte**, **Åbne**, **Kommende** eller **Afsluttet** for at se opgavedetaljerne.
- Se procesoplysninger i opgavedetaljerne, som for eksempel sagsnummer, sagsbehandler, hvem der startede processen, og opgave- og procesfrist.
- kun: Vis opgave med vedhæftede dokumenter i en samlet PDF-fil. I opgaven, tryk .

- Se de dokumenter, der er vedhæftet på processen. I opgavedetaljerne, trykke på et dokument for at se det.
- Tilføj eller fjern dokumenter til eller fra opgaver.
- Rediger Microsoft Office-dokumenter (). Tryk **Rediger** i dokumentviseren for at redigere det aktuelle dokument.
- Annoter PDF-dokumenter. Tryk på **Rediger** i dokumentfremviseren for at redigere dokumentet.
- Eksportere dokumenter til andre apps. I dokumentfremviseren, tryk **Del** og vælg en app.
- Se hvem der gjorde hvad og hvornår under **Proceslog**.
- Besvar en opgave ved at bruge svarknapperne.
- Opret en ny chat (fra en opgave) eller Svar i en chat for at diskutere denne opgave.
- Arbejde offline.
- kun: Modtage meddelelser, når en opgave ændres, eller du får en ny opgave.

Bemærk: Det kan være nødvendigt, at du henter og installerer et visningsprogram fra App Store (for) eller Google Play (for) for at åbne visse dokumentformater.

Konfigurer WorkZone Mobile.

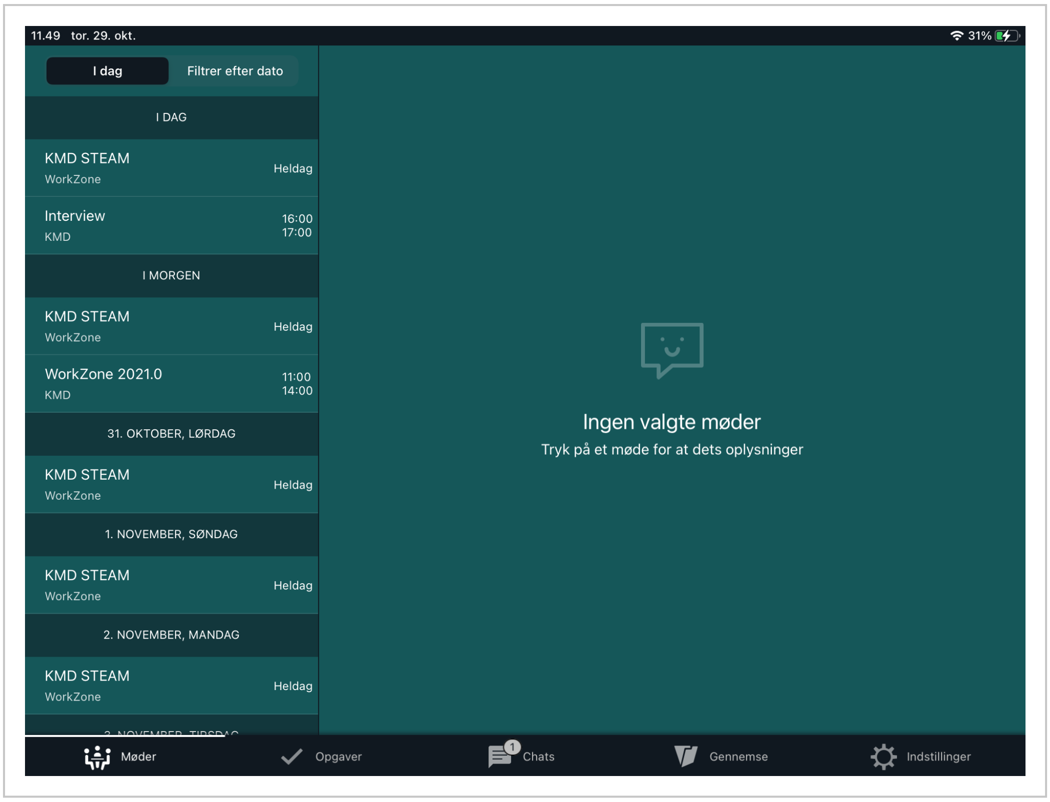
Se dine eksisterende WorkZone-chats og besvar dem, eller opret nye chats fra de tilknyttede opgaver. Se Arbejde med WorkZone-chats.

Brug WorkZone Mobile

Når du starter WorkZone Mobile første gang, vises din mødeliste Hvis du ikke har installeret WorkZone Meeting, vises din opgaveliste.

Hvordan navigerer jeg?

Navigationsruden vises nu i bunden af skærmen. Tryk på **Møder**, **Opgaver**, **Chats**, **Gennemse** eller **Indstillinger** alt efter hvad det er, du ønsker at gøre.



Hvordan opdaterer jeg lister?

Træk ned for at opdatere møde- og opgavelister.

Hvordan kan jeg modtage meddelelser?

Du kan vælge mellem at modtage meddelelser om de nye opgaver, der er tildelt til dig eller ændringer, der er blevet foretaget på dine eksisterende sager, f.eks, om ændringer på opgavefrister eller prioriteter. De meddelelser, du modtager, afhænger af din rolle i processen. For eksempler på meddelelser, se Om opgavemeddelelser i WorkZone Process onlinehjælpen.

Gå til **Indstillinger** > **Meddelelser** > **WorkZone**, og tryk **Tillad meddelelser** for at slå meddelelser til på din enhed.

Forudsætning:

- Push-meddelelser skal først aktiveres af din administrator i WorkZone Configurator. Se Procesmeddelelser i WorkZone Process Administrator Guide.

- For at synkronisere og opdatere opgaveliste og opgaveindhold automatisk, skal du slå meddelelser til. Hvis du ikke har slået meddelelser til, må du opdatere opgavelisten manuelt. Træk i opgavelisten for at opdatere den.

Bemærk: Meddelelser er ikke tilgængelige i modulet WorkZone Meeting.

Log på og log af

Log på

Når WorkZone Mobile startes, vises siden **Log på**.

- Hvis din organisation bruger OAuth2 til brugergodkendelse, vil et nyt browservindue åbne, hvor du bliver bedt om at angive brugernavn og password. Herefter vil dit password blive udfyldt automatisk for WorkZone Mobile.

1. Indtast URL for WorkZone i feltet **Server** og tryk **Næste**.
2. I dialogen **Log ind**, indtast dit brugernavn i feltet **Brugernavn** og dit password i feltet **Password** (oftest det samme som dit netværksbrugernavn og -password) og tryk **LOG IND**.

> **Tip:** For iOS-enheder kan du angive serverindstillingerne i indstillingerne for din enhed. Tryk på **Indstillinger** > WorkZone, og indtast URL'en for WorkZone i feltet **Adresse**. Næste gang du logger ind, vil du derfor ikke behøve at indtaste serveroplysninger igen.

Hvis WorkZone Mobile er installeret med et Moble Device Management-system (system til styring af mobile enheder), er serverindstillinger angivet automatisk. Du kan se indstillingerne på din enhed. Tryk **Indstillinger** > WorkZone > **Indstillinger** under **ADMINISTRATION AF MOBILE APPLIKATIONER**.

Udløb af adgangskode.

Ved login

Hvis din adgangskode til netværket er udløbet, vises fejlmeddelelsen "Forkert brugernavn eller adgangskode", når du prøver at logge ind på WorkZone. Skift adgangskode for netværket og indtast herefter din nye adgangskode i WorkZone.

Mens du bruger programmet

Hvis din netværksadgangskode udløber, men du arbejder i WorkZone, vises fejlmeddelelsen "Der er noget galt. Meddelelsen "Indtast venligst dit password for at fortsætte med at bruge WorkZone" vil blive vist. Tryk **OK** og siden **Log ind** åbnes. Skift din netværksadgangskode og indtast din nye adgangskode i WorkZone for at fortsætte dit arbejde hvor du slap.

Log ud

1. Tryk **Indstillinger**.
2. Tryk **Log ud**.

- For enheder, der bruger OAuth2-godkendelse, vil du blive sendt til et log-ud-webvindue. Tryk på det viste link for at vende tilbage til WorkZone Mobile-appen.

Arbejde offline

Du kan udføre en opgave, selvom du er offline. Opgaver gemmes under **USENDTE OPGAVER**. Dine usendte opgaver vil blive sendt, så snart du er online igen.

Opdater mødelisten efter du har været offline

Hvis du har været offline, træk ned for at opdatere mødelisten, når du er online igen. Denne handling vil opdatere møder, der er blevet ændret, mens du har været offline.

Filtrer møder efter en dato

Du skal være online for at filtrere dine møder efter en dato, der ligger i fortiden. Når du er offline, kan du se afsluttede møder, men kun hvis du hentede dem, mens du var online.

WorkZone Mobile gemmer møder offline fra den sidste dato, du valgte, da du var online, og 6 dage frem samt kommende møder.

Ændret forbindelsestilstand mens du arbejder på en opgave

Hvis forbindelsen til serveren ændres fra online til offline og omvendt, mens du arbejder på en opgave, får du besked og bliver spurgt, om du vil genindlæse opgaven.

- Hvis du trykker **Ja:** opgaven opdateres og du mister al ikke-gemt arbejde (for eksempel kommentarer), og du vil ikke kunne redigere dokumenter eller aktører.
- Hvis du trykker **Nej:** Du kan fortsætte med at arbejde på opgaven og besvare ved at bruge svarknapperne.

Konfigurer WorkZone Mobile

Du kan indstille WorkZone Mobile ved at trykke **Indstillinger** i navigationsruden.

Se oplysninger om release og login

På siden Indstillinger finder du oplysninger om det aktuelle WorkZone Mobile-versionsnummer og login-oplysninger.

> **Tip:** Hvis du kontakter KMD Support angående et problem med WorkZone Mobile, bedes du inkludere et skærmbillede af disse oplysninger.

Automatisk fejlrapportering

Aktiver denne indstilling til for automatisk at dele fejlrapporter. Rapporterede fejl indeholder ikke personlige data.

Del analyse

Aktiver denne indstilling for automatisk at sende fejlrapporter (såsom systemdata om netværksfejl, fejl i overførsel i baggrunden og andre relevante data). Brugernes fejllogs indeholder ingen personlige data. Funktionen er som standard slået fra.

Rediger mødedokumenter

Vælg standardfunktionsmåden for dokumentredigering af mødedokumenter. Du kan vælge at redigere det oprindelige dokument eller oprette en kopi til redigering, når du trykker på knappen **Rediger** i dokumentvisningen.

Vælg **Altid** for at kunne vælge mellem mulighederne, når du trykker på knappen **Rediger**.

Antal linjer, der vises i titlen

Hvis titlerne på dine opgaver og møder er for lange til en linje, kan du hæve antallet af viste linjer. For at gøre dette, tryk . For at fjerne antal viste linjer, tryk .

Vi kommende opgaver

Vælg denne, vil du vil se kommende opgaver i din opgaveliste. Funktionen er som standard slået til.

Vis afsluttede opgaver

Vælg denne, hvis du vil se afsluttede opgaver i din opgaveliste. Funktionen er som standard slået til.

Behold afsluttede opgaver

Denne funktion kan kun vælges, hvis indstillingen **Vis afsluttede opgaver** er slået til. Angiv hvor mange dage eller uger, du vil bevare afsluttede opgaver i din opgaveliste. Som udgangspunkt er der angivet 2 dage.

Se brugervejledning

Klik **Hjælp** for at åbne WorkZone Mobile Brugervejledning.

Arbejde med møder

Forudsætning: WorkZone for OfficeWorkZone 365.

Du kan se dine WorkZone-møder, der er oprettet i Outlook via WorkZone for Office eller WorkZone 365 (enten skrivebordsprogrammet eller webudgaven).

WorkZone Mobile åbner med liste over dagens forestående møder vist øverst og derefter møder for dagen efter og senere møder. Du kan også trykke på **Filtrer efter dato** og derefter vælge en dato for at se møder 7 dage frem fra den valgte dato.

- Tryk på et møde for at se mødets detaljer.
- Træk ned for at opdatere mødelisten, så du kan se møder, der er blevet oprettet eller ændret efter du loggede ind (eller efter du opdaterede sidst).

Vis dokumenter

Forudsætning: WorkZone PDF.

Møde kan have dokumenter vedhæftet på dagsordenspunkter.

- Tryk på dokumenttitlen for at se dokumentets indhold.

Dokumentet åbner i PDF-format, bortset fra Excel-dokumenter og nogle tekstfil-formater, såsom `TXT` og `XML`, der åbner i Quick Look. Dokumenter, der ikke kan konverteres til PDF, for eksempel video- og lydfiler, åbner i deres oprindelige format.

Rediger Microsoft Office-dokumenter ()

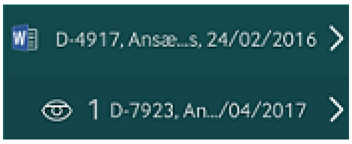
Forudsætning: Du skal have Microsoft Office 365 installeret på din enhed.

Du kan kun redigere dokumenter, når du er online.

1. Tryk på det dokument, du vil redigere.
2. Tryk Rediger i dokumentfremviseren for at redigere dokumentet i den tilsvarende Office-applikation. Du kan vælge at redigere dokumentet eller oprette en kopi af dokumentet og derefter redigere kopien. Kopien er kun synlig for dig.
3. Foretag dine ændringer og tryk , tryk derefter for vende tilbage til mødet.

   - Hvis du ikke har slået **Automatisk lagring** til i din Office-app: Foretag dine ændringer og gem dokumentet. Tryk derefter , tryk derefter for at vende tilbage til mødet.

Hvis du har oprettet en kopi, gemmes den på dagsordenspunktet på mødesagen i WorkZone med dig som sagsbehandler. Du kan se kopien af dokumentet på mødet under det oprindelige dokument.



Ikonet angiver det antal medarbejdere, der kan tilgå din dokumentkopi. Som standard er det kun dig, der jar adgang til dokumentkopien. Du kan eventuelt åbne din dokumentkopi i WorkZone Client og give andre medarbejdere adgang til den. Se Administrer adgangrettigheder i WorkZone Clienten til Brugervejledning.

Bemærk:

- Du kan kun oprette én kopi af hvert dokument. Næste gang, du vil annotere dokumentet, åbnes din dokumentkopi. Kun hvis du har ændret kopiens tilstand til **Låst** eller **Arkiveret** i WorkZone Client, vil der blive oprettet en ny kopi.
- Du kan ikke oprette en kopi af en kopi.

Hvis dokumentet ikke er et Office-dokument, kan du annotere en PDF-kopi af dokumentet (se Annoter PDF-dokumenter), eller du kan eksportere dokumentet til en tilsvarende app, hvor du kan redigere dokumentet (se Del dokumenter vha. andre apps.).

Se også: Du kan ikke redigere Office-dokumenter - Apps til Office 365 åbner ikke dokumenterne

Annoter PDF-dokumenter

Du kan annotere ikke-Microsoft Office-dokumenter, for eksempel, PDF, MSG, PNG osv. i PDF-format ved brug af den indbyggede PDF-editor. Størrelsen på PDF-dokumenter, der kan annoteres afhænger af din organisations kapacitet og internetforbindelsen.

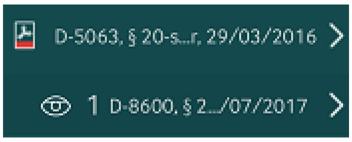
Vigtigt:

- Du vil ikke kunne gemme dine ændringer i et stort PDF-dokument. Hvis du prøver at gemme dine ændringer og beskeden "opdaterer 0 ud af 1" vises i statuslinjen i længere tid, anbefaler vi, at du lukker, sletter og derefter geninstallerer appen.
- Hvis en anden bruger redigerer og gemme det samme PDF-dokument før du nåede at gemme dine ændringer, modtager du en meddelelse om dokumentkonflikten, hvor du har mulighed for at kassere dine ændringer eller at overskrive den anden brugers ændringer. Hvis udkastversionering er slået til for din organisation, kan du altid se og gendanne tidligere versioner af dokumentet i WorkZone Client. Se WorkZone Client Brugervejledning.

1. Tryk på det dokument, du vil annotere.
2. Tryk på **Rediger** i dokumentfremviseren for at annotere dokumentet i PDF-format. En PDF-kopi af dokumentet oprettes og åbner i PDF-editoren.
    - Hvis det originale dokument er et PDF-dokument, kan du vælge at annotere det originale dokument eller oprette en privat kopi til annotation.
    - Kopien er kun synlig for dig.
3. Tryk på **Rediger** i PDF-editoren for at få vist en værktøjslinje med forskellige muligheder for at annotere. Tryk på en knap i værktøjslinjen og tryk derefter på det sted i dokumentet, hvor du vil annotere det. Du kan, for eksempel trykke på **Huskeseddel** for at føje en huskeseddel til et bestemt afsnit i dokumentet. Se Brug PDF-redigeringsprogram (iOS-version).
4. Tilføj dine annotationer og tryk derefter på **Gem**.
5. Tryk på **Tilbage** for at vende tilbage til mødet.

Bemærk: Du kan kun oprette én kopi af hvert dokument. Næste gang du vil annotere et dokument, vil den eksisterende kopi blive brugt. Kun hvis du har ændret kopiens tilstand til **Låst** eller **Arkiveret** i WorkZone Client, vil der blive oprettet en ny kopi.

Kopien gemmes på dagsordenspunktet på mødesagen i WorkZone med dig som sagsbehandler. I mødet lam di se. at din personlige kopi er blevet tilføjet under det oprindelige dokument.



Ikonet angiver det antal medarbejdere, der kan tilgå din dokumentkopi. Som standard er det kun dig, der jar adgang til dokumentkopien. Du kan eventuelt åbne din dokumentkopi i WorkZone Client og give andre medarbejdere adgang til den. Se Administrer adgangrettigheder i WorkZone Clienten til Brugervejledning.

Del dokumenter vha. andre apps.

1. Tryk på det dokument, som du vil eksportere.
2. I dokumentfremviseren, tryk **Del** og vælg en relevant app.

Den valgte app åbner en kopi af dokumentet. Du kan ikke gemme dokumentet tilbage på WorkZone.

Arbejde med opgaver

Når du har modtaget en opgave i WorkZone Mobile, kan du besvare den. Alt afhængigt af hvilken type opgave, der er tale om, kan du, for eksempel, Accepter, Videresend, Spring over, Godkend eller Afvis eller bekræfte opgaven.

Før du svarer, kan du redigere dokumenterne på en opgave, tilføje eller fjerne dokumenter og aktører eller skrive en kommentar. Du kan også Ranger dine opgaver eller Opret en ny chat (fra en opgave) for at diskutere denne opgaveproces med relevante deltagere.

Hvis du er stedfortræder for en bruger, kan du nu skifte til denne brugers opgaveliste og Arbejde med dine stedfortræderopgaver.

Vis en opgave

1. Tryk **Opgaver** i navigationsruden for at få vist en liste over opgaver.
2. Tryk på en opgave for at se eller redigere opgaveoplysningerne.
3. Tryk på en svar-knappen for at besvare en opgave eller for at foretage ændringer på en opgave eller dens tilhørende dokumenter.

Besvar en opgave

Nedenfor er der nogle eksempler på, hvordan du kan besvare opgaver inden for forskellige procestyper.

Accepter

Hvis du accepterer ejerskab af, for eksempel, en fordelingsopgave, bliver du sagsbehandler.

Videresend

Hvis du ikke kan eller ikke ønsker at udføre en opgave, kan du videresende den til en anden.

1. Tryk **Videresend til**.
2. Start med at skrive et navn, og vælg herefter den aktuelle opgave fra listen.
3. Tryk på **Videresend**.

Spring over

Du kan springe nogle opgavetyper over. Hvis du, for eksempel, springer en opgave i en forelæggelsesproces over, videresendes opgaven til næste person i godkendelsesrækkefølgen.

Godkend eller Afvis

En opgave kan bestå i at godkende eller afvise noget, for eksempel et dokument. Sagbehandleren modtager en meddelelse om din handling og processen kan startes om, eller flyttes til næste fase.

OK

Hvis du som procesejer modtager en besvarelse på din proces, beder systemet dig om at bekræfte modtagelse af besvarelsen. Opgaverne opdateres derefter i oversigten **Processer** og i Outlook, og processen lukkes.

Når du har besvaret en opgave, vises den næste åbne opgave. Hvis der ikke er nogen åbne opgaver, vises opgavelisten i stedet.

Andre handlinger på en opgave

Her kan du se eksempler på handlinger, som du kan udføre på en opgave.

Filtrér dine opgaver med brugerdefinerede filtre

Forudsætning:

- Funktionaliteten for brugerdefinerede filtre understøttes fra WorkZone Mobile version 2021.1 og fremad.
- Din administrator skal først aktivere **Brugerdefinerede filtre** i WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task** > Custom filters). Se Feature Settings i WorkZone Configurator Administrator Guide.

På din opgaveliste kan du anvende brugerdefinerede filtre, som er tilgængelige for dig. Brugerdefinerede filtre er gemte søgelister (forespørgsler), der er oprettet i WorkZone OData QueryBuilder.

> Vigtigt: En gemt forespørgsel bliver tilgængelig for dig som et brugerdefineret filter, hvis det har entiteten **WzpUserTasks** og er blevet delt med dig af den bruger, der har oprettet filtret (eller hvis du selv har oprettet det).

Læs mere om at [oprette, redigere og dele forespørgsler](#) i WorkZone Process Administrator Guide.

- Som standard anvendes der ingen filtre.
- Hvis du ikke har nogle tilgængelige filtre, vil knappen ⊽ ikke blive vist.

1. Tryk ⊽ øverst i opgavelisten.
2. Fra en liste over tilgængelige brugerdefinerede filtre, tryk på det filter, du vil anvende.

   -Eller-

   For at fjerne det eksisterende filer, tryk **Intet filter**.

3. Tryk **Færdig** i iOS, eller **OK** i Android. Det valgte filter er nu anvendt.

> Vigtigt: Du kan kun se de opgaver, der er tildelt dig.

Arbejde med dine stedfortræderopgaver

> **Forudsætning:**
>
> - Arbejde med dine stedfortræderopgaver understøttes fra WorkZone Mobile version 2021.1 og frem.
> - Din administrator skal først aktivere Arbejde med dine stedfortræderopgaver i WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task** > Delegated tasks). Se Feature Settings i WorkZone Configurator Administrator Guide.

Hvis du er stedfortræder for en bruger, kan du nu skifte til denne brugers opgaveliste og arbejde med deres opgaver. Læs mere om stedfortrædere i WorkZone Client Brugervejledning.

- Du kan kun arbejde med en opgaveliste (altså enten dine egne eller en anden brugers opgaver) ad gangen. Som standard er det dine egne opgaver, der vises.
- Indstillingen **Mine opgaver** vises kun, hvis du er stedfortræder for mindst en bruger.

1. Tryk **Mine opgaver** øverst i opgavelisten.
2. Fra en liste over brugere, som du er stedfortræder for, tryk på den bruger, hvis opgaver du vil arbejde med.

   -Eller-

   For at skifte tilbage til dine egne opgaver, tryk **Mine opgaver**.
3. Tryk **Færdig** i eller **OK** i . Opgavelisten for den valgte bruger vises nu.

Ranger dine opgaver

Forudsætning: WorkZone Process 2019.3 eller senere.

Når der startes en ny proces, tildeles brugeropgaver automatisk den næste tilgængelige plads i rækkefølgen. Tryk **Rangorden** øverst i listen over dine opgaver for at sortere dine opgaver efter den rækkefølge, de har i WorkZone Client. Se WorkZone ClientBruger-vejledning for om rækkefølge/rangorden.

Du kan ændre rækkefølgen på dine opgaver for at angive den rækkefølge, de skal behand-les i.

Vigtigt: Du kan ikke ændre rækkefølgen på en afventende opgave.

1. Tryk **Rækkefølge** øverst i listen.
2. Tryk **Rediger**.
3. Tryk ved siden den opgave, du vil omarrangere, og træk og slip opgaven, så den passer med den ønskede rækkefølge.
4. Tryk **Gem ændringer**.

Vis opgave som PDF ()

Forudsætning:

- WorkZone PDF.
- Du skal være online for at få vist din opgave som en PDF.
- Dokumenter skal have et filformat, der tillader konvertering til PDF. Se Understøttede dokumentformater.
- Dokumenter skal være ubeskyttede.

Tryk i toppen for at vise en opsummering af din opgave og vedhæftede dokumenter i en samlet PDF-fil.

- PDF'en er skrivebeskyttet.

Vis opgavedokumenter

> **Forudsætning:** WorkZone PDF.

De fleste opgaver har vedhæftede dokumenter.

- Tryk på dokumenttitlen for at se det indhold.

Dokumentet åbner i PDF-format med undtagelse af Excel-dokumenter og nogle filformater som for eksempel TXT og XML, som åbner i Quick Look. Dokumenter, der ikke kan konverteres til PDF, for eksempel video- og lydfiler, åbner i deres oprindelige format. Se Understøttede dokumentformater

- Fra dokumentvisningen, tryk og i toppen for at åbne forrige eller næste dokument på den pågældende opgave.
- Stryg op og ned for at gå til næste eller forrige side i det åbnede dokument.

Tilføj eller fjern dokumenter

1. Tryk **Rediger**, og tryk derefter:

Søg	Søg i alle dokumenter på den aktuelle sag og tilføj dokumenter.
Tilføj	Tilføj et dokument fra din enhed. Du kan: • Gennemse og tilføje et dokument fra din enhed. • Tilføje billeder fra dit fotobibliotek. • Du kan også tage et billede eller optage en video med kameraet i din telefon og føje det til opgaven. **Bemærk:** Du kan kun tilføje dokumenter, når du er online.
Filtre	Anvend filtre på dine dokumenter (ikke arkiverede eller afsluttede) og tilføj dokumenter. Hvis du har føjet arkiverede eller afsluttede dokumenter til dine **Favoritdokumenter**, vises disse, når du anvender dette filter. Bemærk at denne funktion kun er gældende for de udvidede processer.

Slet	Fjern dokumenter fra opgaven.

2. Tryk for at vende tilbage til opgaven og derefter gemme eller annullere dine ændringer.

Rediger Microsoft Office-dokumenter ()

Forudsætning: Du skal have Microsoft Office 365 installeret på din enhed.

Bemærk: Du kan kun redigere dokumenter, når du er online.

1. Tryk på det dokument, du vil redigere.
2. Tryk **Rediger** i dokumentfremviseren for at åbne det dokument, du gerne vil redigere i den tilsvarende Office-applikation.
3. Foretag dine ændringer og tryk for at lukke dokumentet. Tryk derefter for at vende tilbage til opgaven.
   - Hvis du ikke har slået **Automatisk lagring** til i din Office-app: Foretag dine ændringer og gem dokumentet. Tryk herefter for at lukke dokumentet og tryk for at vende tilbage til opgaven.

Hvis dokumentet ikke er et Office-dokument, kan du eksportere dokumentet til en relevant app for at redigere det. Se Del dokumenter vha. andre apps..

Se også: Du kan ikke redigere Office-dokumenter - Apps til Office 365 åbner ikke dokumenterne

Annoter PDF-dokumenter

Du kan annotere PDF-dokumenter. Størrelsen på PDF-dokumenter, der kan annoteres afhænger af din organisations kapacitet og internetforbindelsen.

Vigtigt:

- Du vil ikke kunne gemme dine ændringer i et stort PDF-dokument. Hvis du prøver at gemme dine ændringer og beskeden "opdaterer 0 ud af 1" vises i statuslinjen i længere tid, anbefaler vi, at du lukker, sletter og derefter geninstallerer appen.
- Hvis en anden bruger redigerer og gemme det samme PDF-dokument før du nåede at gemme dine ændringer, modtager du en meddelelse om dokumentkonflikten, hvor du har mulighed for at kassere dine ændringer eller at overskrive den anden brugers ændringer. Hvis udkastversionering er slået til for din organisation, kan du altid se og gendanne tidligere versioner af dokumentet i WorkZone Client. Se WorkZone Client Brugervejledning.

1. Tryk på det PDF-dokument, du vil annotere.
2. I dokumentviseren, tryk **Rediger**. Dokumentet åbner i PDF-editoren.
3. I PDF-redigeringsprogrammet, tryk **Rediger** for at åbne en værktøjslinje med forskellige annoteringsindstillinger. Tryk på den relevante knap i værktøjslinjen og tryk herefter dér i dokumentet, hvor du vil lave en annotering. Du kan, for eksempel trykke på **Huskeseddel** for at føje en huskeseddel til et bestemt afsnit i dokumentet. Se Brug PDF-redigeringsprogram (iOS-version).
4. Tilføj dine annotationer og tryk derefter **Gem**.

Del dokumenter vha. andre apps.

1. Tryk på det dokument, du vil dele.
2. I dokumentfremviseren, tryk **Del** og vælg en relevant app.

Den valgte app åbner en kopi af dokumentet. Bemærk, at du ikke kan gemme dokumentet tilbage i WorkZone.

Tilføj eller fjern aktører

1. Tryk **Rediger** og tryk herefter:

Søg	Søg efter medarbejdere og enheder, der har registreret mail-oplysninger, og tilføje dem som aktører.

Aktørsekvens	Søg i aktørsekvenser og tilføj sekvenser. Bemærk at denne funktion kun er gældende for de udvidede processer.
Slet	Fjern aktører.

2. Tryk på for at vende tilbage til opgaven og gemme eller annullere dine ændringer.

Ændre rækkefølgen af dokumenter og aktører

1. Tryk **Rediger**, og tryk herefter **Skift rækkefølge**.
2. Træk et dokument eller en aktør til en ny placering for at ændre rækkefølgen på, for eksempel, dokumenter og godkendere på en forelæggelsesopgave.
3. Tryk på for at vende tilbage til opgaven og gemme eller annullere dine ændringer.

Om opgavefrister og prioriteter

Opgaverne på opgavelisten er markeret i forhold til frister og prioriteter. Som standard er opgaverne sorteret efter frist. Tryk **Prioritet** eller **Opdateret** øverst i listen, hvis du vil sortere opgaverne efter prioritet eller hvornår dokumentet sidst blev opdateret-

Frister

En opgave er markeret med en farvet linje til højre.

- Grøn – Processen er i gang.
- Gul – Procesfristen nærmer sig.
- Rød – Procesfristen er overskredet.

Frister vises ved siden af opgaverne. Åbn en opgave for at se flere oplysninger om opgavens frist.

Prioriteter

- Et udråbstegn "!" Angiver at denne opgave har høj prioritet.
- Et punkttegn angiver at denne opgave har lav prioritet.

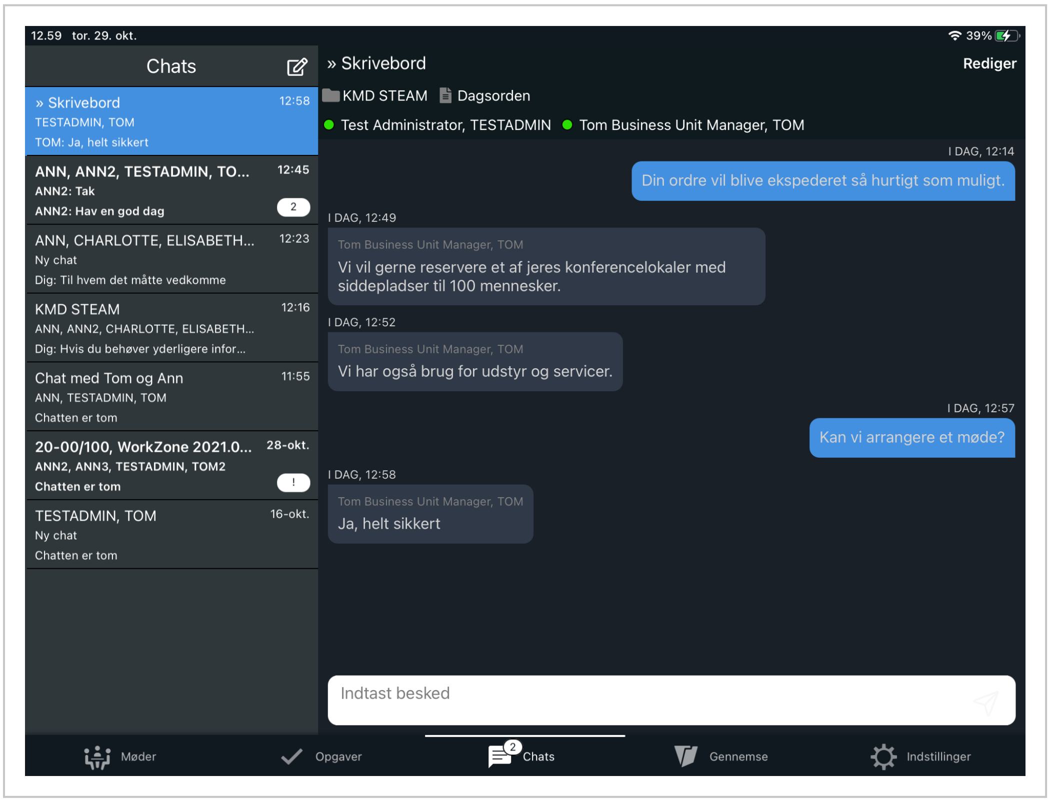
Bemærk: Kun udvidede processer kan have prioriteter.

Arbejde med WorkZone-chats

Forudsætning:

- Chatfunktionen understøttes fra WorkZone Mobile version 2020.2.
- **Chat**-modulet skal først aktiveres af din administrator i WorkZone Configurator, både for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) og WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). Se Feature Settings i WorkZone Configurator Administrator Guide.

I WorkZone Mobile, kan du se dine eksisterende chats og besvare dem, oprette nye chats, administrere chathenvisninger (tilføje eller fjerne sager, dokumenter og deltagere), forhåndsvise og redigere chatdokumenter (kun redigerbare dokumenter) og se metadata for chatdokumenter og sager. Se WorkZone Client Brugervejledning for yderligere oplysninger om WorkZone Chat.



Se dine chats

1. Tryk **Chats** i navigationsruden for at se en liste over chats, hvor du enten er opretter eller deltager. Dine chats sorteres efter hvornår de sidst blev opdateret.
2. Tryk på en chat for at åbne den. I chatten kan du se chatoplysninger såsom deltagere, henvisninger og beskeder.

> **Tip:**
>
> - Der vises et tal på ikonet for **Chats** i navigationsruden, som indikerer hvor mange ulæste beskeder, du har samlet over alle dine chats.
> - Der vises også et tal på individuelle chats i chatlisten, som indikerer hvor mange ulæste beskeder, du har i den pågældende chat.
> - En grøn prik ved siden af en brugers navn i chatten, indikerer at vedkommende er online. En grå prik indikerer at brugeren er offline.

Svar i en chat

1. Tryk **Chats** i navigationsruden.
2. Tryk på den chat, du vil besvare.
3. Indtast din besked i inputfeltet, og tryk eller .

> **Tip:** Du kan fortsætte med at skrive dine chatbeskeder, mens du er offline. De sendes automatisk næste gang du er online.

Opret en ny chat (fra en opgave)

1. Tryk **Opgaver** i navigationsruden.
2. Tryk på den opgave, som du vil oprette en chat for.
3. Tryk i øverste højre hjørne. Der oprettes nu en ny chat om den pågældende opgave. Opgavens sag og dertilhørende dokumenter tilføjes automatisk som chathenvisninger.

Tip:

- Hvis der allerede eksisterer en chat om denne procesopgave, åbnes den i stedet.
- Du kan tilføje eller fjerne chatsager, -dokumenter eller -deltagere efter behov. Se Administrer chathenvisninger.
- Hvis opgavens sag eller tilhørende dokumenter beskyttes af et indblik, er det kun brugere med pågældende adgangsrettigheder, der kan se sagen eller eventuelle dokumenter i chathenvisningerne.

Opret en ny chat (uden en opgave)

1. Tryk **Chats** i navigationsruden.
2. Tryk i listen **Chats** (øverste venstre hjørne på skærmvisningen). Du bedes derefter om at tilføje chatdeltagere.
3. Tilføj chatdeltagere og tryk **Færdig**. Den nye chat oprettes.
4. Du kan eventuelt trykke **Rediger** for at tilføje chatsager og -dokumenter. Se Administrer chathenvisninger.

Administrer chathenvisninger

Du kan tilføje eller fjerne chatsager, -dokumenter eller -deltagere i dine chats.

- Du skan være online for at kunne fjerne chatsager, -dokumenter eller -deltagere.

1. Tryk på den chat, hvorpå du vil tilføje eller fjerne dokumenter, sager eller deltagere.
2. Tryk **Rediger** under chattens titel.
3. Vælg den sag, det dokument eller den bruger, som du vil fjerne eller tilføje.

   - For at tilføje: Tryk **Tilføj deltager**, **Tilføj dokument**, eller **Tilføj sag** og indtast derefter navnet på den sag, det dokument eller den deltager, du vil tilføje.

- For at fjerne: Tryk ⊖ ved siden af den eksisterende sag, dokument eller bruger for at fjerne dem fra listen.

4. Tryk **Færdig**.

Forhåndsvisning af chatdokumenter

1. Tryk på den chat, der indeholder det dokument, du vil se en forhåndsvining af.
2. Tryk på dokumenttitlen for at se dokumentets indhold.

> **Tip:**
>
> - Tryk og øverst på skærmen for at se forrige eller næste dokument i den aktuelle chat
> - Stryg op og ned for at gå til næste eller forrige side i det åbnede dokument.

3. Tryk **Tilbage** for at lukke forhåndsvisningen og gå tilbage til chatten.

Rediger et chatdokument

- Du skal være online for at kunne redigere chatdokumenter.

1. Tryk på den chat, der indeholder det dokument, du vil redigere.
2. Tryk på dokumentets titel.
3. Tryk i øverste højre hjørne for at redigere dokumentet.

> **Bemærk:** Det kan være nødvendigt, at du henter en tilsvarende Microsoft Office-app for at kunne redigere visse dokumentformater.

4. Gem dine ændringer og tryk **Tilbage** for at vende tilbage til chatten.

Se oplysninger om chatdokumenter og -sager

Du kan se oplysninger om dokumenter og sager i dine chats.

1. Tryk på en chat med et dokument eller en sag.

   - For dokumenter:

     a. Tryk på dokumenttitlen for at åbne dokumentet i visnings-tilstand.

        > **Tip:** Tryk og øverst på skærmen for at se forrige eller næste dokument i den aktuelle chat.

     b. Udfør den relevante handling:

        - For at se metadata for et dokument: Tryk i øverste højre hjørne. Dokumentets metadata vises. Tryk for at vende tilbage til doku-mentvisningen.
        - For at redigere dette dokument: Tryk i det øverste højre hjørne.
        - For at se den tilknyttede sag: Tryk i øverste højre hjørne. Tryk **Tilbage** for at vende tilbage til det åbne dokument.

   - For sager:

     a. Tryk på sagstitlen for at åbne dens detaljer.

        > **Tip:** Tryk og øverst på skærmen for at se den for-rige eller næste sag i den aktuelle chat.

     b. Under **Dokumenter**, kan du se eventuelle dokumenter på den aktuelle sag.

Tip:

- Tryk på et dokument for at se en forhåndsvisning af det, redigere det eller for at se dokumentets metadata.

-Eller-

- Tryk **Metadata** for at se sagens metadata (du skal være online for at kunne se sagens metadata).

2. Tryk **Tilbage** for at vende tilbage til chatten.

Gennemse WorkZone-sager og -dokumenter

Forudsætning:

- Funktionen Gennemse (På nuværende tidspunkt tilgængelig i en eksperimentel udgave) understøttes fra WorkZone version 2021.0.
- Modulet **Gennemse** skal først aktiveres af din administrator i WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). Se **Feature Settings** i WorkZone Configurator Administrator Guide.
- Du skal være online for at kunne bruge modulet **Gennemse**.

Du kan hurtigt gennemse dine sagslister eller dokumentlister (altså dine WorkZone-lister, herunder også foruddefinerede filtre og brugerdefinerede filtre) og se elementer i dem. Se WorkZone Client Brugervejledning for yderligere oplysninger om WorkZone-lister.

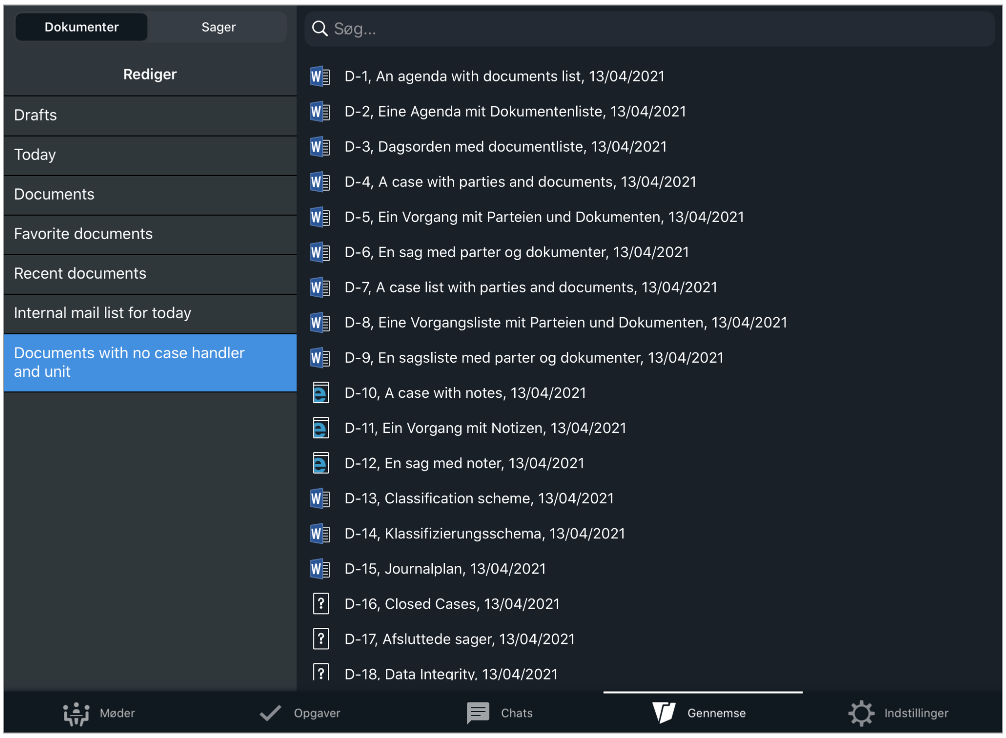
Du kan hurtigt søge efter sager og dokumenter, der er tilgængelige for dig i WorkZone og se deres oplysninger.

- På sager: Du kan se dokumenter på den valgte sag, forhåndsvise eller redigere dokumenternes indhold (i redigerbare dokumenter), se deres metadata og se metadata for selve sagen.
- På dokumenter: Du kan se en forhåndsvisning eller redigere dokumenterne (hvis de er redigerbare) og se deres metadata og navigere til de tilknyttede sager og se deres oplysninger og metadata.

Vigtigt:

- For at redigere visse dokumentformater, kan det være nødvendigt at installere et tilsvarende Office-program.

- I Gennemse-funktionen fungerer almindelige WorkZone-adgangsregler: Du vil kun kunne se og redigere de elementer, du har adgang til.



Søg på sager og dokumenter

Du kan søge efter WorkZone-sager og -dokumenter og se deres indhold og oplysninger.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på den relevante fane (**Dokumenter** eller **Sager**). Herefter vil du få vist dine WorkZone-lister over dokumenter eller sager (afhængig af den valgte fane), herunder også dine foruddefinerede filtre og brugerdefinerede filter.
3. Tryk på den relevante liste for at se elementer i den.

> Tip: For lister med mange elementer, kan du bruge søgefeltet til at finde et dokument eller en sag i listen.

4. Tryk på en sag eller et dokument for at se deres oplysninger og henvisninger. Se Se sagsoplysninger og Se dokumentoplysninger.

Tilpas dine viste lister

Du kan tilpasse hvilke WorkZone-lister, der vil blive vist, når du åbner modulet Gennemse, eller omarrangere listernes visningsrækkefølge.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på fanen **Sager** eller **Dokumenter**.
3. Tryk **Rediger**. Du vil herefter se en todelt liste over dine eksisterende WorkZone-lister.
    - **Valgte filtre**: viser de af dine WorkZone-lister, der er markeret til at blive vist som standard.
    - **Søgeresultater**: viser foruddefinerede filtre (afhængig af hvilken fane, du har valgt), som du kan markere til at blive vist, når du åbner modulet Gennemse.
4. For at tilføje eller fjerne en liste fra dine valgte filtre, eller for at ændre rækkefølgen på dine viste lister, tryk og hold ved siden af en liste og træk den til en ny placering.

> **Tip:**
>
> - Tryk hurtigt to gange på en liste for at flytte den fra **Valgte filtre** til **Søgeresultater** - Du kan også gøre det den anden vej.
> - Tryk **Foruddefinerede filtre** eller **Brugerdefinerede filtre**, og tast en søgning i søgefeltet for at søge efter et bestemt foruddefineret filter eller brugerdefineret filter.
>   - Foruddefinerede filtre er dine WorkZone-lister der er automatisk indstillet af din organisation. Søg efter foruddefinerede filtre skelner mellem store og små bogstaver

> - Brugerdefinerede filtre er dine WorkZone-lister, herunder gemte søgninger, som er oprettet i WorkZone Client. Søgning efter brugerdefinerede filtre skelner mellem store og små bogstaver.

5. Tryk **Færdig** for at gemme dine ændringer, eller tryk **Annuller** for at kassere dem.

Se sagsoplysninger

I modulet **Gennemse** kan du se sager, der er tilgængelige for dig og deres metadata, se dokumenter på e valgte sager, se en forhåndsvisning af og redigere deres indhold (kun i redigerbare dokumenter) og se dokumentmetadata.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på fanen **Sager**. Der vises derefter en liste over WorkZone-sagslister, som du har adgang til.
3. Tryk på den relevante sagsliste og vælg den relevante sag. Eventuelt Søg på sager og dokumenter.
4. Tryk **Dokumenter** for at se alle dokumenter (som du har adgang til) på denne sag.

> **Tip:**
>
> - Tryk på et dokument for at se en forhåndsvisning af det, redigere det (hvis det er redigerbart) eller se dokumentets metadata. Se trin 4-5 i Se dokumentoplysninger.
> - Tryk **Metadata** for at se metadata for denne sag.

5. Tryk **Tilbage** for at gå tilbage til den valgte sagsliste.

Se dokumentoplysninger

Du kan se en forhåndsvisning af WorkZone-dokumenter, som er tilgængelige for dig, redigere dem (hvis de er redigerbare), se deres metadata og gå til de tilknyttede sager, hvor du kan se deres oplysninger og metadata.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på fanen **Dokumenter**. Der vises derefter en liste over WorkZone-dokumentlister, som du har adgang til.
3. Tryk på den relevante dokumentliste og vælg det relevante dokument. Eventuelt Søg på sager og dokumenter. Dokumentet åbning derefter i visningstilstand.
4. Udfør den relevante handling:
    - For at se metadata for dette dokument: Tryk i øverste højre hjørne. Tryk for at vende tilbage til dokumentvisningen.
    - For at redigere dokumentet (Hvis det er redigerbart): Tryk i øverste højre hjørne.

      > **Bemærk:** Det kan være nødvendigt, at du henter en tilsvarende Office-app for at kunne redigere visse dokumentformater.

    - For at gå til den tilknyttede sag og se sagens oplysninger og metadata: Tryk i øverste højre hjørne.
5. Tryk **Tilbage** for at vende tilbage til fanen **Dokumenter**.

Brug PDF-redigeringsprogram (iOS-version)

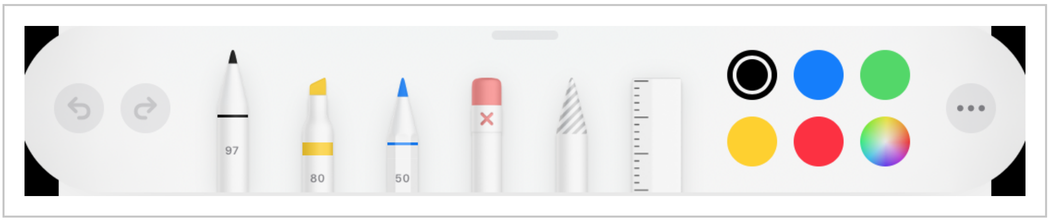
Du kan annotere PDF-dokumenter med en PDF-editor.

1. I dokumentviseren, tryk **Rediger** for at åbne PDF-redigeringsprogrammet.
2. Tryk
3. Tryk **Rediger** for at åbne værktøjslinjen for annotationer.
4. Tryk på det værktøj, du vil anvende, og tryk derefter på det sted i dokumentet, hvor du vil tilføje en annotation.

> Tip: Du kan søge efter tekster i dokumentet og se omridset og annotationer, der gør navigeringen hurtigere.

> Tip: Tryk på det valgte redigeringsværktøj igen for at ændre yderligere parametre såsom farve, tykkelse, gennemsigtighed, fyldfarve, farve på strøg, rammefarve og tekststørrelse, hvor de kan anvendes. Når du har tilpasset de relevante indstillinger, tryk **Færdig** for at gemme dine ændringer.

	Tilføj en huskeseddel.
	Fremhæv den markerede tekst. Tryk og træk over den tekst, der skal fremhæves. • Tryk to gange på for at redigere farven og gennemsigtigheden, som teksten fremhæves i.
	Gennemstreg den valgte markerede tekst. Tryk og træk over den tekst, der skal streges igennem. • Tryk to gange på for redigere indstillinger for den gennemstregede tekst såsom farve, tykkelse og gennemsigtighed.
	Understreg den valgte tekst med en lige linje. Tryk og træk over den tekst, der skal understreges. • Tryk to gange på for at redigere indstillingerne for den understregede tekst såsom farve, tykkelse og gennemsigtighed.
	Understreg den valgte tekst med en bølget linje. Tryk og træk over den tekst, der skal understreges. • Tryk to gange på for at redigere indstillingerne for den understregede tekst såsom farve, tykkelse og gennemsigtighed.
	Tilføj underskrift. Du kan oprette en ny underskrift eller bruge en foruddefineret. I dialogen **Underskrifter**: 1. Tryk på en eksisterende signatur, du vil bruge. -Eller- 2. Tryk **Ny signatur** for at oprette en signatur for flere brugere, eller tryk **One Time Signature** for at oprette en signatur, der kun bruges en gang. Tilføj din signatur under **Sign here** og tryk **Sign**.
	Tegn i frihånd. • Tryk på det relevante tegneværktøj i værktøjslinjen med tegneværktøj nederst i skærmen, for at vælge det eller redigere parametre for det.



Bemærk: WorkZone Mobile-versionen til Citrix har flere forskellige simple og gratis værktøj til at tegne med end den almindelige version.

Slet tidligere håndtegnede illustrationer eller tekstmarkører.

Tilføj tekst.

- Tryk to gange på for at redigere farve, rammefarve, tykkelse, tekststørrelse og gennemsigtighed.

Tegn pile.

- Tryk to gange på for at redigere pilens farve, tykkelse og gennemsigtighed.

Tegn lige streger.

- Tryk to gange på for at redigere farve, tykkelse og gennemsigtighed.

Tegn rektangler.

- Tryk to gange på for at redigere farve på strøg, fyldfarve, tykkelse og gennemsigtighed.

Tegn ellipser

- Tryk to gange på for at redigere farve på strøg, fyldfarve, tykkelse og gennemsigtighed.

Tegn polygoner

1. Tryk på ikonet for redigering.

2. Vælg farve på strøg, fyldfarve, tykkelse og indstillinger for gennemsigtighed.
3. Tryk **Færdig** for at tegne.

Tegn skyformede polygoner.

1. Tryk på ikonet for redigering.
2. Vælg farve på strøg, fyldfarve, tykkelse og indstillinger for gennemsigtighed.
3. Tryk **Færdig** for at tegne.

Tegn polylinjer.

1. Tryk på ikonet for redigering.
2. Vælg farve på strøg, fyldfarve, tykkelse og indstillinger for gennemsigtighed.
3. Tryk **Færdig** for at tegne.

Tegn lige steger med kalibrerede mål

- Tryk to gange på for at redigere farve, tykkelse, gennemsigtighed, målestok, præcision eller objektfastgørelse.

Tegn kalibrerede polylinjer.

1. Tryk på ikonet for redigering.
2. Vælg farve, tykkelse, gennemsigtighed, målestok, præcision eller objektfastgørelse.
3. Tryk **Færdig** for at tegne.

Tegn udfyldte polygoner.

1. Tryk på ikonet for redigering.
2. Vælg farve, tykkelse, gennemsigtighed, målestok, præcision eller

objektfastgørelse.

3. Tryk **Færdig** for at tegne.

Tegn kurvede streger.

- Tryk to gange på for at redigere farve, tykkelse og gennemsigtighed.

Skift til panoreringsvisning, hvor du kan panorere, bruge zoomfunktionen eller blafre mellem sider for at vælge annotationer.

Luk værktøjslinjen for annotationer.

Ofte stillede spørgsmål

I dette afsnit kan du se en liste over ofte stillede spørgsmål (FAQ) og eventuelle løsninger til WorkZone Mobile.

Synkronisering af møder virker ikke

Løsning

Genstart din enhed og slet WorkZone Mobile-appen. Geninstaller WorkZone Mobile-appen og log ind på WorkZone. Hvis problemet stadig forekommer, bedes du rapportere den.

Office-dokumenter kan ikke åbnes for redigering

Forsøg på at åbne et Office-dokument i redigeringstilstand fejler med fejlbeskeden "Filen kan ikke åbnes".

Løsning

I din enheds indstillinger, vælg den relevante Office-app og tryk **Nulstil Wo**rds-/Excel/PowerPoint. Aktiver knapperne **Ryd alle dokumenter/projektmapper/præsentati**oner **og** Slet logonoplysn**inger,** og luk Office-appen. Prøv herefter at genåbne Office-dokumentet.

WorkZone Mobile-app til Intune stopper med at forbinde (Intune til)

Efter et stykke tid stopper WorkZone Mobile-appen med at tilslutte, hvilket fører til fejl-meddelelsen "Not connected/Ikke tilsluttet". Hvis du forsøger at genstarte appen, vises fejl-beskeden "Connect/Tilslut".

Løsning

Tjek indstillingerne for Wi-Fi på din enhed. Tjek at du bruger din almindelige inter-netforbindelse (altså den forbindelse, som du tidligere har koblet til WorkZone med).

Navigationsruder forsviner (-versionen til Citrix)

I sjældne tilfælde forsvinder alle faner, bortset fra Onlinehjælpen, hvilket forhindrer navigering i appen.

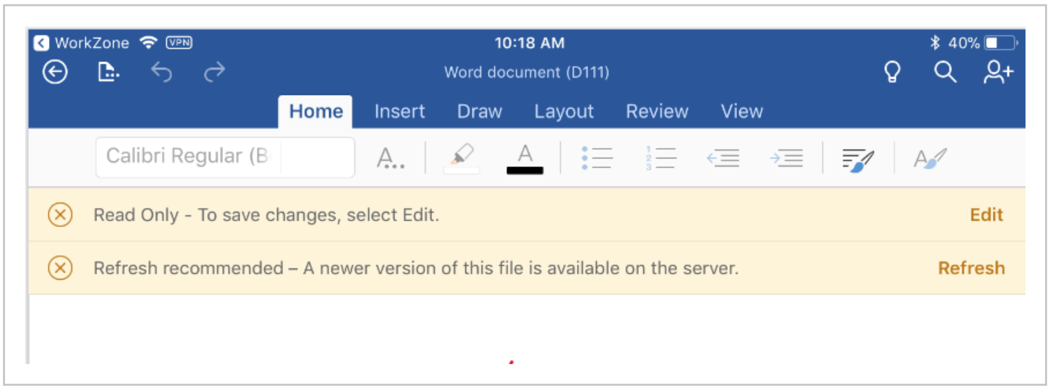
Løsning

Afinstaller og geninstaller appen fra Secure Hub.

Office 365-beskeder i WorkZone Mobile

Følgende beskeder kan fremkomme i toppen af skærmen i Office 365, når du åbner dokumenter til redigering fra WorkZone Mobile. Klik på den relevante besked nedenfor for at se yderligere oplysninger om beskeden, og hvordan man kommer videre.

> **Eksempel**:Office-meddelelser i Word



> **Tip:**
>
> - Tryk på **Seneste** i din Office-applikation for at se status på de dokumenter, du senest har åbnet. Du kan, for eksempel, se om et dokument er blevet overført eller hentet korrekt. En advarsel vises, hvis der er problemer med dokumentet.
> - Se også Office Hjælp for mere information. Åbn et dokument i Office-appen, og tryk  > **Hjælp og Support** for at åbne Office Hjælpen.

Opdatering anbefales - Der er en nyere version af filen på serveren.

Når du prøver at redigere et dokument, der er åbent på en anden klient (telefon, tablet, bærbar) samtidigt. Dokumentet er skrivebeskyttet.

Sådan fortsætter du

Tryk **Opdatér** for at se de seneste ændringer.

Der kan ikke overføres - Log på din konto.

Nogle gange kan et dokument ikke overføres til WorkZone-serveren og bliver skrivebeskyttet efter en af de følgende handlinger:

- Du har lukket dit Office-program
- Du har skiftet sproget i enhedens indstillinger
- Du har genstartet din enhed

Sådan fortsætter du

Undgå at genstarte din telefon og undgå at lukke Office-appen.

Når du ser beskeden "Der kan ikke overføres - Log på din konto", tryk **Mere...**> **Log ind**. Åbn derefter dokumentet fra listen **Seneste** i Office-appen. Dokumentet kan igen redigeres.

Der kan ikke overføres - der er noget galt og ændringerne kan ikke overføres

Du er højst sandsynligt i færd med at ændre et låst eller arkiveret dokument. Se Rediger dokumenttilstand i brugervejledningen til WorkZone Client.

Sådan fortsætter du

Du kan gemme en kopi af dokumentet og derefter redigere i kopien. Tryk **Gem en kopi** i meddelelsen. Kopien gemmes kun lokalt.

Der kan ikke overføres - En anden redigerer filen

Du forsøger at redigere et dokument, der allerede redigeres af en anden.

Sådan fortsætter du

Du kan vente på den anden bruger bliver færdig med at redigere og lukke dokumentet, eller gemme en kopi af dokumentet lokalt og redigere i kopien. Tryk **Gem en kopi** i meddelelsen. Kopien gemmes kun lokalt.

Denne version af Microsoft Excel kan ikke køre VBA-makroer.

Du har åbnet et Excel-dokument, der indeholder makroer. Office 365 understøtter ikke makroer.

Sådan fortsætter du

Tryk **Luk** i meddelelsen for at lukke den. Du kan fortsætte med at arbejde på dokumentet, men makroer ignoreres. Ændringer gemmes.

Filen indeholder makroer, der ikke fungerer med denne version af Word. Makroerne bevares med filen, så du ikke mister dem

Du prøver at åbne et Word-dokument, der indeholder makroer. Office 365 understøtter ikke makroer.

Sådan fortsætter du

Tryk **Afvis** for at lukke beskeden. Du kan fortsætte med at arbejde på dokumentet, men makroer ignoreres. Ændringer gemmes.

Tillad filkonvertering?

Du er i gang med at åbne et dokument i Excel, men Excel støtter ikke filformatet.

Sådan fortsætter du

Excel viser meddelelsen "For at kunne åbne, eksportere til og udskrive visse filtyper skal Excel konvertere filen ved hjælp af en Microsoft-onlinetjeneste." Tryk **Tillad** for at konvertere dokumentet til xlsx. Du kan også åbne dokumentet på en computer og gemme det i xlsx-format, og derefter føje dokumentet til en WorkZone-sag, -opgave eller -møde (alt afhængigt af hvad du arbejder på).

Filen kan ikke åbnes. Denne filtype understøttes ikke af denne version af Office.

Du er i gang med at åbne et dokument i Excel, men Excel støtter ikke filformatet.

Sådan fortsætter du

Tryk **Luk** for at lukke meddelelsen. Du kan åbne dokumentet på en stationær eller bærbar computer og gemme dokumentet i xlsx-format og derefter føje dokumentet til en sag, opgave eller et møde, alt afhængigt af hvad du arbejder på.

Skrivebeskyttet - Vælg Rediger, hvis du vil gemme ændringer

På mobile enheder vises beskeden hver gang, du åbner et dokument.

Sådan fortsætter du

Tryk **Redigér** i meddelelsen for at redigere dokumentet.

Skrivebeskyttet - En anden har denne fil åben. Du kan gemme ændringer til en kopi eller åbne filen senere.

Du er i færd med at redigere et dokument, der allerede redigeres af en anden. Dokumentet er låst af en anden bruger.

Sådan fortsætter du

Tryk **Gem en kopi** for at oprette en kopi, du kan redigere, eller tryk **Annuller**, hvis du vil vente til filen ikke længere redigeres af en anden. Kopien gemmes kun lokalt.

Skrivebeskyttet - Dette er et ældre filformat. Ændringerne kan kun gemmes på en kopi af filen.

Du er i færd med at redigere et dokument med et gammels dokument-format, der ikke understøttes af Office 365.

Sådan fortsætter du

1. Tryk **Annuller** i meddelelsen.
2. Åbn dokumentet på en computer og gem det med et nyt dokumentformat, for eksempel xlsx, docx eller pptx.
3. Føj dokumentet til sagen, opgaven eller mødet, alt afhængigt af hvad du arbejder på.

Excel 95-funktionen "Deling af projektmappe" er blevet aktiveret for denne projektmappe. Hvis du vil redigere denne fil, skal du gemme en kopi (vi fjerner delingen af projektmappen).

Du er i færd med at redigere et Excel 95-dokument med "Deling af projektmappe", hvilket ikke understøttes af Office 365.

Sådan fortsætter du

1. Tryk **Annuller** i meddelelsen.
2. Åbne dokumentet på en computer og gem det som en xlsx-fil.
3. Føj dokumentet til sagen, opgaven eller mødet, alt afhængigt af hvad du arbejder på.

Du kan ikke redigere Office-dokumenter - Apps til Office 365 åbner ikke dokumenterne

Du forsøger at redigere et dokument i en Office-app, Word, for eksempel, men appen åbner ikke dokumentet pga. problemer med dit login i Office-appen.

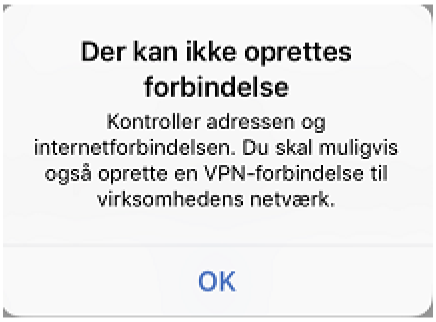
Sådan fortsætter du

Nedenfor kan du se de trin, du skal følge for at løse problemet med Word som et eksempel. Trinnene er de samme for andre Office-apps. Du behøver kun at anvende disse trin i en Office-app - indstillingerne vil efterfølgende også træde i kraft i de andre apps.

Vigtigt: Sørg for, at du ikke har nogen Office-applikationer kørende på din enhed.

1. På din enhed, skal du trykke **Indstillinger** > **Word**, og rulle ned til **Nulstil Word** og derefter aktivere **Ryd alle dokumenter** og **Slet Log-onoplysninger.**
2. Åbn Word på din enhed.
3. Tryk **Åbn** > **Tilføj et sted** > **SharePoint-webstedets URL-adresse**.
4. Indtast URL-adressen for WorkZone Explorer, f.eks https://MyCompanySite/Explorer/.
5. Tryk **Næste** flere gange.
6. Indtast dine logonoplysninger og tryk **Log på**.

   Dit logon mislykkes med følgende fejlmeddelelse:

   Dine oplysninger er dog blevet gemt og du burde nu kunne redigere Word-dokumenter.

7. Tryk **OK** i meddelelsen og rediger et dokument via WorkZone Mobile.

Tip: Office-appen kan komme til at åbne med visningen **Steder** over det dokument, du vil redigere. Tryk **Annuller** og du vil derefter kunne se dokumentet igen.

Vilkår og betingelser

Intellektuel ejendomsret

Dette dokument tilhører KMD. Oplysningerne heri må ikke kopieres, anvendes eller videregives uden for den sammenhæng, hvori de er givet, og til andet end de af KMD godkendte forretningsmæssige formål eller til teknisk evaluering, i overensstemmelse med aftalen mellem KMD og modtager. Dette forbehold afskærer ikke modtageren fra at bruge oplysningerne, såfremt de er fremskaffet på lovlig vis, og der ikke fremgår andre begrænsninger af anden aftale mellem KMD og modtageren.

Ansvarsfraskrivelse

Dette dokument er udelukkende beregnet til generel oplysning. Oplysningerne anses for at være korrekte og retvisende. KMD kan dog ikke garantere dette. KMD forbeholder sig retten til at ændre dokumentet og de beskrevne produkter uden varsel. KMD og dokumentets ophavsmænd fraskriver sig ethvert erstatningsansvar.

KMD WORKZONE

_Mobile

2021.3

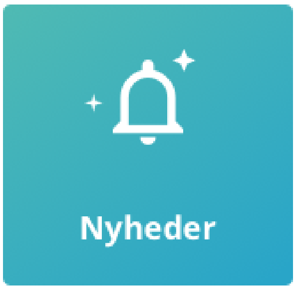
Brugervejledning

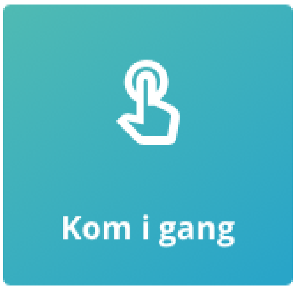
Indhold

WorkZone Mobile 2021.3

Med WorkZone Mobile kan du tilgå WorkZone-sager, -dokumenter, -opgaver og møder på din mobile enhed. Denne Brugervejledning dækker både iOS- og Android-versionen af WorkZone Mobile.

Retningslinjer, der kun gælder for enten iOS- eller Android-versionen, markeres med ikonerne (iOS) og (Android).





Ofte stillede spørgsmål

Hvad sker der, hvis jeg arbejder offline?

Du kan udføre en opgave, selvom du er offline. Den slags opgaver gemmes under **Usendte opgaver**. Når du igen er online og trækker for at opdatere, sendes dine usendte opgaver.

Relateret produktdokumentation

- WorkZone Process Brugervejledning
- WorkZone for Office Brugervejledning
- WorkZone Client Brugervejledning

WorkZone-links

- WorkZone-dokumentation
- WorkZone-support
- WorkZone-websted
- WorkZone-portal

Nyheder

Der er ingen ændringer i denne release.

Det var nyt i WorkZone Mobile 2021.2

Gennemse med dine WorkZone-lister

Du kan nu navigere i modulet Gennemse med dine foruddefinerede og brugerdefinerede WorkZone-lister og omarrangere dem, så de passer dine behov. Se Tilpas dine viste lister og Søg på sager og dokumenter.

Det var nyt i WorkZone Mobile 2021.1

Naviger til en sag fra et dokument

Du kan nu navigere fra dokumenter, som du har åbnet i modulet Gennemse eller fra en chat, til deres tilknyttede sag og her se dagens oplysninger. Se Se oplysninger om chat-dokumenter og -sager og Se dokumentoplysninger.

Arbejde med dine stedfortræderopgaver

Hvis du er stedfortræder for en bruger, kan du nu skifte til denne brugers opgaveliste og arbejde med deres opgaver. Se Arbejde med dine stedfortræderopgaver.

Brugerdefinerede filtre for opgaver

I din opgaveliste kan du nu anvende brugerdefinerede filtre, som er tilgængelige for dig. Brugerdefinerede filtre er gemte søgerlister, der er oprettet i WorkZone OData QueryBuilder. Se Filtrér dine opgaver med brugerdefinerede filtre.

Det var nyt i WorkZone Mobile 2021.0

Modulet Gennemse

- Du kan nu gennemse alle sager og dokumenter, der tilgængelige for dig i WorkZone fra din mobile enhed. Du kan søge efter sager eller dokumenter, se deres metadata, se eksisterende dokumenter på den valgte sag, forhåndsvise og

redigere valgte dokumenter (hvis de er redigerbare). Se Gennemse WorkZone-sager og -dokumenter.

Chatforbedringer

- Du kan nu oprette nye chats direkte fra **Chats**-modulet. Se Opret en ny chat (uden en opgave).
- Du kan nu se og redigere sagsdokumenter (hvis de er redigerbare), og se sags-metadata for sagerne på dine chats. Se Vis oplysninger for chatsager og chat-dokumenter.
- Du kan redigere dokumenter i dine chats. Se Rediger et chatdokument.

Forbedringer i brugergrænsefladen

- Knappen **Hjælp** findes nu under **Indstillinger**.

Det var nyt i WorkZone Mobile 2020.3

Chatforbedringer

- Du kan nu se en forhåndsvisning dokumenter i dine chats. Se Forhåndsvisning af chatdokumenter.
- Du kan se metadata for dokumenterne i dine chats. Se Vis metadata for chat-dokumenter.
- Du kan se om brugerne i dine chats er online eller offline. Se Vis dine chats.

Rediger WorkZone-dokumenter via Office 365 i Intune-versionen ( )

- WorkZone Mobile-versionen til Intune understøtter nu redigering af WorkZone-dokumenter med Microsoft Office 365.

Det var nyt i WorkZone Mobile 2020.2

Log ind på WorkZone Mobile via OAuth2

Hvis din organisation bruger OAuth2 til brugergodkendelse, kan du logge ind på WorkZone Mobile ved brug af OAuth2. Se Log ind og ud.

Arbejde med WorkZone-chats

I WorkZone Mobile kan du se dine eksisterende chats og besvare dem, oprette nye chats om eksisterende processer fra de tilknyttede opgaver og tilføje eller fjerne deltagere i en chat. Se Arbejde med chats.

Meddelelser om dokumentkonflikt, når PDF-dokumenter redigeres af flere brugere samtidigt

Hvis flere brugere redigerer i det samme PDF-dokument samtidigt, vil den anden bruger modtage en meddelelse om dokumentkonflikt, hvor brugeren kan vælge at kassere ændringerne eller at overskrive den anden brugers ændringer. Se Annoter PDF-dokumenter.

Det var nyt i WorkZone Mobile 2020.1

- Fejlrettelser.

Det var nyt i WorkZone Mobile 2020.0

Forbedret synkronisering for WorkZone-møder

- WorkZone Mobile afspejler nu aflysninger af møder, der er foretaget i Outlook via WorkZone Meeting eller WorkZone 365 (Både i skrivebords- og webapplikationen).
- WorkZone Mobile afspejler nu ændringer, der er blevet foretaget på dagsordenspunkter i Outlook via WorkZone Meeting eller WorkZone 365 (Både i skrivebords- og webapplikationen).

Se Arbejde med møder.

Forbedringer af brugerindstillinger

- Du kan bruge de nye indstillinger **Vis kommende opgaver** og **Vis afsluttede opgaver** til at indstille om du ser kommende og afsluttede opgaver i din opgaveliste.
- Aktivér den nye indstilling **Share Analytics** for at tillade indsamling af brugeres fejl-logs for WorkZone Mobile, såsom systemoplysninger om netværksfejl, fejl i hentning af filer i baggrunden og lignende fejlhændelser. Indsamlede fejllogs indeholder ingen personhenførbare data.

Se Konfigurer WorkZone Mobile.

Forbedringer i sikkerhed

- Indhold i WorkZone Mobile skjules, hvis en brugers adgangskode ikke længere er gyldigt.

Det var nyt i WorkZone Mobile 2019.3

Forbedret navigation

- Navigationsruden vises nu i bunden af skærmen. Tryk på et modul for at arbejde med det.
- Knappen **Log ud** findes nu under **Indstillinger**.
- Dokumenter åbner nu i fuld skærm.

Forbedringer i forhåndsvisning af opgaver

- Arranger dine opgaver i den rækkefølge, du ønsker de skal behandles i. Se Arranger rækkefølge på dine opgaver.
- Tryk **Rangorden** øverst i din opgaveliste for at sortere efter rangorden. Se Arranger rækkefølge på dine opgaver.
- Tryk for at se din opgave med vedhæftede dokumenter som en samlet PDF-fil. Se Vis opgave som PDF.

- Når du viser dokumenter på en opgave, tryk på knapperne og for at åbne det tidligere eller det næste dokument på opgaven, eller stryg til højre/venstre for at se den tidligere/næste side i dokumentet. Se Vis dokumenter.

Det var nyt i WorkZone Mobile 2019.2

Fejlrettelser.

Du kan nu definere antal linjer, der skal vises i møde- og opgavetitler. Se Konfigurer WorkZone Mobile.

Det var nyt i WorkZone Mobile 2019.1

Fejlrettelser.

- Appen stopper med at fungere, når du forsøger at åbne den efter, du har opdateret til en ny release - Dette er nu rettet.
- Forkerte beskeder åbnes på siden **Log ind**, når du trykker **Retur** i felterne **Server** og **Brugernavn**, når du bruger tastaturet - Dette er rettet.

Det var nyt i WorkZone Mobile 2019.0

Support ved ændring af kodeord

Hvis dit kodeord udløber mens du arbejder i WorkZone, vil siden **Log ind** åbne, og du kan først gentage dit arbejde, når du har indtastet dit kodeord. Se Log ind og ud.

Performanceforbedringer

Den tid, det tager at hente aktiver, opgaver og dokumenter, er blevet reduceret med 30%.

Det var nyt i WorkZone Mobile 2018.2

- Når du har besvaret en opgave, bliver den næste vist automatisk. Se Arbejde med opgaver.
- Performanceforbedringer.
- Fejlrettelser.

Det var nyt i WorkZone Mobile 2018.1

- Fejlrettelser.

Nyheder i WorkZone Mobile 2018

- Føj billeder fra fotobiblioteket på din enhed til en opgave. Se Tilføj eller fjern dokumenter.
- Tag et billede eller optag en video og føj billedet eller videoen til en opgave med det samme.
- Performanceforbedringer.
- Bedre brugergrænseflade på iPhone X.

Genererel information

Kom godt i gang

Log på og log af på WorkZone Mobile.

- Se dine kommende WorkZone-møder (Oprettes i Outlook via WorkZone for Office eller WorkZone 365).
- I navigationsruden, tryk på et modul, du vil arbejde med. For eksempel, tryk **Opgaver** for at se en opgaveliste. Opgaverne er markeret i forhold til frister og prioriteter.

På et møde kan du:

- Tryk på et møde for at se mødets detaljer.
- I mødetaljerne, se oplysninger om dato og tid, placering, deltagere, dagsordenspunkter og vedhæftede filer.
- Se dokumenter, der er vedhæftet på et møde. Tryk på et dokument i mødetaljerne for at se det.
- Rediger Microsoft Office-dokumenter (). Tryk på **Rediger** i dokumentfremviseren for at redigere dokumentet.
- Annoter PDF-dokumenter, for eksempel PDF, MSG, PNG og JPG i PDF-format. Tryk på **Rediger** i dokumentfremviseren for at redigere dokumentet.
- Eksportere dokumenter til andre apps. I dokumentfremviseren, tryk **Del** og vælg en app.
- Arbejde offline.

På en opgave kan du:

- Trykke på en opgave under **Usendte**, **Åbne**, **Kommende** eller **Afsluttet** for at se opgavedetaljerne.
- Se procesoplysninger i opgavedetaljerne, som for eksempel sagsnummer, sagsbehandler, hvem der startede processen, og opgave- og procesfrist.
- kun: Vis opgave med vedhæftede dokumenter i en samlet PDF-fil. I opgaven, tryk .

- Se de dokumenter, der er vedhæftet på processen. I opgavedetaljerne, trykke på et dokument for at se det.
- Tilføj eller fjern dokumenter til eller fra opgaver.
- Rediger Microsoft Office-dokumenter (). Tryk **Rediger** i dokumentviseren for at redigere det aktuelle dokument.
- Annoter PDF-dokumenter. Tryk på **Rediger** i dokumentfremviseren for at redigere dokumentet.
- Eksportere dokumenter til andre apps. I dokumentfremviseren, tryk **Del** og vælg en app.
- Se hvem der gjorde hvad og hvornår under **Proceslog**.
- Besvar en opgave ved at bruge svarknapperne.
- Opret en ny chat (fra en opgave) eller Svar i en chat for at diskutere denne opgave.
- Arbejde offline.
- kun: Modtage meddelelser, når en opgave ændres, eller du får en ny opgave.

Bemærk: Det kan være nødvendigt, at du henter og installerer et visningsprogram fra App Store (for) eller Google Play (for) for at åbne visse dokumentformater.

Konfigurer WorkZone Mobile.

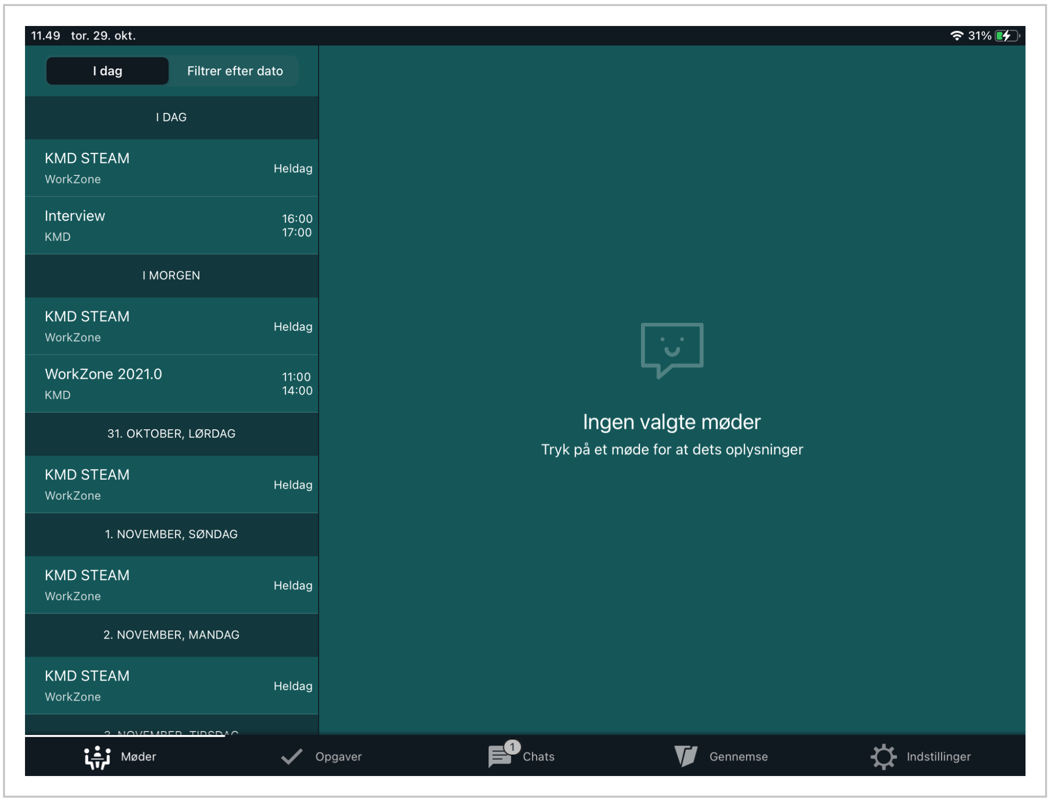
Se dine eksisterende WorkZone-chats og besvar dem, eller opret nye chats fra de tilknyttede opgaver. Se Arbejde med WorkZone-chats.

Brug WorkZone Mobile

Når du starter WorkZone Mobile første gang, vises din mødeliste Hvis du ikke har installeret WorkZone Meeting, vises din opgaveliste.

Hvordan navigerer jeg?

Navigationsruden vises nu i bunden af skærmen. Tryk på **Møder**, **Opgaver**, **Chats**, **Gennemse** eller **Indstillinger** alt efter hvad det er, du ønsker at gøre.



Hvordan opdaterer jeg lister?

Træk ned for at opdatere møde- og opgavelister.

Hvordan kan jeg modtage meddelelser?

Du kan vælge mellem at modtage meddelelser om de nye opgaver, der er tildelt til dig eller ændringer, der er blevet foretaget på dine eksisterende sager, f.eks, om ændringer på opgavefrister eller prioriteter. De meddelelser, du modtager, afhænger af din rolle i processen. For eksempler på meddelelser, se Om opgavemeddelelser i WorkZone Process onlinehjælpen.

Gå til **Indstillinger** > **Meddelelser** > **WorkZone**, og tryk **Tillad meddelelser** for at slå meddelelser til på din enhed.

Forudsætning:

- Push-meddelelser skal først aktiveres af din administrator i WorkZone Configurator. Se Procesmeddelelser i WorkZone Process Administrator Guide.

- For at synkronisere og opdatere opgaveliste og opgaveindhold automatisk, skal du slå meddelelser til. Hvis du ikke har slået meddelelser til, må du opdatere opgavelisten manuelt. Træk i opgavelisten for at opdatere den.

Bemærk: Meddelelser er ikke tilgængelige i modulet WorkZone Meeting.

Log på og log af

Log på

Når WorkZone Mobile startes, vises siden **Log på**.

- Hvis din organisation bruger OAuth2 til brugergodkendelse, vil et nyt browservindue åbne, hvor du bliver bedt om at angive brugernavn og password. Herefter vil dit password blive udfyldt automatisk for WorkZone Mobile.

1. Indtast URL for WorkZone i feltet **Server** og tryk **Næste**.
2. I dialogen **Log ind**, indtast dit brugernavn i feltet **Brugernavn** og dit password i feltet **Password** (oftest det samme som dit netværksbrugernavn og -password) og tryk **LOG IND**.

> **Tip:** For iOS-enheder kan du angive serverindstillingerne i indstillingerne for din enhed. Tryk på **Indstillinger** > WorkZone, og indtast URL'en for WorkZone i feltet **Adresse**. Næste gang du logger ind, vil du derfor ikke behøve at indtaste serveroplysninger igen.

Hvis WorkZone Mobile er installeret med et Moble Device Management-system (system til styring af mobile enheder), er serverindstillinger angivet automatisk. Du kan se indstillingerne på din enhed. Tryk **Indstillinger** > WorkZone > **Indstillinger** under **ADMINISTRATION AF MOBILE APPLIKATIONER**.

Udløb af adgangskode.

Ved login

Hvis din adgangskode til netværket er udløbet, vises fejlmeddelelsen "Forkert brugernavn eller adgangskode", når du prøver at logge ind på WorkZone. Skift adgangskode for netværket og indtast herefter din nye adgangskode i WorkZone.

Mens du bruger programmet

Hvis din netværksadgangskode udløber, men du arbejder i WorkZone, vises fejlmeddelelsen "Der er noget galt. Meddelelsen "Indtast venligst dit password for at fortsætte med at bruge WorkZone" vil blive vist. Tryk **OK** og siden **Log ind** åbnes. Skift din netværksadgangskode og indtast din nye adgangskode i WorkZone for at fortsætte dit arbejde hvor du slap.

Log ud

1. Tryk **Indstillinger**.
2. Tryk **Log ud**.

- For enheder, der bruger OAuth2-godkendelse, vil du blive sendt til et log-ud-webvindue. Tryk på det viste link for at vende tilbage til WorkZone Mobile-appen.

Arbejde offline

Du kan udføre en opgave, selvom du er offline. Opgaver gemmes under **USENDTE OPGAVER**. Dine usendte opgaver vil blive sendt, så snart du er online igen.

Opdater mødelisten efter du har været offline

Hvis du har været offline, træk ned for at opdatere mødelisten, når du er online igen. Denne handling vil opdatere møder, der er blevet ændret, mens du har været offline.

Filtrer møder efter en dato

Du skal være online for at filtrere dine møder efter en dato, der ligger i fortiden. Når du er offline, kan du se afsluttede møder, men kun hvis du hentede dem, mens du var online.

WorkZone Mobile gemmer møder offline fra den sidste dato, du valgte, da du var online, og 6 dage frem samt kommende møder.

Ændret forbindelsestilstand mens du arbejder på en opgave

Hvis forbindelsen til serveren ændres fra online til offline og omvendt, mens du arbejder på en opgave, får du besked og bliver spurgt, om du vil genindlæse opgaven.

- Hvis du trykker **Ja:** opgaven opdateres og du mister al ikke-gemt arbejde (for eksempel kommentarer), og du vil ikke kunne redigere dokumenter eller aktører.
- Hvis du trykker **Nej:** Du kan fortsætte med at arbejde på opgaven og besvare ved at bruge svarknapperne.

Konfigurer WorkZone Mobile

Du kan indstille WorkZone Mobile ved at trykke **Indstillinger** i navigationsruden.

Se oplysninger om release og login

På siden Indstillinger finder du oplysninger om det aktuelle WorkZone Mobile-versionsnummer og login-oplysninger.

> **Tip:** Hvis du kontakter KMD Support angående et problem med WorkZone Mobile, bedes du inkludere et skærmbillede af disse oplysninger.

Automatisk fejlrapportering

Aktiver denne indstilling til for automatisk at dele fejlrapporter. Rapporterede fejl indeholder ikke personlige data.

Del analyse

Aktiver denne indstilling for automatisk at sende fejlrapporter (såsom systemdata om netværksfejl, fejl i overførsel i baggrunden og andre relevante data). Brugernes fejllogs indeholder ingen personlige data. Funktionen er som standard slået fra.

Rediger mødedokumenter

Vælg standardfunktionsmåden for dokumentredigering af mødedokumenter. Du kan vælge at redigere det oprindelige dokument eller oprette en kopi til redigering, når du trykker på knappen **Rediger** i dokumentvisningen.

Vælg **Altid** for at kunne vælge mellem mulighederne, når du trykker på knappen **Rediger**.

Antal linjer, der vises i titlen

Hvis titlerne på dine opgaver og møder er for lange til en linje, kan du hæve antallet af viste linjer. For at gøre dette, tryk . For at fjerne antal viste linjer, tryk .

Vi kommende opgaver

Vælg denne, vil du vil se kommende opgaver i din opgaveliste. Funktionen er som standard slået til.

Vis afsluttede opgaver

Vælg denne, hvis du vil se afsluttede opgaver i din opgaveliste. Funktionen er som standard slået til.

Behold afsluttede opgaver

Denne funktion kan kun vælges, hvis indstillingen **Vis afsluttede opgaver** er slået til. Angiv hvor mange dage eller uger, du vil bevare afsluttede opgaver i din opgaveliste. Som udgangspunkt er der angivet 2 dage.

Se brugervejledning

Klik **Hjælp** for at åbne WorkZone Mobile Brugervejledning.

Arbejde med møder

> **Forudsætning:** WorkZone for OfficeWorkZone 365.

Du kan se dine WorkZone-møder, der er oprettet i Outlook via WorkZone for Office eller WorkZone 365 (enten skrivebordsprogrammet eller webudgaven).

WorkZone Mobile åbner med liste over dagens forestående møder vist øverst og derefter møder for dagen efter og senere møder. Du kan også trykke på **Filtrer efter dato** og derefter vælge en dato for at se møder 7 dage frem fra den valgte dato.

- Tryk på et møde for at se mødets detaljer.
- Træk ned for at opdatere mødelisten, så du kan se møder, der er blevet oprettet eller ændret efter du loggede ind (eller efter du opdaterede sidst).

Vis dokumenter

> **Forudsætning:** WorkZone PDF.

Møde kan have dokumenter vedhæftet på dagsordenspunkter.

- Tryk på dokumenttitlen for at se dokumentets indhold.

Dokumentet åbner i PDF-format, bortset fra Excel-dokumenter og nogle tekstfil-formater, såsom `TXT` og `XML`, der åbner i Quick Look. Dokumenter, der ikke kan konverteres til PDF, for eksempel video- og lydfiler, åbner i deres oprindelige format.

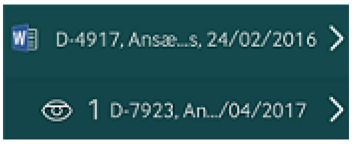
Rediger Microsoft Office-dokumenter ()

> **Forudsætning:** Du skal have Microsoft Office 365 installeret på din enhed.

Du kan kun redigere dokumenter, når du er online.

1. Tryk på det dokument, du vil redigere.
2. Tryk Rediger i dokumentfremviseren for at redigere dokumentet i den tilsvarende Office-applikation. Du kan vælge at redigere dokumentet eller oprette en kopi af dokumentet og derefter redigere kopien. Kopien er kun synlig for dig.
3. Foretag dine ændringer og tryk , tryk derefter for vende tilbage til mødet.
    - Hvis du ikke har slået **Automatisk lagring** til i din Office-app: Foretag dine ændringer og gem dokumentet. Tryk derefter , tryk derefter for at vende tilbage til mødet.

Hvis du har oprettet en kopi, gemmes den på dagsordenspunktet på mødesagen i WorkZone med dig som sagsbehandler. Du kan se kopien af dokumentet på mødet under det oprindelige dokument.



Ikonet angiver det antal medarbejdere, der kan tilgå din dokumentkopi. Som standard er det kun dig, der jar adgang til dokumentkopien. Du kan eventuelt åbne din dokumentkopi i WorkZone Client og give andre medarbejdere adgang til den. Se Administrer adgangrettigheder i WorkZone Clienten til Brugervejledning.

Bemærk:

- Du kan kun oprette én kopi af hvert dokument. Næste gang, du vil annotere dokumentet, åbnes din dokumentkopi. Kun hvis du har ændret kopiens tilstand til **Låst** eller **Arkiveret** i WorkZone Client, vil der blive oprettet en ny kopi.
- Du kan ikke oprette en kopi af en kopi.

Hvis dokumentet ikke er et Office-dokument, kan du annotere en PDF-kopi af dokumentet (se Annoter PDF-dokumenter), eller du kan eksportere dokumentet til en tilsvarende app, hvor du kan redigere dokumentet (se Del dokumenter vha. andre apps.).

Se også: Du kan ikke redigere Office-dokumenter - Apps til Office 365 åbner ikke dokumenterne

Annoter PDF-dokumenter

Du kan annotere ikke-Microsoft Office-dokumenter, for eksempel, PDF, MSG, PNG osv. i PDF-format ved brug af den indbyggede PDF-editor. Størrelsen på PDF-dokumenter, der kan annoteres afhænger af din organisations kapacitet og internetforbindelsen.

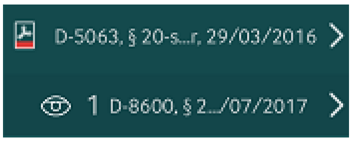
Vigtigt:

- Du vil ikke kunne gemme dine ændringer i et stort PDF-dokument. Hvis du prøver at gemme dine ændringer og beskeden "opdaterer 0 ud af 1" vises i statuslinjen i længere tid, anbefaler vi, at du lukker, sletter og derefter geninstallerer appen.
- Hvis en anden bruger redigerer og gemme det samme PDF-dokument før du nåede at gemme dine ændringer, modtager du en meddelelse om dokumentkonflikten, hvor du har mulighed for at kassere dine ændringer eller at overskrive den anden brugers ændringer. Hvis udkastversionering er slået til for din organisation, kan du altid se og gendanne tidligere versioner af dokumentet i WorkZone Client. Se WorkZone Client Brugervejledning.

1. Tryk på det dokument, du vil annotere.
2. Tryk på **Rediger** i dokumentfremviseren for at annotere dokumentet i PDF-format. En PDF-kopi af dokumentet oprettes og åbner i PDF-editoren.
    - Hvis det originale dokument er et PDF-dokument, kan du vælge at annotere det originale dokument eller oprette en privat kopi til annotation.
    - Kopien er kun synlig for dig.
3. Tryk på **Rediger** i PDF-editoren for at få vist en værktøjslinje med forskellige muligheder for at annotere. Tryk på en knap i værktøjslinjen og tryk derefter på det sted i dokumentet, hvor du vil annotere det. Du kan, for eksempel trykke på **Huskeseddel** for at føje en huskeseddel til et bestemt afsnit i dokumentet. Se Brug PDF-redigeringsprogram (iOS-version).
4. Tilføj dine annotationer og tryk derefter på **Gem**.
5. Tryk på **Tilbage** for at vende tilbage til mødet.

Bemærk: Du kan kun oprette én kopi af hvert dokument. Næste gang du vil annotere et dokument, vil den eksisterende kopi blive brugt. Kun hvis du har ændret kopiens tilstand til **Låst** eller **Arkiveret** i WorkZone Client, vil der blive oprettet en ny kopi.

Kopien gemmes på dagsordenspunktet på mødesagen i WorkZone med dig som sagsbehandler. I mødet lam di se. at din personlige kopi er blevet tilføjet under det oprindelige dokument.



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Del dokumenter vha. andre apps.

1. Tryk på det dokument, som du vil eksportere.
2. I dokumentfremviseren, tryk **Del** og vælg en relevant app.

Den valgte app åbner en kopi af dokumentet. Du kan ikke gemme dokumentet tilbage på WorkZone.

Arbejde med opgaver

Når du har modtaget en opgave i WorkZone Mobile, kan du besvare den. Alt afhængigt af hvilken type opgave, der er tale om, kan du, for eksempel, Accepter, Videresend, Spring over, Godkend eller Afvis eller bekræfte opgaven.

Før du svarer, kan du redigere dokumenterne på en opgave, tilføje eller fjerne dokumenter og aktører eller skrive en kommentar. Du kan også Ranger dine opgaver eller Opret en ny chat (fra en opgave) for at diskutere denne opgaveproces med relevante deltagere.

Hvis du er stedfortræder for en bruger, kan du nu skifte til denne brugers opgaveliste og Arbejde med dine stedfortræderopgaver.

Vis en opgave

1. Tryk **Opgaver** i navigationsruden for at få vist en liste over opgaver.
2. Tryk på en opgave for at se eller redigere opgaveoplysningerne.
3. Tryk på en svar-knappen for at besvare en opgave eller for at foretage ændringer på en opgave eller dens tilhørende dokumenter.

Besvar en opgave

Nedenfor er der nogle eksempler på, hvordan du kan besvare opgaver inden for forskellige procestyper.

Accepter

Hvis du accepterer ejerskab af, for eksempel, en fordelingsopgave, bliver du sagsbehandler.

Videresend

Hvis du ikke kan eller ikke ønsker at udføre en opgave, kan du videresende den til en anden.

1. Tryk **Videresend til**.
2. Start med at skrive et navn, og vælg herefter den aktuelle opgave fra listen.
3. Tryk på **Videresend**.

Spring over

Du kan springe nogle opgavetyper over. Hvis du, for eksempel, springer en opgave i en forelæggelsesproces over, videresendes opgaven til næste person i godkendelsesrækkefølgen.

Godkend eller Afvis

En opgave kan bestå i at godkende eller afvise noget, for eksempel et dokument. Sagbehandleren modtager en meddelelse om din handling og processen kan startes om, eller flyttes til næste fase.

OK

Hvis du som procesejer modtager en besvarelse på din proces, beder systemet dig om at bekræfte modtagelse af besvarelsen. Opgaverne opdateres derefter i oversigten **Processer** og i Outlook, og processen lukkes.

Når du har besvaret en opgave, vises den næste åbne opgave. Hvis der ikke er nogen åbne opgaver, vises opgavelisten i stedet.

Andre handlinger på en opgave

Her kan du se eksempler på handlinger, som du kan udføre på en opgave.

Filtrér dine opgaver med brugerdefinerede filtre

Forudsætning:

- Funktionaliteten for brugerdefinerede filtre understøttes fra WorkZone Mobile version 2021.1 og fremad.
- Din administrator skal først aktivere **Brugerdefinerede filtre** i WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task** > Custom filters). Se Feature Settings i WorkZone Configurator Administrator Guide.

På din opgaveliste kan du anvende brugerdefinerede filtre, som er tilgængelige for dig. Brugerdefinerede filtre er gemte søgelister (forespørgsler), der er oprettet i WorkZone OData QueryBuilder.

> **Vigtigt:** En gemt forespørgsel bliver tilgængelig for dig som et brugerdefineret filter, hvis det har entiteten **WzpUserTasks** og er blevet delt med dig af den bruger, der har oprettet filtret (eller hvis du selv har oprettet det).

Læs mere om at [oprette, redigere og dele forespørgsler](#) i WorkZone Process Administrator Guide.

- Som standard anvendes der ingen filtre.
- Hvis du ikke har nogle tilgængelige filtre, vil knappen ikke blive vist.

1. Tryk øverst i opgavelisten.
2. Fra en liste over tilgængelige brugerdefinerede filtre, tryk på det filter, du vil anvende.

   -Eller-

   For at fjerne det eksisterende filer, tryk **Intet filter**.

3. Tryk **Færdig** i iOS, eller **OK** i Android. Det valgte filter er nu anvendt.

> Vigtigt: Du kan kun se de opgaver, der er tildelt dig.

Arbejde med dine stedfortræderopgaver

> **Forudsætning:**
>
> - Arbejde med dine stedfortræderopgaver understøttes fra WorkZone Mobile version 2021.1 og frem.
> - Din administrator skal først aktivere Arbejde med dine stedfortræderopgaver i WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task** > Delegated tasks). Se Feature Settings i WorkZone Configurator Administrator Guide.

Hvis du er stedfortræder for en bruger, kan du nu skifte til denne brugers opgaveliste og arbejde med deres opgaver. Læs mere om stedfortrædere i WorkZone Client Brugervejledning.

- Du kan kun arbejde med en opgaveliste (altså enten dine egne eller en anden brugers opgaver) ad gangen. Som standard er det dine egne opgaver, der vises.
- Indstillingen **Mine opgaver** vises kun, hvis du er stedfortræder for mindst en bruger.

1. Tryk **Mine opgaver** øverst i opgavelisten.
2. Fra en liste over brugere, som du er stedfortræder for, tryk på den bruger, hvis opgaver du vil arbejde med.

   -Eller-

   For at skifte tilbage til dine egne opgaver, tryk **Mine opgaver**.
3. Tryk **Færdig** i eller **OK** i . Opgavelisten for den valgte bruger vises nu.

Ranger dine opgaver

Forudsætning: WorkZone Process 2019.3 eller senere.

Når der startes en ny proces, tildeles brugeropgaver automatisk den næste tilgængelige plads i rækkefølgen. Tryk **Rangorden** øverst i listen over dine opgaver for at sortere dine opgaver efter den rækkefølge, de har i WorkZone Client. Se WorkZone ClientBruger-vejledning for om rækkefølge/rangorden.

Du kan ændre rækkefølgen på dine opgaver for at angive den rækkefølge, de skal behandles i.

Vigtigt: Du kan ikke ændre rækkefølgen på en afventende opgave.

1. Tryk **Rækkefølge** øverst i listen.
2. Tryk **Rediger**.
3. Tryk ved siden den opgave, du vil omarrangere, og træk og slip opgaven, så den passer med den ønskede rækkefølge.
4. Tryk **Gem ændringer**.

Vis opgave som PDF ()

Forudsætning:

- WorkZone PDF.
- Du skal være online for at få vist din opgave som en PDF.
- Dokumenter skal have et filformat, der tillader konvertering til PDF. Se Understøttede dokumentformater.
- Dokumenter skal være ubeskyttede.

Tryk i toppen for at vise en opsummering af din opgave og vedhæftede dokumenter i en samlet PDF-fil.

- PDF'en er skrivebeskyttet.

Vis opgavedokumenter

Forudsætning: WorkZone PDF.

De fleste opgaver har vedhæftede dokumenter.

- Tryk på dokumenttitlen for at se det indhold.

Dokumentet åbner i PDF-format med undtagelse af Excel-dokumenter og nogle filformater som for eksempel TXT og XML, som åbner i Quick Look. Dokumenter, der ikke kan konverteres til PDF, for eksempel video- og lydfiler, åbner i deres oprindelige format. Se Understøttede dokumentformater

- Fra dokumentvisningen, tryk og i toppen for at åbne forrige eller næste dokument på den pågældende opgave.
- Stryg op og ned for at gå til næste eller forrige side i det åbnede dokument.

Tilføj eller fjern dokumenter

1. Tryk **Rediger**, og tryk derefter:

Søg	Søg i alle dokumenter på den aktuelle sag og tilføj dokumenter.
Tilføj	Tilføj et dokument fra din enhed. Du kan: • Gennemse og tilføje et dokument fra din enhed. • Tilføje billeder fra dit fotobibliotek. • Du kan også tage et billede eller optage en video med kameraet i din telefon og føje det til opgaven. **Bemærk:** Du kan kun tilføje dokumenter, når du er online.
Filtre	Anvend filtre på dine dokumenter (ikke arkiverede eller afsluttede) og tilføj dokumenter. Hvis du har føjet arkiverede eller afsluttede dokumenter til dine **Favoritdokumenter**, vises disse, når du anvender dette filter. Bemærk at denne funktion kun er gældende for de udvidede processer.

Slet	Fjern dokumenter fra opgaven.

2. Tryk for at vende tilbage til opgaven og derefter gemme eller annullere dine ændringer.

Rediger Microsoft Office-dokumenter ()

Forudsætning: Du skal have Microsoft Office 365 installeret på din enhed.

Bemærk: Du kan kun redigere dokumenter, når du er online.

1. Tryk på det dokument, du vil redigere.
2. Tryk **Rediger** i dokumentfremviseren for at åbne det dokument, du gerne vil redigere i den tilsvarende Office-applikation.
3. Foretag dine ændringer og tryk for at lukke dokumentet. Tryk derefter for at vende tilbage til opgaven.
   - Hvis du ikke har slået **Automatisk lagring** til i din Office-app: Foretag dine ændringer og gem dokumentet. Tryk herefter for at lukke dokumentet og tryk for at vende tilbage til opgaven.

Hvis dokumentet ikke er et Office-dokument, kan du eksportere dokumentet til en relevant app for at redigere det. Se Del dokumenter vha. andre apps..

Se også: Du kan ikke redigere Office-dokumenter - Apps til Office 365 åbner ikke dokumenterne

Annoter PDF-dokumenter

Du kan annotere PDF-dokumenter. Størrelsen på PDF-dokumenter, der kan annoteres afhænger af din organisations kapacitet og internetforbindelsen.

Vigtigt:

- Du vil ikke kunne gemme dine ændringer i et stort PDF-dokument. Hvis du prøver at gemme dine ændringer og beskeden "opdaterer 0 ud af 1" vises i statuslinjen i længere tid, anbefaler vi, at du lukker, sletter og derefter geninstallerer appen.
- Hvis en anden bruger redigerer og gemme det samme PDF-dokument før du nåede at gemme dine ændringer, modtager du en meddelelse om dokumentkonflikten, hvor du har mulighed for at kassere dine ændringer eller at overskrive den anden brugers ændringer. Hvis udkastversionering er slået til for din organisation, kan du altid se og gendanne tidligere versioner af dokumentet i WorkZone Client. Se WorkZone Client Brugervejledning.

1. Tryk på det PDF-dokument, du vil annotere.
2. I dokumentviseren, tryk **Rediger**. Dokumentet åbner i PDF-editoren.
3. I PDF-redigeringsprogrammet, tryk **Rediger** for at åbne en værktøjslinje med forskellige annoteringsindstillinger. Tryk på den relevante knap i værktøjslinjen og tryk herefter dér i dokumentet, hvor du vil lave en annotering. Du kan, for eksempel trykke på **Huskeseddel** for at føje en huskeseddel til et bestemt afsnit i dokumentet. Se Brug PDF-redigeringsprogram (iOS-version).
4. Tilføj dine annotationer og tryk derefter **Gem**.

Del dokumenter vha. andre apps.

1. Tryk på det dokument, du vil dele.
2. I dokumentfremviseren, tryk **Del** og vælg en relevant app.

Den valgte app åbner en kopi af dokumentet. Bemærk, at du ikke kan gemme dokumentet tilbage i WorkZone.

Tilføj eller fjern aktører

1. Tryk **Rediger** og tryk herefter:

Søg	Søg efter medarbejdere og enheder, der har registreret mail-oplysninger, og tilføje dem som aktører.

Aktørsekvens	Søg i aktørsekvenser og tilføj sekvenser. Bemærk at denne funktion kun er gældende for de udvidede processer.
Slet	Fjern aktører.

2. Tryk på for at vende tilbage til opgaven og gemme eller annullere dine ændringer.

Ændre rækkefølgen af dokumenter og aktører

1. Tryk **Rediger**, og tryk herefter **Skift rækkefølge**.
2. Træk et dokument eller en aktør til en ny placering for at ændre rækkefølgen på, for eksempel, dokumenter og godkendere på en forelæggelsesopgave.
3. Tryk på for at vende tilbage til opgaven og gemme eller annullere dine ændringer.

Om opgavefrister og prioriteter

Opgaverne på opgavelisten er markeret i forhold til frister og prioriteter. Som standard er opgaverne sorteret efter frist. Tryk **Prioritet** eller **Opdateret** øverst i listen, hvis du vil sortere opgaverne efter prioritet eller hvornår dokumentet sidst blev opdateret-

Frister

En opgave er markeret med en farvet linje til højre.

- Grøn – Processen er i gang.
- Gul – Procesfristen nærmer sig.
- Rød – Procesfristen er overskredet.

Frister vises ved siden af opgaverne. Åbn en opgave for at se flere oplysninger om opgavens frist.

Prioriteter

- Et udråbstegn "!" Angiver at denne opgave har høj prioritet.
- Et punkttegn angiver at denne opgave har lav prioritet.

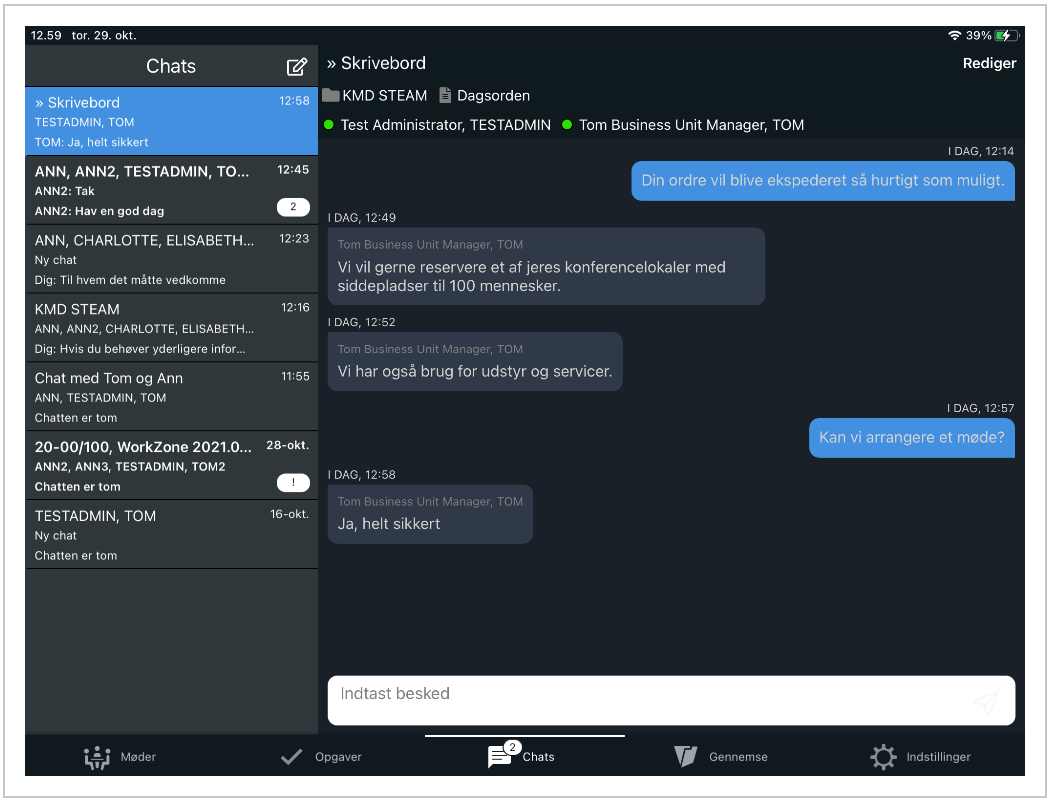
Bemærk: Kun udvidede processer kan have prioriteter.

Arbejde med WorkZone-chats

Forudsætning:

- Chatfunktionen understøttes fra WorkZone Mobile version 2020.2.
- **Chat**-modulet skal først aktiveres af din administrator i WorkZone Configurator, både for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) og WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). Se Feature Settings i WorkZone Configurator Administrator Guide.

I WorkZone Mobile, kan du se dine eksisterende chats og besvare dem, oprette nye chats, administrere chathenvisninger (tilføje eller fjerne sager, dokumenter og deltagere), forhåndsvise og redigere chatdokumenter (kun redigerbare dokumenter) og se metadata for chatdokumenter og sager. Se WorkZone Client Brugervejledning for yderligere oplysninger om WorkZone Chat.



Se dine chats

1. Tryk **Chats** i navigationsruden for at se en liste over chats, hvor du enten er opretter eller deltager. Dine chats sorteres efter hvornår de sidst blev opdateret.
2. Tryk på en chat for at åbne den. I chatten kan du se chatoplysninger såsom deltagere, henvisninger og beskeder.

> **Tip:**
>
> - Der vises et tal på ikonet for **Chats** i navigationsruden, som indikerer hvor mange ulæste beskeder, du har samlet over alle dine chats.
> - Der vises også et tal på individuelle chats i chatlisten, som indikerer hvor mange ulæste beskeder, du har i den pågældende chat.
> - En grøn prik ved siden af en brugers navn i chatten, indikerer at vedkommende er online. En grå prik indikerer at brugeren er offline.

Svar i en chat

1. Tryk **Chats** i navigationsruden.
2. Tryk på den chat, du vil besvare.
3. Indtast din besked i inputfeltet, og tryk eller .

> **Tip:** Du kan fortsætte med at skrive dine chatbeskeder, mens du er offline. De sendes automatisk næste gang du er online.

Opret en ny chat (fra en opgave)

1. Tryk **Opgaver** i navigationsruden.
2. Tryk på den opgave, som du vil oprette en chat for.
3. Tryk i øverste højre hjørne. Der oprettes nu en ny chat om den pågældende opgave. Opgavens sag og dertilhørende dokumenter tilføjes automatisk som chathenvisninger.

Tip:

- Hvis der allerede eksisterer en chat om denne procesopgave, åbnes den i stedet.
- Du kan tilføje eller fjerne chatsager, -dokumenter eller -deltagere efter behov. Se Administrer chathenvisninger.
- Hvis opgavens sag eller tilhørende dokumenter beskyttes af et indblik, er det kun brugere med pågældende adgangs-rettigheder, der kan se sagen eller eventuelle dokumenter i chat-henvisningerne.

Opret en ny chat (uden en opgave)

1. Tryk **Chats** i navigationsruden.
2. Tryk i listen **Chats** (øverste venstre hjørne på skærmvisningen). Du bedes derefter om at tilføje chatdeltagere.
3. Tilføj chatdeltagere og tryk **Færdig**. Den nye chat oprettes.
4. Du kan eventuelt trykke **Rediger** for at tilføje chatsager og -dokumenter. Se Administrer chathenvisninger.

Administrer chathenvisninger

Du kan tilføje eller fjerne chatsager, -dokumenter eller -deltagere i dine chats.

- Du skan være online for at kunne fjerne chatsager, -dokumenter eller -deltagere.

1. Tryk på den chat, hvorpå du vil tilføje eller fjerne dokumenter, sager eller del-tagere.
2. Tryk **Rediger** under chattens titel.
3. Vælg den sag, det dokument eller den bruger, som du vil fjerne eller tilføje.

   - For at tilføje: Tryk **Tilføj deltager**, **Tilføj dokument**, eller **Tilføj sag** og indtast derefter navnet på den sag, det dokument eller den deltager, du vil tilføje.

- For at fjerne: Tryk ved siden af den eksisterende sag, dokument eller bruger for at fjerne dem fra listen.

4. Tryk **Færdig**.

Forhåndsvisning af chatdokumenter

1. Tryk på den chat, der indeholder det dokument, du vil se en forhåndsvining af.
2. Tryk på dokumenttitlen for at se dokumentets indhold.

> **Tip:**
>
> - Tryk og øverst på skærmen for at se forrige eller næste dokument i den aktuelle chat
> - Stryg op og ned for at gå til næste eller forrige side i det åbnede dokument.

3. Tryk **Tilbage** for at lukke forhåndsvisningen og gå tilbage til chatten.

Rediger et chatdokument

- Du skal være online for at kunne redigere chatdokumenter.

1. Tryk på den chat, der indeholder det dokument, du vil redigere.
2. Tryk på dokumentets titel.
3. Tryk i øverste højre hjørne for at redigere dokumentet.

> **Bemærk:** Det kan være nødvendigt, at du henter en tilsvarende Microsoft Office-app for at kunne redigere visse dokumentformater.

4. Gem dine ændringer og tryk **Tilbage** for at vende tilbage til chatten.

Se oplysninger om chatdokumenter og -sager

Du kan se oplysninger om dokumenter og sager i dine chats.

1. Tryk på en chat med et dokument eller en sag.

    - For dokumenter:

        a. Tryk på dokumenttitlen for at åbne dokumentet i visningstilstand.

        > Tip: Tryk og øverst på skærmen for at se forrige eller næste dokument i den aktuelle chat.

        b. Udfør den relevante handling:

            - For at se metadata for et dokument: Tryk i øverste højre hjørne. Dokumentets metadata vises. Tryk for at vende tilbage til dokumentvisningen.
            - For at redigere dette dokument: Tryk i det øverste højre hjørne.
            - For at se den tilknyttede sag: Tryk i øverste højre hjørne. Tryk **Tilbage** for at vende tilbage til det åbne dokument.

    - For sager:

        a. Tryk på sagstitlen for at åbne dens detaljer.

        > Tip: Tryk og øverst på skærmen for at se den forrige eller næste sag i den aktuelle chat.

        b. Under **Dokumenter**, kan du se eventuelle dokumenter på den aktuelle sag.

Tip:

- Tryk på et dokument for at se en forhåndsvisning af det, redigere det eller for at se dokumentets metadata.

-Eller-

- Tryk **Metadata** for at se sagens metadata (du skal være online for at kunne se sagens metadata).

2. Tryk **Tilbage** for at vende tilbage til chatten.

Gennemse WorkZone-sager og -dokumenter

Forudsætning:

- Funktionen Gennemse (På nuværende tidspunkt tilgængelig i en eksperimentel udgave) understøttes fra WorkZone version 2021.0.
- Modulet **Gennemse** skal først aktiveres af din administrator i WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). Se **Feature Settings** i WorkZone Configurator Administrator Guide.
- Du skal være online for at kunne bruge modulet **Gennemse**.

Du kan hurtigt gennemse dine sagslister eller dokumentlister (altså dine WorkZone-lister, herunder også foruddefinerede filtre og brugerdefinerede filtre) og se elementer i dem. Se WorkZone Client Brugervejledning for yderligere oplysninger om WorkZone-lister.

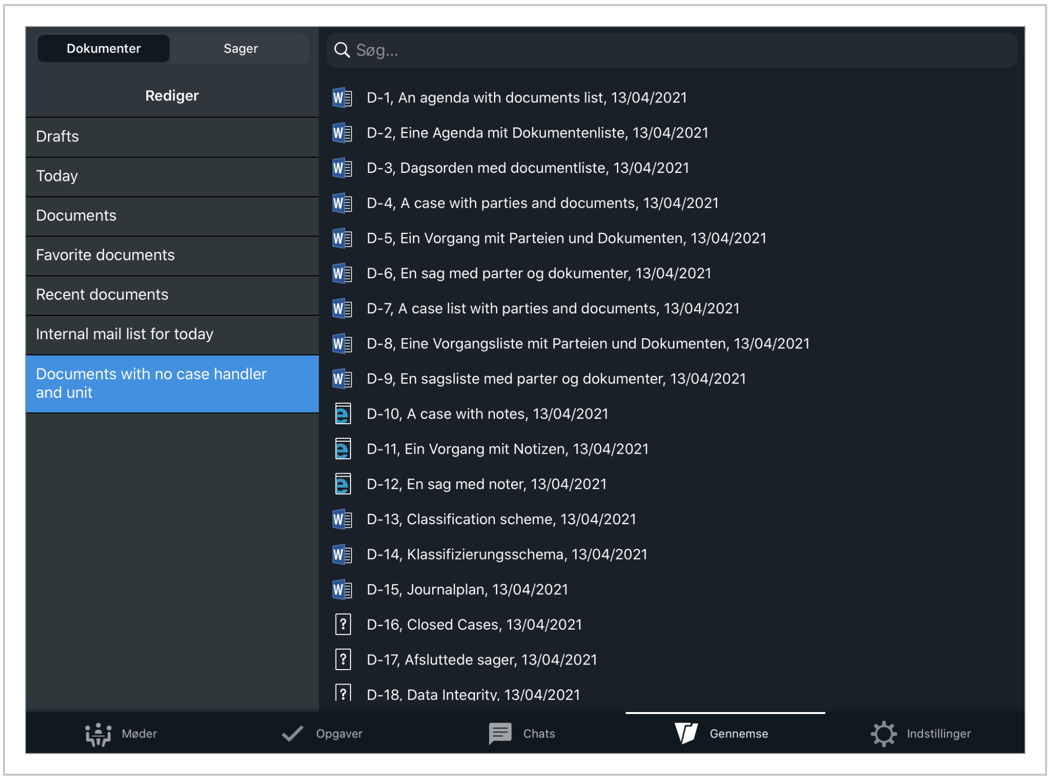
Du kan hurtigt søge efter sager og dokumenter, der er tilgængelige for dig i WorkZone og se deres oplysninger.

- På sager: Du kan se dokumenter på den valgte sag, forhåndsvise eller redigere dokumenternes indhold (i redigerbare dokumenter), se deres metadata og se metadata for selve sagen.
- På dokumenter: Du kan se en forhåndsvisning eller redigere dokumenterne (hvis de er redigerbare) og se deres metadata og navigere til de tilknyttede sager og se deres oplysninger og metadata.

Vigtigt:

- For at redigere visse dokumentformater, kan det være nødvendigt at installere et tilsvarende Office-program.

- I Gennemse-funktionen fungerer almindelige WorkZone-adgangsregler: Du vil kun kunne se og redigere de elementer, du har adgang til.



Søg på sager og dokumenter

Du kan søge efter WorkZone-sager og -dokumenter og se deres indhold og oplysninger.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på den relevante fane (**Dokumenter** eller **Sager**). Herefter vil du få vist dine WorkZone-lister over dokumenter eller sager (afhængig af den valgte fane), herunder også dine foruddefinerede filtre og brugerdefinerede filter.
3. Tryk på den relevante liste for at se elementer i den.

> Tip: For lister med mange elementer, kan du bruge søgefeltet til at finde et dokument eller en sag i listen.

4. Tryk på en sag eller et dokument for at se deres oplysninger og henvisninger. Se Se sagsoplysninger og Se dokumentoplysninger.

Tilpas dine viste lister

Du kan tilpasse hvilke WorkZone-lister, der vil blive vist, når du åbner modulet Gennemse, eller omarrangere listernes visningsrækkefølge.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på fanen **Sager** eller **Dokumenter**.
3. Tryk **Rediger**. Du vil herefter se en todelt liste over dine eksisterende WorkZone-lister.
    - **Valgte filtre**: viser de af dine WorkZone-lister, der er markeret til at blive vist som standard.
    - **Søgeresultater**: viser foruddefinerede filtre (afhængig af hvilken fane, du har valgt), som du kan markere til at blive vist, når du åbner modulet Gennemse.
4. For at tilføje eller fjerne en liste fra dine valgte filtre, eller for at ændre rækkefølgen på dine viste lister, tryk og hold ☰ ved siden af en liste og træk den til en ny placering.

> **Tip:**
>
> - Tryk hurtigt to gange på en liste for at flytte den fra **Valgte filtre** til **Søgeresultater** - Du kan også gøre det den anden vej.
> - Tryk **Foruddefinerede filtre** eller **Brugerdefinerede filtre**, og tast en søgning i søgefeltet for at søge efter et bestemt foruddefineret filter eller brugerdefineret filter.
>   - Foruddefinerede filtre er dine WorkZone-lister der er automatisk indstillet af din organisation. Søg efter foruddefinerede filtre skelner mellem store og små bogstaver

> - Brugerdefinerede filtre er dine WorkZone-lister, herunder gemte søgninger, som er oprettet i WorkZone Client. Søgning efter brugerdefinerede filtre skelner mellem store og små bogstaver.

5. Tryk **Færdig** for at gemme dine ændringer, eller tryk **Annuller** for at kassere dem.

Se sagsoplysninger

I modulet **Gennemse** kan du se sager, der er tilgængelige for dig og deres metadata, se dokumenter på e valgte sager, se en forhåndsvisning af og redigere deres indhold (kun i redigerbare dokumenter) og se dokumentmetadata.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på fanen **Sager**. Der vises derefter en liste over WorkZone-sagslister, som du har adgang til.
3. Tryk på den relevante sagsliste og vælg den relevante sag. Eventuelt Søg på sager og dokumenter.
4. Tryk **Dokumenter** for at se alle dokumenter (som du har adgang til) på denne sag.

> **Tip:**
>
> - Tryk på et dokument for at se en forhåndsvisning af det, redigere det (hvis det er redigerbart) eller se dokumentets metadata. Se trin 4-5 i Se dokumentoplysninger.
> - Tryk **Metadata** for at se metadata for denne sag.

5. Tryk **Tilbage** for at gå tilbage til den valgte sagsliste.

Se dokumentoplysninger

Du kan se en forhåndsvisning af WorkZone-dokumenter, som er tilgængelige for dig, redigere dem (hvis de er redigerbare), se deres metadata og gå til de tilknyttede sager, hvor du kan se deres oplysninger og metadata.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på fanen **Dokumenter**. Der vises derefter en liste over WorkZone-dokumentlister, som du har adgang til.
3. Tryk på den relevante dokumentliste og vælg det relevante dokument. Eventuelt Søg på sager og dokumenter. Dokumentet åbning derefter i visningstilstand.
4. Udfør den relevante handling:

   - For at se metadata for dette dokument: Tryk i øverste højre hjørne. Tryk for at vende tilbage til dokumentvisningen.
   - For at redigere dokumentet (Hvis det er redigerbart): Tryk i øverste højre hjørne.

     Bemærk: Det kan være nødvendigt, at du henter en tilsvarende Office-app for at kunne redigere visse dokumentformater.

   - For at gå til den tilknyttede sag og se sagens oplysninger og metadata: Tryk i øverste højre hjørne.
5. Tryk **Tilbage** for at vende tilbage til fanen **Dokumenter**.

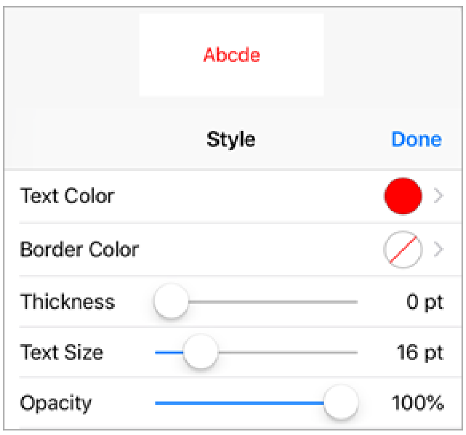
Brug PDF-redigeringsprogram (iOS-version)

Du kan annotere PDF-dokumenter med en PDF-editor.

1. I dokumentviseren, tryk **Rediger** for at åbne PDF-redigeringsprogrammet.
2. Tryk
3. Tryk **Rediger** for at åbne værktøjslinjen for annotationer.
4. Tryk på det værktøj, du vil anvende, og tryk derefter på det sted i dokumentet, hvor du vil tilføje en annotation.

> Tip: Du kan søge efter tekster i dokumentet og se omridset og annotationer, der gør navigeringen hurtigere.

> Tip: Tryk på det valgte redigeringsværktøj igen for at ændre yderligere parametre såsom farve, tykkelse, gennemsigtighed, fyldfarve, farve på strøg, rammefarve og tekststørrelse, hvor de kan anvendes. Når du har tilpasset de relevante indstillinger, tryk **Færdig** for at gemme dine ændringer.



Tilføj en huskeseddel.

Fremhæv den markerede tekst. Tryk og træk over den tekst, der skal fremhæves.

- Tryk to gange på for at redigere farven og gennemsigtigheden, som teksten fremhæves i.

Gennemstreg den valgte markerede tekst. Tryk og træk over den tekst, der skal streges igennem.

- Tryk to gange på for redigere indstillinger for den gennemstregede tekst såsom farve, tykkelse og gennemsigtighed.

Understreg den valgte tekst med en lige linje. Tryk og træk over den tekst, der skal understreges.

- Tryk to gange på for at redigere indstillingerne for den understregede tekst såsom farve, tykkelse og gennemsigtighed.

Understreg den valgte tekst med en bølget linje. Tryk og træk over den tekst, der skal understreges.

- Tryk to gange på for at redigere indstillingerne for den understregede tekst såsom farve, tykkelse og gennemsigtighed.

Tilføj underskrift. Du kan oprette en ny underskrift eller bruge en foruddefineret.

I dialogen **Underskrifter**:

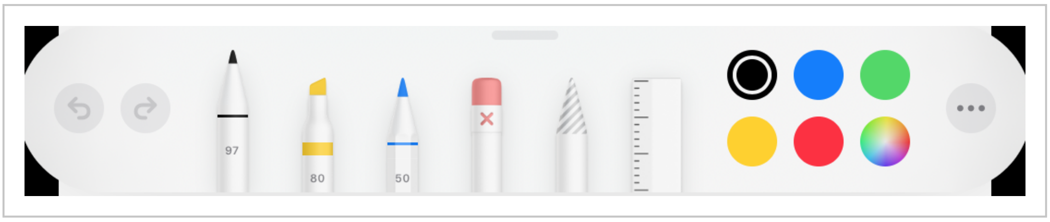
1. Tryk på en eksisterende signatur, du vil bruge.

   -Eller-

2. Tryk **Ny signatur** for at oprette en signatur for flere brugere, eller tryk **One Time Signature** for at oprette en signatur, der kun bruges en gang. Tilføj din signatur under **Sign here** og tryk **Sign**.

Tegn i frihånd.

- Tryk på det relevante tegneværktøj i værktøjslinjen med tegneværktøj nederst i skærmen, for at vælge det eller redigere parametre for det.



Bemærk: WorkZone Mobile-versionen til Citrix har flere forskellige simple og gratis værktøj til at tegne med end den almindelige version.

Slet tidligere håndtegnede illustrationer eller tekstmarkører.

Tilføj tekst.

- Tryk to gange på for at redigere farve, rammefarve, tykkelse, tekststørrelse og gennemsigtighed.

Tegn pile.

- Tryk to gange på for at redigere pilens farve, tykkelse og gennemsigtighed.

Tegn lige streger.

- Tryk to gange på for at redigere farve, tykkelse og gennemsigtighed.

Tegn rektangler.

- Tryk to gange på for at redigere farve på strøg, fyldfarve, tykkelse og gennemsigtighed.

Tegn ellipser

- Tryk to gange på for at redigere farve på strøg, fyldfarve, tykkelse og gennemsigtighed.

Tegn polygoner

1. Tryk på ikonet for redigering.

2. Vælg farve på strøg, fyldfarve, tykkelse og indstillinger for gennemsigtighed.
3. Tryk **Færdig** for at tegne.

Tegn skyformede polygoner.

1. Tryk på ikonet for redigering.
2. Vælg farve på strøg, fyldfarve, tykkelse og indstillinger for gennemsigtighed.
3. Tryk **Færdig** for at tegne.

Tegn polylinjer.

1. Tryk på ikonet for redigering.
2. Vælg farve på strøg, fyldfarve, tykkelse og indstillinger for gennemsigtighed.
3. Tryk **Færdig** for at tegne.

Tegn lige steger med kalibrerede mål

- Tryk to gange på for at redigere farve, tykkelse, gennemsigtighed, målestok, præcision eller objektfastgørelse.

Tegn kalibrerede polylinjer.

1. Tryk på ikonet for redigering.
2. Vælg farve, tykkelse, gennemsigtighed, målestok, præcision eller objektfastgørelse.
3. Tryk **Færdig** for at tegne.

Tegn udfyldte polygoner.

1. Tryk på ikonet for redigering.
2. Vælg farve, tykkelse, gennemsigtighed, målestok, præcision eller objekt-

fastgørelse.

3. Tryk **Færdig** for at tegne.

Tegn kurvede streger.

- Tryk to gange på for at redigere farve, tykkelse og gennemsigtighed.

Skift til panoreringsvisning, hvor du kan panorere, bruge zoomfunktionen eller blafre mellem sider for at vælge annotationer.

Luk værktøjslinjen for annotationer.

Ofte stillede spørgsmål

I dette afsnit kan du se en liste over ofte stillede spørgsmål (FAQ) og eventuelle løsninger til WorkZone Mobile.

Synkronisering af møder virker ikke

Løsning

Genstart din enhed og slet WorkZone Mobile-appen. Geninstaller WorkZone Mobile-appen og log ind på WorkZone. Hvis problemet stadig forekommer, bedes du rapportere den.

Office-dokumenter kan ikke åbnes for redigering

Forsøg på at åbne et Office-dokument i redigeringstilstand fejler med fejlbeskeden "Filen kan ikke åbnes".

Løsning

I din enheds indstillinger, vælg den relevante Office-app og tryk **Nulstil Wo**rds-/Excel/PowerPoint. Aktiver knapperne **Ryd alle dokumenter/projektmapper/præsentati**oner **og** Slet logonoplysn**inger,** og luk Office-appen. Prøv herefter at genåbne Office-dokumentet.

WorkZone Mobile-app til Intune stopper med at forbinde (Intune til)

Efter et stykke tid stopper WorkZone Mobile-appen med at tilslutte, hvilket fører til fejlmeddelelsen "Not connected/Ikke tilsluttet". Hvis du forsøger at genstarte appen, vises fejlbeskeden "Connect/Tilslut".

Løsning

Tjek indstillingerne for Wi-Fi på din enhed. Tjek at du bruger din almindelige internetforbindelse (altså den forbindelse, som du tidligere har koblet til WorkZone med).

Navigationsruder forsviner (-versionen til Citrix)

I sjældne tilfælde forsvinder alle faner, bortset fra Onlinehjælpen, hvilket forhindrer navigering i appen.

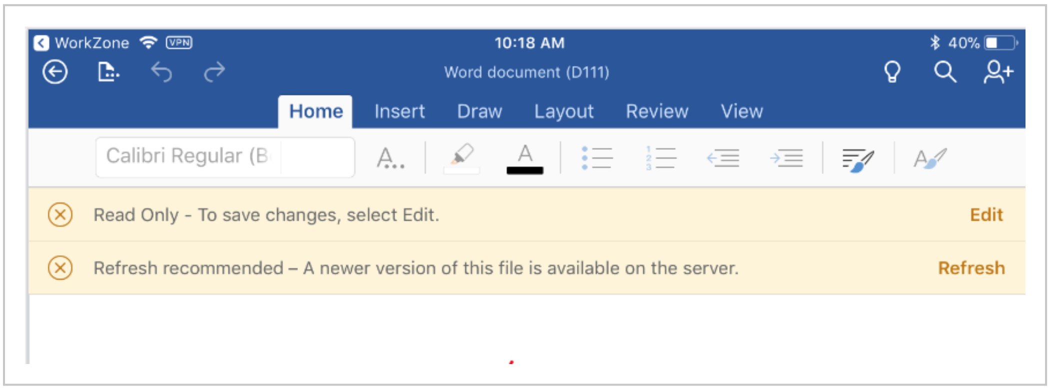
Løsning

Afinstaller og geninstaller appen fra Secure Hub.

Office 365-beskeder i WorkZone Mobile

Følgende beskeder kan fremkomme i toppen af skærmen i Office 365, når du åbner dokumenter til redigering fra WorkZone Mobile. Klik på den relevante besked nedenfor for at se yderligere oplysninger om beskeden, og hvordan man kommer videre.

> **Eksempel**:Office-meddelelser i Word



Tip:

- Tryk på **Seneste** i din Office-applikation for at se status på de dokumenter, du senest har åbnet. Du kan, for eksempel, se om et dokument er blevet overført eller hentet korrekt. En advarsel vises, hvis der er problemer med dokumentet.
- Se også Office Hjælp for mere information. Åbn et dokument i Office-appen, og tryk  > **Hjælp og Support** for at åbne Office Hjælpen.

Opdatering anbefales - Der er en nyere version af filen på serveren.

Når du prøver at redigere et dokument, der er åbent på en anden klient (telefon, tablet, bærbar) samtidigt. Dokumentet er skrivebeskyttet.

Sådan fortsætter du

Tryk **Opdatér** for at se de seneste ændringer.

Der kan ikke overføres - Log på din konto.

Nogle gange kan et dokument ikke overføres til WorkZone-serveren og bliver skrivebeskyttet efter en af de følgende handlinger:

- Du har lukket dit Office-program
- Du har skiftet sproget i enhedens indstillinger
- Du har genstartet din enhed

Sådan fortsætter du

Undgå at genstarte din telefon og undgå at lukke Office-appen.

Når du ser beskeden "Der kan ikke overføres - Log på din konto", tryk **Mere...**> **Log ind**. Åbn derefter dokumentet fra listen **Seneste** i Office-appen. Dokumentet kan igen redigeres.

Der kan ikke overføres - der er noget galt og ændringerne kan ikke overføres

Du er højst sandsynligt i færd med at ændre et låst eller arkiveret dokument. Se Rediger dokumenttilstand i brugervejledningen til WorkZone Client.

Sådan fortsætter du

Du kan gemme en kopi af dokumentet og derefter redigere i kopien. Tryk **Gem en kopi** i meddelelsen. Kopien gemmes kun lokalt.

Der kan ikke overføres - En anden redigerer filen

Du forsøger at redigere et dokument, der allerede redigeres af en anden.

Sådan fortsætter du

Du kan vente på den anden bruger bliver færdig med at redigere og lukke dokumentet, eller gemme en kopi af dokumentet lokalt og redigere i kopien. Tryk **Gem en kopi** i meddelelsen. Kopien gemmes kun lokalt.

Denne version af Microsoft Excel kan ikke køre VBA-makroer.

Du har åbnet et Excel-dokument, der indeholder makroer. Office 365 understøtter ikke makroer.

Sådan fortsætter du

Tryk **Luk** i meddelelsen for at lukke den. Du kan fortsætte med at arbejde på dokumentet, men makroer ignoreres. Ændringer gemmes.

Filen indeholder makroer, der ikke fungerer med denne version af Word. Makroerne bevares med filen, så du ikke mister dem

Du prøver at åbne et Word-dokument, der indeholder makroer. Office 365 understøtter ikke makroer.

Sådan fortsætter du

Tryk **Afvis** for at lukke beskeden. Du kan fortsætte med at arbejde på dokumentet, men makroer ignoreres. Ændringer gemmes.

Tillad filkonvertering?

Du er i gang med at åbne et dokument i Excel, men Excel støtter ikke filformatet.

Sådan fortsætter du

Excel viser meddelelsen "For at kunne åbne, eksportere til og udskrive visse filtyper skal Excel konvertere filen ved hjælp af en Microsoft-onlinetjeneste." Tryk **Tillad** for at konvertere dokumentet til xlsx. Du kan også åbne dokumentet på en computer og gemme det i xlsx-format, og derefter føje dokumentet til en WorkZone-sag, -opgave eller -møde (alt afhængigt af hvad du arbejder på).

Filen kan ikke åbnes. Denne filtype understøttes ikke af denne version af Office.

Du er i gang med at åbne et dokument i Excel, men Excel støtter ikke filformatet.

Sådan fortsætter du

Tryk **Luk** for at lukke meddelelsen. Du kan åbne dokumentet på en stationær eller bærbar computer og gemme dokumentet i xlsx-format og derefter føje dokumentet til en sag, opgave eller et møde, alt afhængigt af hvad du arbejder på.

Skrivebeskyttet - Vælg Rediger, hvis du vil gemme ændringer

På mobile enheder vises beskeden hver gang, du åbner et dokument.

Sådan fortsætter du

Tryk **Redigér** i meddelelsen for at redigere dokumentet.

Skrivebeskyttet - En anden har denne fil åben. Du kan gemme ændringer til en kopi eller åbne filen senere.

Du er i færd med at redigere et dokument, der allerede redigeres af en anden. Dokumentet er låst af en anden bruger.

Sådan fortsætter du

Tryk **Gem en kopi** for at oprette en kopi, du kan redigere, eller tryk **Annuller**, hvis du vil vente til filen ikke længere redigeres af en anden. Kopien gemmes kun lokalt.

Skrivebeskyttet - Dette er et ældre filformat. Ændringerne kan kun gemmes på en kopi af filen.

Du er i færd med at redigere et dokument med et gammels dokument-format, der ikke understøttes af Office 365.

Sådan fortsætter du

1. Tryk **Annuller** i meddelelsen.
2. Åbn dokumentet på en computer og gem det med et nyt dokumentformat, for eksempel xlsx, docx eller pptx.
3. Føj dokumentet til sagen, opgaven eller mødet, alt afhængigt af hvad du arbejder på.

Excel 95-funktionen "Deling af projektmappe" er blevet aktiveret for denne projektmappe. Hvis du vil redigere denne fil, skal du gemme en kopi (vi fjerner delingen af projektmappen).

Du er i færd med at redigere et Excel 95-dokument med "Deling af projektmappe", hvilket ikke understøttes af Office 365.

Sådan fortsætter du

1. Tryk **Annuller** i meddelelsen.
2. Åbne dokumentet på en computer og gem det som en xlsx-fil.
3. Føj dokumentet til sagen, opgaven eller mødet, alt afhængigt af hvad du arbejder på.

Du kan ikke redigere Office-dokumenter - Apps til Office 365 åbner ikke dokumenterne

Du forsøger at redigere et dokument i en Office-app, Word, for eksempel, men appen åbner ikke dokumentet pga. problemer med dit login i Office-appen.

Sådan fortsætter du

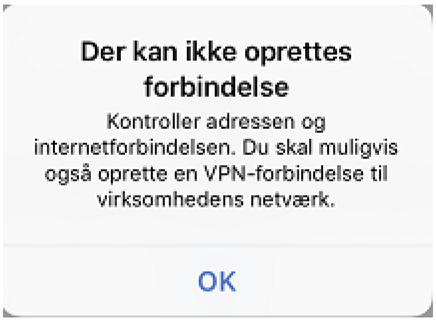
Nedenfor kan du se de trin, du skal følge for at løse problemet med Word som et eksempel. Trinnene er de samme for andre Office-apps. Du behøver kun at anvende disse trin i en Office-app - indstillingerne vil efterfølgende også træde i kraft i de andre apps.

> Vigtigt: Sørg for, at du ikke har nogen Office-applikationer kørende på din enhed.

1. På din enhed, skal du trykke **Indstillinger** > **Word**, og rulle ned til **Nulstil Word** og derefter aktivere **Ryd alle dokumenter** og **Slet Logonoplysninger.**
2. Åbn Word på din enhed.
3. Tryk **Åbn** > **Tilføj et sted** > **SharePoint-webstedets URL-adresse**.
4. Indtast URL-adressen for WorkZone Explorer, f.eks https://MyCompanySite/Explorer/.

5. Tryk **Næste** flere gange.
6. Indtast dine logonoplysninger og tryk **Log på**.

   Dit logon mislykkes med følgende fejlmeddelelse:

   Dine oplysninger er dog blevet gemt og du burde nu kunne redigere Word-dokumenter.
7. Tryk **OK** i meddelelsen og rediger et dokument via WorkZone Mobile.

> Tip: Office-appen kan komme til at åbne med visningen **Steder** over det dokument, du vil redigere. Tryk **Annuller** og du vil derefter kunne se dokumentet igen.

Vilkår og betingelser

Intellektuel ejendomsret

Dette dokument tilhører KMD. Oplysningerne heri må ikke kopieres, anvendes eller videregives uden for den sammenhæng, hvori de er givet, og til andet end de af KMD godkendte forretningsmæssige formål eller til teknisk evaluering, i overensstemmelse med aftalen mellem KMD og modtager. Dette forbehold afskærer ikke modtageren fra at bruge oplysningerne, såfremt de er fremskaffet på lovlig vis, og der ikke fremgår andre begrænsninger af anden aftale mellem KMD og modtageren.

Ansvarsfraskrivelse

Dette dokument er udelukkende beregnet til generel oplysning. Oplysningerne anses for at være korrekte og retvisende. KMD kan dog ikke garantere dette. KMD forbeholder sig retten til at ændre dokumentet og de beskrevne produkter uden varsel. KMD og dokumentets ophavsmænd fraskriver sig ethvert erstatningsansvar.

2021.3

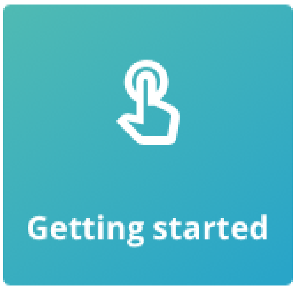
User Guide

Contents

WorkZone Mobile 2021.3

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

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



FAQ

What happens if I am working offline?

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

Related product documentation

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

WorkZone links

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

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

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

Work with your delegated tasks

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

Custom filters for tasks

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

This was new in WorkZone Mobile 2021.0

New Browse module

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

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

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

UI improvements

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

This was new in WorkZone Mobile 2020.3

Chat enhancements

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

Editing WorkZone documents via Office 365 in Intune version ()

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

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

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

Work with WorkZone chats

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

Conflict notification for simultaneously edited PDF documents

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

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

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

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

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

This was new in WorkZone Mobile 2019.3

Improved navigation

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

Task view improvements

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

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

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

This was new in WorkZone Mobile 2019.0

Support for password change

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

Performance improvements

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

This was new in WorkZone Mobile 2018.2

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

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

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

General information

Getting started

Log in and out on WorkZone Mobile.

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

On a meeting, you can:

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

On a task, you can:

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

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

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

Set up WorkZone Mobile.

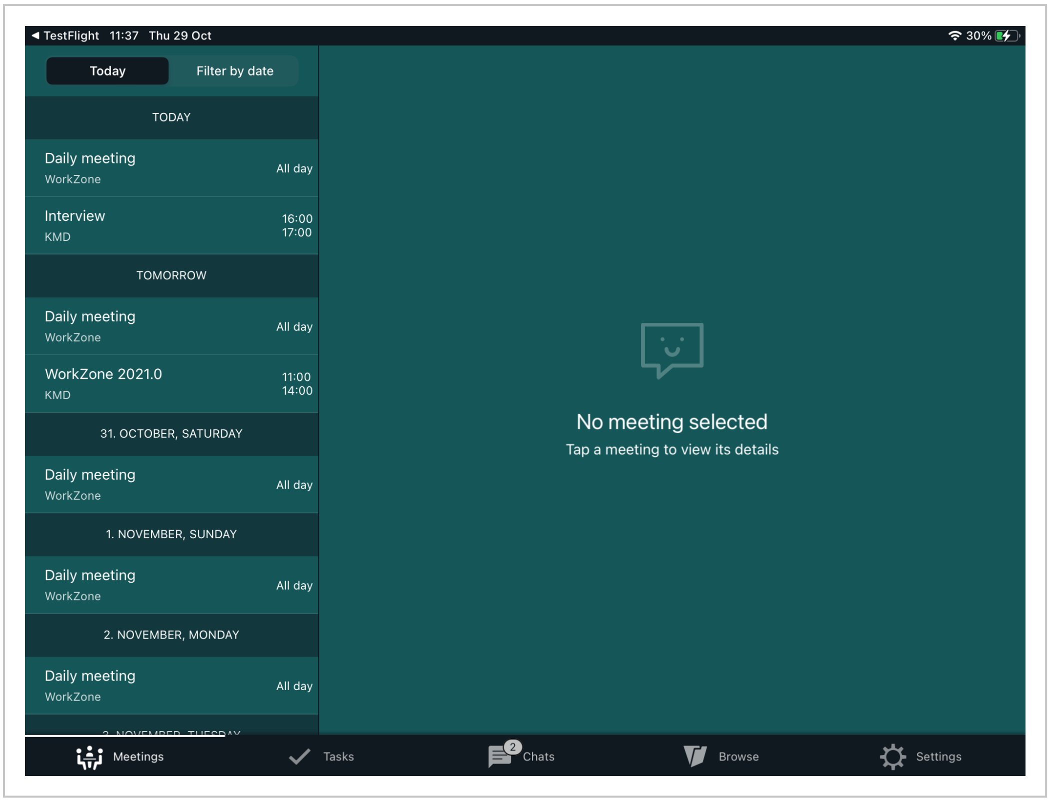
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

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

How do I navigate?

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



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

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

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

> **Prerequisite:**
>
> - Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

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

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

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

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

Password expiration

At login

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

While you work

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

Log out

1. Tap **Settings**.
2. Tap **Log out**.

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

Work offline

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

Refresh the meeting list after being offline

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

Filter meetings on a date

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

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

Changed connection state while working on a task

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

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

Set up WorkZone Mobile

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

View release and login information

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

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

Automatic error reporting

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

Share analytics

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

Edit meeting documents

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

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

Number of lines displayed in title

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

Show upcoming tasks

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

Show closed tasks

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

Keep closed tasks

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

View online help

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

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

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

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

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

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

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

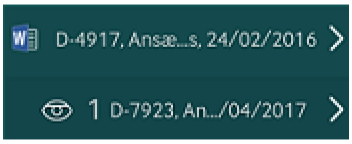
Edit Microsoft Office documents ()

> **Prerequisite:** You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

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

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



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

Note:

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

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

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

Annotate PDF documents

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

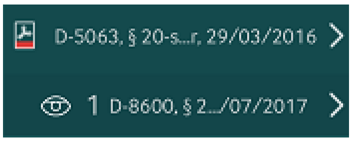
Important:

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

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

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

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



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

Share documents using other apps

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

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

Work with tasks

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

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

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

View a task

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

Respond to a task

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

Accept

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

Forward

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

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

Skip

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

Approve or Reject

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

OK

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

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

Other actions on a task

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

Filter your tasks using custom filters

Prerequisite:

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

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

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

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

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

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

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See [Feature Settings]() in WorkZone Configurator Administrator Guide.

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

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

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

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

Important: You cannot change ranking for a pending task.

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

View task as a PDF ()

Prerequisite:

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

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

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

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

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

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

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

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

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

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

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

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

Annotate PDF documents

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

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

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

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

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

Add or remove actors

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

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

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

Change order of documents and actors

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

About task deadlines and priorities

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

Deadlines

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

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

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

Priorities

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

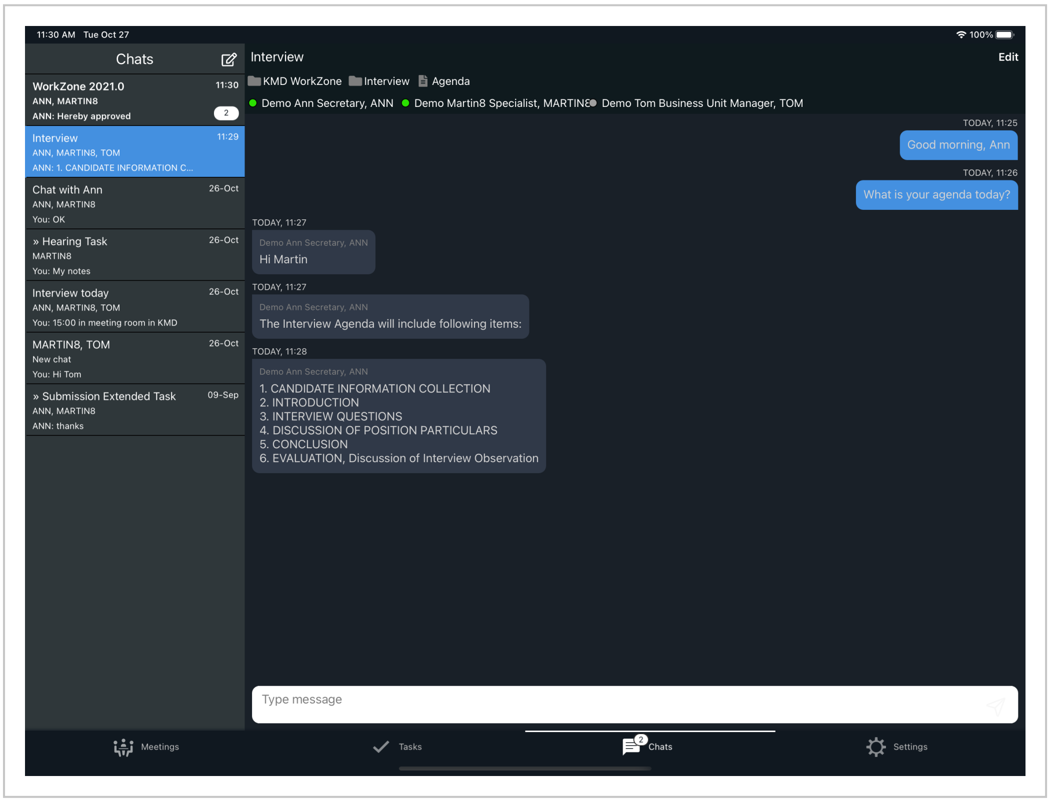
> **Note:** Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

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

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



View your chats

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

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

Reply in a chat

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

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

Create a new chat (from a task)

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

Tip:

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

Create a new chat (without a task)

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

Manage chat references

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

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

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

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

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

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

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

View details for chat documents and cases

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

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

   - For documents:

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

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

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

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

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

     > **Tip:**

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

 -Or-

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

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

Browse WorkZone cases and documents

Prerequisite:

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

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

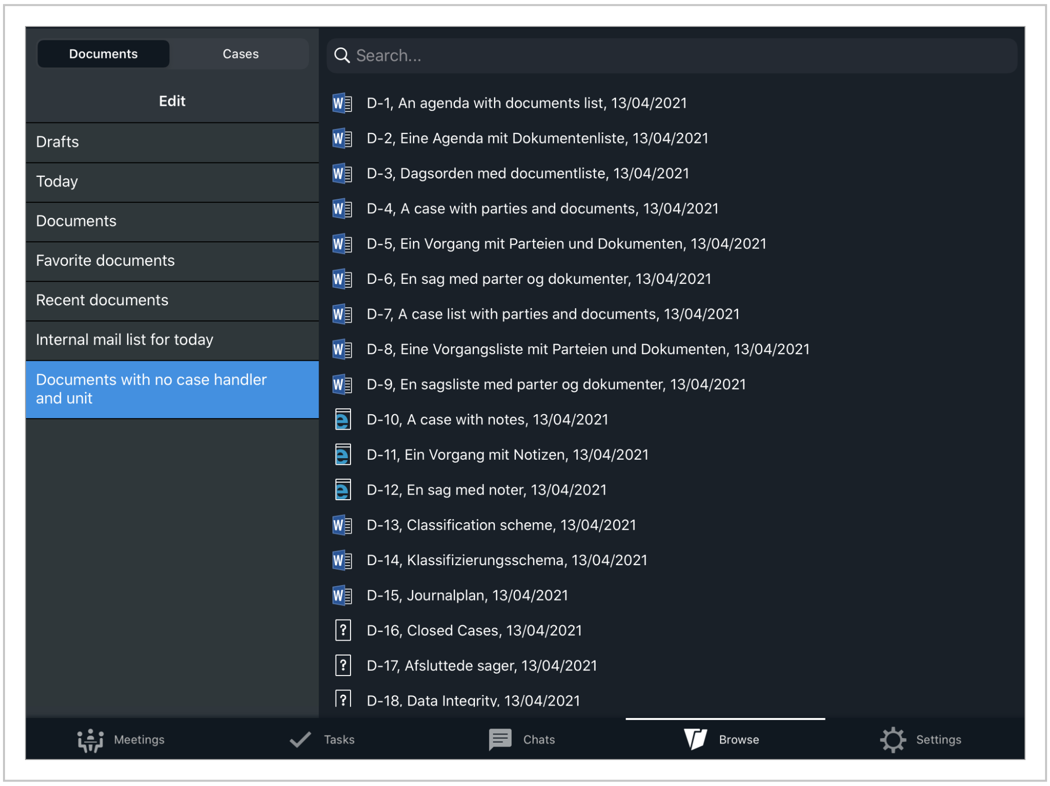
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
   - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
   - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

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

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

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

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

    - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
    - To edit this document (if the document is editable): Tap at the top right corner.

      > **Note:** You might need to install a relevant Office app to edit some document formats.

    - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

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

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

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

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

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

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

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

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

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

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

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

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

In the **Signatures** dialog:

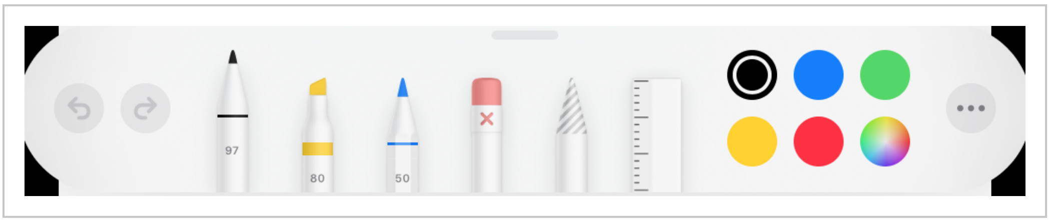
1. Tap an existing signature to use.

   -Or-

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

Draw free hand.

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



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

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

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

Draw straight lines with calibrated measures

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

Draw calibrated polylines.

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

Draw filled polygons.

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

Draw curved lines.

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

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

Close the annotation toolbar.

FAQ

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

Meeting synchronization does not work

Workaround

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

Cannot open Office documents for editing

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

Workaround

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

WorkZone Mobile app for Intune stops connecting (for Intune)

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

Workaround

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

Navigation tabs disappear (version for Citrix)

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

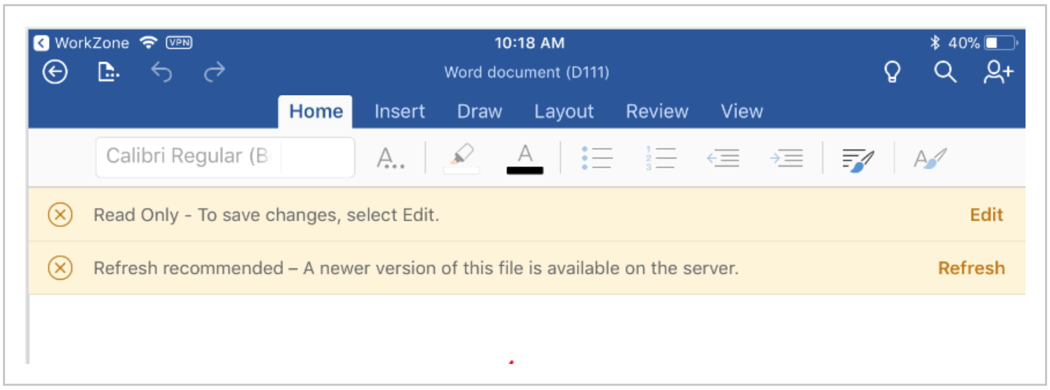
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

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

> **Example**: Office messages in Word



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

Refresh recommended - A newer version of this file is available on the server

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

How to continue

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

Can't upload – Please sign into your account

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

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

How to continue

Do not reboot your phone and do not close the Office mobile app.

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

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

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

How to continue

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

Can't upload – Someone else is editing this file

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

How to continue

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

This version of Excel can't run with VBA macros

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

How to continue

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

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

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

How to continue

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

Allow file conversion?

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

How to continue

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

Can't open file. This file type is unsupported by this version of Office

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

How to continue

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

Read Only – To save changes, select Edit

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

How to continue

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

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

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

How to continue

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

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

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

How to continue

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

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

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

How to continue

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

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

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

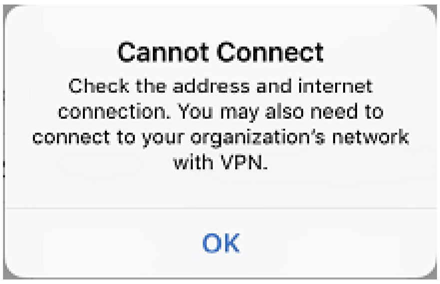
How to continue

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

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

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

   The log-in will fail with this message:

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

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

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

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KMD WORKZONE

_Mobile

2021.3

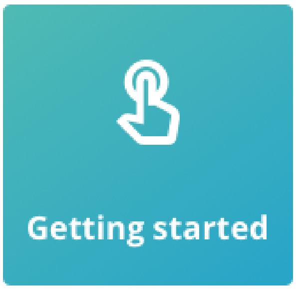
User Guide

Contents

WorkZone Mobile 2021.3

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

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



FAQ

What happens if I am working offline?

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

Related product documentation

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

WorkZone links

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

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

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

Work with your delegated tasks

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

Custom filters for tasks

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

This was new in WorkZone Mobile 2021.0

New Browse module

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

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

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

UI improvements

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

This was new in WorkZone Mobile 2020.3

Chat enhancements

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

Editing WorkZone documents via Office 365 in Intune version ()

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

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

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

Work with WorkZone chats

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

Conflict notification for simultaneously edited PDF documents

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

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

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

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

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

This was new in WorkZone Mobile 2019.3

Improved navigation

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

Task view improvements

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

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

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

This was new in WorkZone Mobile 2019.0

Support for password change

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

Performance improvements

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

This was new in WorkZone Mobile 2018.2

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

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

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

General information

Getting started

Log in and out on WorkZone Mobile.

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

On a meeting, you can:

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

On a task, you can:

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

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

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

Set up WorkZone Mobile.

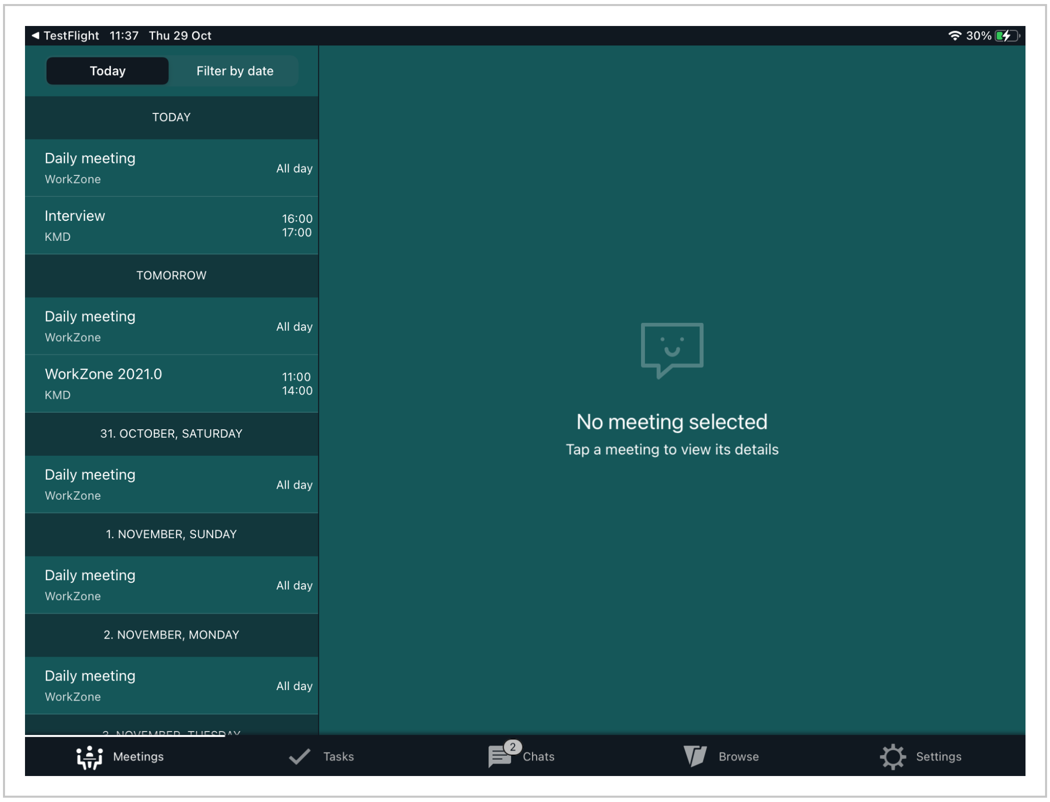
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

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

How do I navigate?

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



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

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

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

> **Prerequisite:**
>
> - Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

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

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

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

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

Password expiration

At login

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

While you work

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

Log out

1. Tap **Settings**.
2. Tap **Log out**.

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

Work offline

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

Refresh the meeting list after being offline

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

Filter meetings on a date

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

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

Changed connection state while working on a task

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

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

Set up WorkZone Mobile

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

View release and login information

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

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

Automatic error reporting

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

Share analytics

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

Edit meeting documents

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

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

Number of lines displayed in title

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

Show upcoming tasks

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

Show closed tasks

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

Keep closed tasks

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

View online help

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

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

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

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

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

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

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

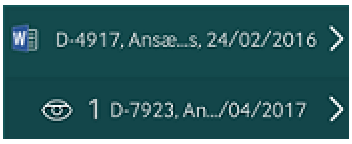
Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

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

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



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

Note:

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

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

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

Annotate PDF documents

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

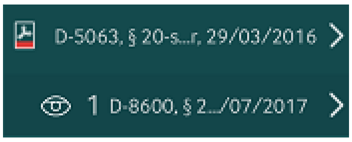
Important:

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

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

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

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



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

Share documents using other apps

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

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

Work with tasks

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

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

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

View a task

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

Respond to a task

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

Accept

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

Forward

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

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

Skip

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

Approve or Reject

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

OK

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

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

Other actions on a task

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

Filter your tasks using custom filters

Prerequisite:

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

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

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

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

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

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

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

> - The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

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

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

> **Prerequisite:** WorkZone Process 2019.3 or later.

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

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

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

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

View task as a PDF ()

Prerequisite:

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

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

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

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

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

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

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

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

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

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

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

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

Annotate PDF documents

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

Important:

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

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

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

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

Add or remove actors

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

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

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

Change order of documents and actors

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

About task deadlines and priorities

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

Deadlines

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

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

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

Priorities

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

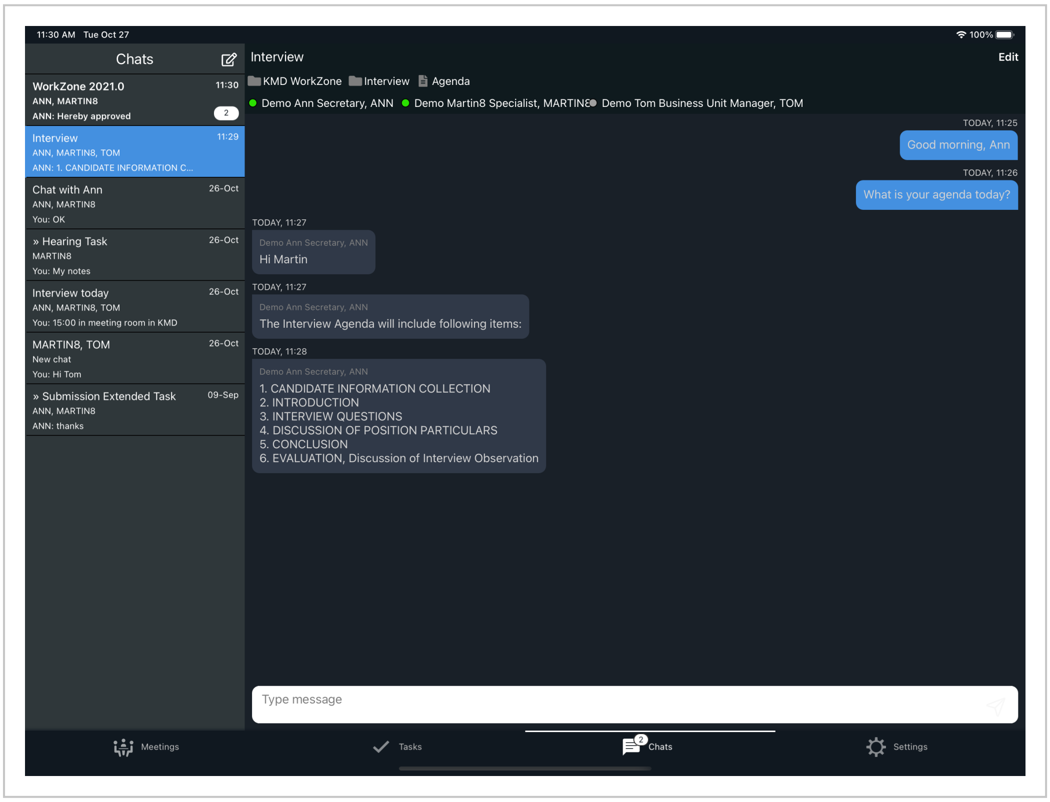
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

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

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



View your chats

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

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

Reply in a chat

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

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

Create a new chat (from a task)

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

Tip:

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

Create a new chat (without a task)

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

Manage chat references

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

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

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

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

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

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

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

View details for chat documents and cases

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

1. Tap the chat with a document or a case.
   - For documents:
     a. Tap the document title to open it in a preview mode.

        Tip: Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:
        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.
   - For cases:
     a. Tap the case title to open its details.

        Tip: Tap and at the top to view the previous or next case on this chat.

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

        Tip:

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

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

Browse WorkZone cases and documents

Prerequisite:

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

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

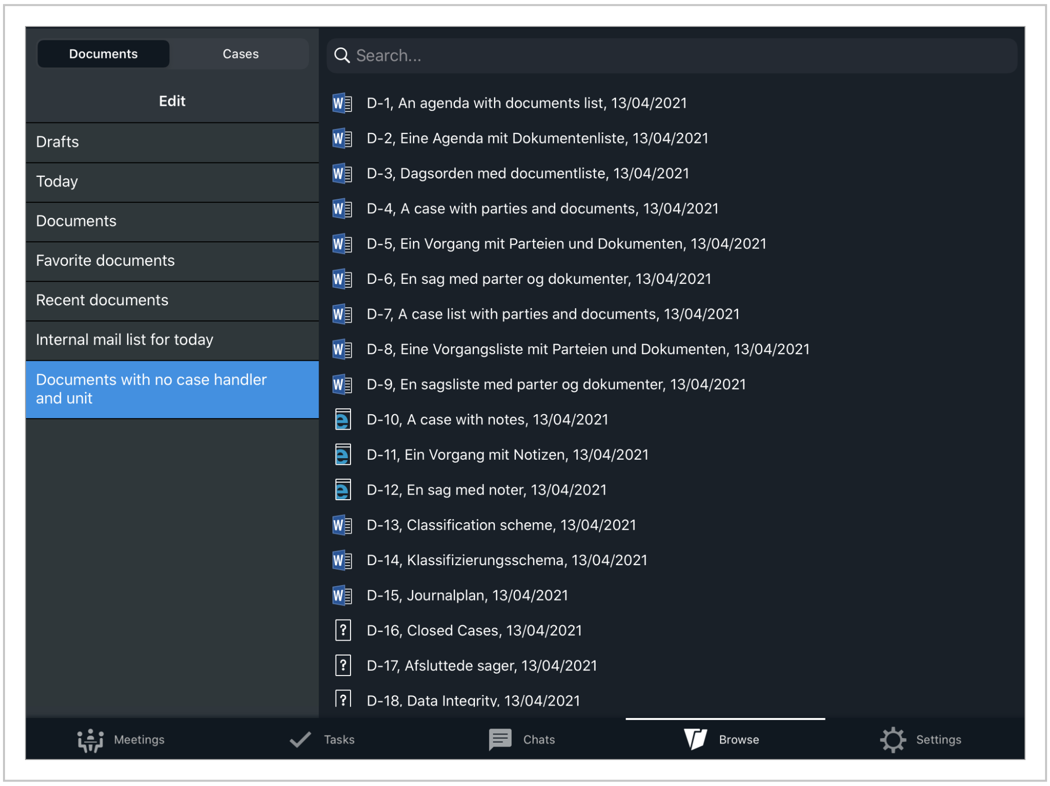
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

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

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

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

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

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     > **Note:** You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

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

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

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

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

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

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

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

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

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

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

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

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

In the **Signatures** dialog:

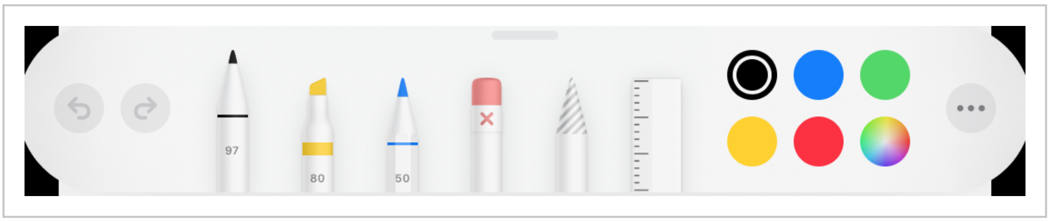
1. Tap an existing signature to use.

   -Or-

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

Draw free hand.

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



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

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

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

Draw straight lines with calibrated measures

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

Draw calibrated polylines.

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

Draw filled polygons.

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

Draw curved lines.

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

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

Close the annotation toolbar.

FAQ

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

Meeting synchronization does not work

Workaround

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

Cannot open Office documents for editing

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

Workaround

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

WorkZone Mobile app for Intune stops connecting (for Intune)

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

Workaround

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

Navigation tabs disappear (version for Citrix)

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

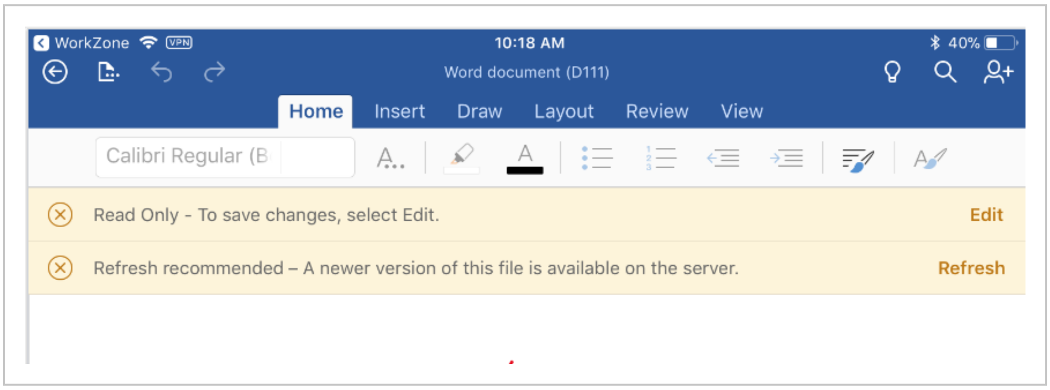
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

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

> **Example**: Office messages in Word



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

Refresh recommended - A newer version of this file is available on the server

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

How to continue

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

Can't upload – Please sign into your account

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

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

How to continue

Do not reboot your phone and do not close the Office mobile app.

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

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

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

How to continue

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

Can't upload – Someone else is editing this file

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

How to continue

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

This version of Excel can't run with VBA macros

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

How to continue

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

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

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

How to continue

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

Allow file conversion?

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

How to continue

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

Can't open file. This file type is unsupported by this version of Office

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

How to continue

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

Read Only – To save changes, select Edit

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

How to continue

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

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

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

How to continue

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

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

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

How to continue

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

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

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

How to continue

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

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

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

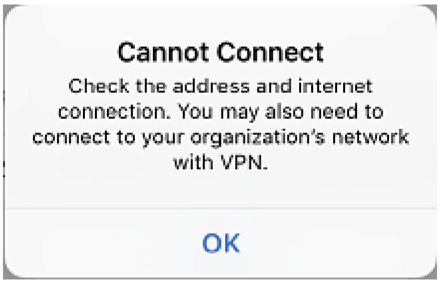
How to continue

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

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

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

    The log-in will fail with this message:

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

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

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

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KMD WORKZONE

_Mobile

2021.3

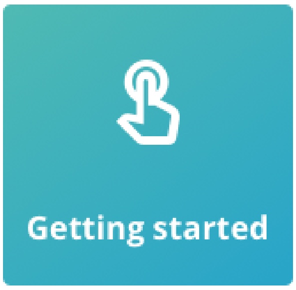
User Guide

Contents

WorkZone Mobile 2021.3

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

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



FAQ

What happens if I am working offline?

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

Related product documentation

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

WorkZone links

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

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

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

Work with your delegated tasks

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

Custom filters for tasks

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

This was new in WorkZone Mobile 2021.0

New Browse module

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

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

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

UI improvements

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

This was new in WorkZone Mobile 2020.3

Chat enhancements

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

Editing WorkZone documents via Office 365 in Intune version ( )

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

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

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

Work with WorkZone chats

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

Conflict notification for simultaneously edited PDF documents

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

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

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

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

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

This was new in WorkZone Mobile 2019.3

Improved navigation

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

Task view improvements

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

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

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

This was new in WorkZone Mobile 2019.0

Support for password change

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

Performance improvements

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

This was new in WorkZone Mobile 2018.2

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

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

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

General information

Getting started

Log in and out on WorkZone Mobile.

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

On a meeting, you can:

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

On a task, you can:

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

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

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

Set up WorkZone Mobile.

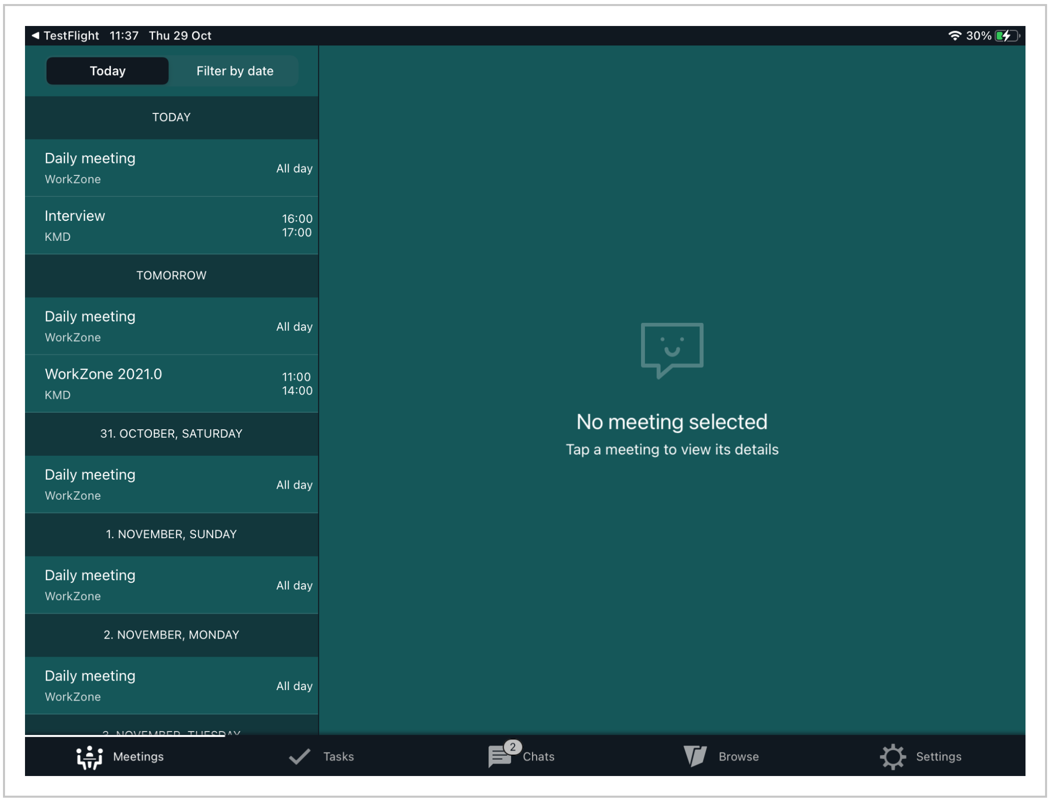
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

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

How do I navigate?

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



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

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

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

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

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

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

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

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

Password expiration

At login

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

While you work

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

Log out

1. Tap **Settings**.
2. Tap **Log out**.

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

Work offline

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

Refresh the meeting list after being offline

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

Filter meetings on a date

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

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

Changed connection state while working on a task

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

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

Set up WorkZone Mobile

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

View release and login information

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

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

Automatic error reporting

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

Share analytics

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

Edit meeting documents

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

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

Number of lines displayed in title

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

Show upcoming tasks

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

Show closed tasks

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

Keep closed tasks

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

View online help

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

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

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

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

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

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

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

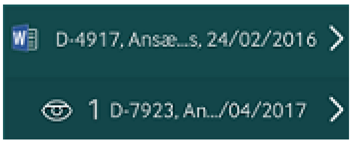
Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

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

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



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

Note:

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

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

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

Annotate PDF documents

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

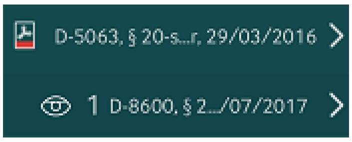
Important:

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

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

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

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



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

Share documents using other apps

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

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

Work with tasks

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

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

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

View a task

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

Respond to a task

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

Accept

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

Forward

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

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

Skip

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

Approve or Reject

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

OK

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

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

Other actions on a task

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

Filter your tasks using custom filters

Prerequisite:

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

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

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

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

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

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

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

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

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

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

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

Important: You cannot change ranking for a pending task.

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

View task as a PDF ()

Prerequisite:

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

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

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

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

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

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

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

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

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

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

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

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

Annotate PDF documents

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

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

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

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

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

Add or remove actors

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

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

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

Change order of documents and actors

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

About task deadlines and priorities

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

Deadlines

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

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

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

Priorities

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

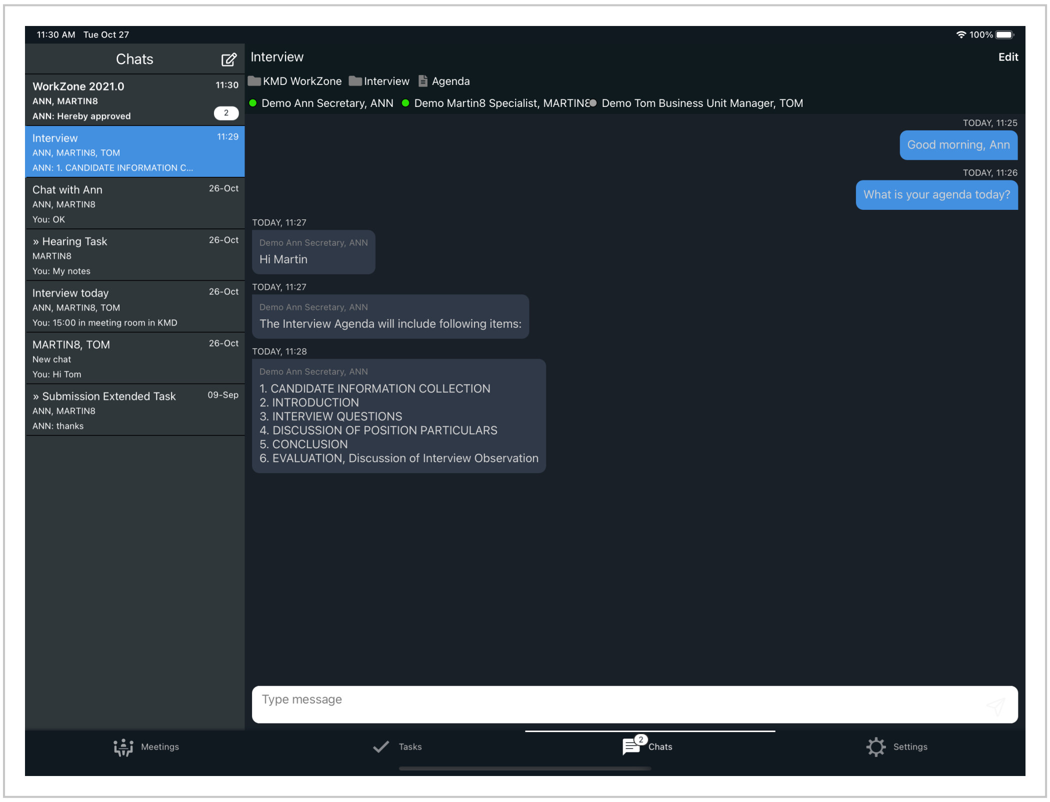
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

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

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



View your chats

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

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

Reply in a chat

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

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

Create a new chat (from a task)

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

Tip:

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

Create a new chat (without a task)

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

Manage chat references

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

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

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

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the doc-ument.

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

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

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

View details for chat documents and cases

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

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

    - For documents:

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

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

        b. Perform the needed action:

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

    - For cases:

        a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

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

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

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

Browse WorkZone cases and documents

Prerequisite:

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

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

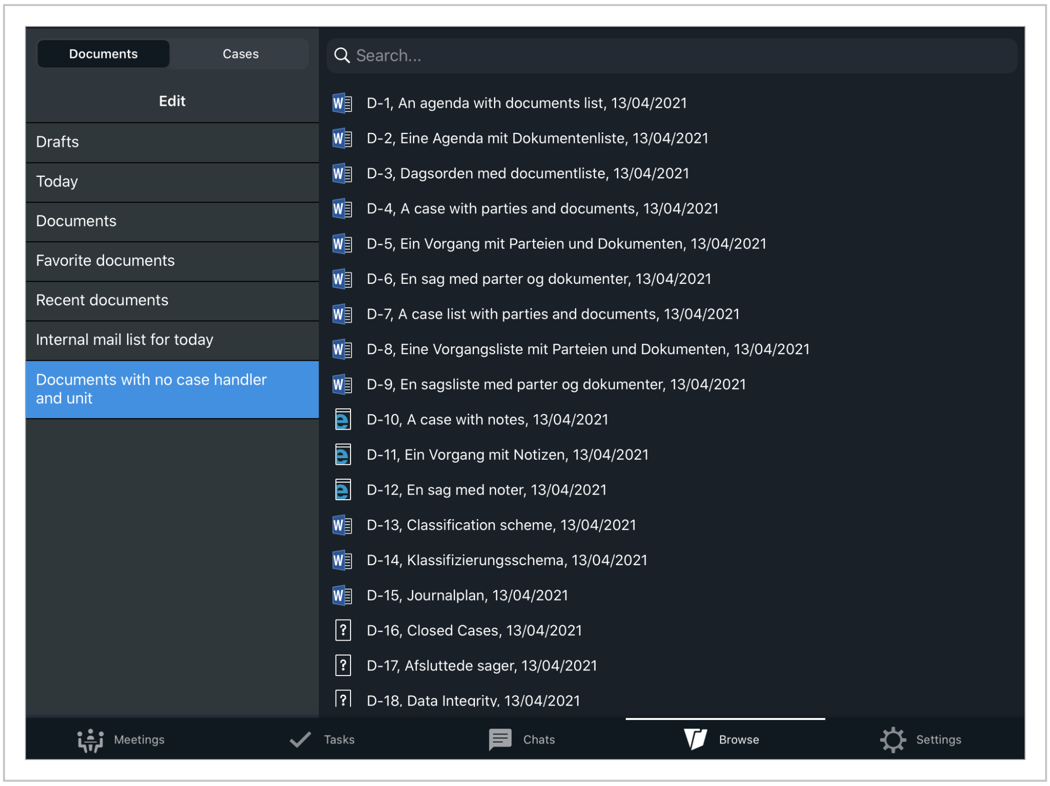
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

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

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

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

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

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     > **Note:** You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

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

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

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

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

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

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

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

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

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

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

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

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

In the **Signatures** dialog:

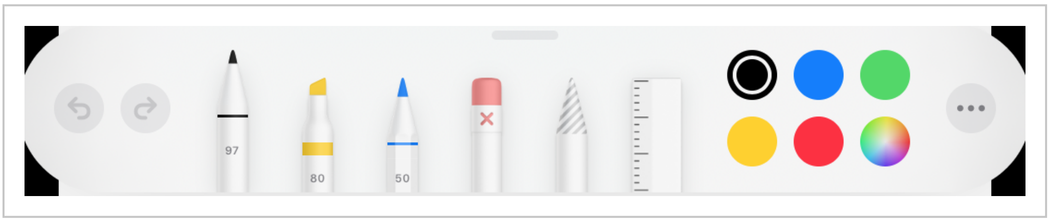
1. Tap an existing signature to use.

   -Or-

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

Draw free hand.

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



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

Erase previous free hand drawing or text marking.

Add text.

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

Draw arrows.

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

Draw straight lines.

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

Draw rectangles

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

Draw ellipses

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

Draw polygons.

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

Draw cloud-like polygons.

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

Draw polylines.

1. Tap the edit icon.

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

Draw straight lines with calibrated measures

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

Draw calibrated polylines.

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

Draw filled polygons.

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

Draw curved lines.

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

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

Close the annotation toolbar.

FAQ

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

Meeting synchronization does not work

Workaround

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

Cannot open Office documents for editing

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

Workaround

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

WorkZone Mobile app for Intune stops connecting (for Intune)

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

Workaround

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

Navigation tabs disappear (version for Citrix)

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

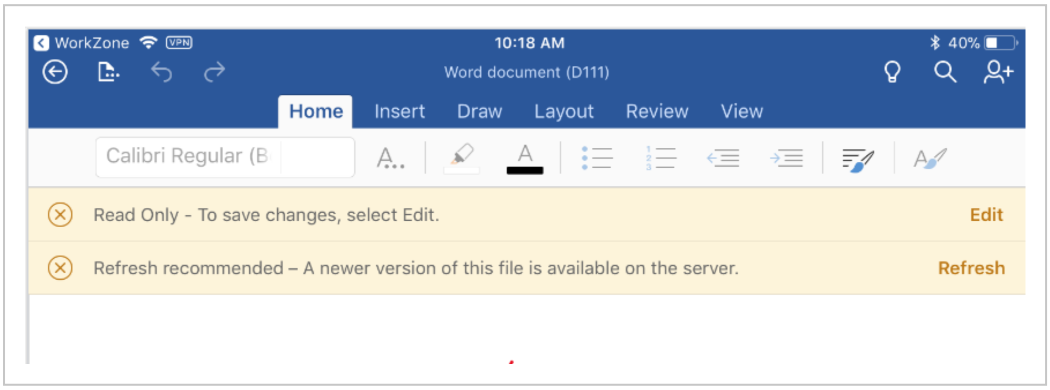
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

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

> **Example**: Office messages in Word



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

Refresh recommended - A newer version of this file is available on the server

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

How to continue

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

Can't upload – Please sign into your account

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

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

How to continue

Do not reboot your phone and do not close the Office mobile app.

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

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

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

How to continue

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

Can't upload – Someone else is editing this file

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

How to continue

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

This version of Excel can't run with VBA macros

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

How to continue

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

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

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

How to continue

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

Allow file conversion?

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

How to continue

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

Can't open file. This file type is unsupported by this version of Office

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

How to continue

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

Read Only – To save changes, select Edit

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

How to continue

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

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

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

How to continue

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

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

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

How to continue

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

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

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

How to continue

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

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

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

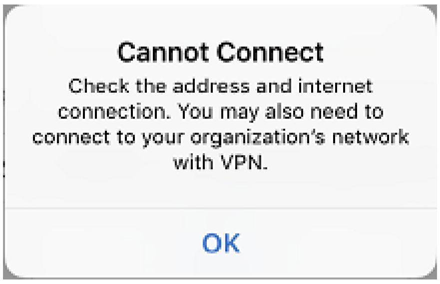
How to continue

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

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

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

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

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

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KMD WORKZONE

_Mobile

2021.3

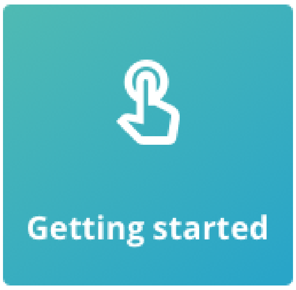
User Guide

Contents

WorkZone Mobile 2021.3

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

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



FAQ

What happens if I am working offline?

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

Related product documentation

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

WorkZone links

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

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

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

Work with your delegated tasks

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

Custom filters for tasks

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

This was new in WorkZone Mobile 2021.0

New Browse module

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

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

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

UI improvements

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

This was new in WorkZone Mobile 2020.3

Chat enhancements

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

Editing WorkZone documents via Office 365 in Intune version ( )

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

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

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

Work with WorkZone chats

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

Conflict notification for simultaneously edited PDF documents

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

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

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

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

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

This was new in WorkZone Mobile 2019.3

Improved navigation

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

Task view improvements

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

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

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

This was new in WorkZone Mobile 2019.0

Support for password change

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

Performance improvements

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

This was new in WorkZone Mobile 2018.2

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

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

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

General information

Getting started

Log in and out on WorkZone Mobile.

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

On a meeting, you can:

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

On a task, you can:

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

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

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

Set up WorkZone Mobile.

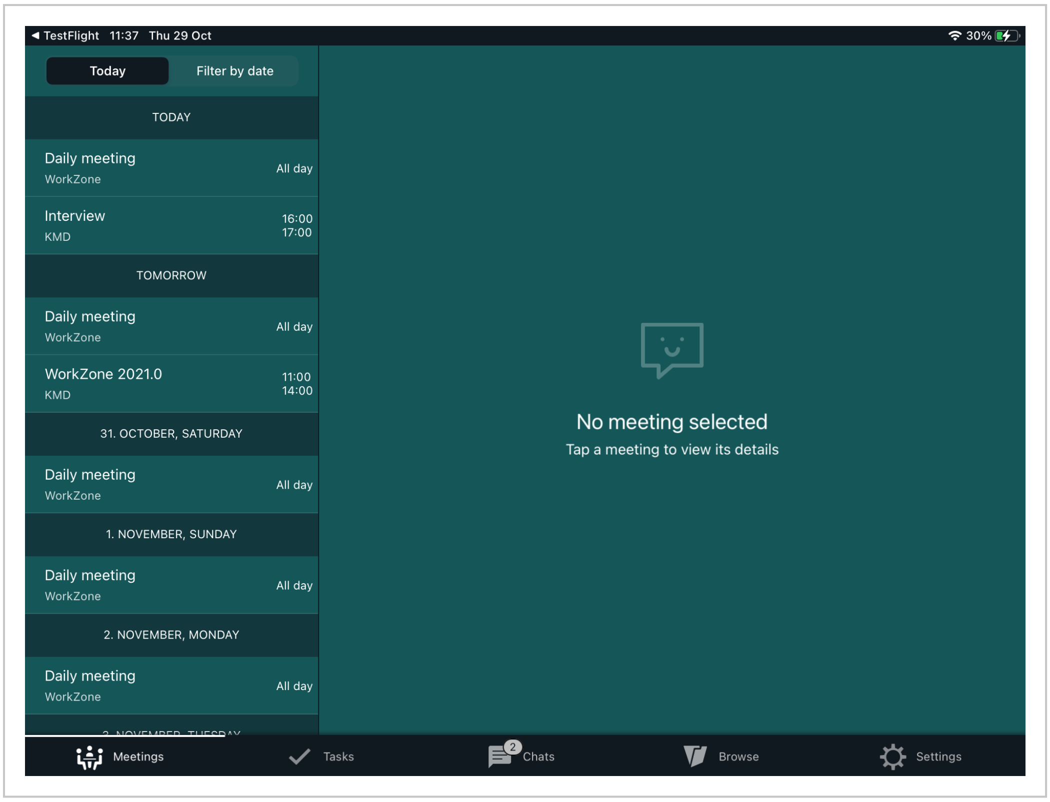
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

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

How do I navigate?

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



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

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

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

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

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

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

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

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

Password expiration

At login

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

While you work

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

Log out

1. Tap **Settings**.
2. Tap **Log out**.

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

Work offline

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

Refresh the meeting list after being offline

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

Filter meetings on a date

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

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

Changed connection state while working on a task

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

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

Set up WorkZone Mobile

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

View release and login information

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

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

Automatic error reporting

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

Share analytics

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

Edit meeting documents

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

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

Number of lines displayed in title

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

Show upcoming tasks

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

Show closed tasks

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

Keep closed tasks

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

View online help

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

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

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

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

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

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

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

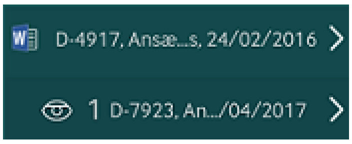
Edit Microsoft Office documents ()

> **Prerequisite:** You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

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

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



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

Note:

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

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

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

Annotate PDF documents

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

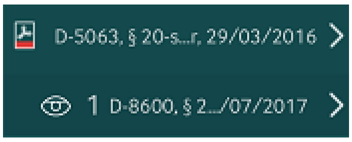
Important:

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

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

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

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



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

Share documents using other apps

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

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

Work with tasks

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

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

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

View a task

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

Respond to a task

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

Accept

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

Forward

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

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

Skip

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

Approve or Reject

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

OK

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

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

Other actions on a task

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

Filter your tasks using custom filters

Prerequisite:

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

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

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

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

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

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

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

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

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

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

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

Important: You cannot change ranking for a pending task.

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

View task as a PDF ()

Prerequisite:

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

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

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

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

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

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

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

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

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

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

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

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

Annotate PDF documents

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

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

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

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

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

Add or remove actors

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

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

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

Change order of documents and actors

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

About task deadlines and priorities

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

Deadlines

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

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

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

Priorities

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

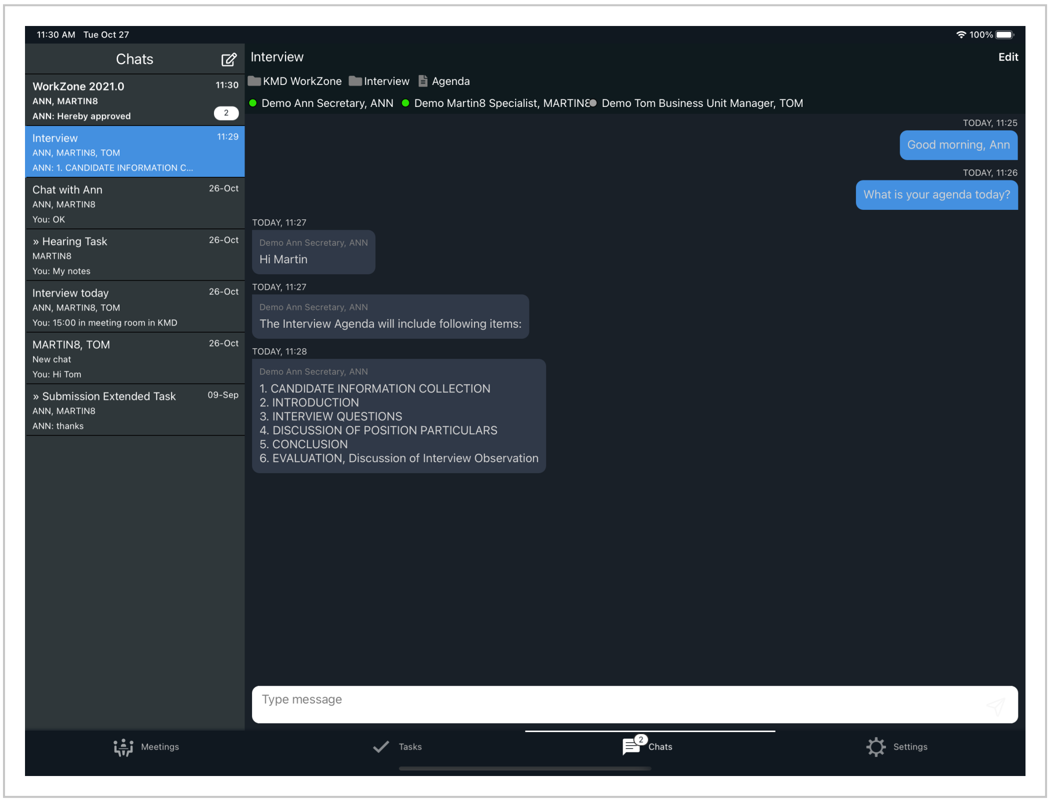
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

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

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



View your chats

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

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

Reply in a chat

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

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

Create a new chat (from a task)

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

Tip:

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

Create a new chat (without a task)

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

Manage chat references

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

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

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

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

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

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

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

View details for chat documents and cases

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

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

   - For documents:

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

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

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

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

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

     > **Tip:**

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

  -Or-

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

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

Browse WorkZone cases and documents

Prerequisite:

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

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

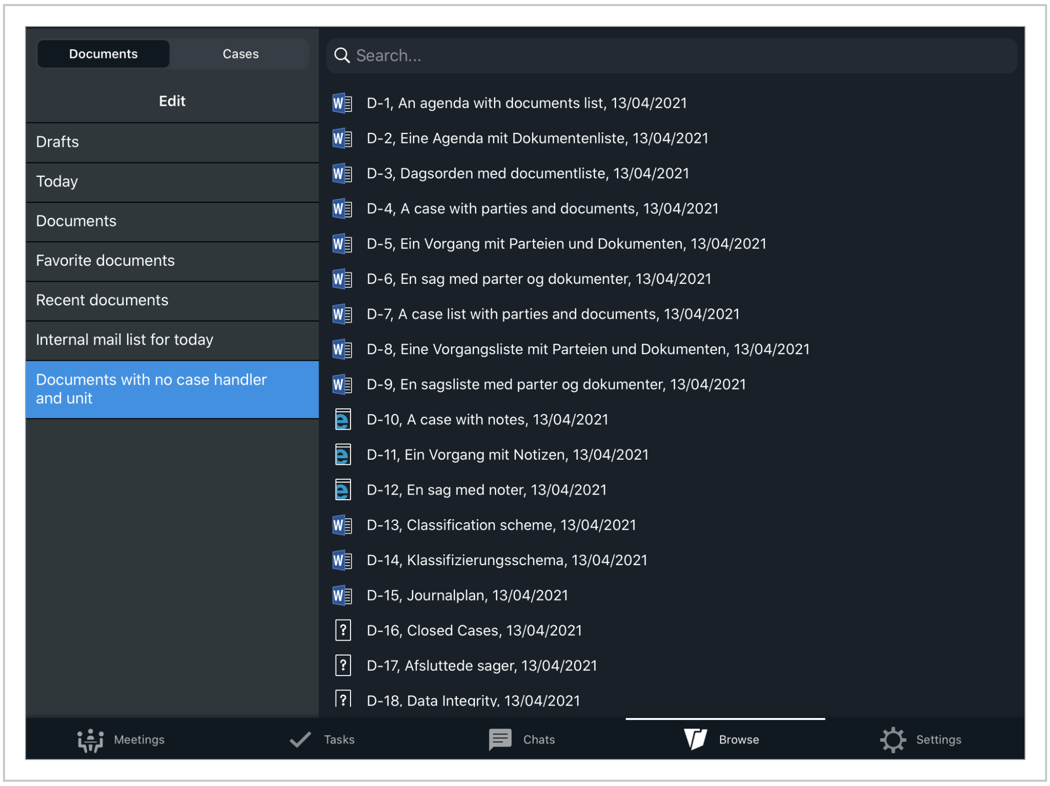
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

- Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

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

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

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

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

    - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
    - To edit this document (if the document is editable): Tap at the top right corner.

      > **Note:** You might need to install a relevant Office app to edit some document formats.

    - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

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

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

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

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

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

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

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

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

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

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

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

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

In the **Signatures** dialog:

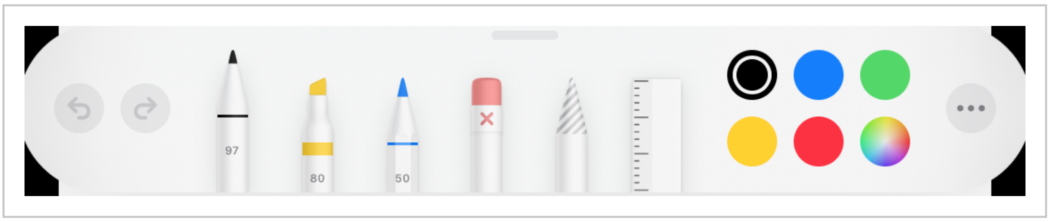
1. Tap an existing signature to use.

   -Or-

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

Draw free hand.

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



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

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

	2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw straight lines with calibrated measures • Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.
	Draw calibrated polylines. 1. Tap the edit icon. 2. Select color, thickness, opacity, scale, precision, or snapping settings. 3. Tap **Done** to start drawing.
	Draw filled polygons. 1. Tap the edit icon. 2. Select color, thickness, opacity, scale, precision, or snapping settings. 3. Tap **Done** to start drawing.
	Draw curved lines. • Double-tap to edit line color, thickness, and opacity settings.
	Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.
	Close the annotation toolbar.

FAQ

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

Meeting synchronization does not work

Workaround

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

Cannot open Office documents for editing

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

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

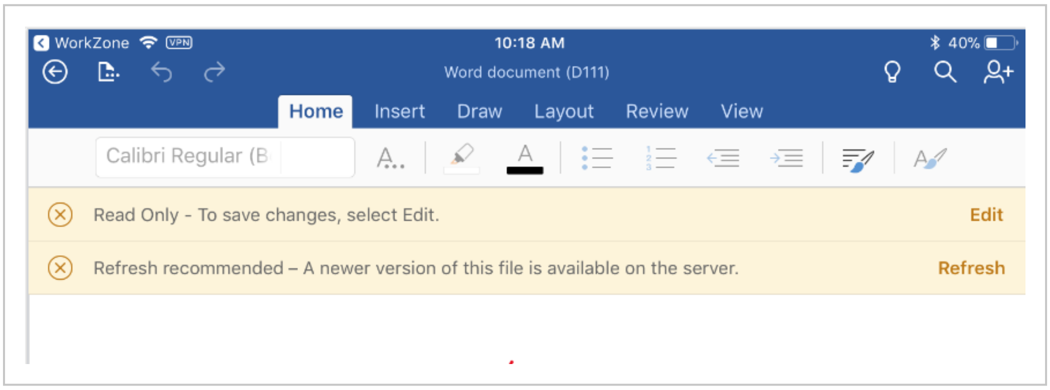
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

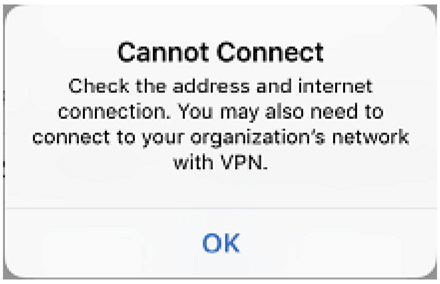
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

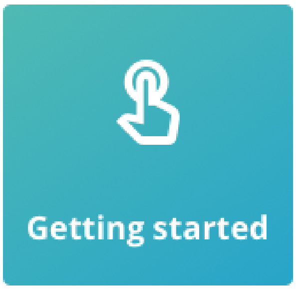
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ( )

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

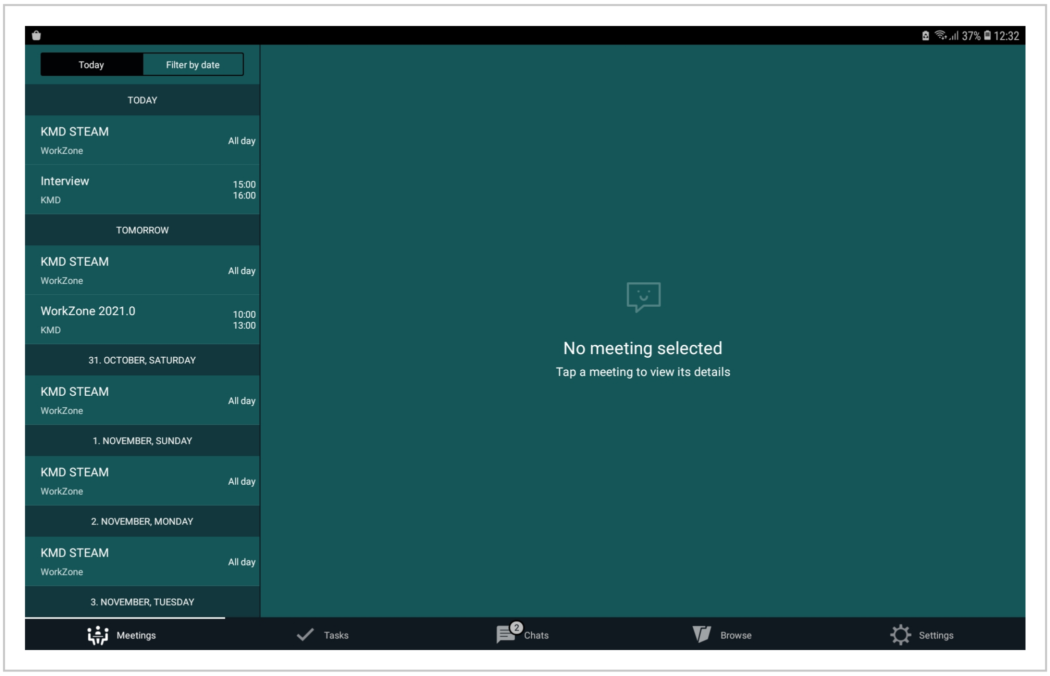
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

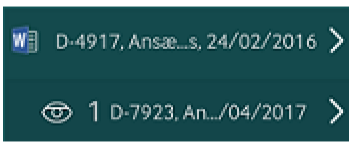
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

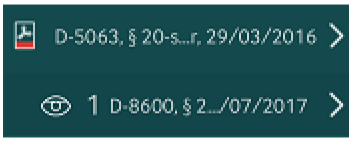
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

> **Prerequisite:**
>
> - The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
> - The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See [Feature Settings](#) in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

> **Important:** A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about creating, editing, and sharing queries.

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

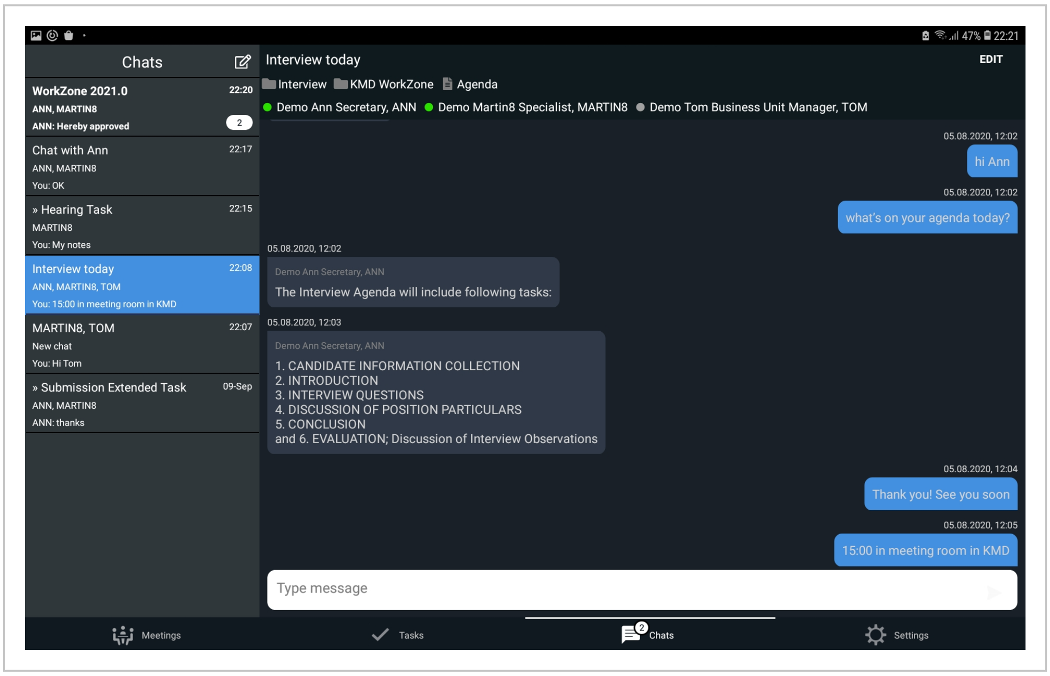
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See [Feature Settings]() in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See [WorkZone Client User Guide]() for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

  - To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

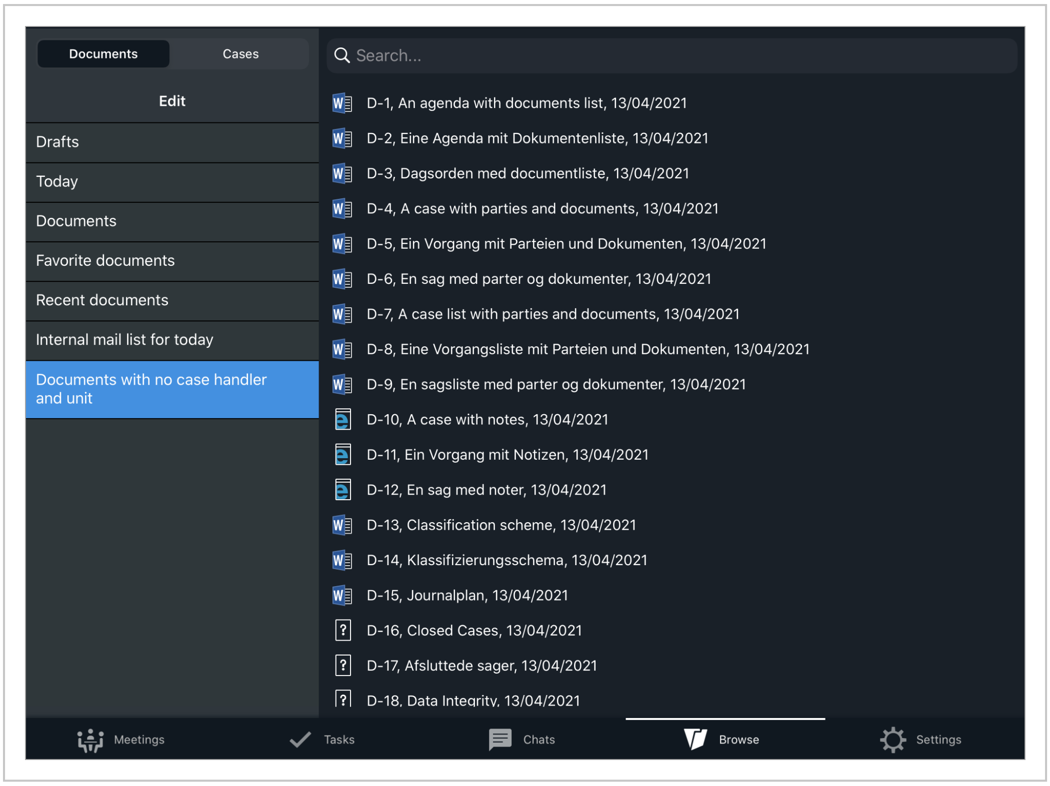
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
>   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:
    - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

  > **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

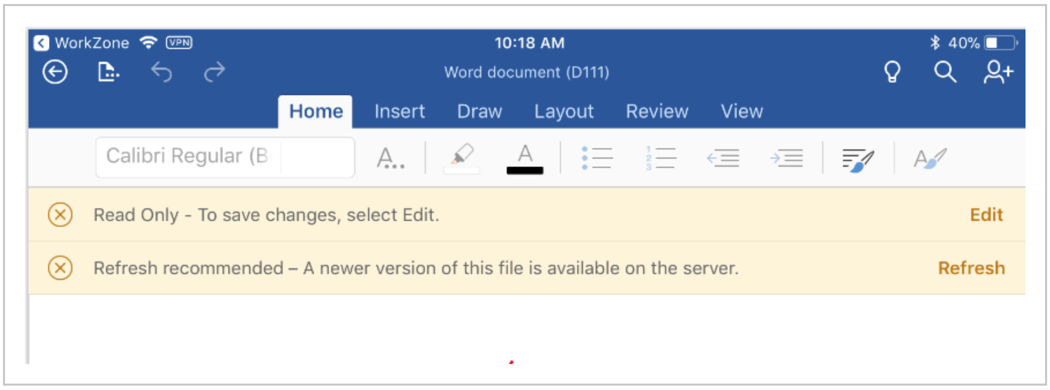
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

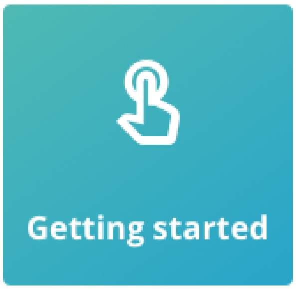
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ()

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

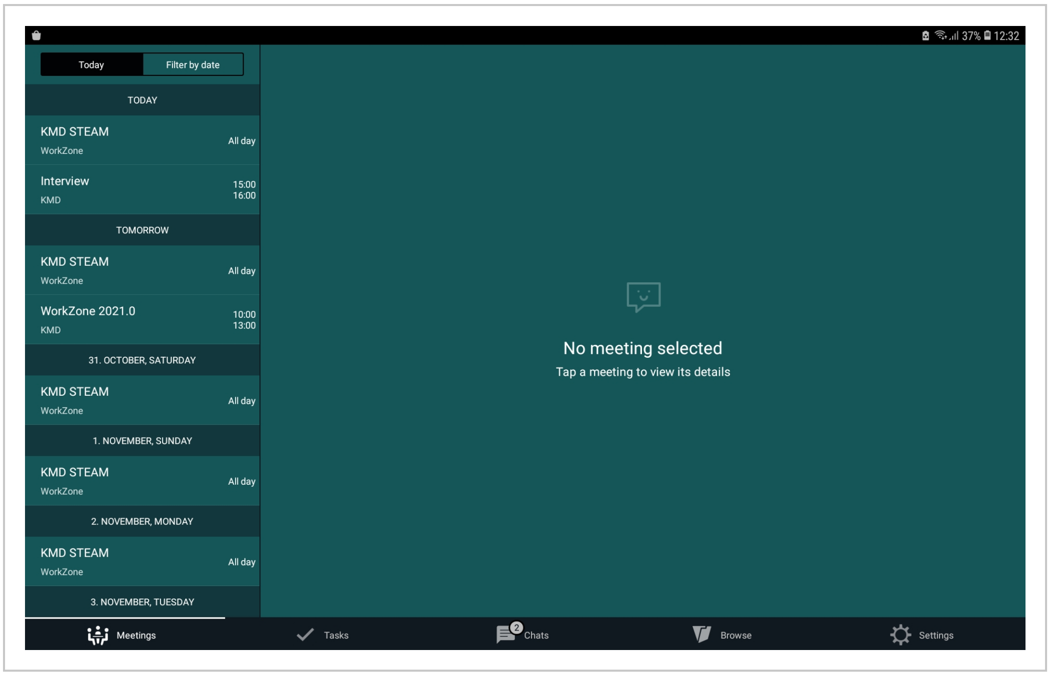
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

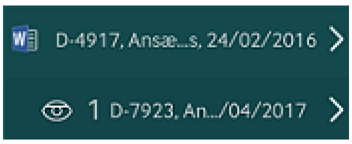
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

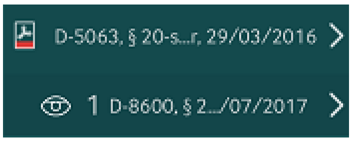
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

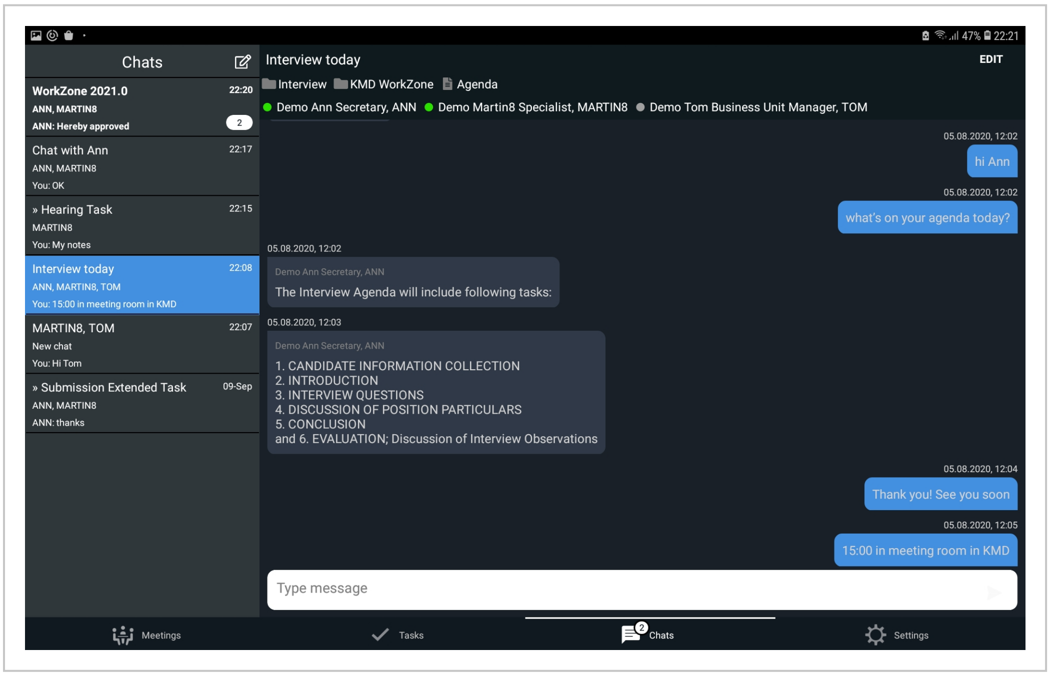
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.
    - For documents:
        a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

        b. Perform the needed action:
            - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
            - To edit this document: Tap at the top right corner.
            - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.
    - For cases:
        a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

        b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

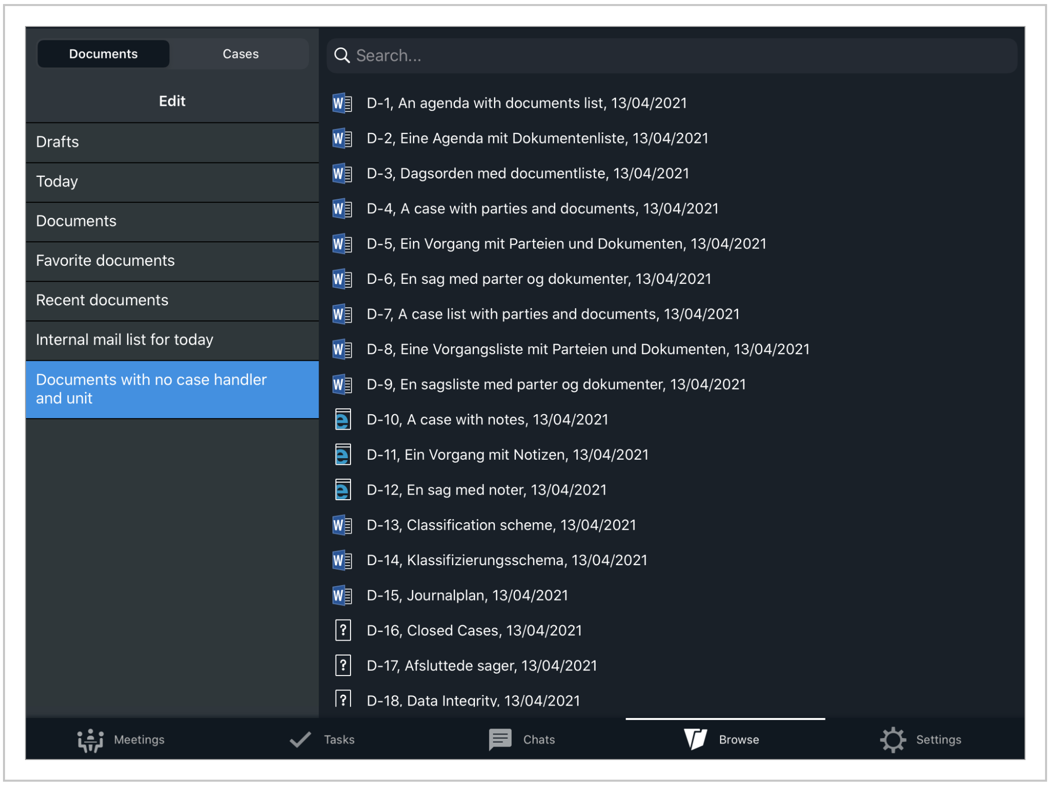
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

    > **Tip:**
    >
    > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
    >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
    >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap  at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

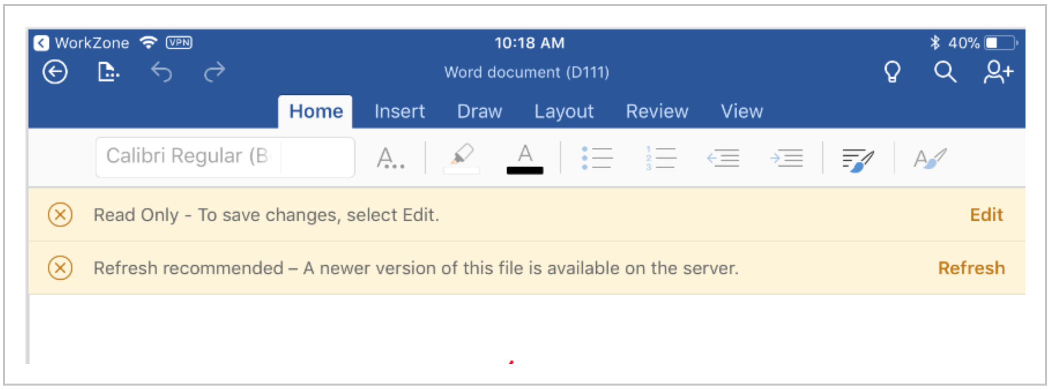
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE _Mobile

2021.3

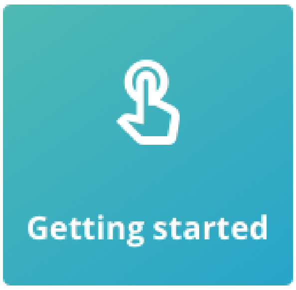
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ()

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

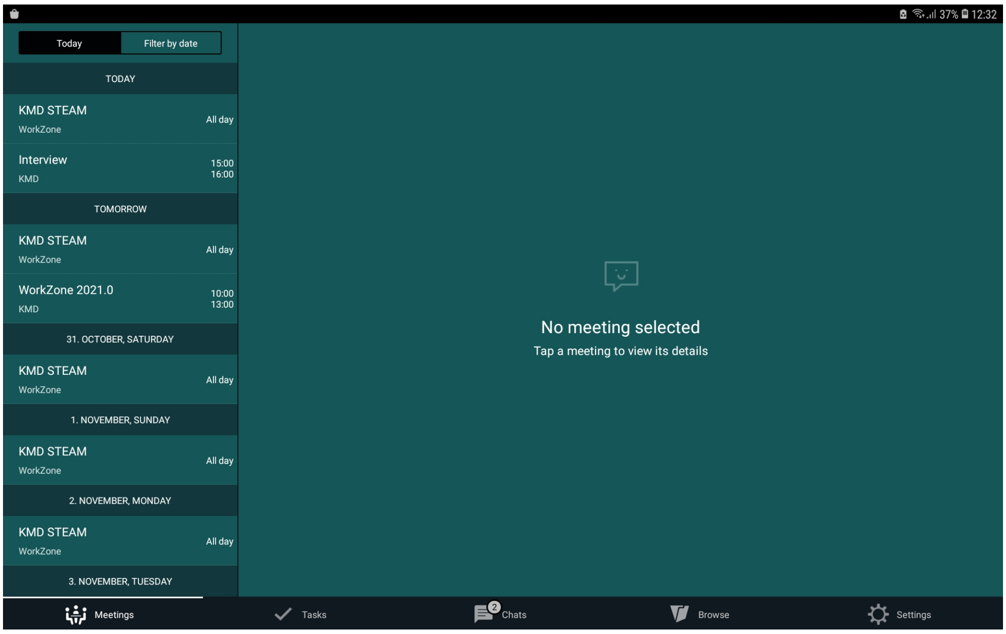
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

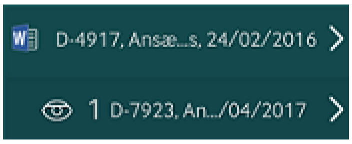
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights](#) in the WorkZone Client User Guide.

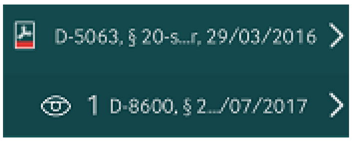
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

> **Prerequisite:**
>
> - The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
> - The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

> Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

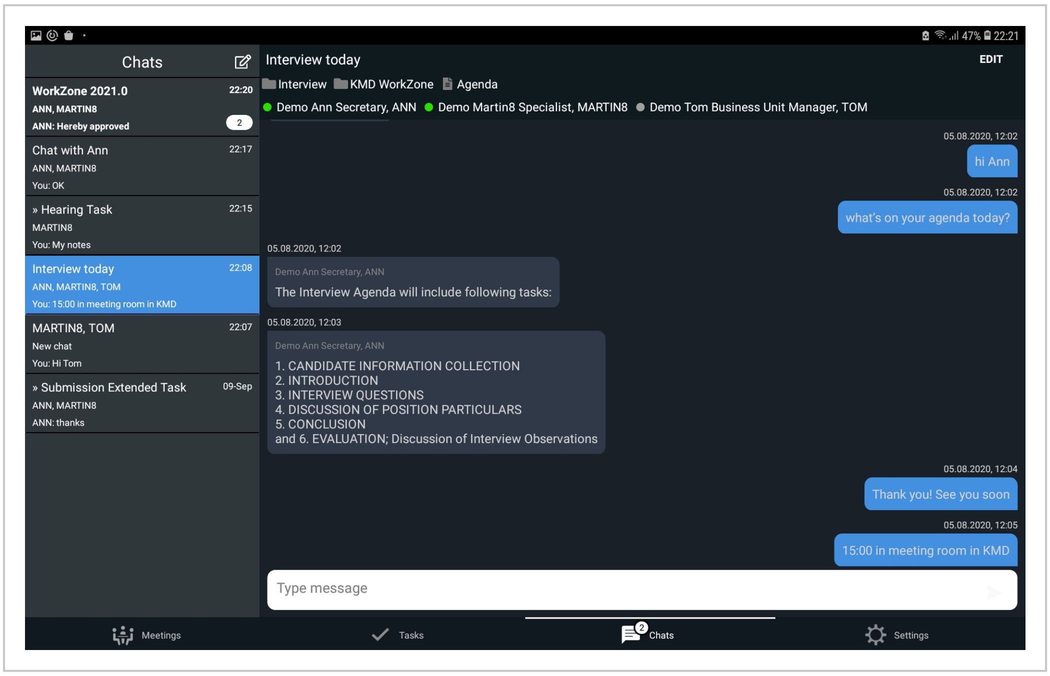
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or  .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap  at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

    - For documents:

        a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

        b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

    - For cases:

        a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

        b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

- Tap a document to preview it, edit it, or view its metadata.

  -Or-

- Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

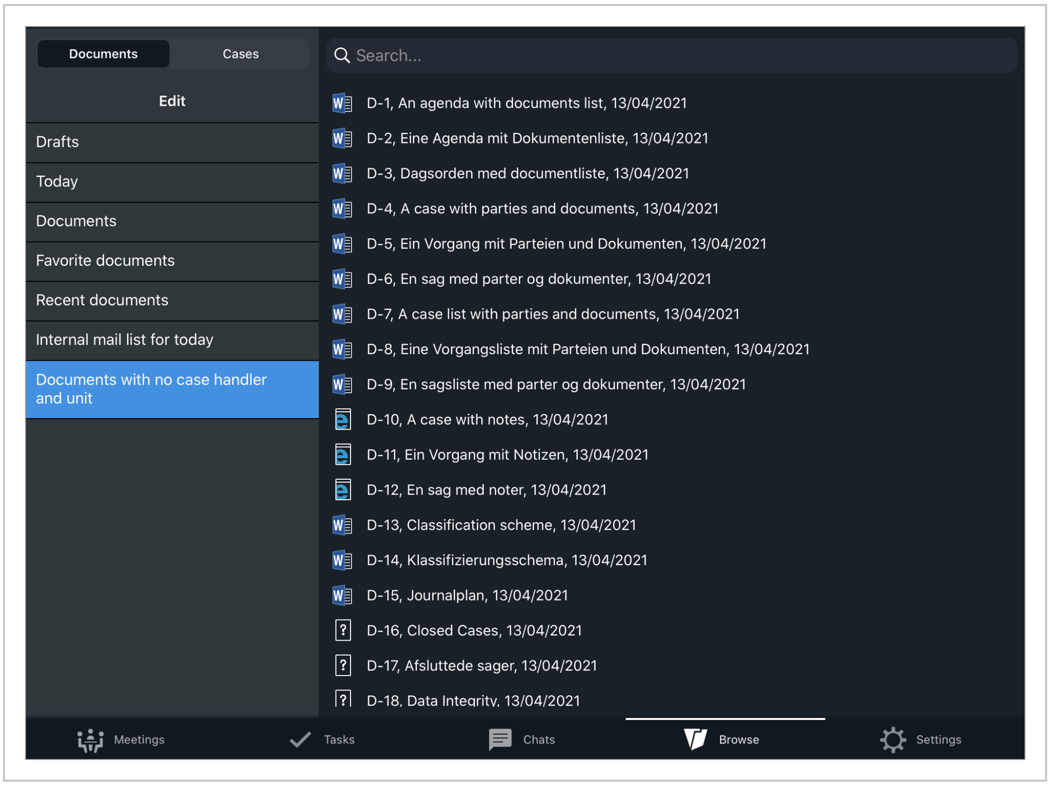
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold next to a list, and drag and drop it to a new position.

    > **Tip:**
    >
    > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
    >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
    >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

    - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

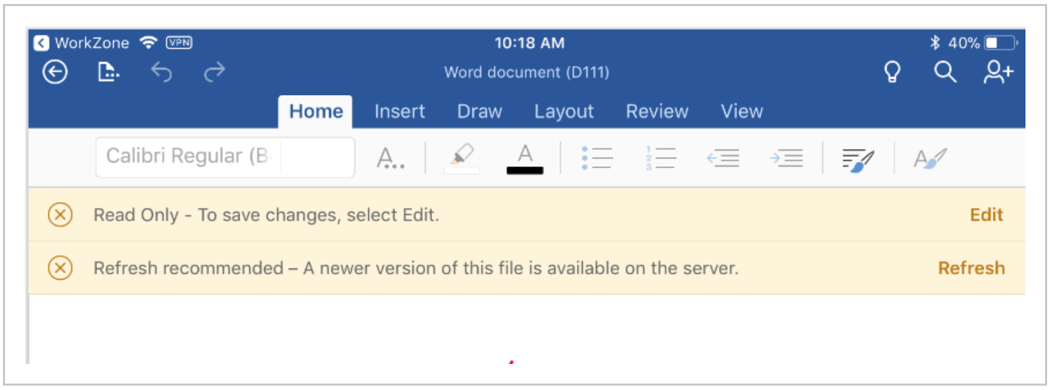
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE _Mobile

2021.3

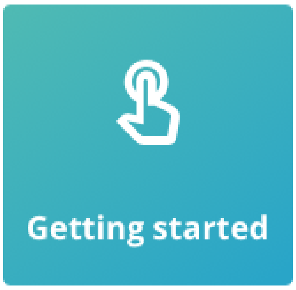
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ()

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

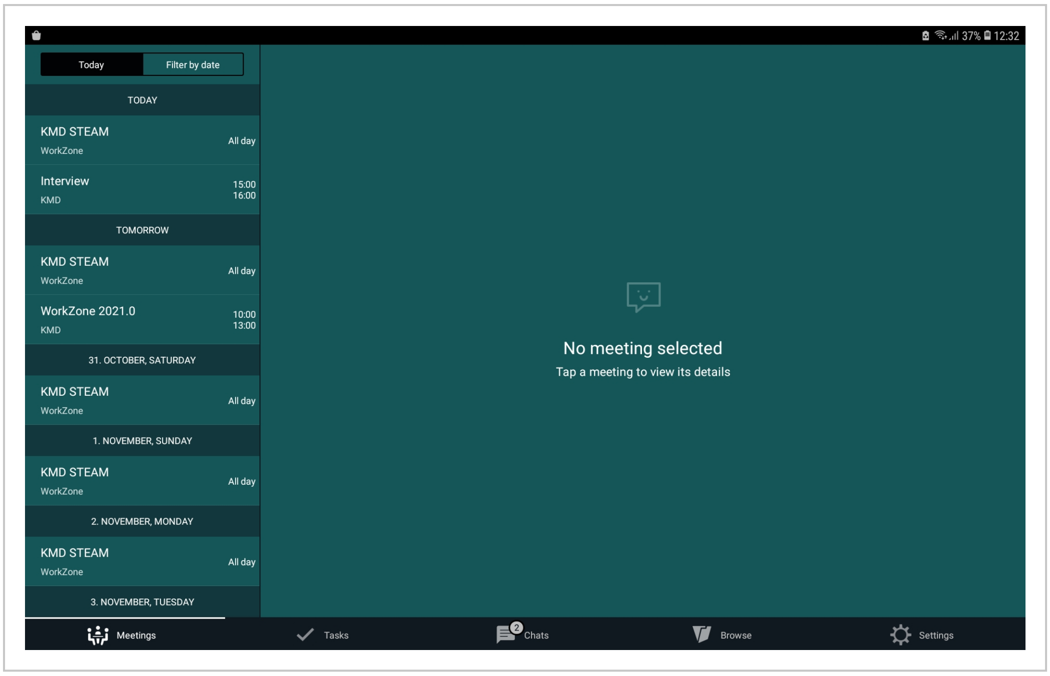
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

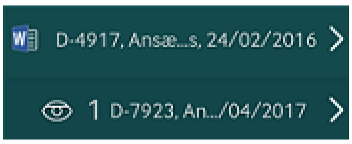
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

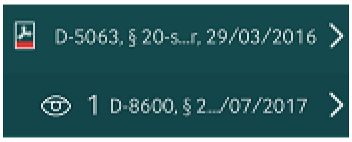
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

> **Prerequisite:**
>
> - The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
> - The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

> Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries](#).

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

> - The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

> **Prerequisite:** WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

> **Important:** You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

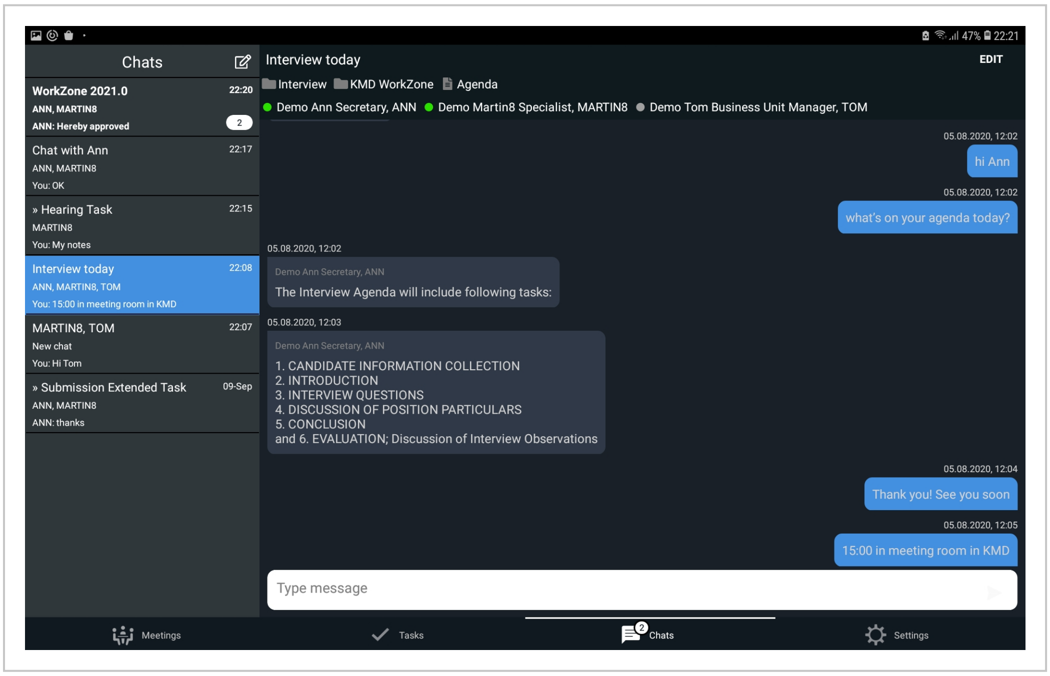
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or  .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap  at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

    - For documents:

        a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

        b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

    - For cases:

        a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

        b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

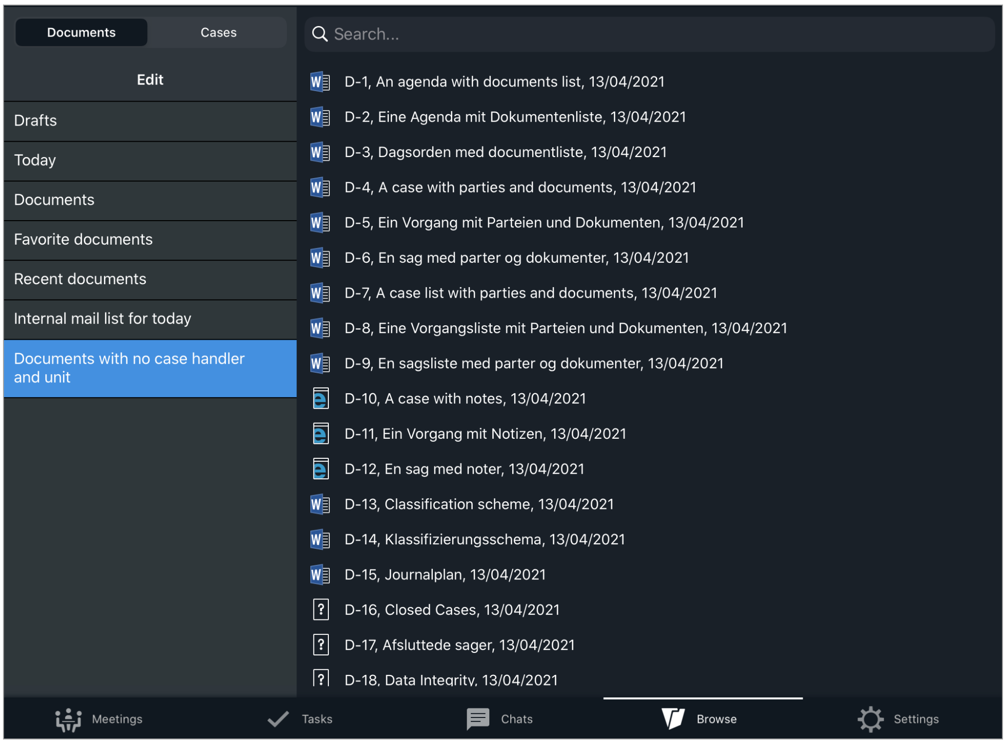
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
   - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
   - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

   > **Tip:**
   >
   > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
   > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
   >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
   >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

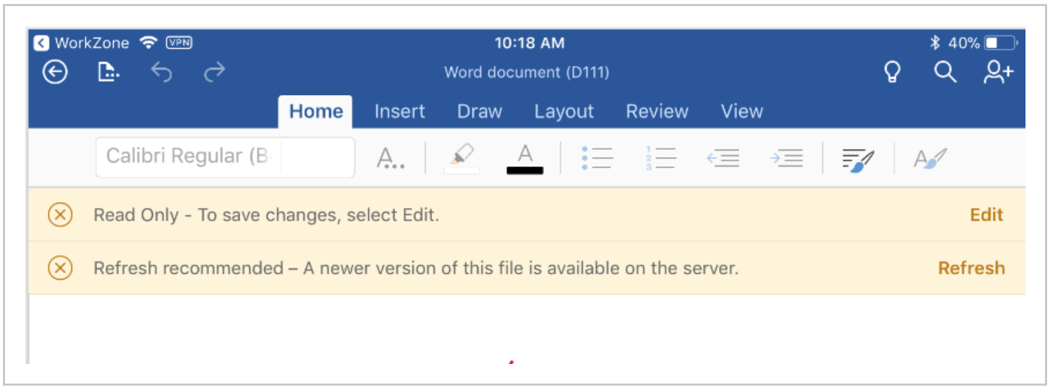
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE _Mobile

2021.3

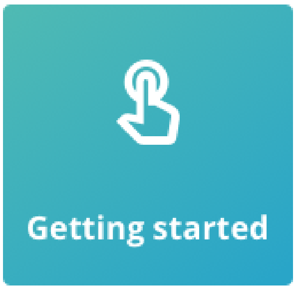
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

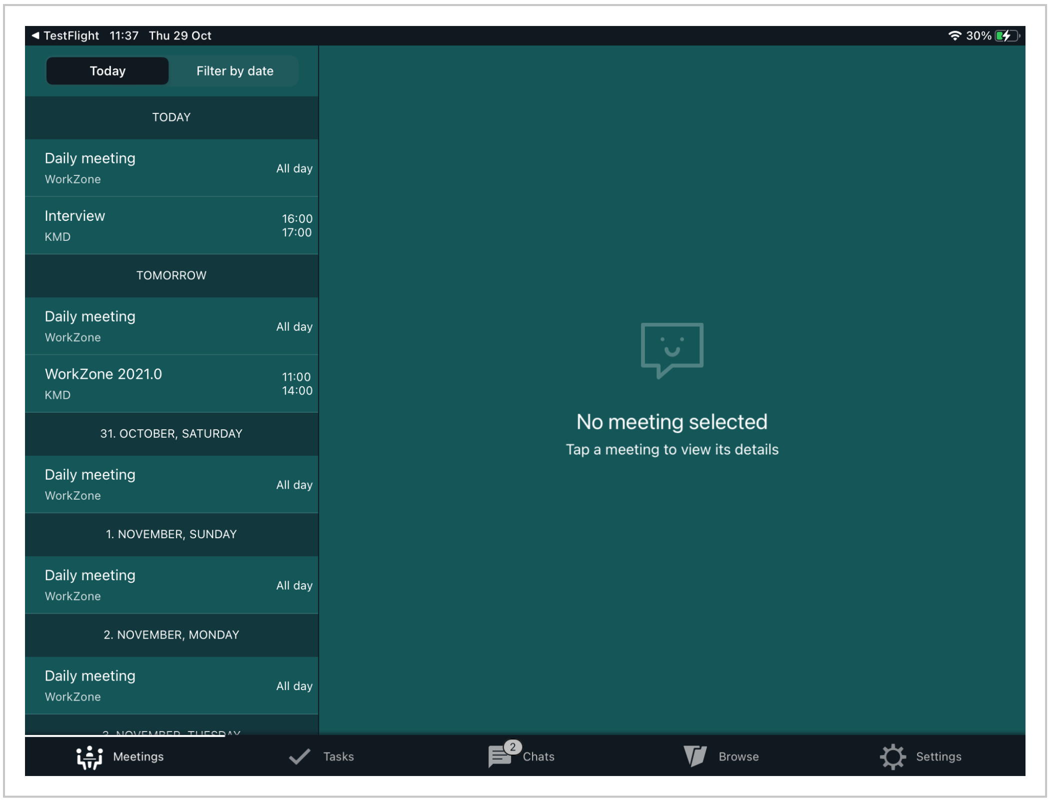
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> **Tip:** For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

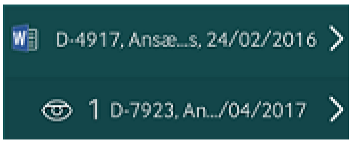
Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
    - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights] in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

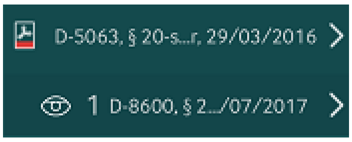
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights] in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries](#).

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

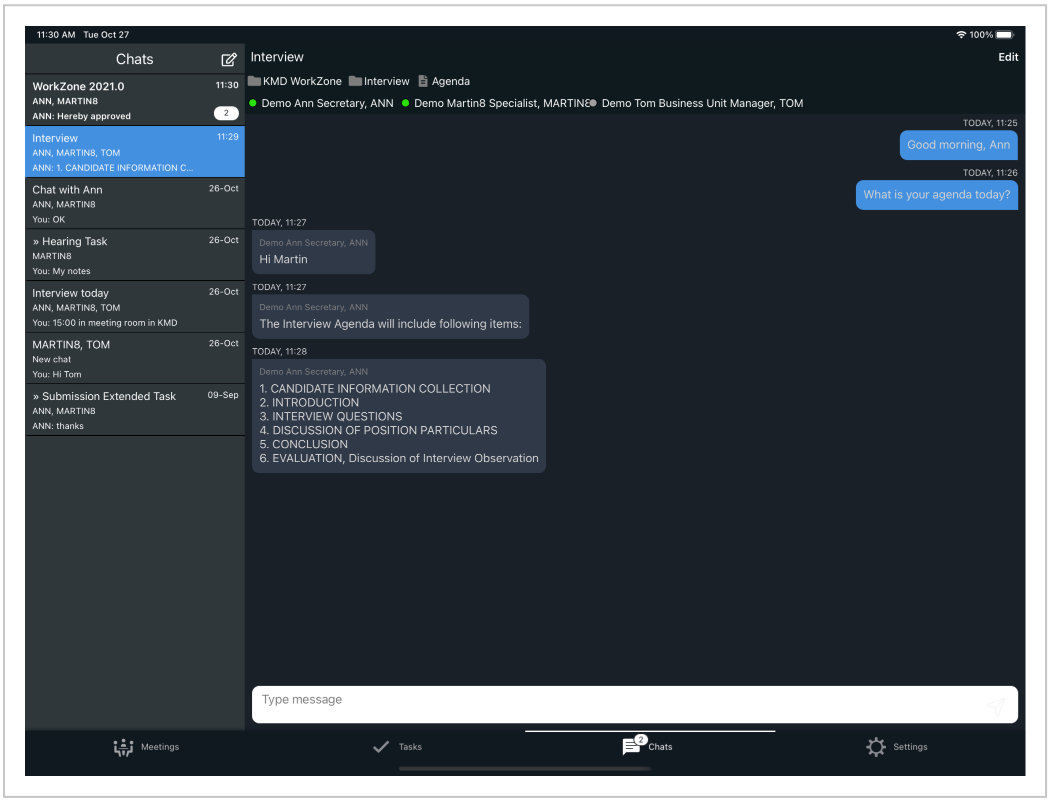
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the doc- ument.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

        > Tip: Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

        > Tip: Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

        > Tip:

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See Feature Settings in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

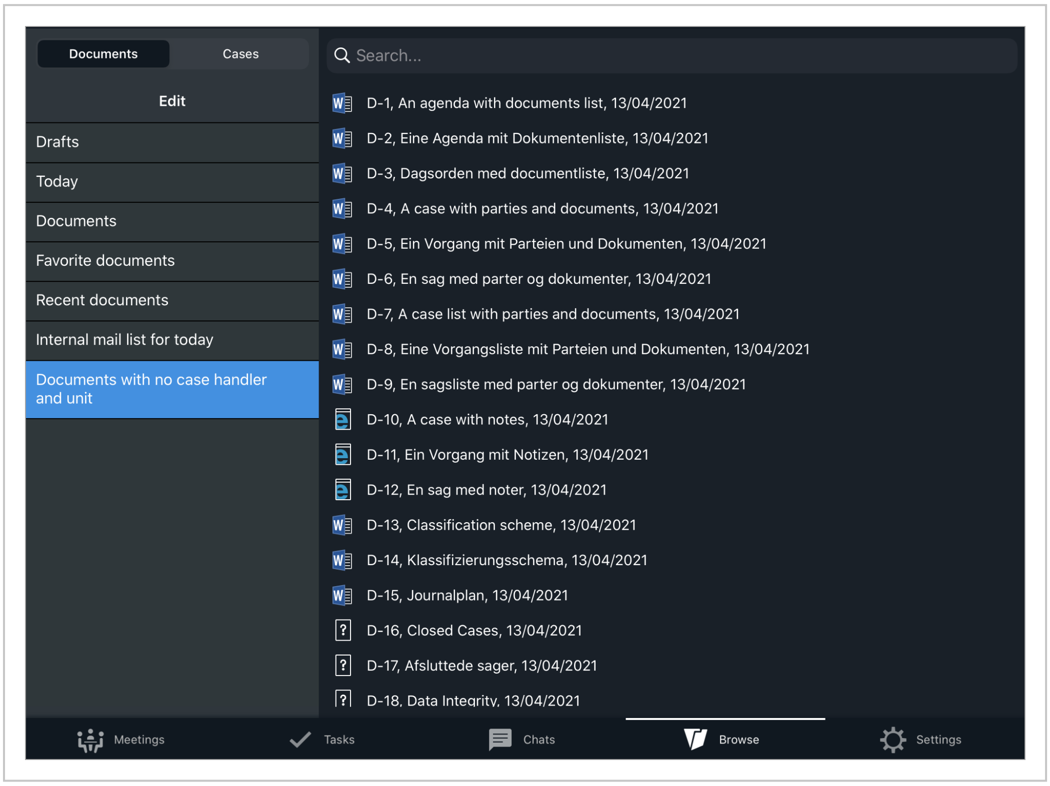
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:
    - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
    - To edit this document (if the document is editable): Tap at the top right corner.

      Note: You might need to install a relevant Office app to edit some document formats.

    - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

> **Tip:** Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

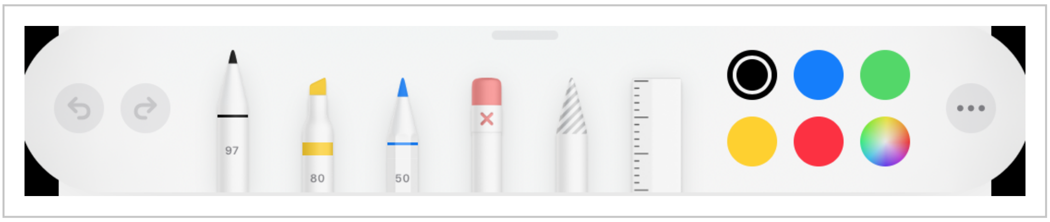
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

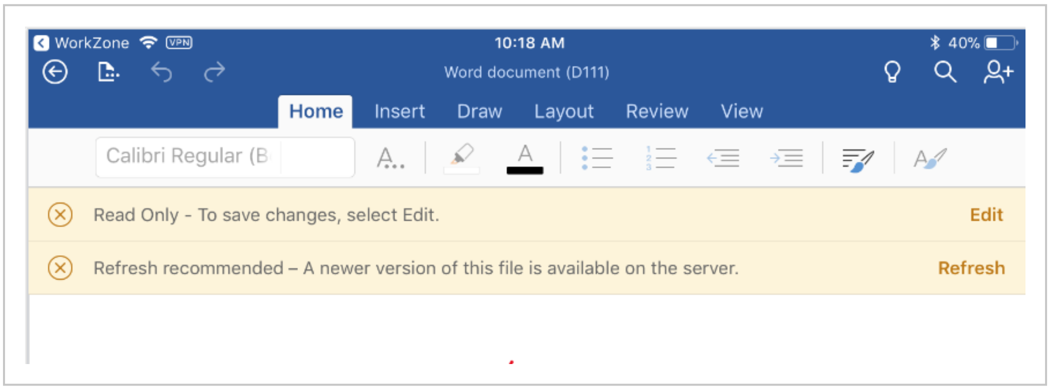
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

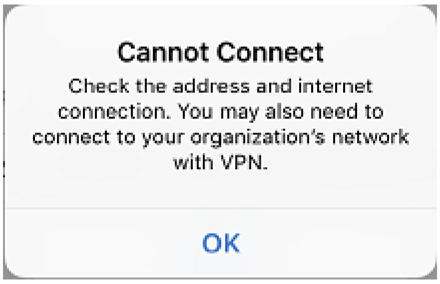
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> Tip: The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

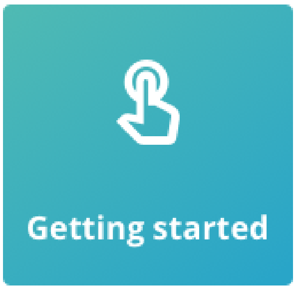
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

> **Note:** You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

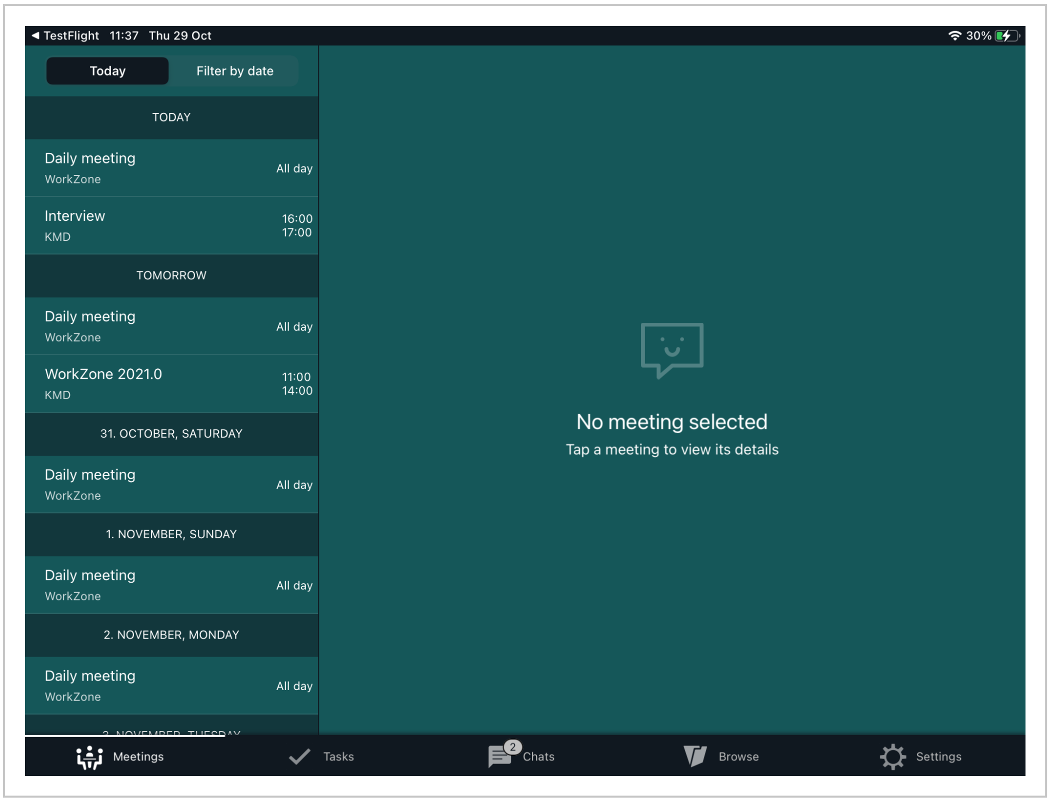
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> Tip: For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

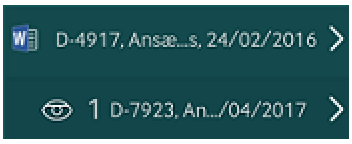
Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
    - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

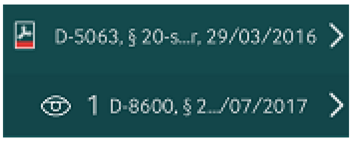
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

> **Note:** You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights] in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries](#).

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

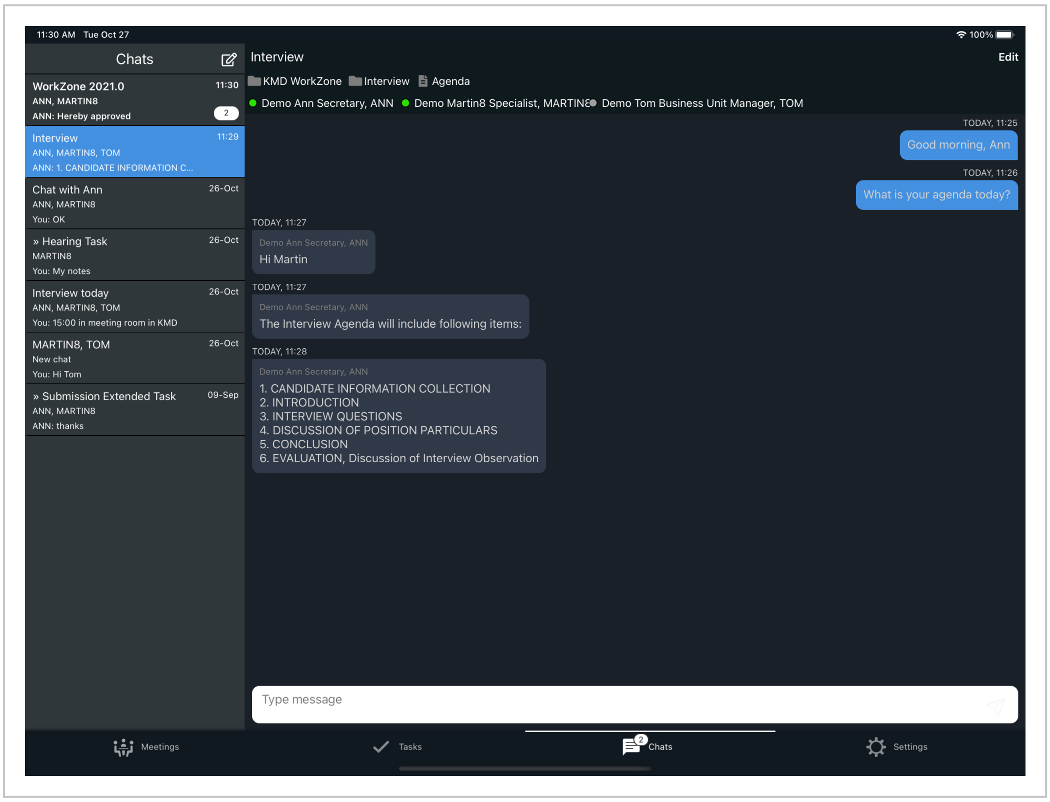
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See Feature Settings in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

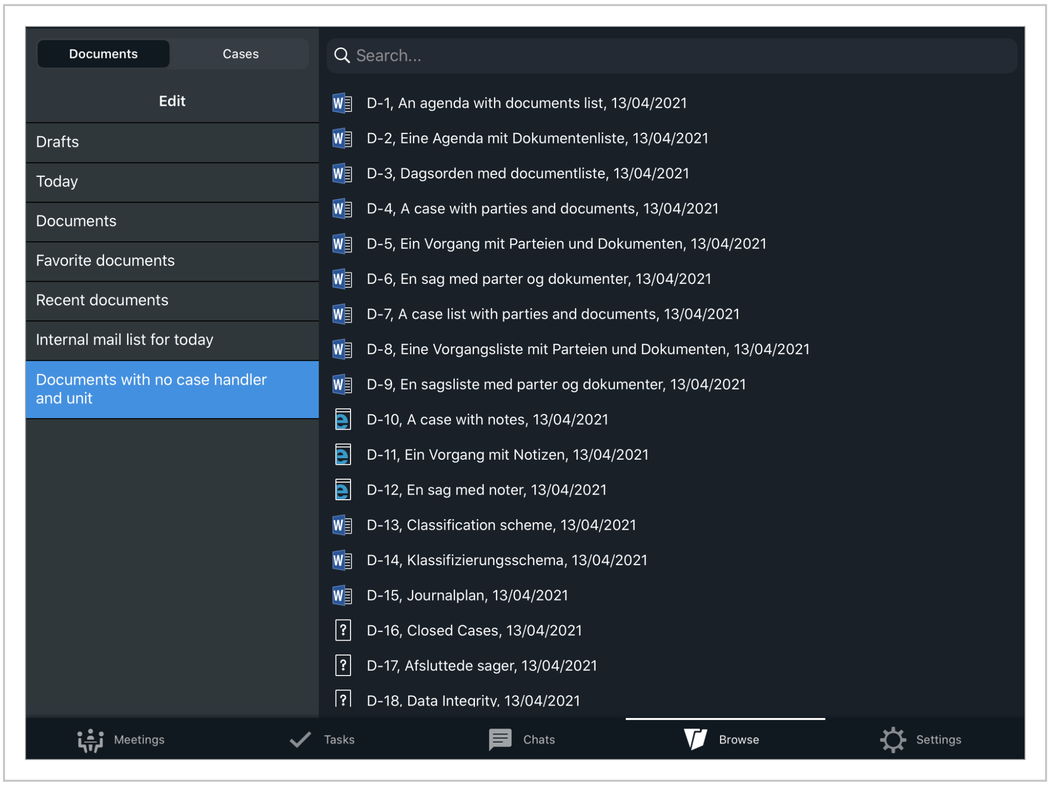
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     Note: You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

> **Tip:** Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

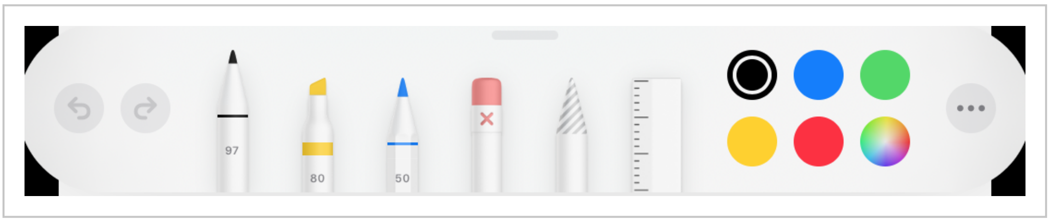
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

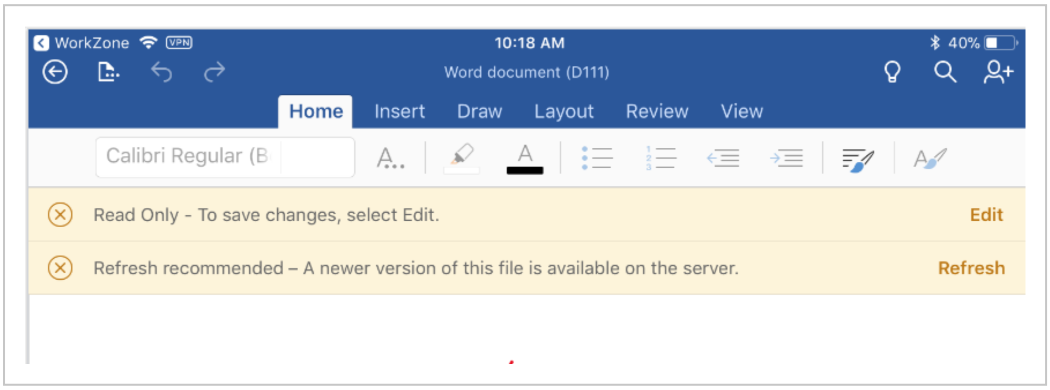
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

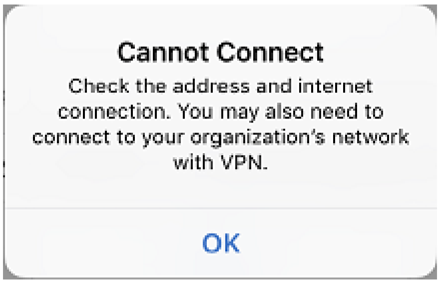
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.

7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

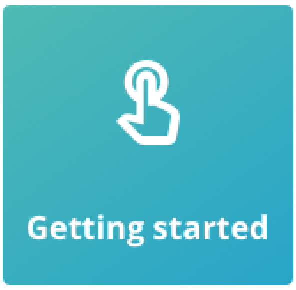
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

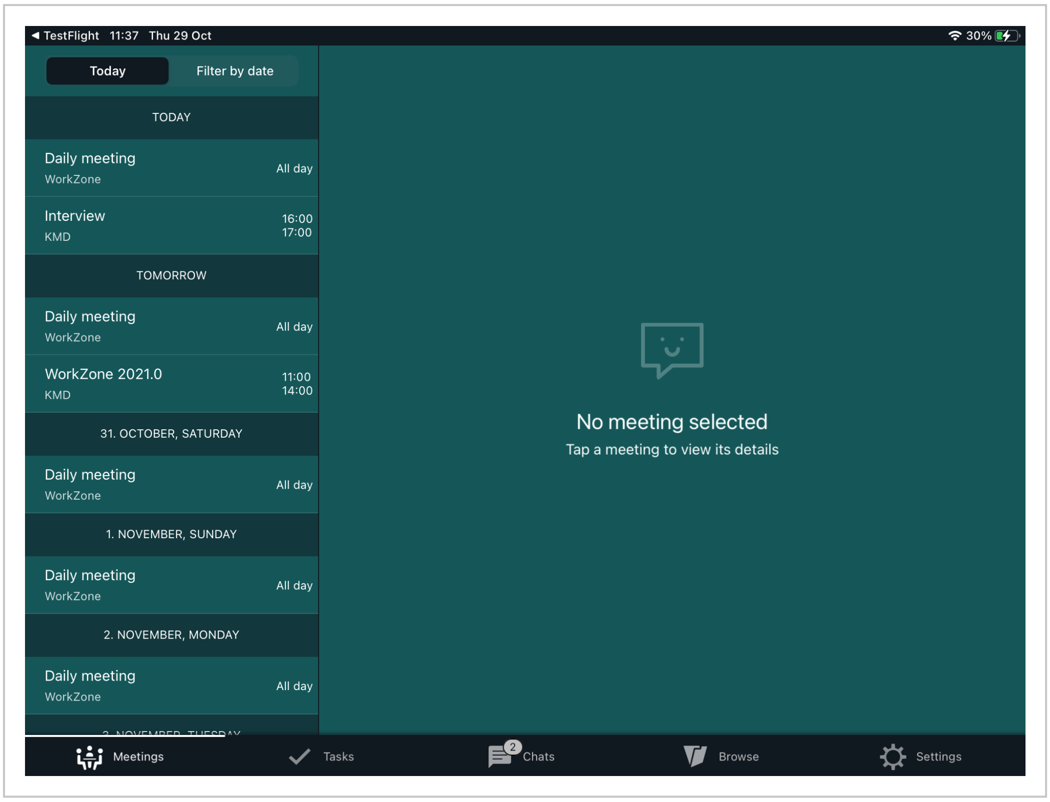
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> **Tip:** For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

Edit Microsoft Office documents ()

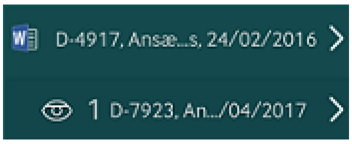
> **Prerequisite:** You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.

    - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

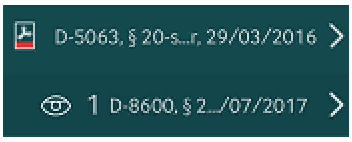
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about creating, editing, and sharing queries.

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on iOS, or **OK** on Android. The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

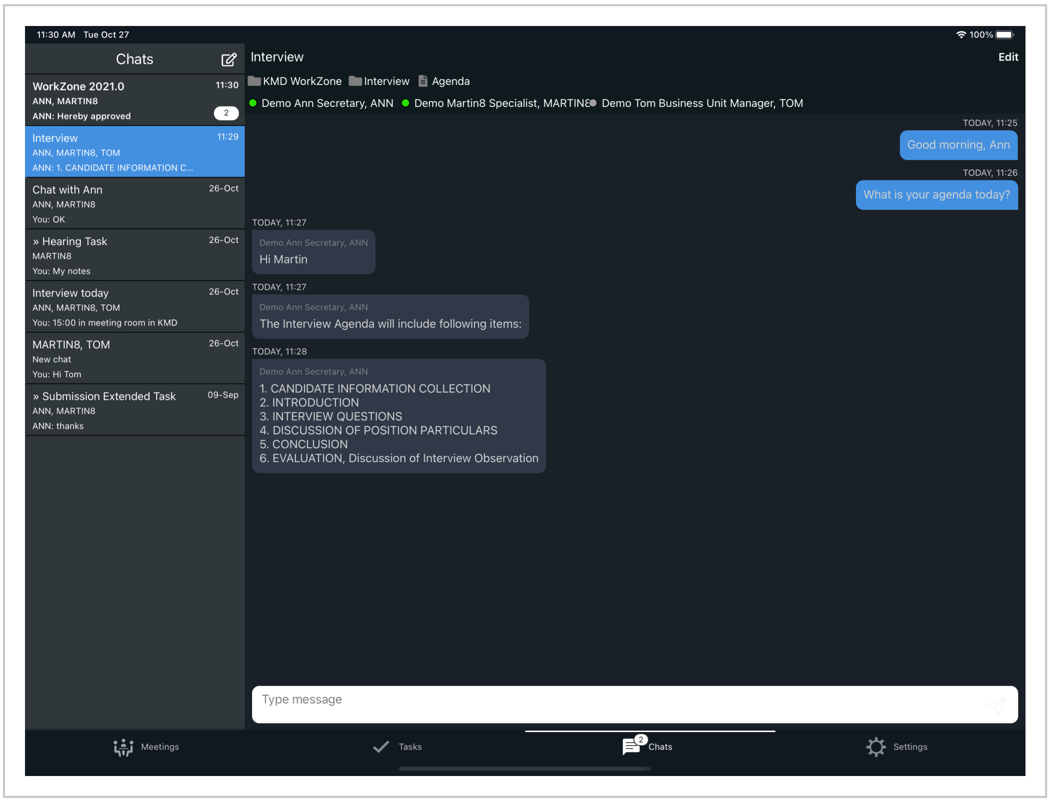
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the doc-ument.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See Feature Settings in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

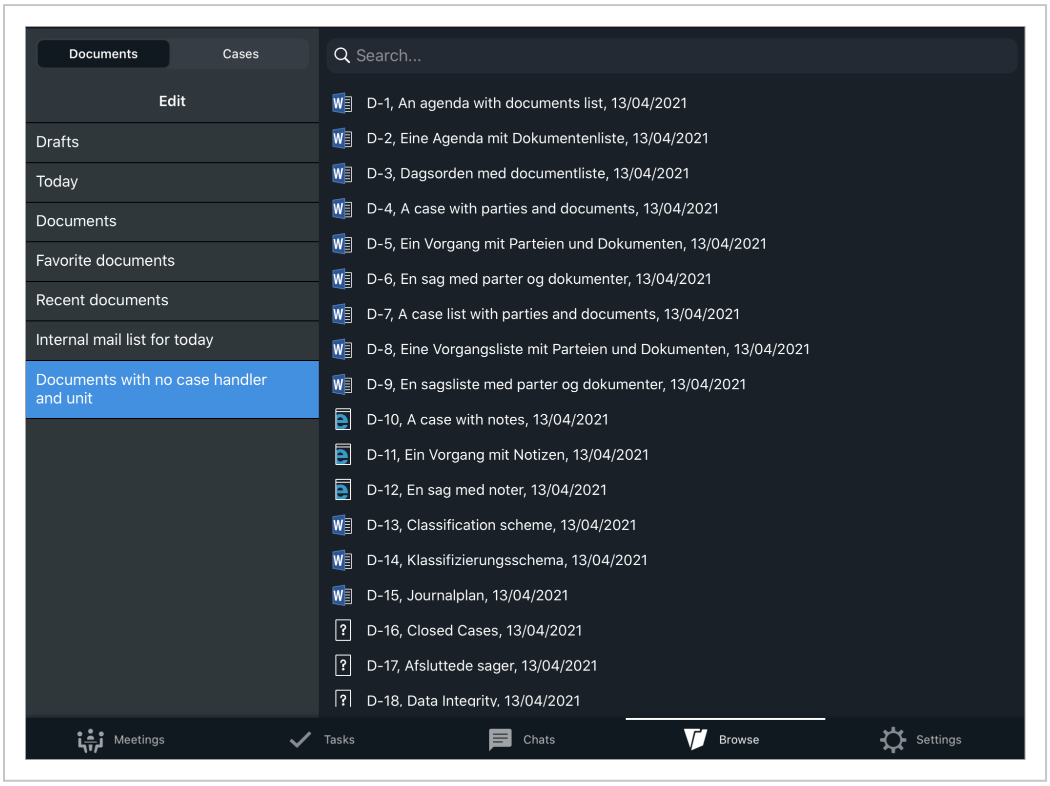
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     Note: You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

> **Tip:** Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

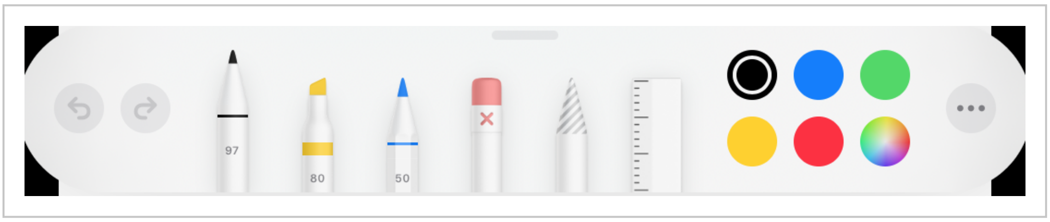
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

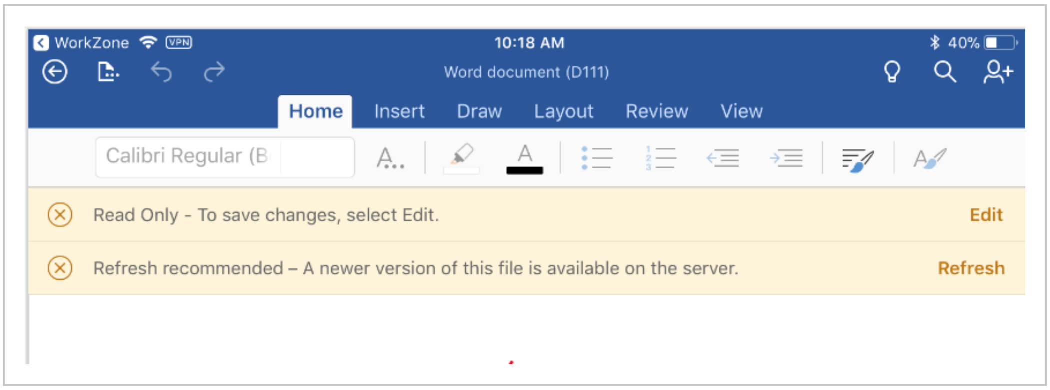
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

Example: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

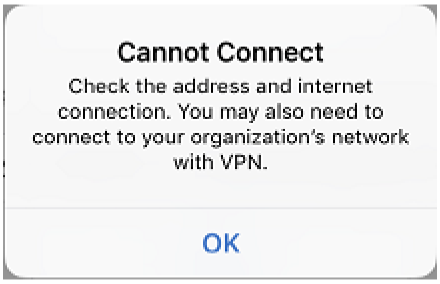
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.

7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

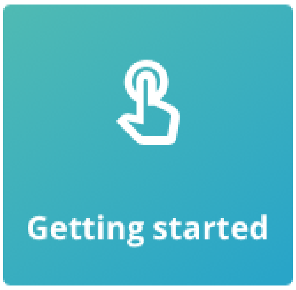
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

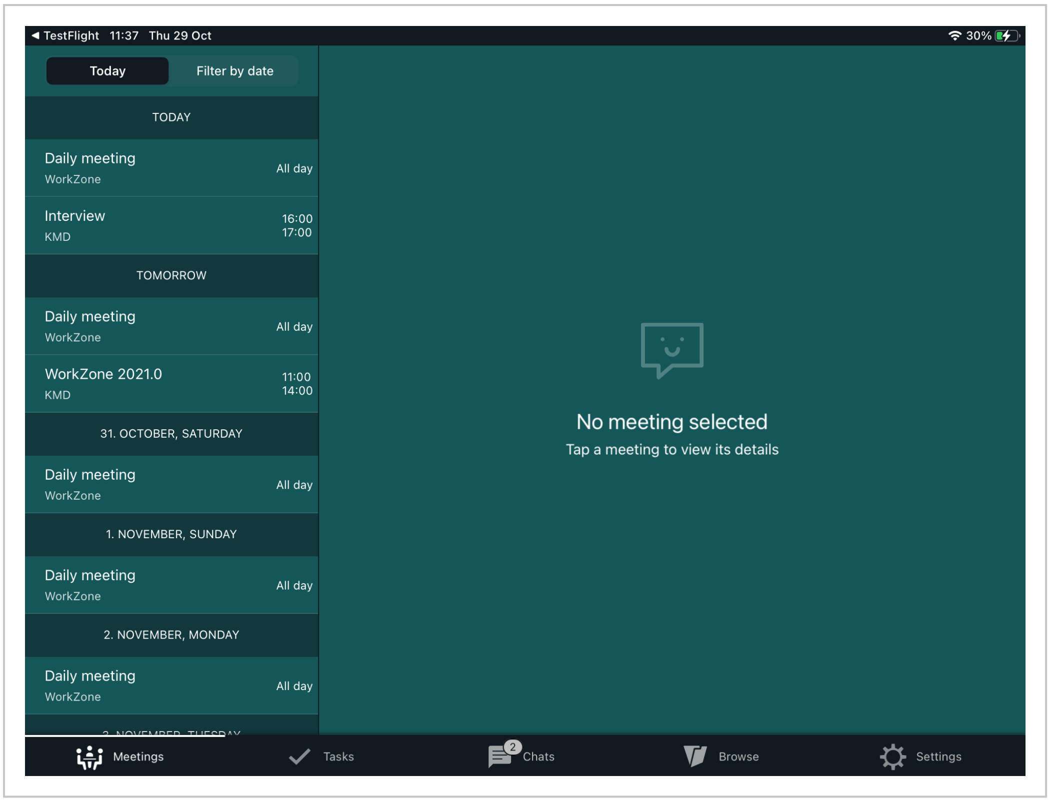
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

> **Prerequisite:**
>
> - Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> Tip: For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap +. To decrease number of displayed lines, tap −.

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

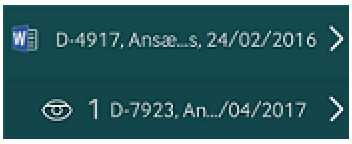
Edit Microsoft Office documents ()

> **Prerequisite:** You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
   - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

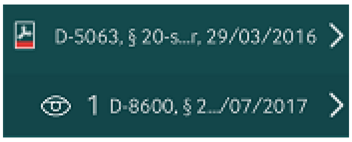
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap ‹ to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap ‹ to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

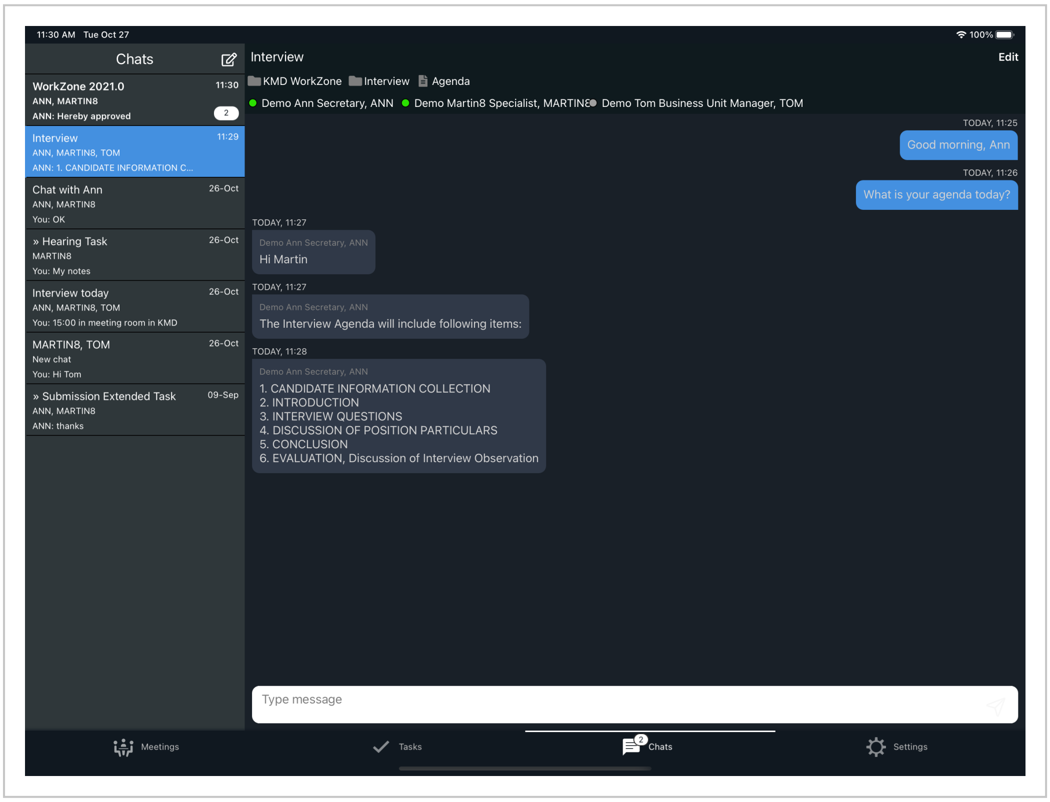
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

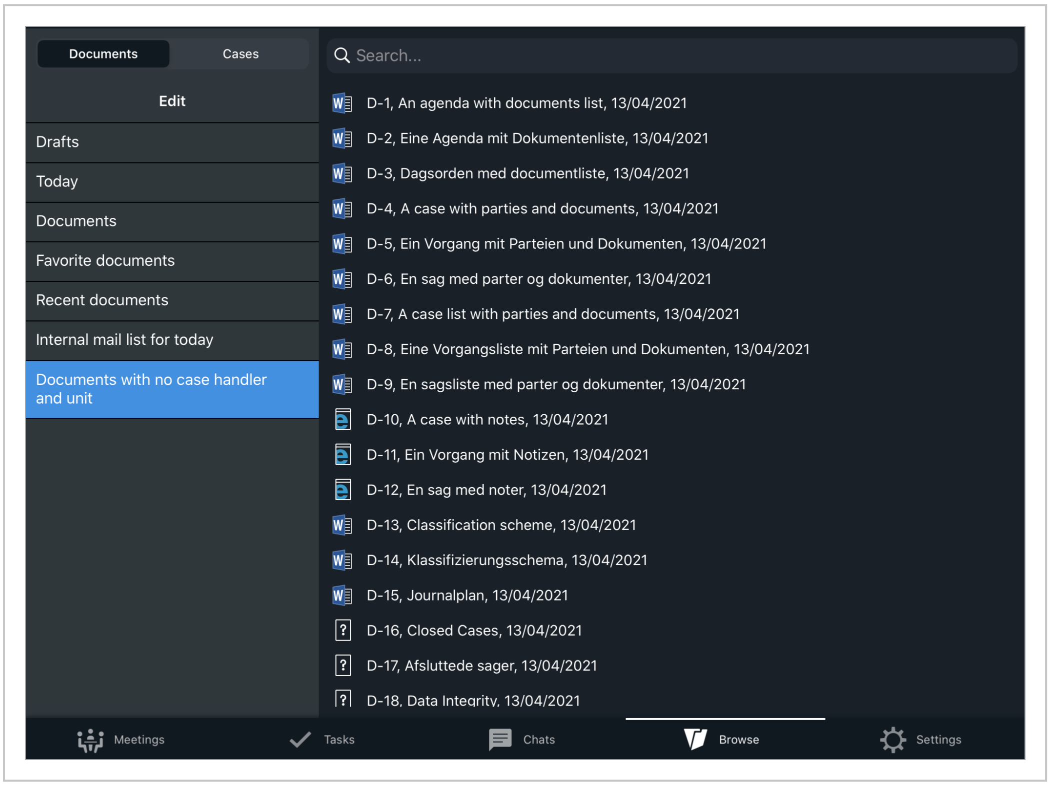
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
   - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
   - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

    - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
    - To edit this document (if the document is editable): Tap at the top right corner.

    > **Note:** You might need to install a relevant Office app to edit some document formats.

    - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

> **Tip:** Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

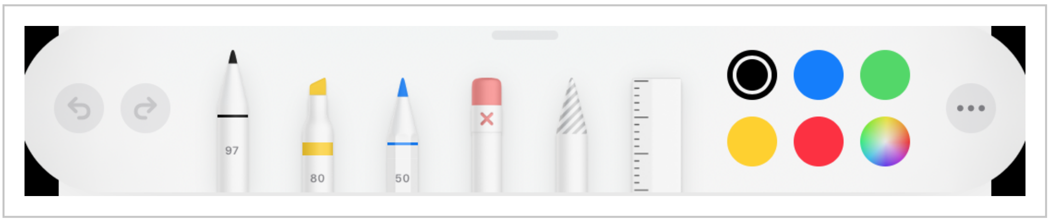
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

	2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw straight lines with calibrated measures • Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.
	Draw calibrated polylines. 1. Tap the edit icon. 2. Select color, thickness, opacity, scale, precision, or snapping settings. 3. Tap **Done** to start drawing.
	Draw filled polygons. 1. Tap the edit icon. 2. Select color, thickness, opacity, scale, precision, or snapping settings. 3. Tap **Done** to start drawing.
	Draw curved lines. • Double-tap to edit line color, thickness, and opacity settings.
	Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.
	Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

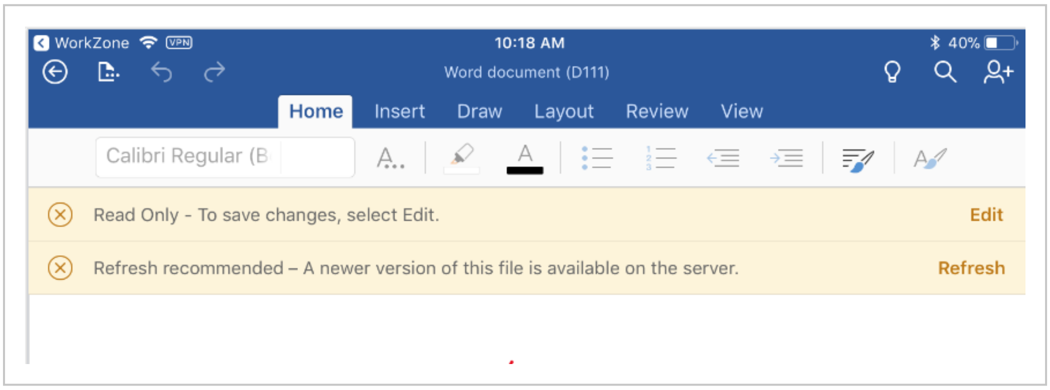
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

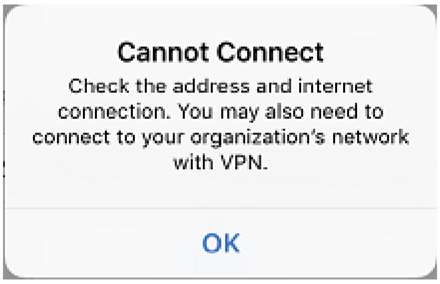
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

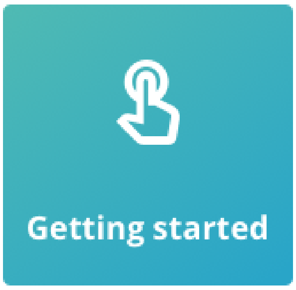
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ()

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

> **Note:** You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

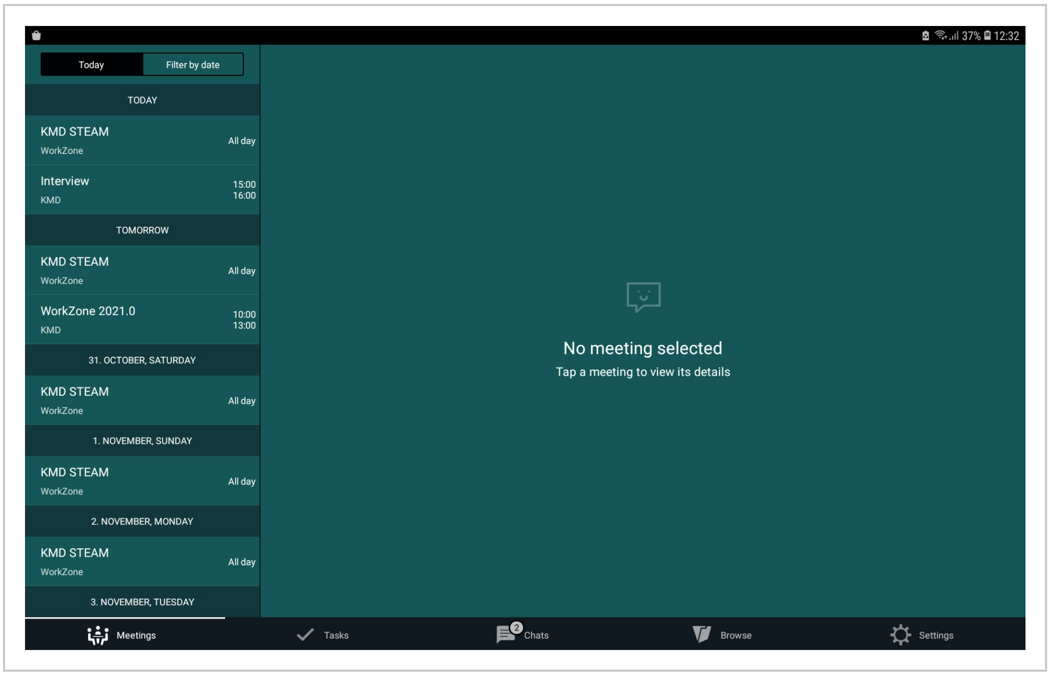
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

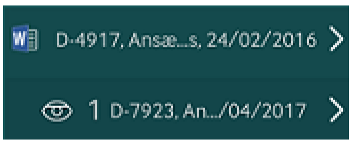
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

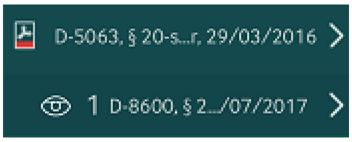
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

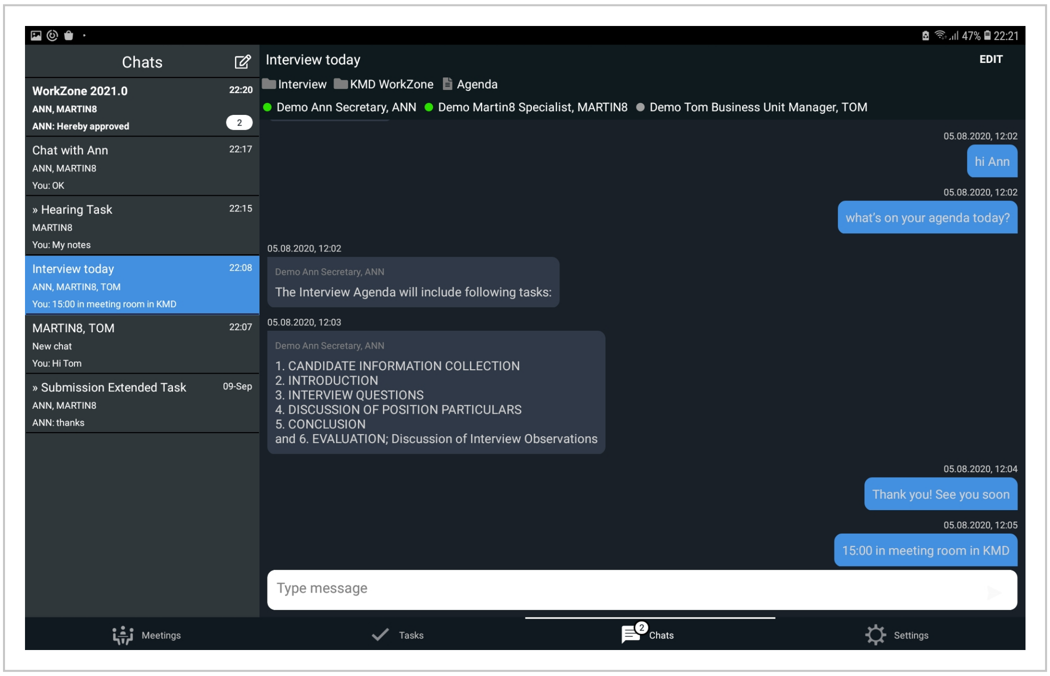
> **Note:** Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.
   - For documents:
     a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:
        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.
   - For cases:
     a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

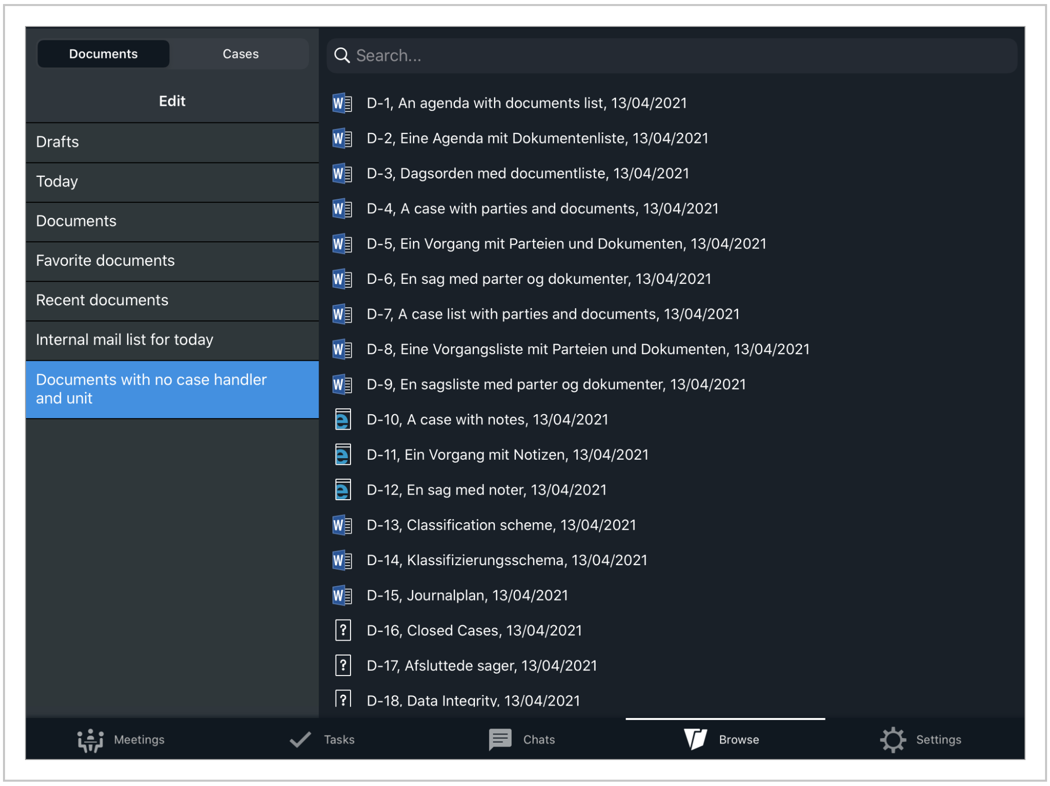
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

    > **Tip:**
    >
    > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
    >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
    >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

Add a sticky note.
Highlight text. Tap and drag over the text.
Strike out text. Tap and drag over the text.
Underline text. Tap and drag over the text.
Squiggly line. Tap and drag over the text.
Add a signature.
Draw free hand.
Erase what you have drawn in free hand.
Write text.
Draw arrows.
Draw lines.
Draw ellipses.
Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

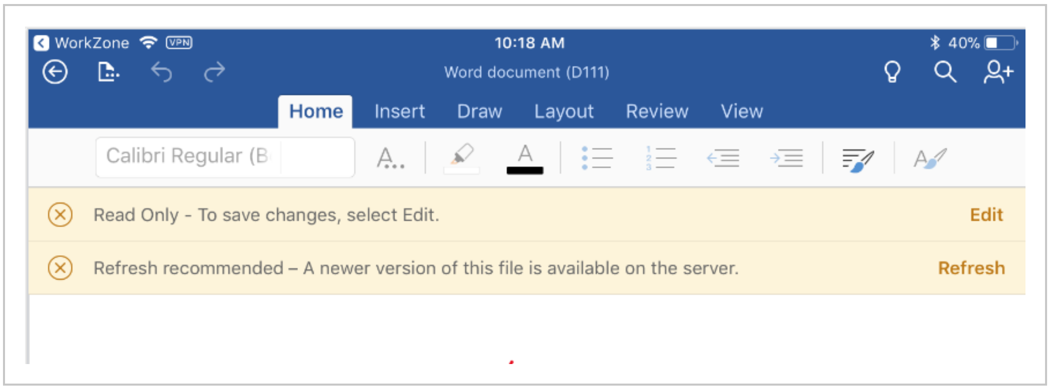
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

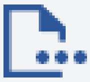
Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

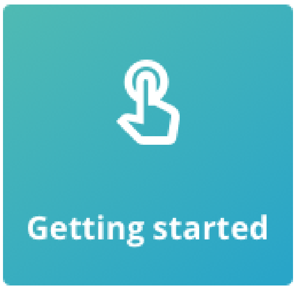
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ()

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

> **Note:** You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

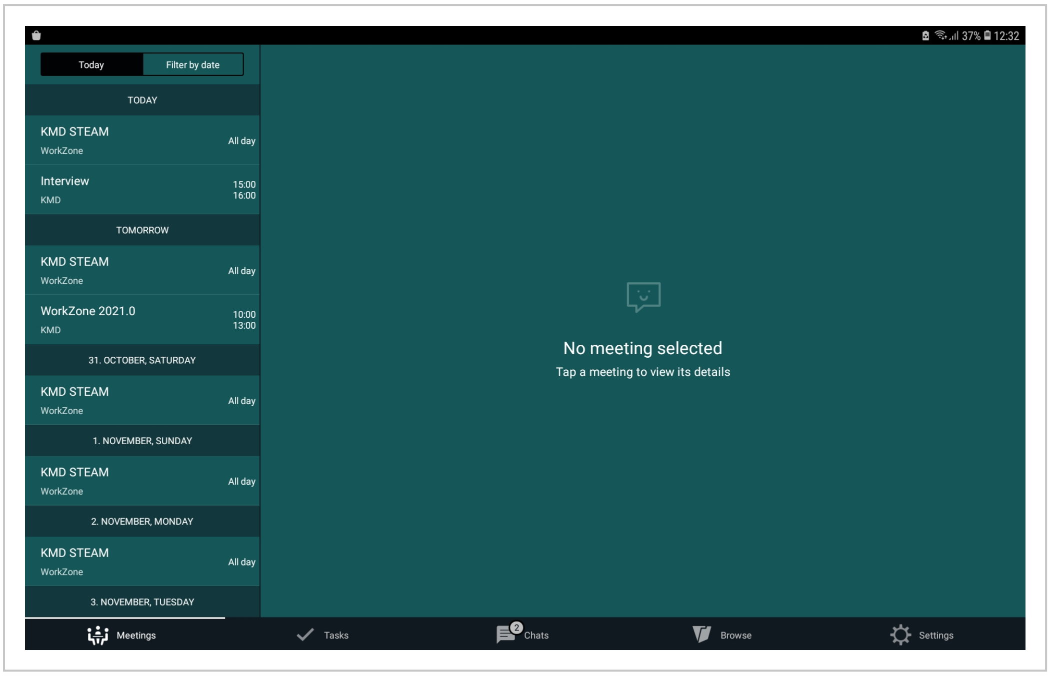
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

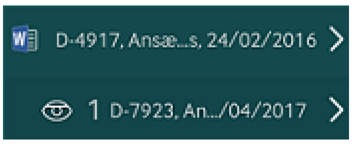
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

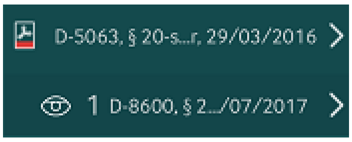
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

> you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

> **Prerequisite:**
>
> - The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
> - The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See [Feature Settings](#) in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

> Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about creating, editing, and sharing queries.

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See [Feature Settings](#) in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about [delegates](#).

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See [WorkZone Client User Guide](#) for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

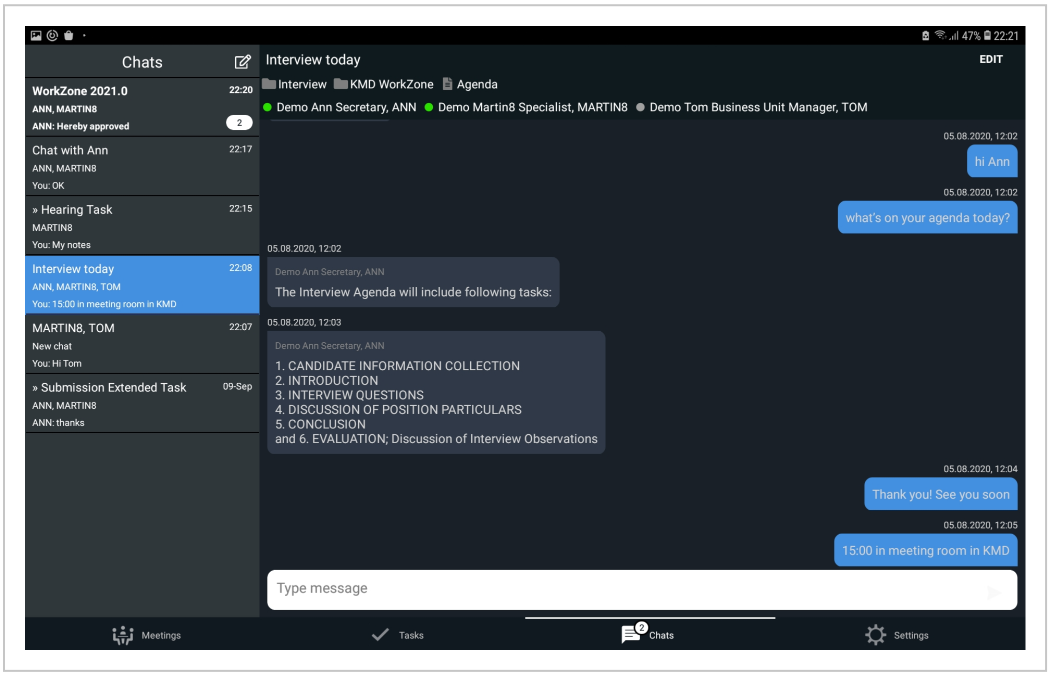
> **Note:** Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See [Feature Settings] in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See [WorkZone Client User Guide] for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

    - For documents:

        a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

        b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

    - For cases:

        a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

        b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

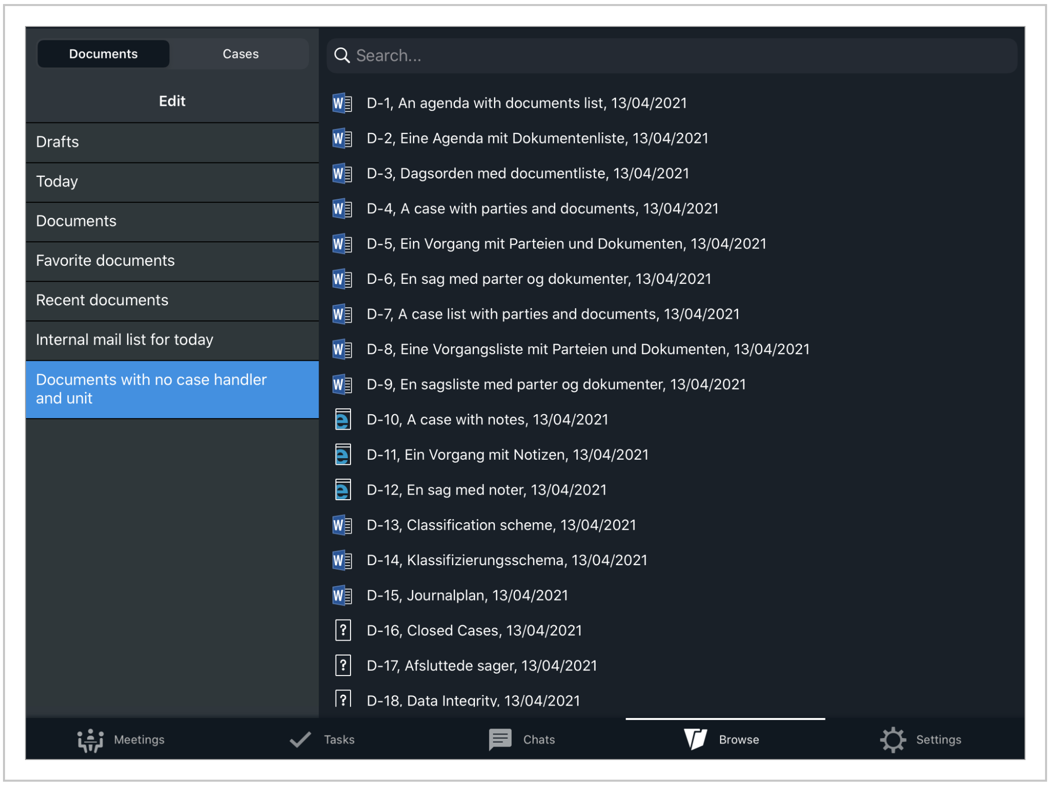
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

    Tip:

    - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
        - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
        - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

    - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

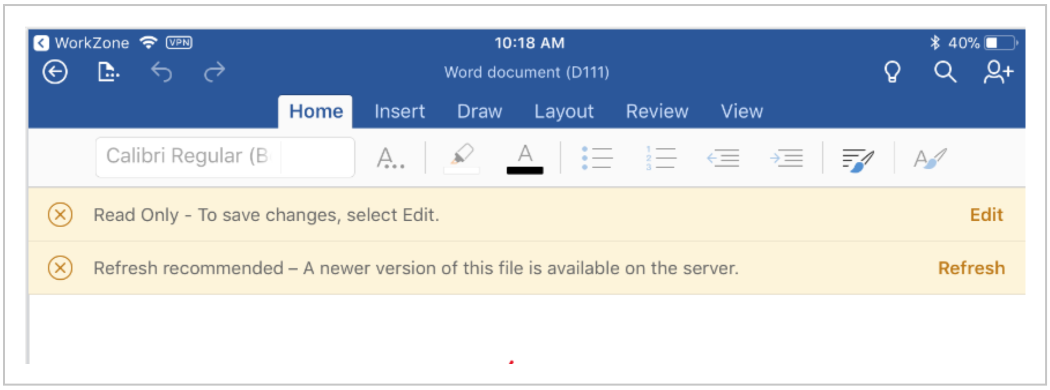
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

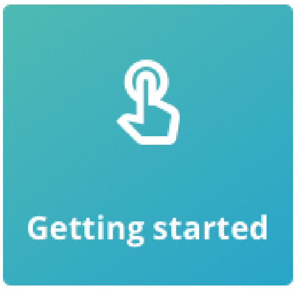
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ( )

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

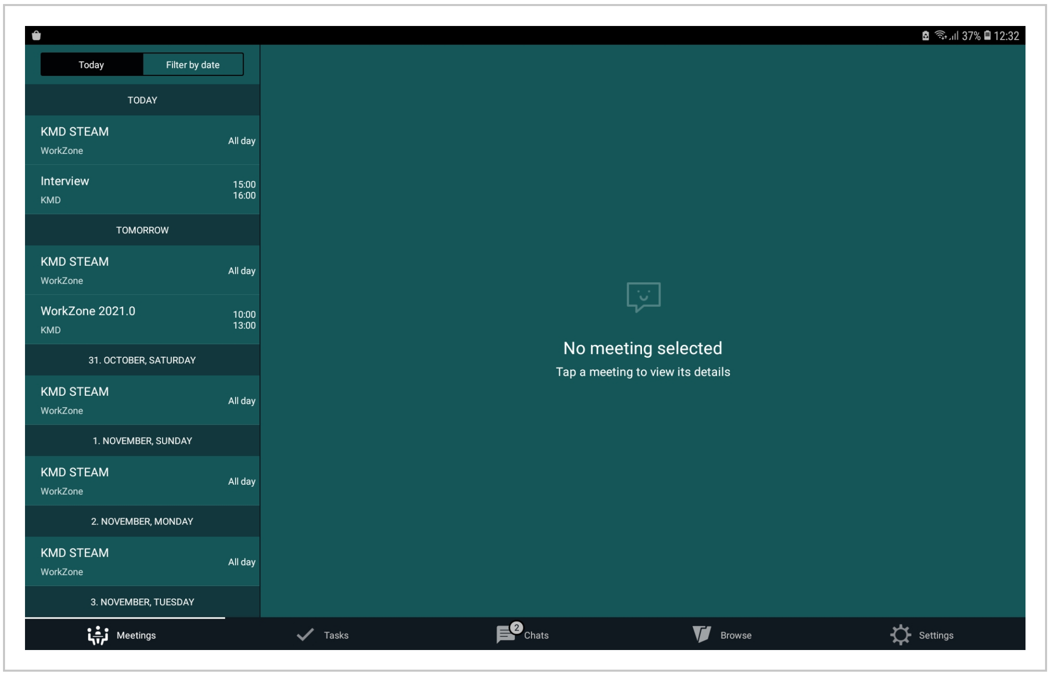
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

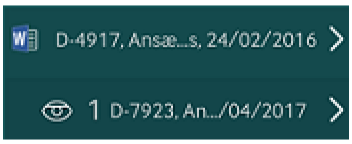
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

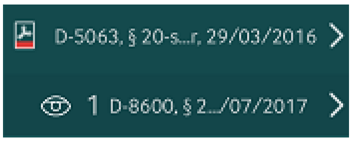
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

> **Prerequisite:**
>
> - The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
> - The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

> Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries](#).

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See [Feature Settings] in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about [delegates].

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See [WorkZone Client User Guide] for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

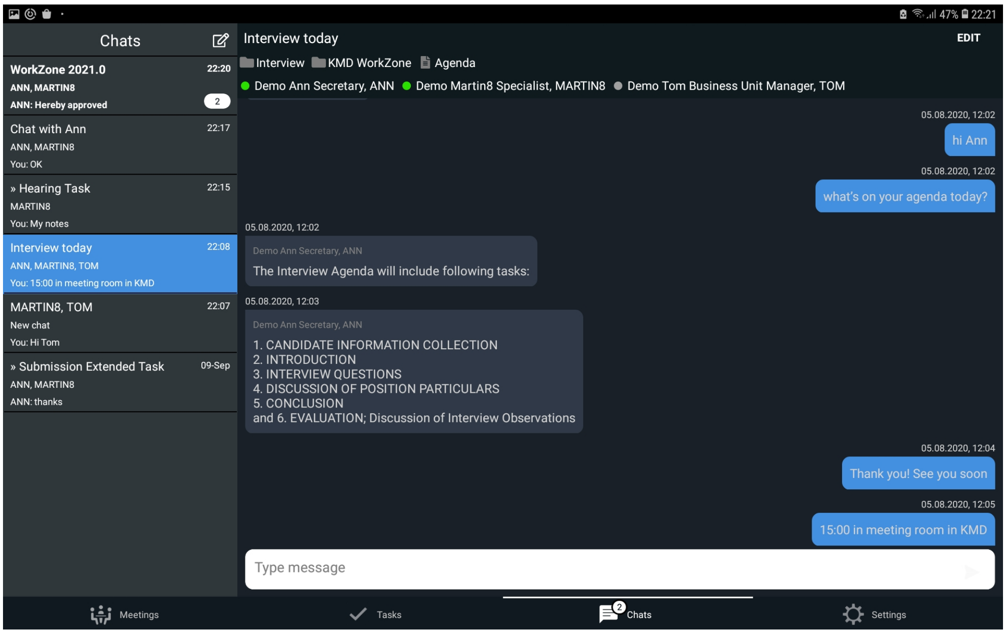
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

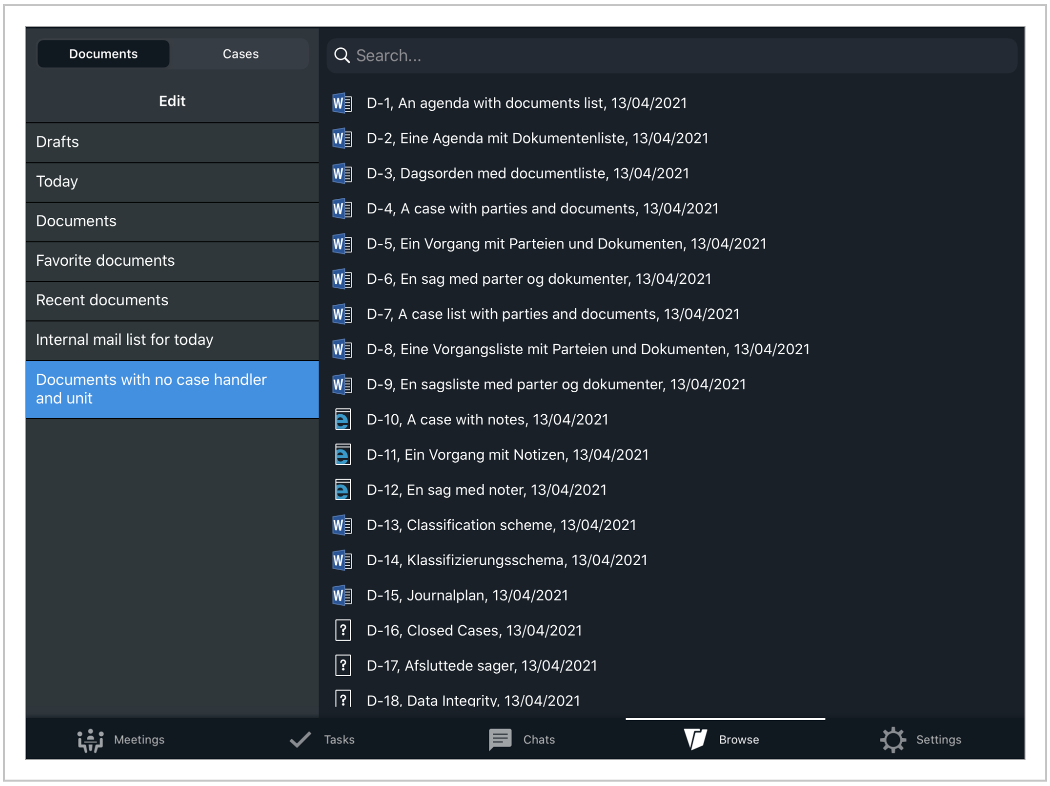
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

    > **Tip:**
    >
    > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
    >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
    >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap  at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

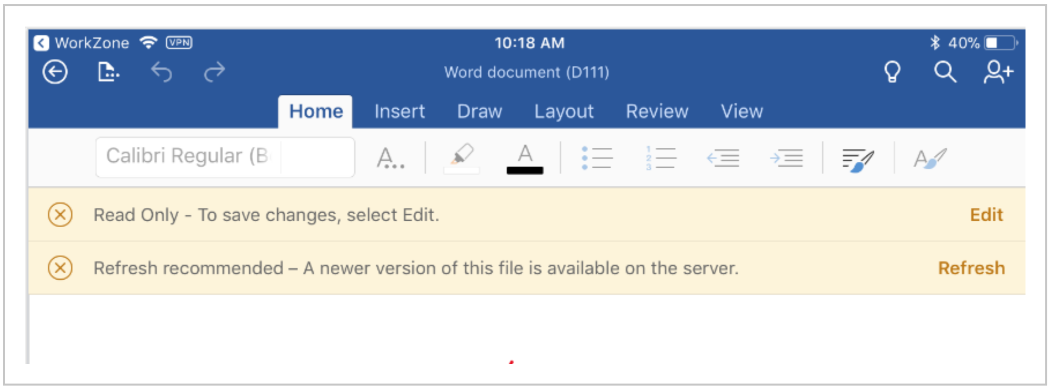
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

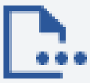
Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

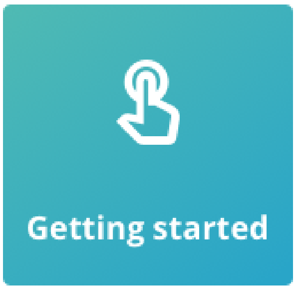
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ()

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

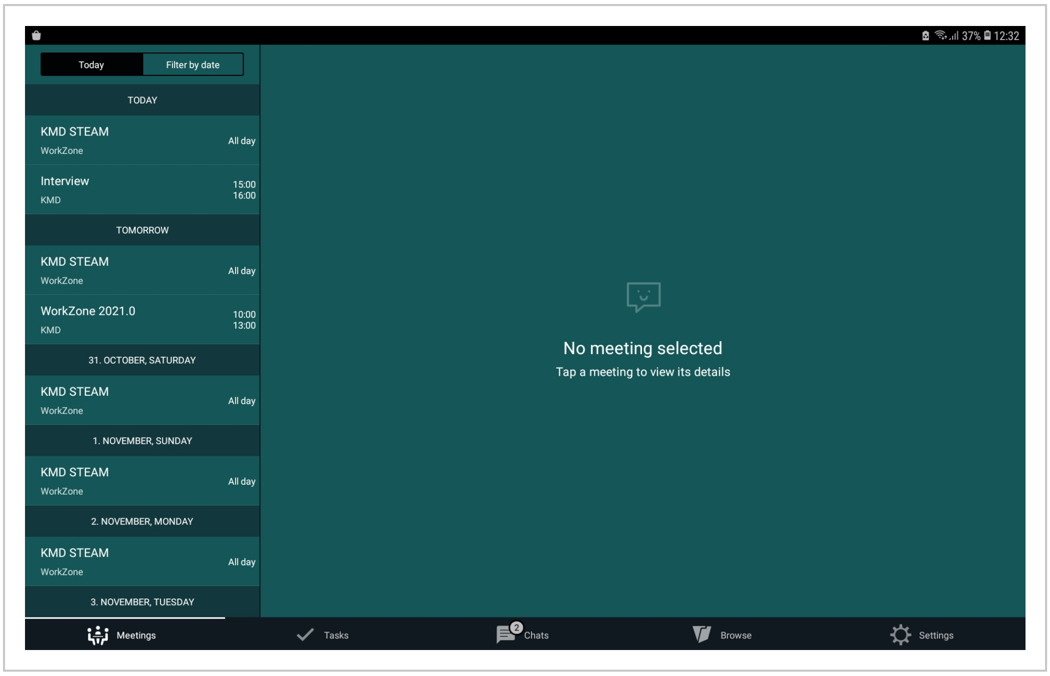
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

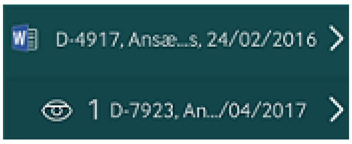
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights] in the WorkZone Client User Guide.

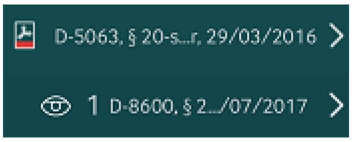
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

> **Prerequisite:**
>
> - The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
> - The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

> Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

> - The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See [Feature Settings] in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about [delegates].

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

> **Prerequisite:** WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See [WorkZone Client User Guide] for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

> **Important:** You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

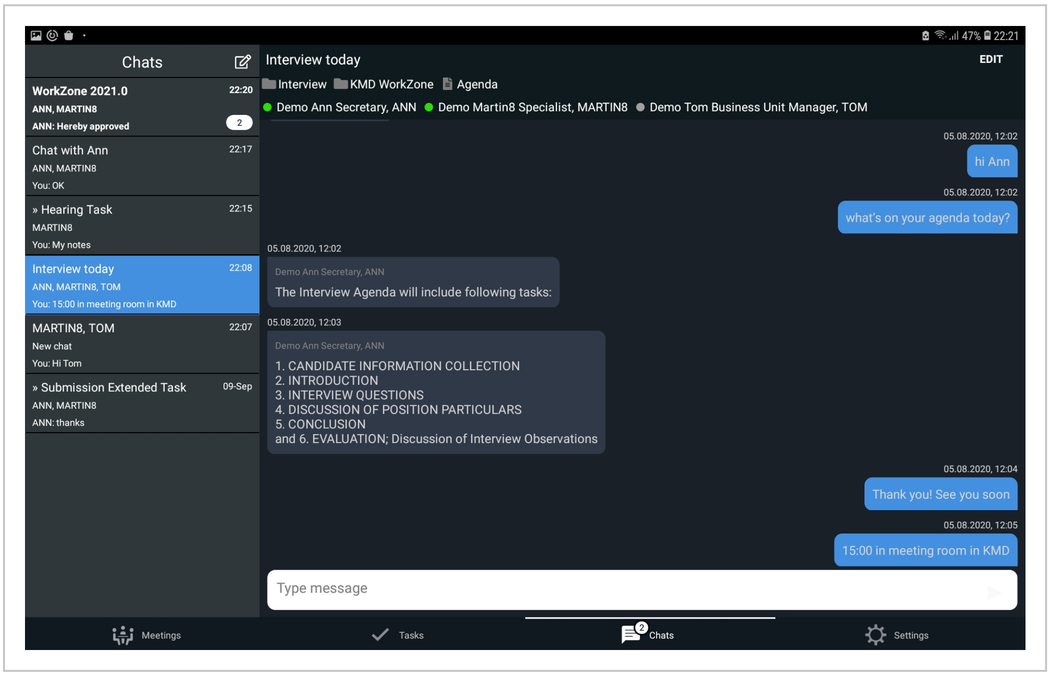
> **Note:** Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or  .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap  at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

    - To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.
4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

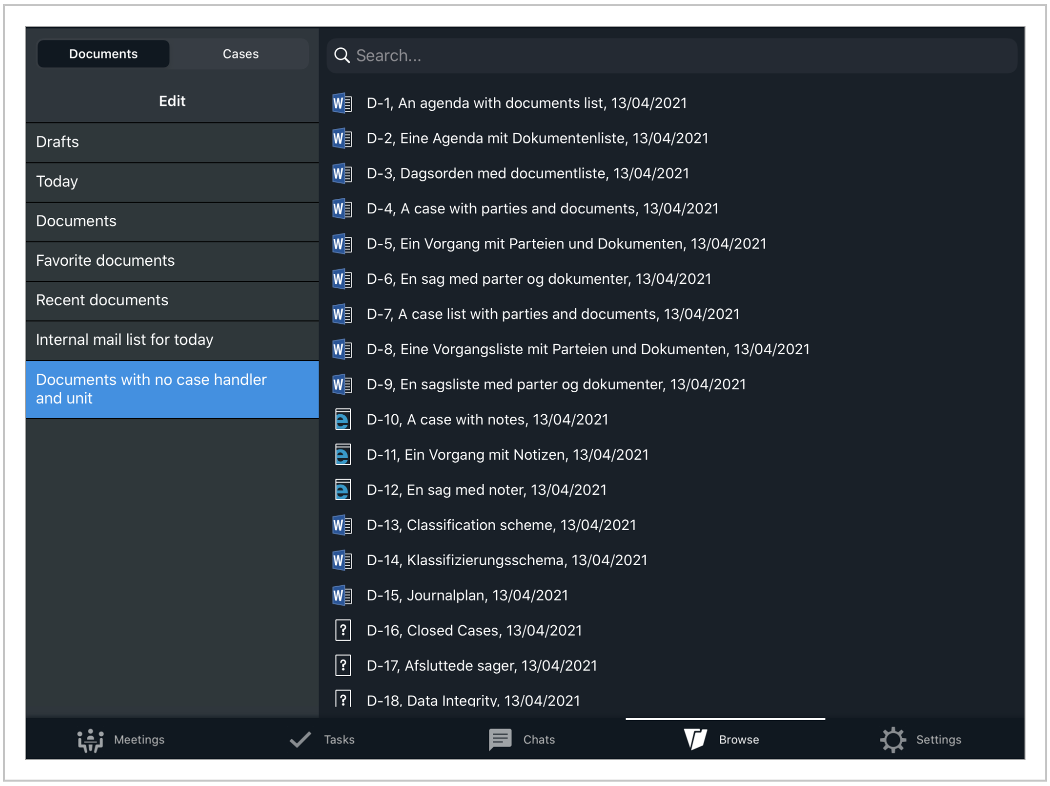
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

    > **Tip:**
    >
    > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
    >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
    >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

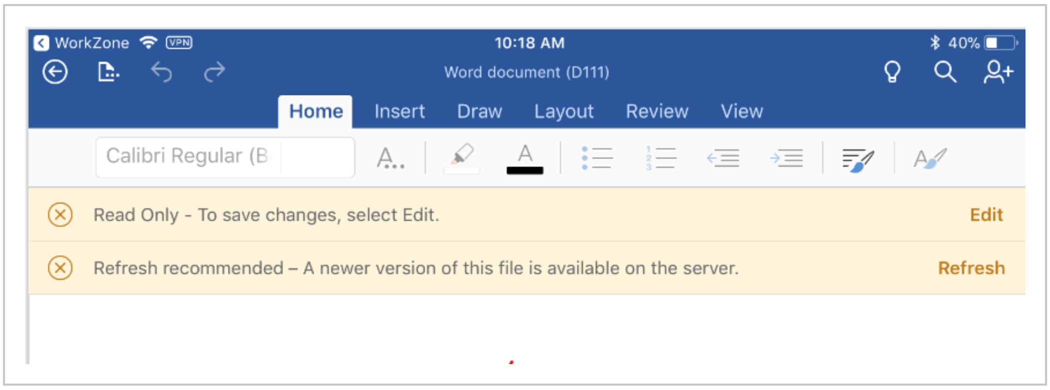
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

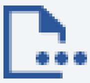
Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE _Mobile

2021.3

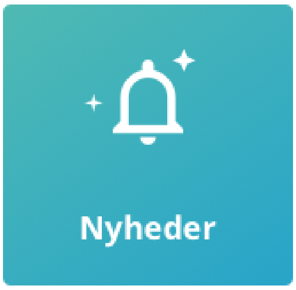
Brugervejledning

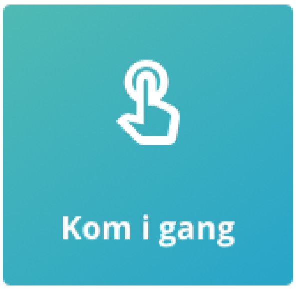
Indhold

WorkZone Mobile 2021.3

Med WorkZone Mobile kan du tilgå WorkZone-sager, -dokumenter, -opgaver og møder på din mobile enhed. Denne Brugervejledning dækker både iOS- og Android-versionen af WorkZone Mobile.

Retningslinjer, der kun gælder for enten iOS- eller Android-versionen, markeres med ikonerne (iOS) og (Android).





Ofte stillede spørgsmål

Hvad sker der, hvis jeg arbejder offline?

Du kan udføre en opgave, selvom du er offline. Den slags opgaver gemmes under **Usendte opgaver**. Når du igen er online og trækker for at opdatere, sendes dine usendte opgaver.

Relateret produktdokumentation

- WorkZone Process Brugervejledning
- WorkZone for Office Brugervejledning
- WorkZone Client Brugervejledning

WorkZone-links

- WorkZone-dokumentation
- WorkZone-support
- WorkZone-websted
- WorkZone-portal

Nyheder

Der er ingen ændringer i denne release.

Det var nyt i WorkZone Mobile 2021.2

Gennemse med dine WorkZone-lister

Du kan nu navigere i modulet Gennemse med dine foruddefinerede og brugerdefinerede WorkZone-lister og omarrangere dem, så de passer dine behov. Se Tilpas dine viste lister og Søg på sager og dokumenter.

Det var nyt i WorkZone Mobile 2021.1

Naviger til en sag fra et dokument

Du kan nu navigere fra dokumenter, som du har åbnet i modulet Gennemse eller fra en chat, til deres tilknyttede sag og her se dagens oplysninger. Se Se oplysninger om chat-dokumenter og -sager og Se dokumentoplysninger.

Arbejde med dine stedfortræderopgaver

Hvis du er stedfortræder for en bruger, kan du nu skifte til denne brugers opgaveliste og arbejde med deres opgaver. Se Arbejde med dine stedfortræderopgaver.

Brugerdefinerede filtre for opgaver

I din opgaveliste kan du nu anvende brugerdefinerede filtre, som er tilgængelige for dig. Brugerdefinerede filtre er gemte søgerlister, der er oprettet i WorkZone OData QueryBuilder. Se Filtrér dine opgaver med brugerdefinerede filtre.

Det var nyt i WorkZone Mobile 2021.0

Modulet Gennemse

- Du kan nu gennemse alle sager og dokumenter, der tilgængelige for dig i WorkZone fra din mobile enhed. Du kan søge efter sager eller dokumenter, se deres metadata, se eksisterende dokumenter på den valgte sag, forhåndsvise og

redigere valgte dokumenter (hvis de er redigerbare). Se Gennemse WorkZone-sager og -dokumenter.

Chatforbedringer

- Du kan nu oprette nye chats direkte fra **Chats**-modulet. Se Opret en ny chat (uden en opgave).
- Du kan nu se og redigere sagsdokumenter (hvis de er redigerbare), og se sags-metadata for sagerne på dine chats. Se Vis oplysninger for chatsager og chat-dokumenter.
- Du kan redigere dokumenter i dine chats. Se Rediger et chatdokument.

Forbedringer i brugergrænsefladen

- Knappen **Hjælp** findes nu under **Indstillinger**.

Det var nyt i WorkZone Mobile 2020.3

Chatforbedringer

- Du kan nu se en forhåndsvisning dokumenter i dine chats. Se Forhåndsvisning af chatdokumenter.
- Du kan se metadata for dokumenterne i dine chats. Se Vis metadata for chat-dokumenter.
- Du kan se om brugerne i dine chats er online eller offline. Se Vis dine chats.

Det var nyt i WorkZone Mobile 2020.2

Log ind på WorkZone Mobile via OAuth2

Hvis din organisation bruger OAuth2 til brugergodkendelse, kan du logge ind på WorkZone Mobile ved brug af OAuth2. Se Log ind og ud.

Arbejde med WorkZone-chats

I WorkZone Mobile kan du se dine eksisterende chats og besvare dem, oprette nye chats om eksisterende processer fra de tilknyttede opgaver og tilføje eller fjerne deltagere i en chat. Se Arbejde med chats.

Forbedringer i forhåndsvisning af opgaver ()

- Arranger dine opgaver i den rækkefølge, du ønsker de skal behandles i. Se Arranger rækkefølge på dine opgaver.

Meddelelser om dokumentkonflikt, når PDF-dokumenter redigeres af flere brugere samtidigt

Hvis flere brugere redigerer i det samme PDF-dokument samtidigt, vil den anden bruger modtage en meddelelse om dokumentkonflikt, hvor brugeren kan vælge at kassere ændringerne eller at overskrive den anden brugers ændringer. Se Annoter PDF-dokumenter.

Det var nyt i WorkZone Mobile 2020.1

- Fejlrettelser.

Det var nyt i WorkZone Mobile 2019.3

Forbedret navigation

- Navigationsruden vises nu i bunden af skærmen. Tryk på et modul for at arbejde med det.
- Knappen **Log ud** findes nu under **Indstillinger**.
- Dokumenter åbner nu i fuld skærm.

Forbedringer i forhåndsvisning af opgaver

- Tryk **Rangorden** øverst i din opgaveliste for at sortere efter rangorden. Se Arranger rækkefølge på dine opgaver.

- Når du viser dokumenter på en opgave, tryk på knapperne og for at åbne det tidligere eller det næste dokument på opgaven, eller stryg til højre/venstre for at se den tidligere/næste side i dokumentet. Se Vis dokumenter.

Det var nyt i WorkZone Mobile 2019.2

Fejlrettelser.

Du kan nu definere antal linjer, der skal vises i møde- og opgavetitler. Se Konfigurer WorkZone Mobile.

Det var nyt i WorkZone Mobile 2019.1

Fejlrettelser.

- Forkerte beskeder åbnes på siden **Log ind**, når du trykker **Retur** i felterne **Server** og **Brugernavn**, når du bruger tastaturet - Dette er rettet.

Support ved ændring af kodeord

Hvis dit kodeord udløber mens du arbejder i WorkZone, vil siden **Log ind** åbne, og du kan først gentage dit arbejde, når du har indtastet dit kodeord. Se Log ind og ud.

Det var nyt i WorkZone Mobile 2018.2

- Når du har besvaret en opgave, bliver den næste vist automatisk. Se Arbejde med opgaver.
- Performanceforbedringer.
- Fejlrettelser.

Det var nyt i WorkZone Mobile 2018.1

- Fejlrettelser.

Nyheder i WorkZone Mobile 2018

- Denne udgave er den første.

Generel information

Kom godt i gang

Log på og log af på WorkZone Mobile.

- Se dine kommende WorkZone-møder (Oprettes i Outlook via WorkZone for Office eller WorkZone 365).
- I navigationsruden, tryk på et modul, du vil arbejde med. For eksempel, tryk **Opgaver** for at se en opgaveliste. Opgaverne er markeret i forhold til frister og prioriteter.

På et møde kan du:

- Tryk på et møde for at se mødets detaljer.
- I mødetaljerne, se oplysninger om dato og tid, placering, deltagere, dagsordenspunkter og vedhæftede filer.
- Se dokumenter, der er vedhæftet på et møde. Tryk på et dokument i mødetaljerne for at se det.
- Arbejde med møder. Tryk på **Rediger** i dokumentfremviseren for at redigere dokumentet.
- Annoter PDF-dokumenter, for eksempel PDF, MSG, PNG og JPG i PDF-format. Tryk på **Rediger** i dokumentfremviseren for at redigere dokumentet.
- Eksportere dokumenter til andre apps. I dokumentfremviseren, tryk **Del** og vælg en app.
- Arbejde offline.

På en opgave kan du:

- Trykke på en opgave under **Usendte**, **Åbne**, **Kommende** eller **Afsluttet** for at se opgavedetaljerne.
- Se procesoplysninger i opgavedetaljerne, som for eksempel sagsnummer, sagsbehandler, hvem der startede processen, og opgave- og procesfrist.
- kun: Vis opgave med vedhæftede dokumenter i en samlet PDF-fil. I opgaven, tryk .

- Se de dokumenter, der er vedhæftet på processen. I opgavedetaljerne, trykke på et dokument for at se det.
- Tilføj eller fjern dokumenter til eller fra opgaver.
- Arbejde med opgaver. Tryk **Rediger** i dokumentviseren for at redigere det aktuelle dokument.
- Annoter PDF-dokumenter. Tryk på **Rediger** i dokumentfremviseren for at redigere dokumentet.
- Eksportere dokumenter til andre apps. I dokumentfremviseren, tryk **Del** og vælg en app.
- Se hvem der gjorde hvad og hvornår under **Proceslog**.
- Besvar en opgave ved at bruge svarknapperne.
- Opret en ny chat (fra en opgave) eller Svar i en chat for at diskutere denne opgave.
- Arbejde offline.
- kun: Modtage meddelelser, når en opgave ændres, eller du får en ny opgave.

Bemærk: Det kan være nødvendigt, at du henter og installerer et visningsprogram fra App Store (for) eller Google Play (for) for at åbne visse dokumentformater.

Konfigurer WorkZone Mobile.

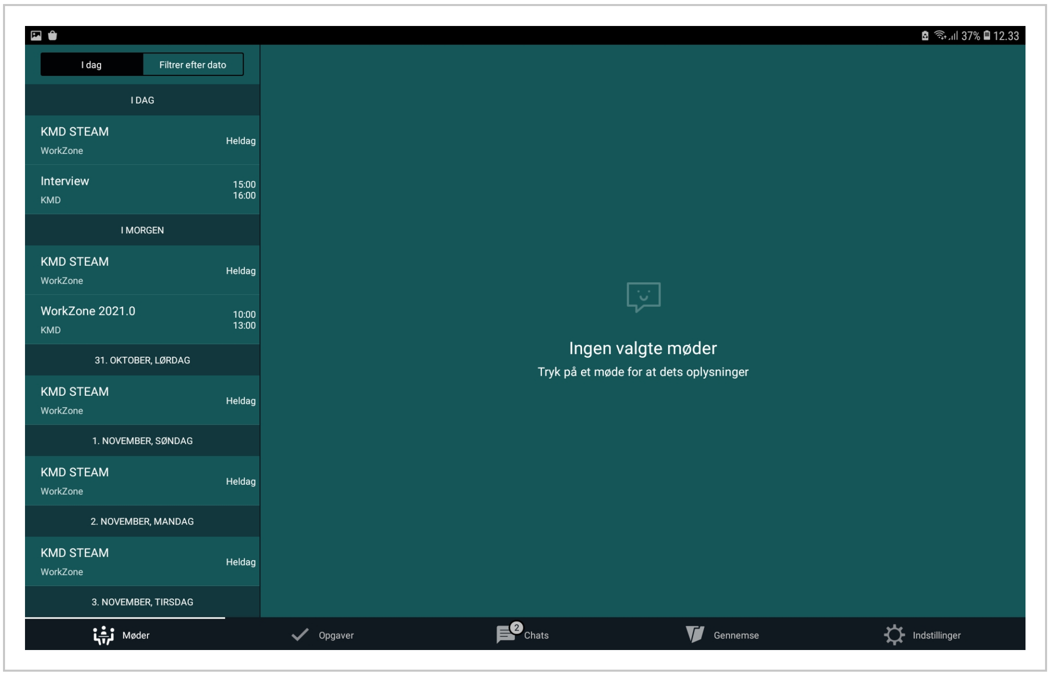
Se dine eksisterende WorkZone-chats og besvar dem, eller opret nye chats fra de tilknyttede opgaver. Se Arbejde med WorkZone-chats.

Brug WorkZone Mobile

Når du starter WorkZone Mobile første gang, vises din mødeliste Hvis du ikke har installeret WorkZone Meeting, vises din opgaveliste.

Hvordan navigerer jeg?

Navigationsruden vises nu i bunden af skærmen. Tryk på **Møder**, **Opgaver**, **Chats**, **Gennemse** eller **Indstillinger** alt efter hvad det er, du ønsker at gøre.



Hvordan opdaterer jeg lister?

Træk ned for at opdatere møde- og opgavelister.

Log på og log af

Log på

Når WorkZone Mobile startes, vises siden **Log på WorkZone Mobile**.

- Hvis din organisation bruger OAuth2 til brugergodkendelse, vil du i en dialog blive bedt om at **Tillade at WorkZone tilgår dine kontakter**, hvor du skal vælge **Tillad**. Du vil derefter blive sendt til et separat web-vindue, hvor du kan angive dit WorkZone-brugernavn og password. Herefter vil dit password blive udfyldt automatisk for WorkZone Mobile. Hvis du har problemer med at logge ind, se OAuth2-godkendelsestilstand - Kan ikke logge ind på WorkZone Mobile-appen via loginforespørgsel i Chrome..

1. Indtast URL for WorkZone i feltet **Server** og tryk **Næste**.
2. I dialogen **Log ind**, indtast dit brugernavn i feltet **Brugernavn** og dit password i feltet **Password** (oftest det samme som dit netværksbrugernavn og -password) og tryk **LOG IND**.

Udløb af adgangskode.

Ved login

Hvis din adgangskode til netværket er udløbet, vises fejlmeddelelsen "Forkert brugernavn eller adgangskode", når du prøver at logge ind på WorkZone. Skift adgangskode for netværket og indtast herefter din nye adgangskode i WorkZone.

Mens du bruger programmet

Hvis din netværksadgangskode udløber, men du arbejder i WorkZone, vises fejlmeddelelsen "Der er noget galt. Meddelelsen "Indtast venligst dit password for at fortsætte med at bruge WorkZone" vil blive vist. Tryk **OK** og siden **Log ind** åbnes. Skift din netværksadgangskode og indtast din nye adgangskode i WorkZone for at fortsætte dit arbejde hvor du slap.

Log ud

1. Tryk **Indstillinger**.
2. Tryk **Log ud**.

- For enheder, der bruger OAuth2-godkendelse, vil du blive sendt til et log-ud-webvindue. Tryk på det viste link for at vende tilbage til WorkZone Mobile-appen.

Arbejde offline

Du kan udføre en opgave, selvom du er offline. Opgaver gemmes under **USENDTE OPGAVER**. Dine usendte opgaver vil blive sendt, så snart du er online igen.

Opdater mødelisten efter du har været offline

Hvis du har været offline, træk ned for at opdatere mødelisten, når du er online igen. Denne handling vil opdatere møder, der er blevet ændret, mens du har været offline.

Filtrer møder efter en dato

Du skal være online for at filtrere dine møder efter en dato, der ligger i fortiden. Når du er offline, kan du se afsluttede møder, men kun hvis du hentede dem, mens du var online.

WorkZone Mobile gemmer møder offline fra den sidste dato, du valgte, da du var online, og 6 dage frem samt kommende møder.

Ændret forbindelsestilstand mens du arbejder på en opgave

Hvis forbindelsen til serveren ændres fra online til offline og omvendt, mens du arbejder på en opgave, får du besked og bliver spurgt, om du vil genindlæse opgaven.

- Hvis du trykker **Ja:** opgaven opdateres og du mister al ikke-gemt arbejde (for eksempel kommentarer), og du vil ikke kunne redigere dokumenter eller aktører.
- Hvis du trykker **Nej:** Du kan fortsætte med at arbejde på opgaven og besvare ved at bruge svarknapperne.

Konfigurer WorkZone Mobile

Du kan indstille WorkZone Mobile ved at trykke **Indstillinger** i navigationsruden.

Se oplysninger om release og login

På siden Indstillinger finder du oplysninger om det aktuelle WorkZone Mobile-versionsnummer og login-oplysninger.

> **Tip:** Hvis du kontakter KMD Support angående et problem med WorkZone Mobile, bedes du inkludere et skærmbillede af disse oplysninger.

Automatisk fejlrapportering

Aktiver denne indstilling til for automatisk at dele fejlrapporter. Rapporterede fejl indeholder ikke personlige data.

Rediger mødedokumenter

Vælg standardfunktionsmåden for dokumentredigering af mødedokumenter. Du kan vælge at redigere det oprindelige dokument eller oprette en kopi til redigering, når du trykker på knappen **Rediger** i dokumentvisningen.

Vælg **Altid** for at kunne vælge mellem mulighederne, når du trykker på knappen **Rediger**.

Udtjekningstid for dokumenter

Det tidsrum, der er tildelt til udtjekning og redigering af et dokument ude for WorkZone Mobile. Denne indstilling gælder, når du åbner et WorkZone-dokument til redigering i en tredjepartsapp.

Udtjekningstiden nulstilles hver gang, du foretager ændringer i et dokument, og når et dokument bliver gemt automatisk af en app.

Udtjekningstiden er normalt 30 minutter.

> **Eksempel**: Du åbner et Word-dokument. Dokumentet bliver tjekket ud og udtjekningstiden starter. Dokumentet gemmes automatisk af Word efter 30 sekunder. Tjek-ud-tiden nulstilles. Du lukker Word-dokumentet efter 15 minutter, og efter yderligere 15 minutter, bliver dokumentet tjekket ind.

Antal linjer, der vises i titlen

Hvis titlerne på dine opgaver og møder er for lange til en linje, kan du hæve antallet af viste linjer. For at gøre dette, tryk . For at fjerne antal viste linjer, tryk .

Vis afsluttede opgaver

Vælg denne, hvis du vil se afsluttede opgaver i din opgaveliste. Funktionen er som standard slået til.

Behold afsluttede opgaver

Denne funktion kan kun vælges, hvis indstillingen **Vis afsluttede opgaver** er slået til. Angiv hvor mange dage eller uger, du vil bevare afsluttede opgaver i din opgaveliste. Som udgangspunkt er der angivet 2 dage.

Se brugervejledning

Klik **Hjælp** for at åbne WorkZone Mobile Brugervejledning.

Arbejde med møder

> Forudsætning: WorkZone for OfficeWorkZone 365.

Du kan se dine WorkZone-møder, der er oprettet i Outlook via WorkZone for Office eller WorkZone 365 (enten skrivebordsprogrammet eller webudgaven).

WorkZone Mobile åbner med liste over dagens forestående møder vist øverst og derefter møder for dagen efter og senere møder. Du kan også trykke på **Filtrer efter dato** og derefter vælge en dato for at se møder 7 dage frem fra den valgte dato.

- Tryk på et møde for at se mødets detaljer.
- Træk ned for at opdatere mødelisten, så du kan se møder, der er blevet oprettet eller ændret efter du loggede ind (eller efter du opdaterede sidst).

Vis dokumenter

> Forudsætning: WorkZone PDF.

Møde kan have dokumenter vedhæftet på dagsordenspunkter.

- Tryk på dokumenttitlen for at se dokumentets indhold.

Dokumentet åbner i PDF-format. Dokumenter, der ikke kan konverteres til PDF, kan ikke forhåndsvises.

Annoter PDF-dokumenter

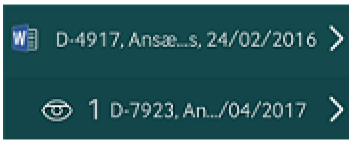
Du kan annotere PDF-dokumenter. Maksimumstørrelsen for PDF-dokumenter, der kan annoteres, afhænger af din organisations kapacitet og internetforbindelsen.

> Vigtigt:

- Du vil ikke kunne gemme dine ændringer i et stort PDF-dokument. Hvis du prøver at gemme dine ændringer og beskeden "opdaterer 0 ud af 1" vises i statuslinjen i længere tid, anbefaler vi, at du lukker, sletter og derefter geninstallerer appen.
- Hvis en anden bruger redigerer og gemme det samme PDF-dokument før du nåede at gemme dine ændringer, modtager du en meddelelse om dokumentkonflikten, hvor du har mulighed for at kassere dine ændringer eller at overskrive den anden brugers ændringer. Hvis udkastversionering er slået til for din organisation, kan du altid se og gendanne tidligere versioner af dokumentet i WorkZone Client. Se WorkZone Client Brugervejledning.

1. Tryk på det dokument, du vil annotere.
2. I dokumentviseren, tryk **Rediger** for at annotere dokumentet i PDF-format. En PDF-kopi af dokumentet oprettes og åbner i PDF-editoren.
    - Hvis det originale dokument er et PDF-dokument, kan du vælge at annotere det originale dokument eller oprette en privat kopi til annotation. Kopien er kun synlig for dig.
3. I PDF-redigeringsprogrammet, tryk **Rediger** for at åbne værktøjslinjen med forskellige annoteringsindstillinger. Tryk på den relevante knap i værktøjslinjen og tryk herefter dér i dokumentet, hvor du vil lave en annotering. Du kan, for eksempel trykke på **Huskeseddel** for at føje en huskeseddel til et bestemt afsnit i dokumentet. Se Brug PDF-redigeringsprogram (Android-version).
4. Tilføj dine annotationer, og tryk derefter **TILBAGE**. Du kan nu gemme eller annullere dine ændringer.
5. Tryk **Tilbage** for at vende tilbage til mødet.

Kopien af dokumentet gemmes på dagsordenspunktet på mødesagen i WorkZone med dig som sagsbehandler. Du kan se kopien af dokumentet på mødet under det oprindelige dokument.



- Ikonet angiver det antal medarbejdere, der kan tilgå din dokumentkopi. Som standard er det kun dig, der jar adgang til dokumentkopien. Du kan eventuelt åbne din dokumentkopi i WorkZone Client og give andre medarbejdere adgang til den. Se Administrer adgangrettigheder i WorkZone Clienten til Brugervejledning.

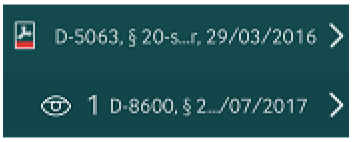
Kopien gemmes på dagsordenspunktet på mødesagen i WorkZone med dig som sagsbehandler.

Bemærk:

- Du kan kun oprette en kopi af et dokument. Næste gang du vil annotere et dokument, vil den eksisterende kopi blive brugt. Kun hvis du har ændret kopiens tilstand til **Låst** eller **Arkiveret** i WorkZone Client, vil der blive oprettet en ny kopi.
- Du kan ikke oprette en kopi af en kopi.

Hvis dokumentet ikke er et Office-dokument, kan du annotere en PDF-kopi af dokumentet, se Annoter PDF-dokumenter, eller du kan eksportere dokumentet til en relevant app for redigering. Se Del dokumenter vha. andre apps..

Se også: Ofte stillede spørgsmål



Bemærk:

- Du kan kun oprette én kopi af hvert dokument. Næste gang, du vil annotere dokumentet, åbnes din dokumentkopi. Kun hvis du har ændret kopiens tilstand til **Låst** eller **Arkiveret** i WorkZone Client, vil der blive oprettet en ny kopi.
- Ikonet angiver det antal medarbejdere, der kan tilgå din dokumentkopi. Som standard er det kun dig, der jar adgang til dokumentkopien. Du kan eventuelt åbne din dokumentkopi i WorkZone Client og give andre medarbejdere adgang

til den. Se Administrer adgangrettigheder i WorkZone Clienten til Bruger-vejledning.

Del dokumenter vha. andre apps.

1. Tryk på det dokument, som du vil eksportere.
2. I dokumentfremviseren, tryk **Del** og vælg en relevant app.

Den valgte app åbner en kopi af dokumentet. Du kan ikke gemme dokumentet tilbage på WorkZone.

Arbejde med opgaver

Når du har modtaget en opgave i WorkZone Mobile, kan du besvare den. Alt afhængigt af hvilken type opgave, der er tale om, kan du, for eksempel, Accepter, Videresend, Spring over, Godkend eller Afvis eller bekræfte opgaven.

Før du svarer, kan du redigere dokumenterne på en opgave, tilføje eller fjerne dokumenter og aktører eller skrive en kommentar. Du kan også Ranger dine opgaver eller Opret en ny chat (fra en opgave) for at diskutere denne opgaveproces med relevante deltagere.

Hvis du er stedfortræder for en bruger, kan du nu skifte til denne brugers opgaveliste og Arbejde med dine stedfortræderopgaver.

Vis en opgave

1. Tryk **Opgaver** i navigationsruden for at få vist en liste over opgaver.
2. Tryk på en opgave for at se eller redigere opgaveoplysningerne.
3. Tryk på en svar-knappen for at besvare en opgave eller for at foretage ændringer på en opgave eller dens tilhørende dokumenter.

Besvar en opgave

Nedenfor er der nogle eksempler på, hvordan du kan besvare opgaver inden for forskellige procestyper.

Accepter

Hvis du accepterer ejerskab af, for eksempel, en fordelingsopgave, bliver du sagsbehandler.

Videresend

Hvis du ikke kan eller ikke ønsker at udføre en opgave, kan du videresende den til en anden.

1. Tryk **Videresend til**.
2. Start med at skrive et navn, og vælg herefter den aktuelle opgave fra listen.
3. Tryk på **Videresend**.

Spring over

Du kan springe nogle opgavetyper over. Hvis du, for eksempel, springer en opgave i en forelæggelsesproces over, videresendes opgaven til næste person i godkendelsesrækkefølgen.

Godkend eller Afvis

En opgave kan bestå i at godkende eller afvise noget, for eksempel et dokument. Sagbehandleren modtager en meddelelse om din handling og processen kan startes om, eller flyttes til næste fase.

OK

Hvis du som procesejer modtager en besvarelse på din proces, beder systemet dig om at bekræfte modtagelse af besvarelsen. Opgaverne opdateres derefter i oversigten **Processer** og i Outlook, og processen lukkes.

Når du har besvaret en opgave, vises den næste åbne opgave. Hvis der ikke er nogen åbne opgaver, vises opgavelisten i stedet.

Andre handlinger på en opgave

Her kan du se eksempler på handlinger, som du kan udføre på en opgave.

Filtrér dine opgaver med brugerdefinerede filtre

Forudsætning:

- Funktionaliteten for brugerdefinerede filtre understøttes fra WorkZone Mobile version 2021.1 og fremad.
- Din administrator skal først aktivere **Brugerdefinerede filtre** i WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task** > Custom filters). Se Feature Settings i WorkZone Configurator Administrator Guide.

På din opgaveliste kan du anvende brugerdefinerede filtre, som er tilgængelige for dig. Brugerdefinerede filtre er gemte søgelister (forespørgsler), der er oprettet i WorkZone OData QueryBuilder.

> **Vigtigt:** En gemt forespørgsel bliver tilgængelig for dig som et brugerdefineret filter, hvis det har entiteten **WzpUserTasks** og er blevet delt med dig af den bruger, der har oprettet filtret (eller hvis du selv har oprettet det).

Læs mere om at oprette, redigere og dele forespørgsler i WorkZone Process Administrator Guide.

- Som standard anvendes der ingen filtre.
- Hvis du ikke har nogle tilgængelige filtre, vil knappen ikke blive vist.

1. Tryk øverst i opgavelisten.
2. Fra en liste over tilgængelige brugerdefinerede filtre, tryk på det filter, du vil anvende.

   -Eller-

   For at fjerne det eksisterende filer, tryk **Intet filter**.
3. Tryk **Færdig** i iOS, eller **OK** i Android. Det valgte filter er nu anvendt.

   > **Vigtigt:** Du kan kun se de opgaver, der er tildelt dig.

Arbejde med dine stedfortræderopgaver

Forudsætning:

- Arbejde med dine stedfortræderopgaver understøttes fra WorkZone Mobile version 2021.1 og frem.
- Din administrator skal først aktivere Arbejde med dine stedfortræderopgaver i WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task** > Delegated tasks). Se **Feature Settings** i WorkZone Configurator Administrator Guide.

Hvis du er stedfortræder for en bruger, kan du nu skifte til denne brugers opgaveliste og arbejde med deres opgaver. Læs mere om stedfortrædere i WorkZone Client Brugervejledning.

- Du kan kun arbejde med en opgaveliste (altså enten dine egne eller en anden brugers opgaver) ad gangen. Som standard er det dine egne opgaver, der vises.
- Indstillingen **Mine opgaver** vises kun, hvis du er stedfortræder for mindst en bruger.

1. Tryk **Mine opgaver** øverst i opgavelisten.
2. Fra en liste over brugere, som du er stedfortræder for, tryk på den bruger, hvis opgaver du vil arbejde med.

   -Eller-
   For at skifte tilbage til dine egne opgaver, tryk **Mine opgaver**.
3. Tryk **Færdig** i eller **OK** i . Opgavelisten for den valgte bruger vises nu.

Ranger dine opgaver

Forudsætning: WorkZone Process 2019.3 eller senere.

Når der startes en ny proces, tildeles brugeropgaver automatisk den næste tilgængelige plads i rækkefølgen. Tryk **Rangorden** øverst i listen over dine opgaver for at sortere dine opgaver efter den rækkefølge, de har i WorkZone Client. Se WorkZone ClientBrugervejledning for om rækkefølge/rangorden.

Du kan ændre rækkefølgen på dine opgaver for at angive den rækkefølge, de skal behandles i.

Vigtigt: Du kan ikke ændre rækkefølgen på en afventende opgave.

1. Tryk **Rækkefølge** øverst i listen.
2. Tryk **Rediger**.
3. Tryk ved siden af den opgave, du vil omarrangere og træk den til den ønskede placering og slip.
4. Tryk **Gem ændringer**.

Vis opgavedokumenter

Forudsætning: WorkZone PDF.

De fleste opgaver har vedhæftede dokumenter.

- Tryk på dokumenttitlen for at se det indhold.

Dokumentet åbner i PDF-format. Dokumenter, der ikke kan konverteres til PDF, kan ikke forhåndsvises.

- Fra dokumentvisningen, tryk og i toppen for at åbne forrige eller næste dokument på den pågældende opgave.
- Stryg op og ned for at gå til næste eller forrige side i det åbnede dokument.

Tilføj eller fjern dokumenter

1. Tryk **Rediger**, og tryk derefter:

Søg	Søg i alle dokumenter på den aktuelle sag og tilføj dokumenter.
Tilføj	Tilføj et dokument fra din enhed. Du kan: • Gennemse og tilføje et dokument fra din enhed.

	• Tag et billede med kameraet i din telefon og føj det til opgaven. **Bemærk:** Du kan kun tilføje dokumenter, når du er online.
Filtre	Anvend filtre på dine dokumenter (ikke arkiverede eller afsluttede) og tilføj dokumenter. Hvis du har føjet arkiverede eller afsluttede dokumenter til dine **Favoritdokumenter**, vises disse, når du anvender dette filter. Bemærk at denne funktion kun er gældende for de udvidede processer.
Slet	Fjern dokumenter fra opgaven.

2. Tryk for at vende tilbage til opgaven og derefter gemme eller annullere dine ændringer.

Annoter PDF-dokumenter

Du kan annotere PDF-dokumenter. Størrelsen på PDF-dokumenter, der kan annoteres afhænger af din organisations kapacitet og internetforbindelsen.

Vigtigt:

- Du vil ikke kunne gemme dine ændringer i et stort PDF-dokument. Hvis du prøver at gemme dine ændringer og beskeden "opdaterer 0 ud af 1" vises i statuslinjen i længere tid, anbefaler vi, at du lukker, sletter og derefter geninstallerer appen.
- Hvis en anden bruger redigerer og gemme det samme PDF-dokument før du nåede at gemme dine ændringer, modtager du en meddelelse om dokumentkonflikten, hvor du har mulighed for at kassere dine ændringer eller at overskrive den anden brugers ændringer. Hvis udkastversionering er slået til for din organisation, kan du altid se og gendanne tidligere versioner af dokumentet i WorkZone Client. Se WorkZone Client Brugervejledning.

1. Tryk på det PDF-dokument, du vil annotere.
2. I dokumentviseren, tryk **Rediger**. Dokumentet åbner i PDF-editoren.

3. I PDF-redigeringsprogrammet, tryk **Rediger** for at åbne en værktøjslinje med forskellige annoteringsindstillinger. Tryk på den relevante knap i værktøjslinjen og tryk herefter dér i dokumentet, hvor du vil lave en annotering. Du kan, for eksempel trykke på **Huskeseddel** for at føje en huskeseddel til et bestemt afsnit i dokumentet. Se Brug PDF-redigeringsprogram (Android-version).
4. Tilføj dine annotationer og tryk derefter **TILBAGE**. Du kan nu gemme eller annullere dine ændringer.

Del dokumenter vha. andre apps.

1. Tryk på det dokument, du vil dele.
2. I dokumentfremviseren, tryk **Del** og vælg en relevant app.

Tilføj eller fjern aktører

1. Tryk **Rediger** og tryk herefter:

Søg	Søg efter medarbejdere og enheder, der har registreret mail-oplysninger, og tilføje dem som aktører.
Aktørsekvens	Søg i aktørsekvenser og tilføj sekvenser. Bemærk at denne funktion kun er gældende for de udvidede processer.
Slet	Fjern aktører.

2. Tryk på for at vende tilbage til opgaven og gemme eller annullere dine ændringer.

Ændre rækkefølgen af dokumenter og aktører

1. Tryk **Rediger**, og tryk herefter **Skift rækkefølge**.
2. Træk et dokument eller en aktør til en ny placering for at ændre rækkefølgen på, for eksempel, dokumenter og godkendere på en forelæggelsesopgave.

Om opgavefrister og prioriteter

Opgaverne på opgavelisten er markeret i forhold til frister og prioriteter. Som standard er opgaverne sorteret efter frist. Tryk **Prioritet** eller **Opdateret** øverst i listen, hvis du vil sortere opgaverne efter prioritet eller hvornår dokumentet sidst blev opdateret-

Frister

En opgave er markeret med en farvet linje til højre.

- Grøn – Processen er i gang.
- Gul – Procesfristen nærmer sig.
- Rød – Procesfristen er overskredet.

Frister vises ved siden af opgaverne. Åbn en opgave for at se flere oplysninger om opgavens frist.

Prioriteter

- Et udråbstegn "!" Angiver at denne opgave har høj prioritet.
- Et punkttegn angiver at denne opgave har lav prioritet.

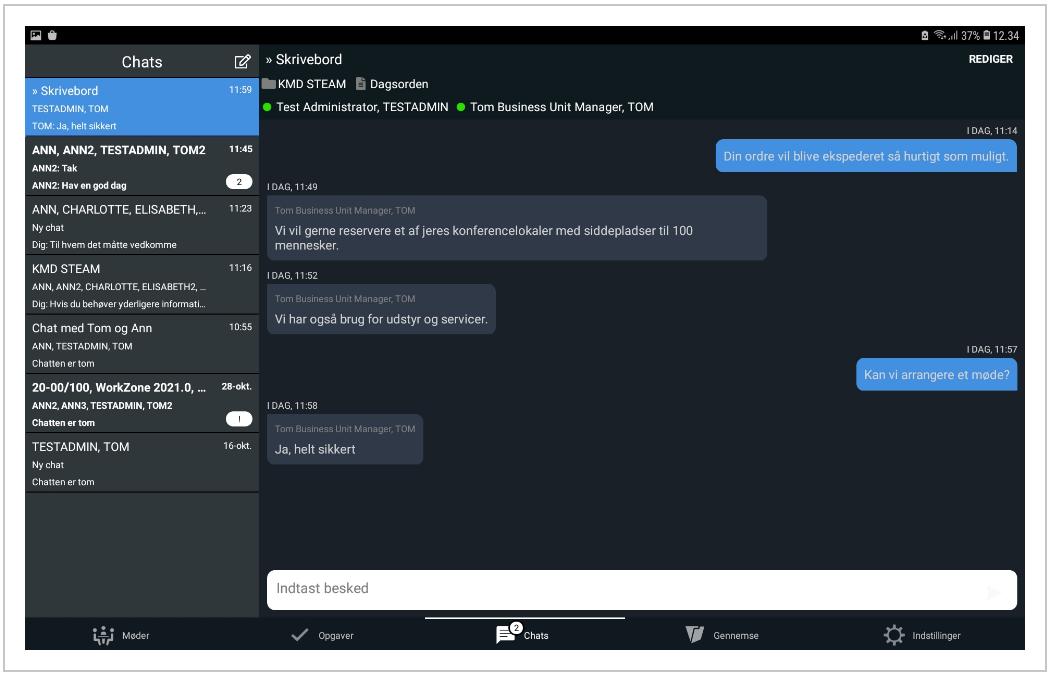
Bemærk: Kun udvidede processer kan have prioriteter.

Arbejde med WorkZone-chats

Forudsætning:

- Chatfunktionen understøttes fra WorkZone Mobile version 2020.2.
- **Chat**-modulet skal først aktiveres af din administrator i WorkZone Configurator, både for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) og WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). Se Feature Settings i WorkZone Configurator Administrator Guide.

I WorkZone Mobile, kan du se dine eksisterende chats og besvare dem, oprette nye chats, administrere chathenvisninger (tilføje eller fjerne sager, dokumenter og deltagere), forhåndsvise og redigere chatdokumenter (kun redigerbare dokumenter) og se metadata for chatdokumenter og sager. Se WorkZone Client Brugervejledning for yderligere oplysninger om WorkZone Chat.



Se dine chats

1. Tryk **Chats** i navigationsruden for at se en liste over chats, hvor du enten er opretter eller deltager. Dine chats sorteres efter hvornår de sidst blev opdateret.

2. Tryk på en chat for at åbne den. I chatten kan du se chatoplysninger såsom deltagere, henvisninger og beskeder.

Tip:

- Der vises et tal på ikonet for **Chats** i navigationsruden, som indikerer hvor mange ulæste beskeder, du har samlet over alle dine chats.
- Der vises også et tal på individuelle chats i chatlisten, som indikerer hvor mange ulæste beskeder, du har i den pågældende chat.
- En grøn prik ved siden af en brugers navn i chatten, indikerer at vedkommende er online. En grå prik indikerer at brugeren er offline.

Svar i en chat

1. Tryk **Chats** i navigationsruden.
2. Tryk på den chat, du vil besvare.
3. Indtast din besked i inputfeltet, og tryk eller .

Tip: Du kan fortsætte med at skrive dine chatbeskeder, mens du er offline. De sendes automatisk næste gang du er online.

Opret en ny chat (fra en opgave)

1. Tryk **Opgaver** i navigationsruden.
2. Tryk på den opgave, som du vil oprette en chat for.
3. Tryk i øverste højre hjørne. Der oprettes nu en ny chat om den pågældende opgave. Opgavens sag og dertilhørende dokumenter tilføjes automatisk som chathenvisninger.

Tip:

- Hvis der allerede eksisterer en chat om denne procesopgave, åbnes den i stedet.
- Du kan tilføje eller fjerne chatsager, -dokumenter eller -deltagere efter behov. Se Administrer chathenvisninger.
- Hvis opgavens sag eller tilhørende dokumenter beskyttes af et indblik, er det kun brugere med pågældende adgangsrettigheder, der kan se sagen eller eventuelle dokumenter i chathenvisningerne.

Opret en ny chat (uden en opgave)

1. Tryk **Chats** i navigationsruden.
2. Tryk i listen **Chats** (øverste venstre hjørne på skærmvisningen). Du bedes derefter om at tilføje chatdeltagere.
3. Tilføj chatdeltagere og tryk **Færdig**. Den nye chat oprettes.
4. Du kan eventuelt trykke **Rediger** for at tilføje chatsager og -dokumenter. Se Administrer chathenvisninger.

Administrer chathenvisninger

Du kan tilføje eller fjerne chatsager, -dokumenter eller -deltagere i dine chats.

- Du skan være online for at kunne fjerne chatsager, -dokumenter eller -deltagere.

1. Tryk på den chat, hvorpå du vil tilføje eller fjerne dokumenter, sager eller deltagere.
2. Tryk **Rediger** under chattens titel.
3. Vælg den sag, det dokument eller den bruger, som du vil fjerne eller tilføje.
    - For at tilføje: Tryk **Tilføj deltager**, **Tilføj dokument**, eller **Tilføj sag** og indtast derefter navnet på den sag, det dokument eller den deltager, du vil tilføje.

- For at fjerne: Tryk ⊖ ved siden af den eksisterende sag, dokument eller bruger for at fjerne dem fra listen.

4. Tryk **Færdig**.

Forhåndsvisning af chatdokumenter

1. Tryk på den chat, der indeholder det dokument, du vil se en forhåndsvining af.
2. Tryk på dokumenttitlen for at se dokumentets indhold.

> **Tip:**
>
> - Tryk og øverst på skærmen for at se forrige eller næste dokument i den aktuelle chat
> - Stryg op og ned for at gå til næste eller forrige side i det åbnede dokument.

3. Tryk **Tilbage** for at lukke forhåndsvisningen og gå tilbage til chatten.

Rediger et chatdokument

- Du skal være online for at kunne redigere chatdokumenter.

1. Tryk på den chat, der indeholder det dokument, du vil redigere.
2. Tryk på dokumentets titel.
3. Tryk i øverste højre hjørne for at redigere dokumentet.

> **Bemærk:** Det kan være nødvendigt, at du henter en tilsvarende Microsoft Office-app for at kunne redigere visse dokumentformater.

4. Gem dine ændringer og tryk **Tilbage** for at vende tilbage til chatten.

Se oplysninger om chatdokumenter og -sager

Du kan se oplysninger om dokumenter og sager i dine chats.

1. Tryk på en chat med et dokument eller en sag.

- For dokumenter:

    a. Tryk på dokumenttitlen for at åbne dokumentet i visningstilstand.

    > **Tip:** Tryk og øverst på skærmen for at se forrige eller næste dokument i den aktuelle chat.

    b. Udfør den relevante handling:

    - For at se metadata for et dokument: Tryk i øverste højre hjørne. Dokumentets metadata vises. Tryk for at vende tilbage til dokumentvisningen.
    - For at redigere dette dokument: Tryk i det øverste højre hjørne.
    - For at se den tilknyttede sag: Tryk i øverste højre hjørne. Tryk **Tilbage** for at vende tilbage til det åbne dokument.

- For sager:

    a. Tryk på sagstitlen for at åbne dens detaljer.

    > **Tip:** Tryk og øverst på skærmen for at se den forrige eller næste sag i den aktuelle chat.

    b. Under **Dokumenter**, kan du se eventuelle dokumenter på den aktuelle sag.

Tip:

- Tryk på et dokument for at se en forhåndsvisning af det, redigere det eller for at se dokumentets metadata.

  -Eller-

- Tryk **Metadata** for at se sagens metadata (du skal være online for at kunne se sagens metadata).

2. Tryk **Tilbage** for at vende tilbage til chatten.

Gennemse WorkZone-sager og -dokumenter

Forudsætning:

- Funktionen Gennemse (På nuværende tidspunkt tilgængelig i en eksperimentel udgave) understøttes fra WorkZone version 2021.0.
- Modulet **Gennemse** skal først aktiveres af din administrator i WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). Se Feature Settings i WorkZone Configurator Administrator Guide.
- Du skal være online for at kunne bruge modulet **Gennemse**.

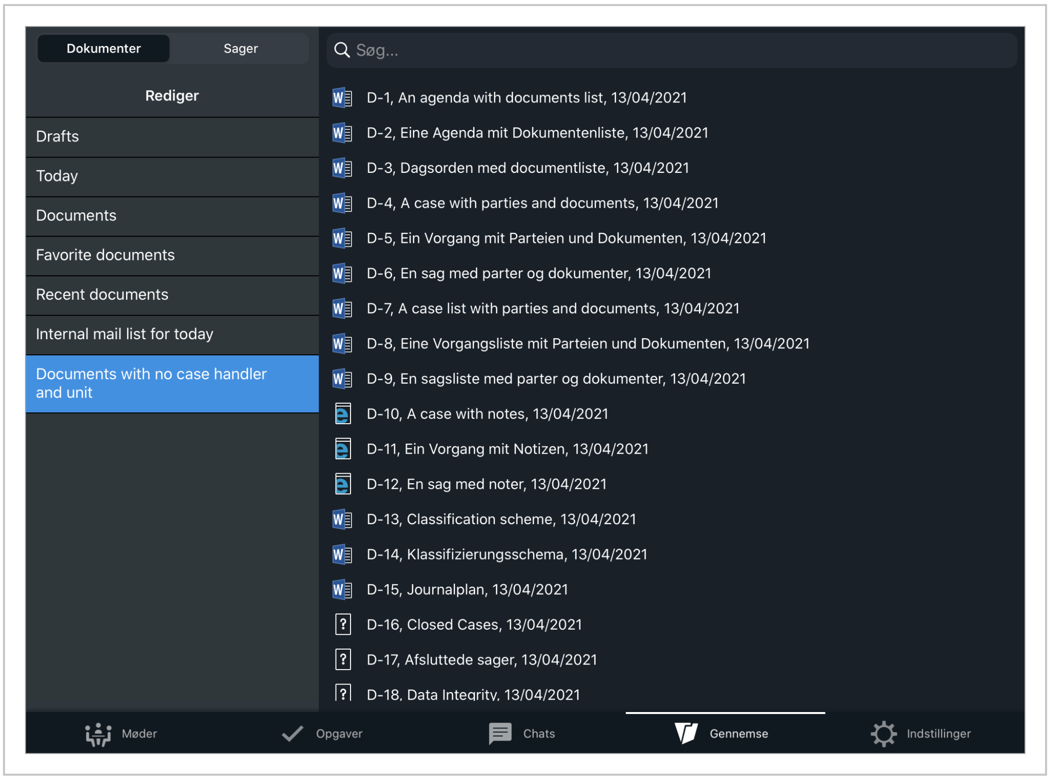
Du kan hurtigt gennemse dine sagslister eller dokumentlister (altså dine WorkZone-lister, herunder også foruddefinerede filtre og brugerdefinerede filtre) og se elementer i dem. Se WorkZone Client Brugervejledning for yderligere oplysninger om WorkZone-lister.

Du kan hurtigt søge efter sager og dokumenter, der er tilgængelige for dig i WorkZone og se deres oplysninger.

- På sager: Du kan se dokumenter på den valgte sag, forhåndsvise eller redigere dokumenternes indhold (i redigerbare dokumenter), se deres metadata og se metadata for selve sagen.
- På dokumenter: Du kan se en forhåndsvisning eller redigere dokumenterne (hvis de er redigerbare) og se deres metadata og navigere til de tilknyttede sager og se deres oplysninger og metadata.

Vigtigt:

- For at redigere visse dokumentformater, kan det være nødvendigt at installere et tilsvarende Office-program.
- I Gennemse-funktionen fungerer almindelige WorkZone-adgangsregler: Du vil kun kunne se og redigere de elementer, du har adgang til.



Søg på sager og dokumenter

Du kan søge efter WorkZone-sager og -dokumenter og se deres indhold og oplysninger.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på den relevante fane (**Dokumenter** eller **Sager**). Herefter vil du få vist dine WorkZone-lister over dokumenter eller sager (afhængig af den valgte fane), herunder også dine foruddefinerede filtre og brugerdefinerede filter.
3. Tryk på den relevante liste for at se elementer i den.

> **Tip:** For lister med mange elementer, kan du bruge søgefeltet til at finde et dokument eller en sag i listen.

4. Tryk på en sag eller et dokument for at se deres oplysninger og henvisninger. Se Se sagsoplysninger og Se dokumentoplysninger.

Tilpas dine viste lister

Du kan tilpasse hvilke WorkZone-lister, der vil blive vist, når du åbner modulet Gennemse, eller omarrangere listernes visningsrækkefølge.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på fanen **Sager** eller **Dokumenter**.
3. Tryk **Rediger**. Du vil herefter se en todelt liste over dine eksisterende WorkZone-lister.
    - **Valgte filtre**: viser de af dine WorkZone-lister, der er markeret til at blive vist som standard.
    - **Søgeresultater**: viser foruddefinerede filtre (afhængig af hvilken fane, du har valgt), som du kan markere til at blive vist, når du åbner modulet Gennemse.
4. For at tilføje eller fjerne en liste fra dine valgte filtre, eller for at ændre rækkefølgen på dine viste lister, tryk og hold ≡ ved siden af en liste og træk den til en ny placering.

> **Tip:**
>
> - Tryk hurtigt to gange på en liste for at flytte den fra **Valgte filtre** til **Søgeresultater** - Du kan også gøre det den anden vej.
> - Tryk **Foruddefinerede filtre** eller **Brugerdefinerede filtre**, og tast en søgning i søgefeltet for at søge efter et bestemt foruddefineret filter eller brugerdefineret filter.
>   - Foruddefinerede filtre er dine WorkZone-lister der er automatisk indstillet af din organisation. Søg efter foruddefinerede filtre skelner mellem store og små bogstaver
>   - Brugerdefinerede filtre er dine WorkZone-lister, herunder gemte søgninger, som er oprettet i WorkZone Client. Søgning efter brugerdefinerede filtre skelner mellem store og små bogstaver.

5. Tryk **Færdig** for at gemme dine ændringer, eller tryk **Annuller** for at kassere dem.

Se sagsoplysninger

I modulet **Gennemse** kan du se sager, der er tilgængelige for dig og deres metadata, se dokumenter på e valgte sager, se en forhåndsvisning af og redigere deres indhold (kun i redigerbare dokumenter) og se dokumentmetadata.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på fanen **Sager**. Der vises derefter en liste over WorkZone-sagslister, som du har adgang til.
3. Tryk på den relevante sagsliste og vælg den relevante sag. Eventuelt Søg på sager og dokumenter.
4. Tryk **Dokumenter** for at se alle dokumenter (som du har adgang til) på denne sag.

   Tip:

   - Tryk på et dokument for at se en forhåndsvisning af det, redigere det (hvis det er redigerbart) eller se dokumentets metadata. Se trin 4-5 i Se dokumentoplysninger.
   - Tryk **Metadata** for at se metadata for denne sag.

5. Tryk **Tilbage** for at gå tilbage til den valgte sagsliste.

Se dokumentoplysninger

Du kan se en forhåndsvisning af WorkZone-dokumenter, som er tilgængelige for dig, redigere dem (hvis de er redigerbare), se deres metadata og gå til de tilknyttede sager, hvor du kan se deres oplysninger og metadata.

1. Tryk **Gennemse** i navigationsruden.
2. Tryk på fanen **Dokumenter**. Der vises derefter en liste over WorkZone-dokumentlister, som du har adgang til.
3. Tryk på den relevante dokumentliste og vælg det relevante dokument. Eventuelt Søg på sager og dokumenter. Dokumentet åbning derefter i visningstilstand.
4. Udfør den relevante handling:

- For at se metadata for dette dokument: Tryk i øverste højre hjørne. Tryk for at vende tilbage til dokumentvisningen.
- For at redigere dokumentet (Hvis det er redigerbart): Tryk i øverste højre hjørne.

> **Bemærk:** Det kan være nødvendigt, at du henter en tilsvarende Office-app for at kunne redigere visse dokumentformater.

- For at gå til den tilknyttede sag og se sagens oplysninger og metadata: Tryk i øverste højre hjørne.

5. Tryk **Tilbage** for at vende tilbage til fanen **Dokumenter**.

Brug PDF-redigeringsprogram (Android-version)

Du kan bruge PDF-editor til at annotere PDF-dokumenter.

- I dokumentviseren, tryk **Rediger** for at åbne PDF-redigeringsprogrammet.

Du kan søge efter tekster i dokumentet og se dispositionen og annotationer, der gør navigeringen hurtigere.

- Tryk på **Rediger** for at se annotationsværktøjslinjen.

Værktøjslinjen giver dig mulighed for at tilføje forskellige typer annotationer i dit PDF-dokument. Tryk på det værktøj, du vil anvende, og tryk derefter på det sted i dokumentet, hvor du vil tilføje en annotation.

	Tilføj en huskeseddel.
	Fremhæv tekst. Tryk og træk hen over tekst.
	Gennemstreg tekst. Tryk og træk hen over tekst.
	Understreg tekst. Tryk og træk hen over tekst.
	bølget streg. Tryk og træk hen over tekst.
	Tilføj underskrift.
	Tegn i frihånd.
	Slet det, du har tegnet i frihånd.
	Skriv tekst.
	Tegn pile.
	Tegn linjer.
	Tegn cirkler.

	Tegn rektangler.
	Vælg et område.
	Luk værktøjslinjen.

Ofte stillede spørgsmål

I dette afsnit kan du se en liste over ofte stillede spørgsmål (FAQ) og eventuelle løsninger til WorkZone Mobile.

Appen kan blive ustabil på enheder, hvor standardsproget ikke er sat til engelsk eller dansk.

Løsning

Skift standardsproget for din enhed til engelsk eller dansk.

OAuth2-godkendelsestilstand - Kan ikke logge ind på WorkZone Mobile-appen via loginforespørgsel i Chrome.

Dine legitimationsoplysninger er gyldige, men du får beskeden om fejlet godkendelse: "Forkert brugernavn eller password". Dette problem ligger i Google Chrome-omstilling.

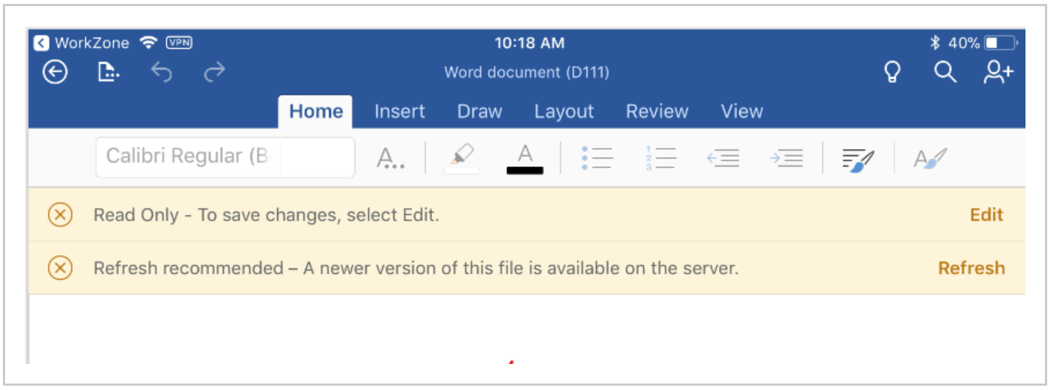
Løsning

Tryk **TILBAGE** eller luk browseren. Du logges derefter ind i WorkZone uden at skulle indtaste dine legitimationsoplysninger igen.

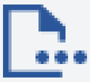
Office 365-beskeder i WorkZone Mobile

Følgende beskeder kan fremkomme i toppen af skærmen i Office 365, når du åbner dokumenter til redigering fra WorkZone Mobile. Klik på den relevante besked nedenfor for at se yderligere oplysninger om beskeden, og hvordan man kommer videre.

> **Eksempel**:Office-meddelelser i Word



Tip:

- Tryk på **Seneste** i din Office-applikation for at se status på de dokumenter, du senest har åbnet. Du kan, for eksempel, se om et dokument er blevet overført eller hentet korrekt. En advarsel vises, hvis der er problemer med dokumentet.
- Se også Office Hjælp for mere information. Åbn et dokument i Office-appen, og tryk  > **Hjælp og Support** for at åbne Office Hjælpen.

Opdatering anbefales - Der er en nyere version af filen på serveren.

Når du prøver at redigere et dokument, der er åbent på en anden klient (telefon, tablet, bærbar) samtidigt. Dokumentet er skrivebeskyttet.

Sådan fortsætter du

Tryk **Opdatér** for at se de seneste ændringer.

Der kan ikke overføres - Log på din konto.

Du har lukket din Office-app eller du har skiftet sprogindstillingerne i enhedens indstillinger og dokumentet kan ikke overføres til WorkZone-serveren. Dokumentet er skrivebeskyttet.

Sådan fortsætter du

Meddelelsen "Der kan ikke overføres - log på din konto" vises. Tryk **Log på** og åbn dokumentet igen i Office-appen.

Der kan ikke overføres - der er noget galt og ændringerne kan ikke overføres

Du er højst sandsynligt i færd med at ændre et låst eller arkiveret dokument. Se Rediger dokumenttilstand i brugervejledningen til WorkZone Client.

Sådan fortsætter du

Du kan gemme en kopi af dokumentet og derefter redigere i kopien. Tryk **Gem en kopi** i meddelelsen. Kopien gemmes kun lokalt.

Der kan ikke overføres - En anden redigerer filen

Du forsøger at redigere et dokument, der allerede redigeres af en anden.

Sådan fortsætter du

Du kan vente på den anden bruger bliver færdig med at redigere og lukke dokumentet, eller gemme en kopi af dokumentet lokalt og redigere i kopien. Tryk **Gem en kopi** i meddelelsen. Kopien gemmes kun lokalt.

Denne version af Microsoft Excel kan ikke køre VBA-makroer.

Du har åbnet et Excel-dokument, der indeholder makroer. Office 365 understøtter ikke makroer.

Sådan fortsætter du

Tryk **Luk** i meddelelsen for at lukke den. Du kan fortsætte med at arbejde på dokumentet, men makroer ignoreres. Ændringer gemmes.

Filen indeholder makroer, der ikke fungerer med denne version af Word. Makroerne bevares med filen, så du ikke mister dem

Du prøver at åbne et Word-dokument, der indeholder makroer. Office 365 understøtter ikke makroer.

Sådan fortsætter du

Tryk **Afvis** for at lukke beskeden. Du kan fortsætte med at arbejde på dokumentet, men makroer ignoreres. Ændringer gemmes.

Tillad filkonvertering?

Du er i gang med at åbne et dokument i Excel, men Excel støtter ikke filformatet.

Sådan fortsætter du

Excel viser meddelelsen "For at kunne åbne, eksportere til og udskrive visse filtyper skal Excel konvertere filen ved hjælp af en Microsoft-onlinetjeneste." Tryk **Tillad** for at konvertere dokumentet til xlsx. Du kan også åbne dokumentet på en computer og gemme det i xlsx-format, og derefter føje dokumentet til en WorkZone-sag, -opgave eller -møde (alt afhængigt af hvad du arbejder på).

Filen kan ikke åbnes. Denne filtype understøttes ikke af denne version af Office.

Du er i gang med at åbne et dokument i Excel, men Excel støtter ikke filformatet.

Sådan fortsætter du

Tryk **Luk** for at lukke meddelelsen. Du kan åbne dokumentet på en stationær eller bærbar computer og gemme dokumentet i xlsx-format og derefter føje dokumentet til en sag, opgave eller et møde, alt afhængigt af hvad du arbejder på.

Skrivebeskyttet - Vælg Rediger, hvis du vil gemme ændringer

På mobile enheder vises beskeden hver gang, du åbner et dokument.

Sådan fortsætter du

Tryk **Redigér** i meddelelsen for at redigere dokumentet.

Skrivebeskyttet - En anden har denne fil åben. Du kan gemme ændringer til en kopi eller åbne filen senere.

Du er i færd med at redigere et dokument, der allerede redigeres af en anden. Dokumentet er låst af en anden bruger.

Sådan fortsætter du

Tryk **Gem en kopi** for at oprette en kopi, du kan redigere, eller tryk **Annuller**, hvis du vil vente til filen ikke længere redigeres af en anden. Kopien gemmes kun lokalt.

Skrivebeskyttet - Dette er et ældre filformat. Ændringerne kan kun gemmes på en kopi af filen.

Du er i færd med at redigere et dokument med et gammels dokument-format, der ikke understøttes af Office 365.

Sådan fortsætter du

1. Tryk **Annuller** i meddelelsen.
2. Åbn dokumentet på en computer og gem det med et nyt dokumentformat, for eksempel xlsx, docx eller pptx.
3. Føj dokumentet til sagen, opgaven eller mødet, alt afhængigt af hvad du arbejder på.

Excel 95-funktionen "Deling af projektmappe" er blevet aktiveret for denne projektmappe. Hvis du vil redigere denne fil, skal du gemme en kopi (vi fjerner delingen af projektmappen).

Du er i færd med at redigere et Excel 95-dokument med "Deling af projektmappe", hvilket ikke understøttes af Office 365.

Sådan fortsætter du

1. Tryk **Annuller** i meddelelsen.
2. Åbne dokumentet på en computer og gem det som en xlsx-fil.
3. Føj dokumentet til sagen, opgaven eller mødet, alt afhængigt af hvad du arbejder på.

Vilkår og betingelser

Intellektuel ejendomsret

Ansvarsfraskrivelse

Dette dokument er udelukkende beregnet til generel oplysning. Oplysningerne anses for at være korrekte og retvisende. KMD kan dog ikke garantere dette. KMD forbeholder sig retten til at ændre dokumentet og de beskrevne produkter uden varsel. KMD og dokumentets ophavsmænd fraskriver sig ethvert erstatningsansvar.

KMD WORKZONE

_Mobile

2021.3

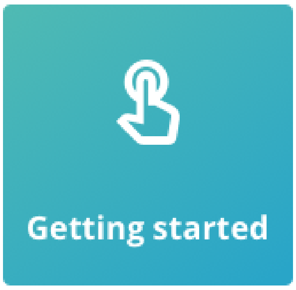
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

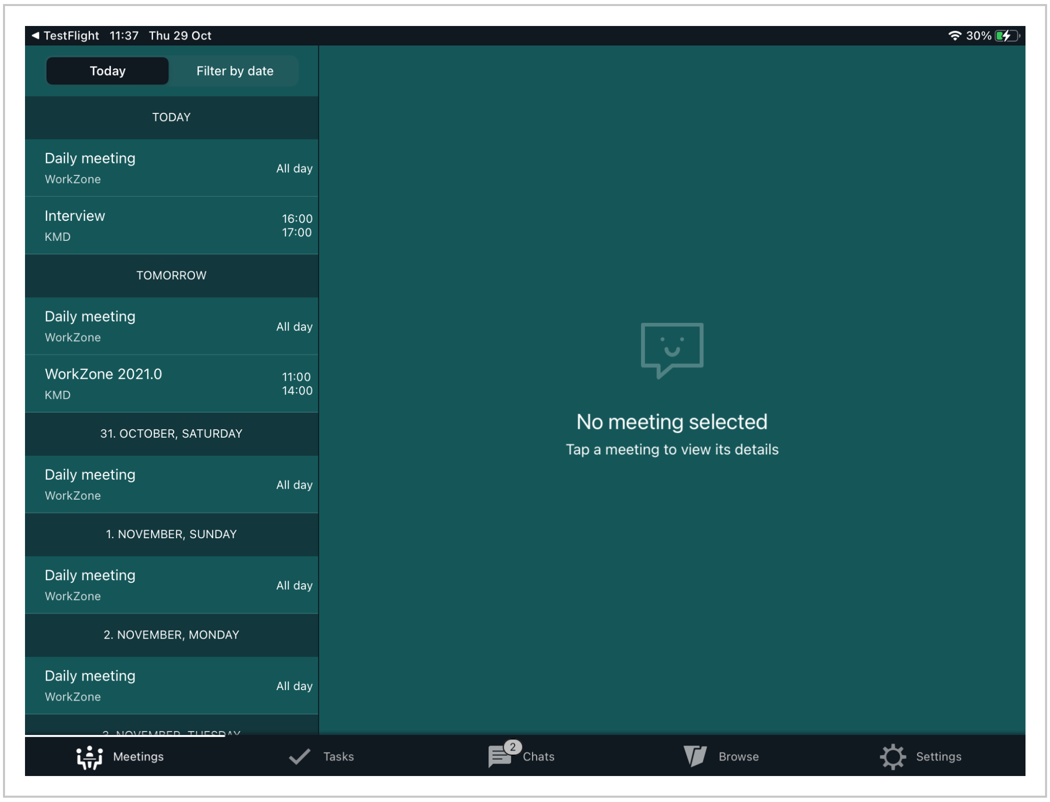
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> **Tip:** For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap +. To decrease number of displayed lines, tap −.

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

Edit Microsoft Office documents ()

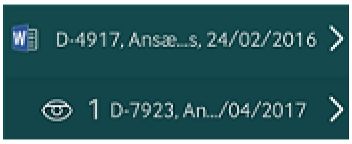
> **Prerequisite:** You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.

    - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

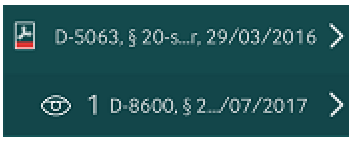
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

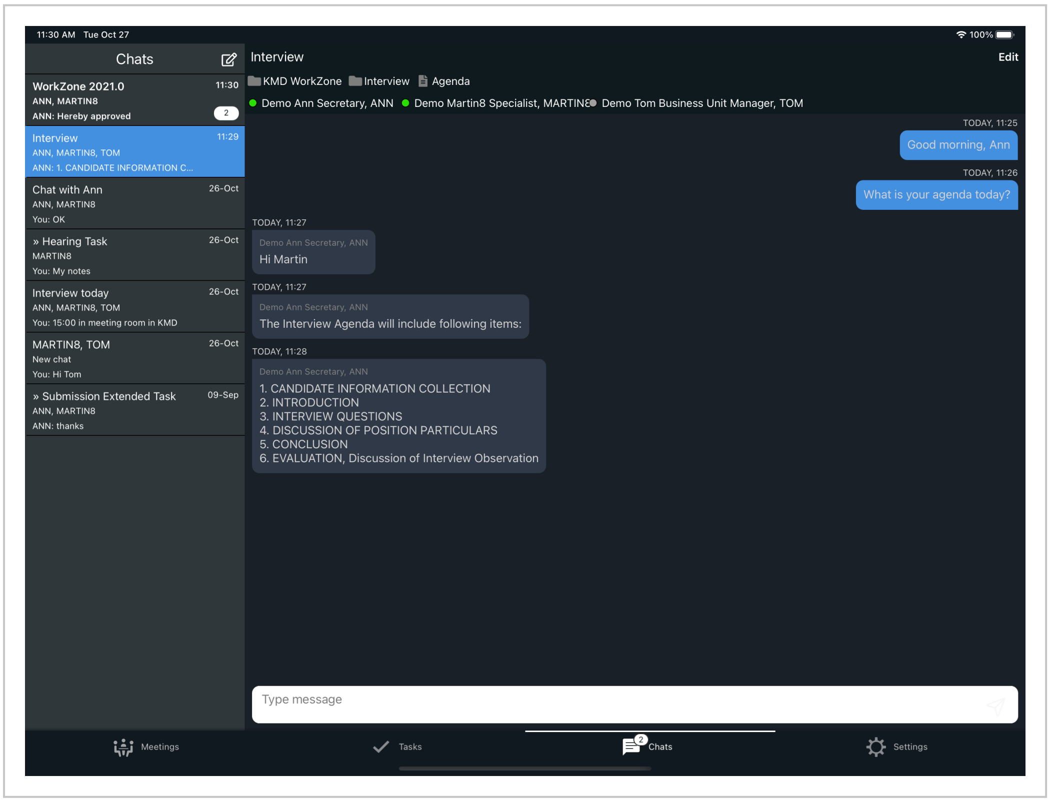
> **Note:** Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

Tip:

- A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
- A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
- A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

Tip: You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the doc-ument.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

    - For documents:

        a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

        b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

    - For cases:

        a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

        b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See Feature Settings in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

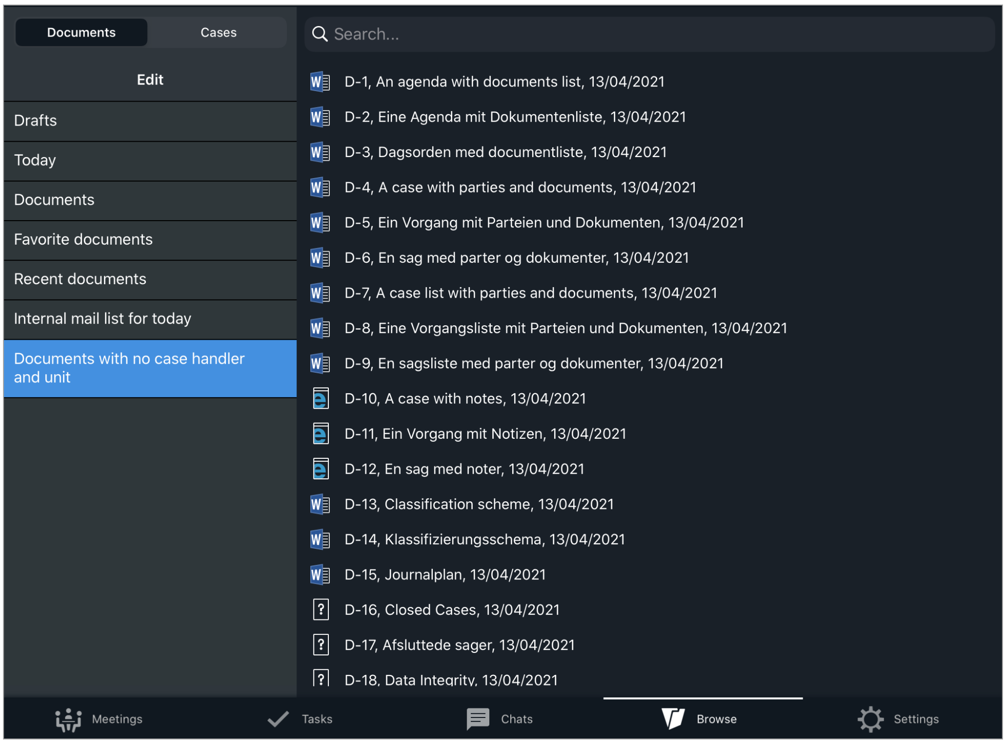
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:
   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     Note: You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> Tip: You can search for text in the document and see the outline and annotations for quick navigation.

> Tip: Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

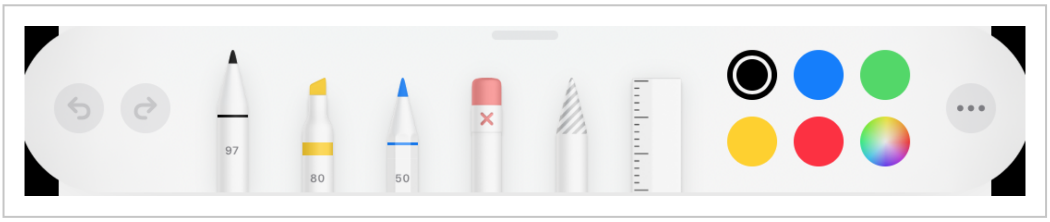
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

Erase previous free hand drawing or text marking.

Add text.

- Double-tap to edit text color, border color, thickness, text size, and opacity settings.

Draw arrows.

- Double-tap to edit arrow color, thickness, and opacity settings.

Draw straight lines.

- Double-tap to edit line color, thickness, and opacity settings.

Draw rectangles

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw ellipses

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw cloud-like polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw polylines.

1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

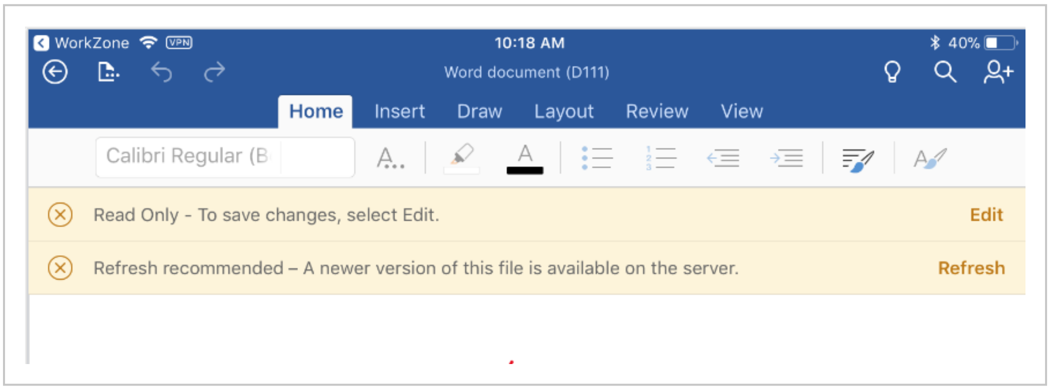
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

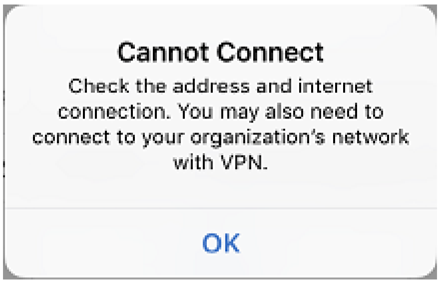
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

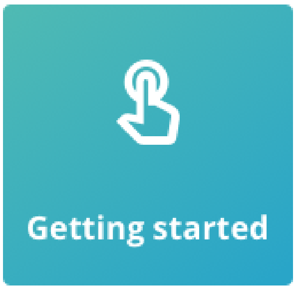
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

> **Note:** You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

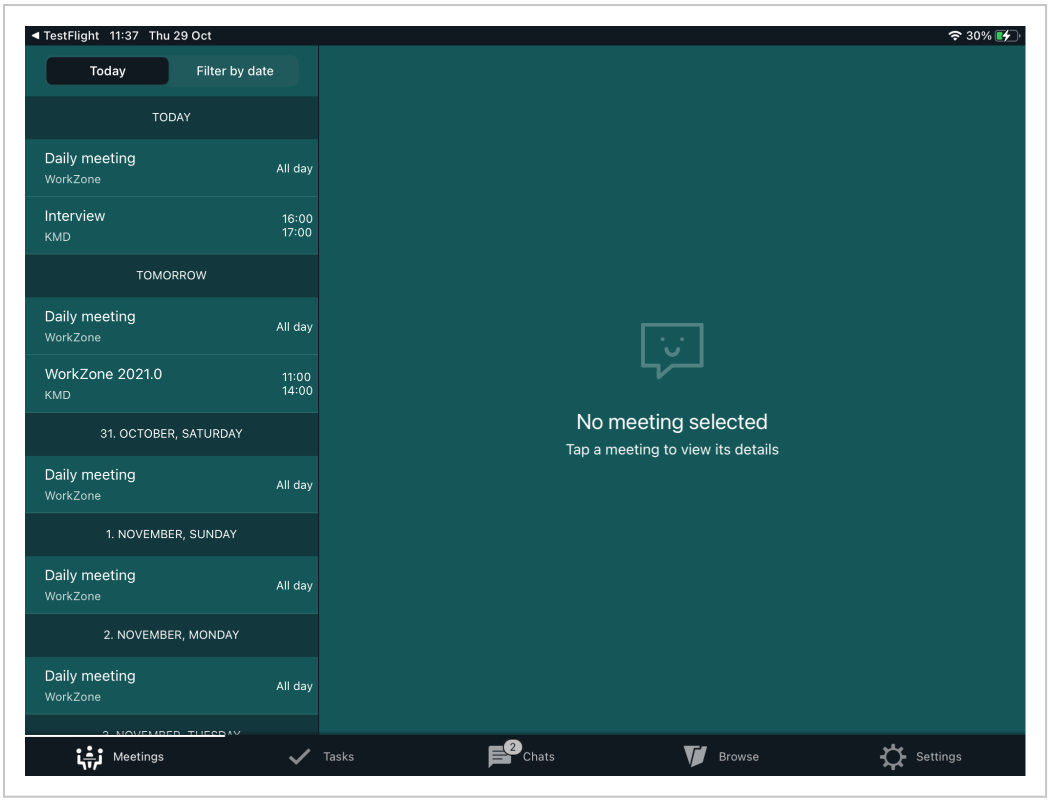
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see [About task notifications] in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

> **Prerequisite:**
>
> - Push notifications must first be enabled by your administrator in WorkZone Configurator. See [Process notifications] in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> Tip: For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

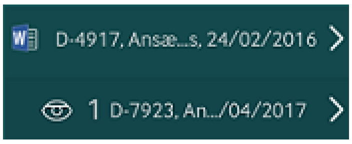
Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
   - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

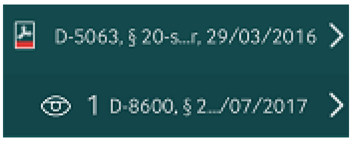
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

> **Prerequisite:**
>
> - The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
> - The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

> Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about creating, editing, and sharing queries.

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> Important: You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See [Feature Settings](#) in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

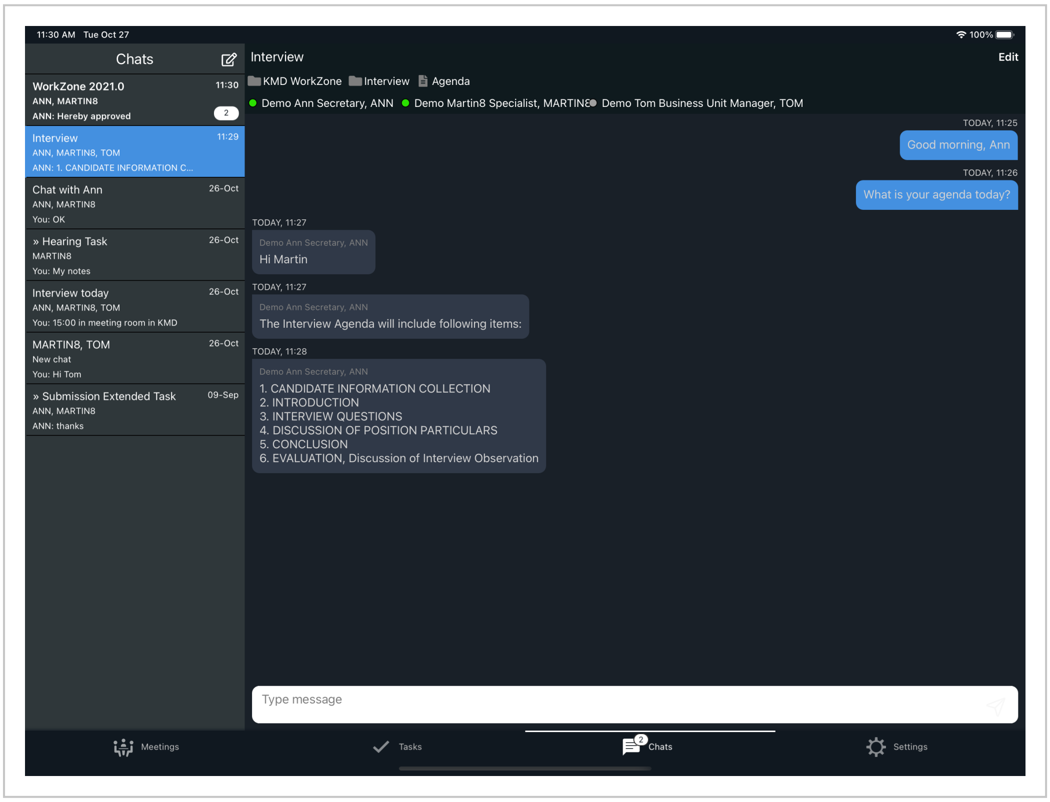
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap  or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap  at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

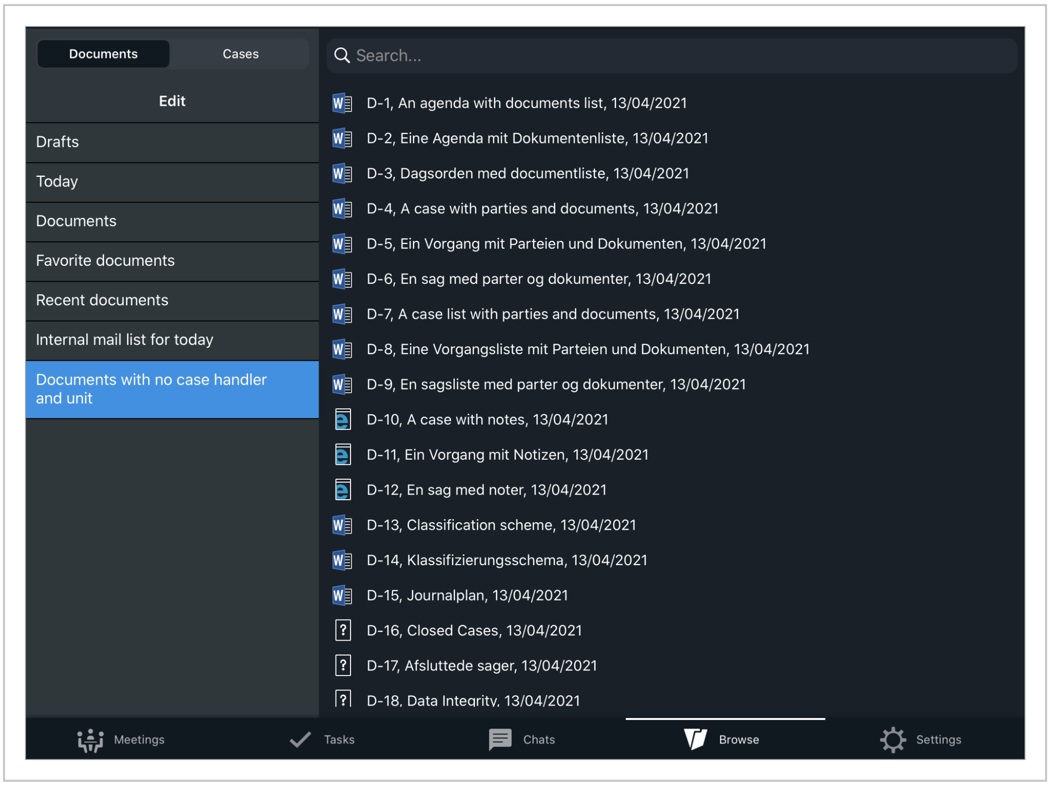
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
   - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
   - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     Note: You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

> **Tip:** Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

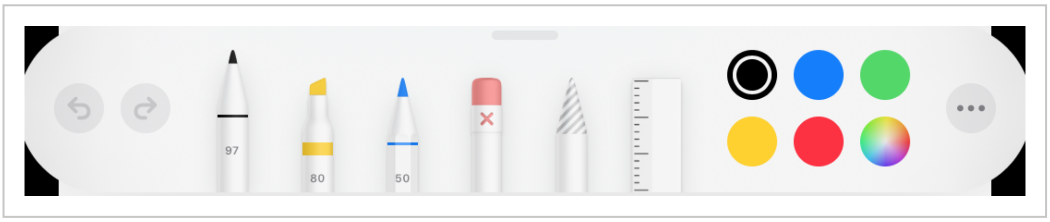
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

Erase previous free hand drawing or text marking.

Add text.

- Double-tap to edit text color, border color, thickness, text size, and opacity settings.

Draw arrows.

- Double-tap to edit arrow color, thickness, and opacity settings.

Draw straight lines.

- Double-tap to edit line color, thickness, and opacity settings.

Draw rectangles

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw ellipses

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw cloud-like polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw polylines.

1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

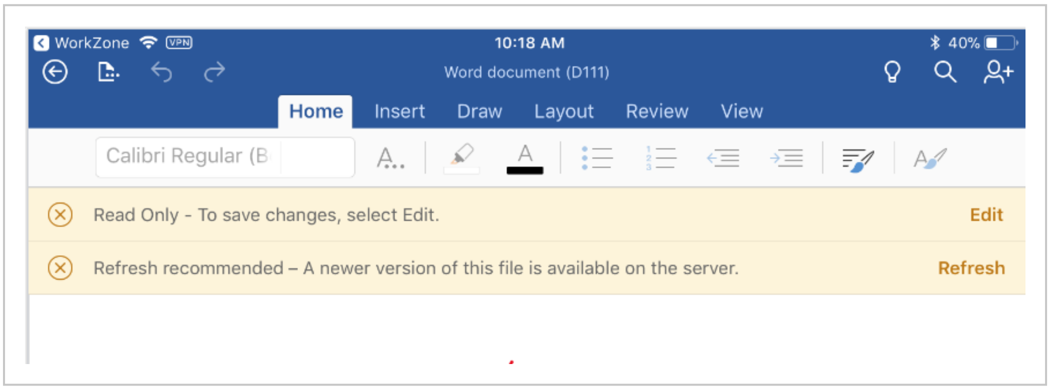
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

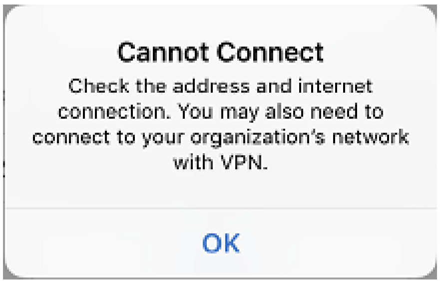
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

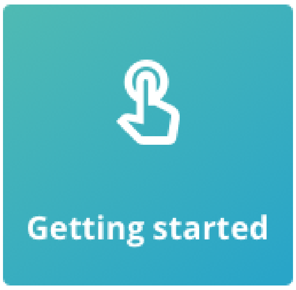
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

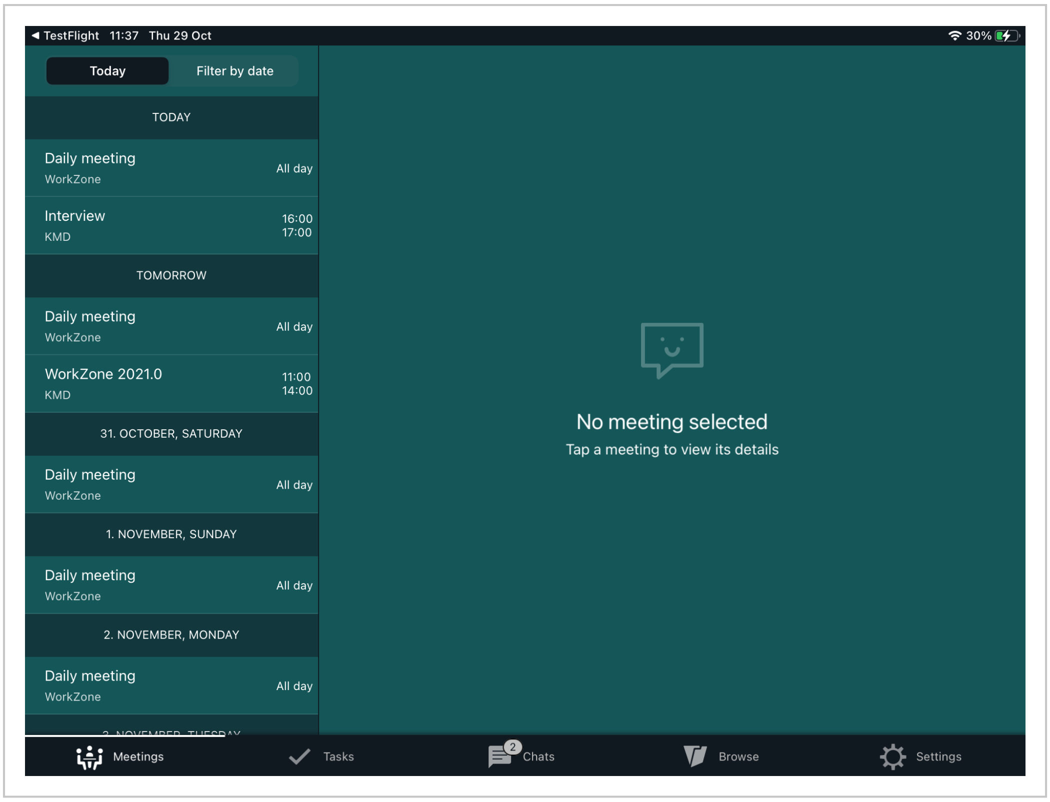
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> **Tip:** For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

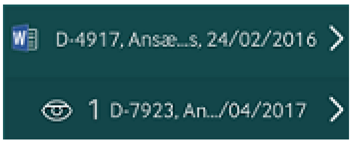
Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
    - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

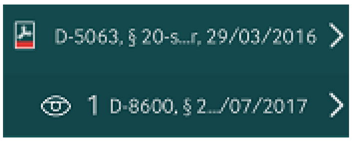
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights] in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

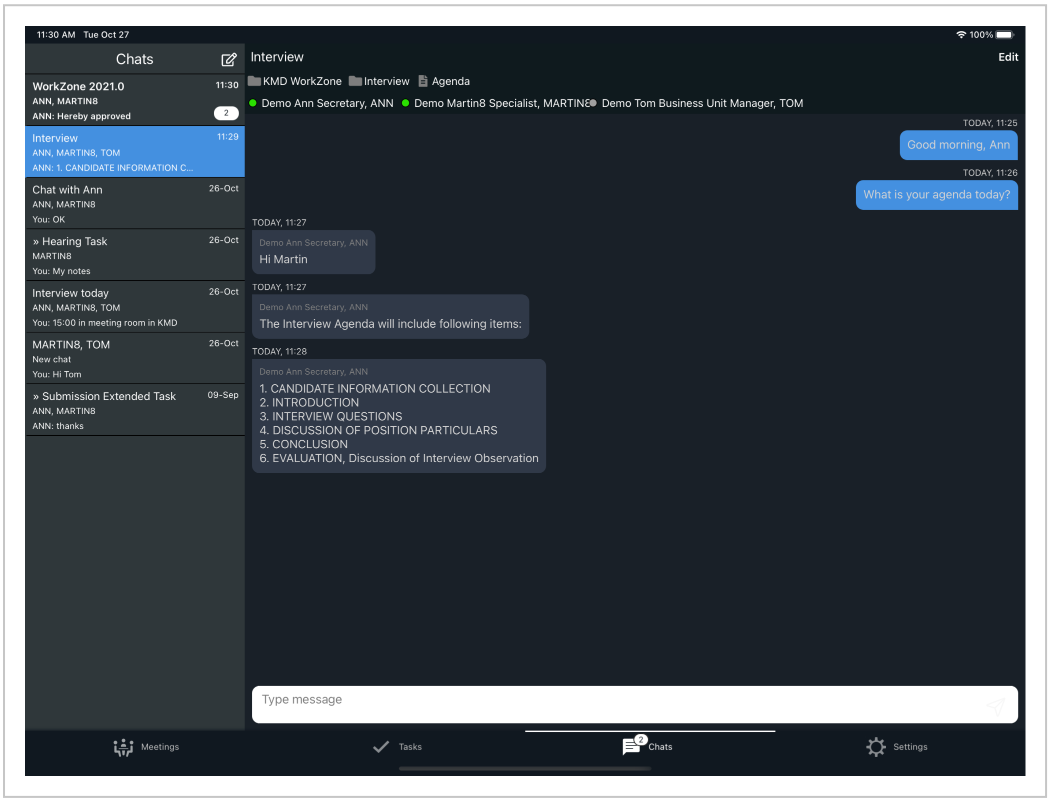
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

Tip:

- A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
- A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
- A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

Tip: You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

       - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
       - To edit this document: Tap at the top right corner.
       - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See Feature Settings in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

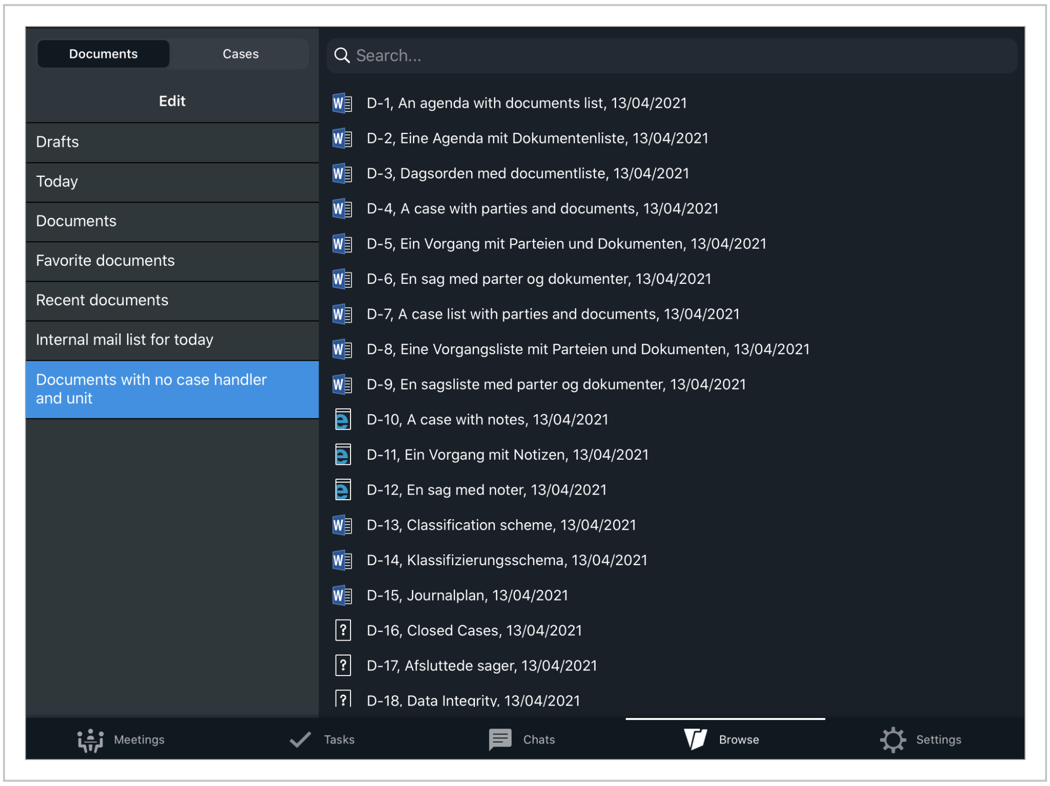
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
   - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
   - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ≡ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     Note: You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

> **Tip:** Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

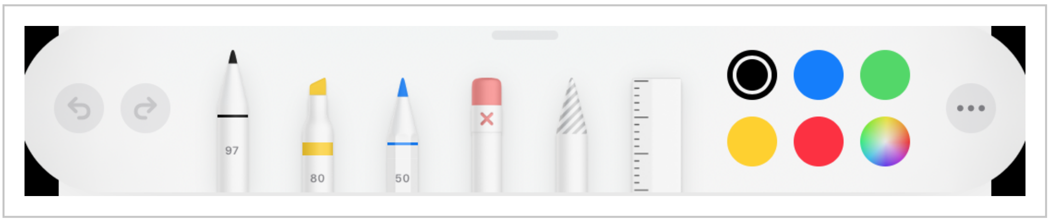
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

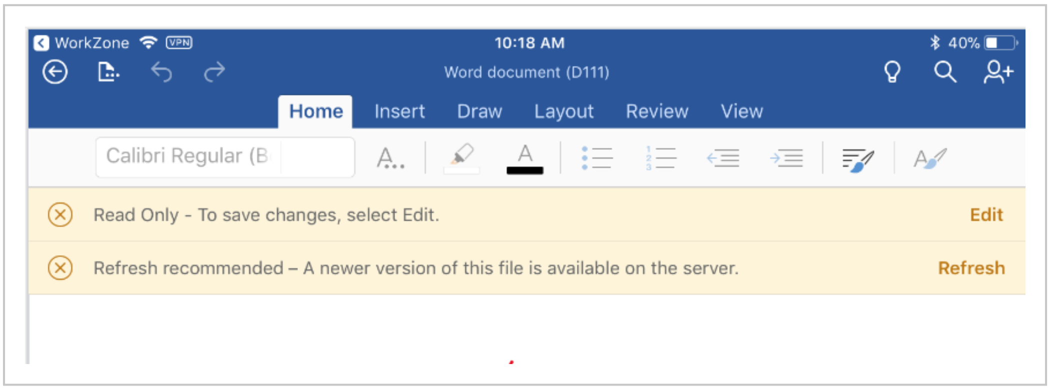
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

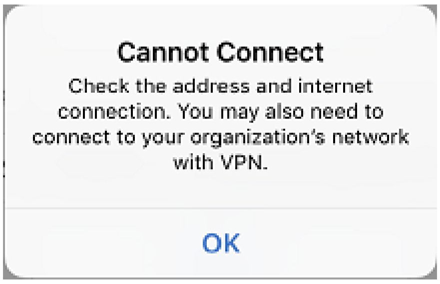
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> Tip: The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

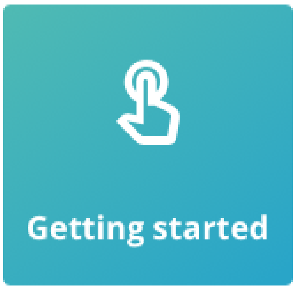
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

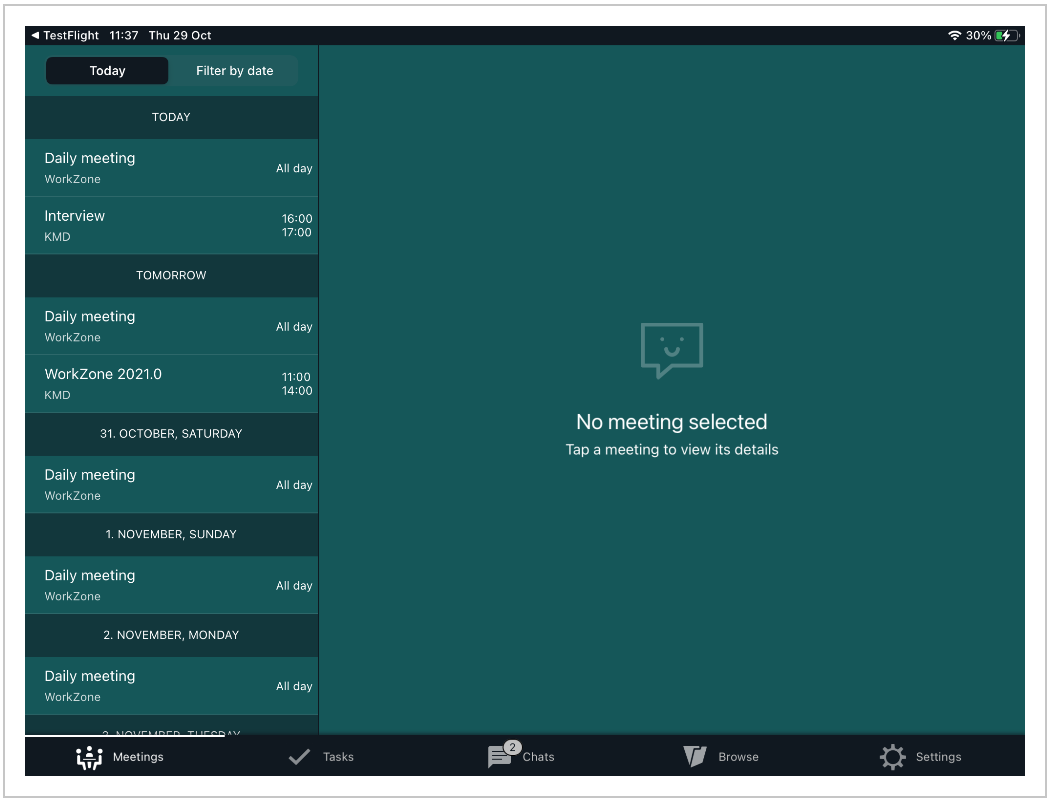
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> **Tip:** For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap +. To decrease number of displayed lines, tap −.

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

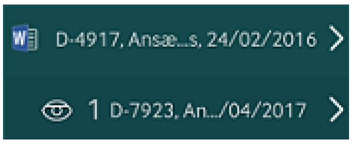
Edit Microsoft Office documents ()

> **Prerequisite:** You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
    - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

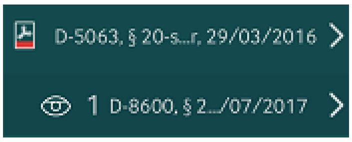
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about creating, editing, and sharing queries.

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

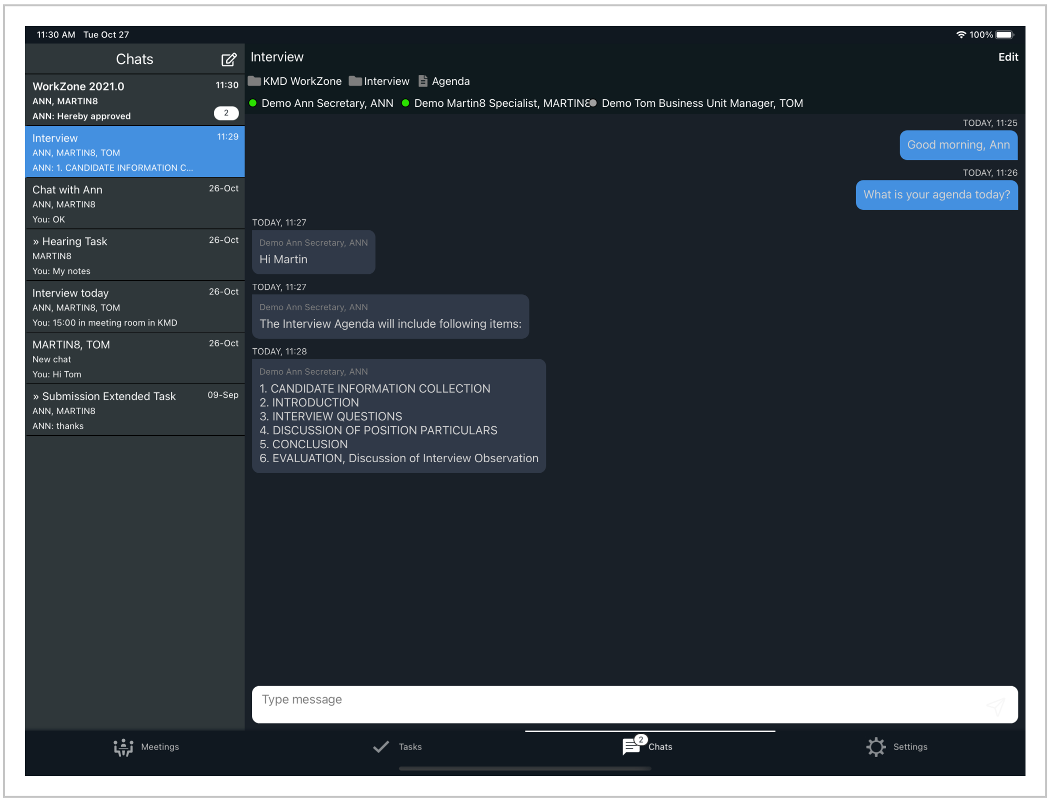
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.
   - For documents:
     a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:
        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.
   - For cases:
     a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

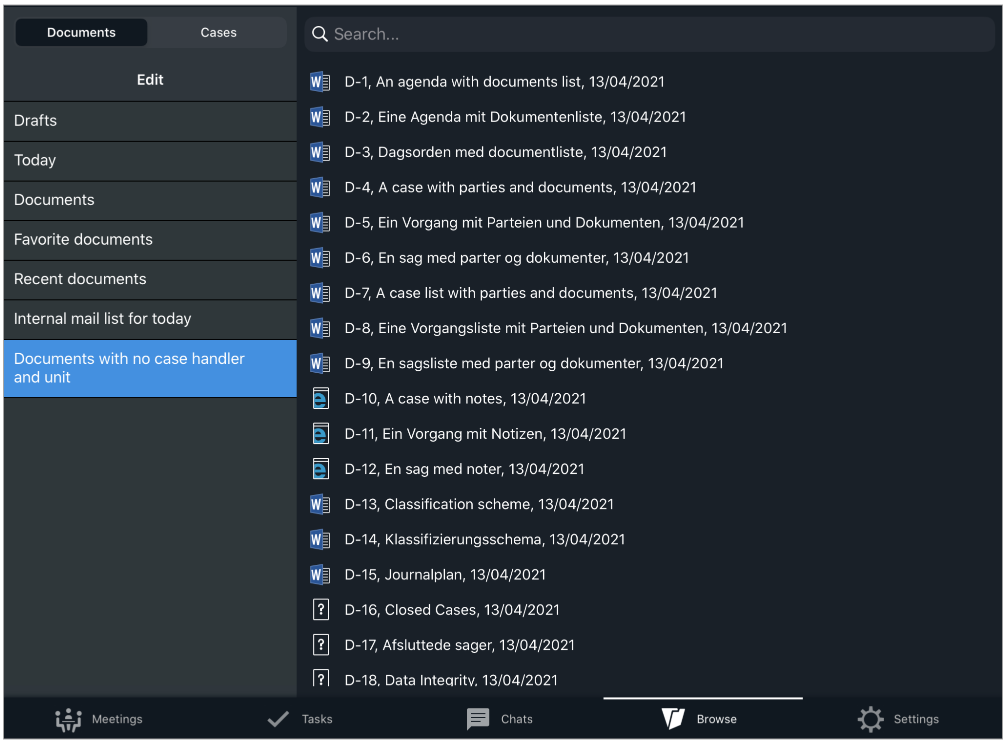
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:
   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     > **Note:** You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

> **Tip:** Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

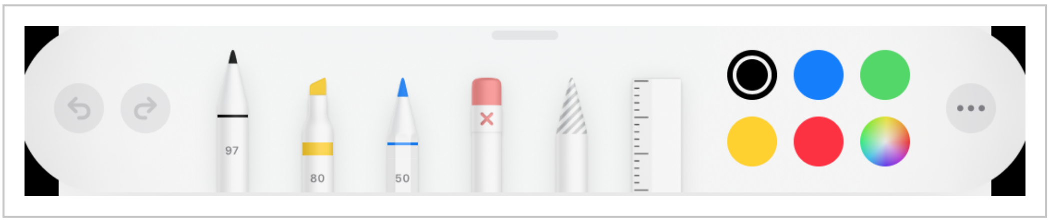
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

Erase previous free hand drawing or text marking.

Add text.

- Double-tap to edit text color, border color, thickness, text size, and opacity settings.

Draw arrows.

- Double-tap to edit arrow color, thickness, and opacity settings.

Draw straight lines.

- Double-tap to edit line color, thickness, and opacity settings.

Draw rectangles

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw ellipses

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw cloud-like polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw polylines.

1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

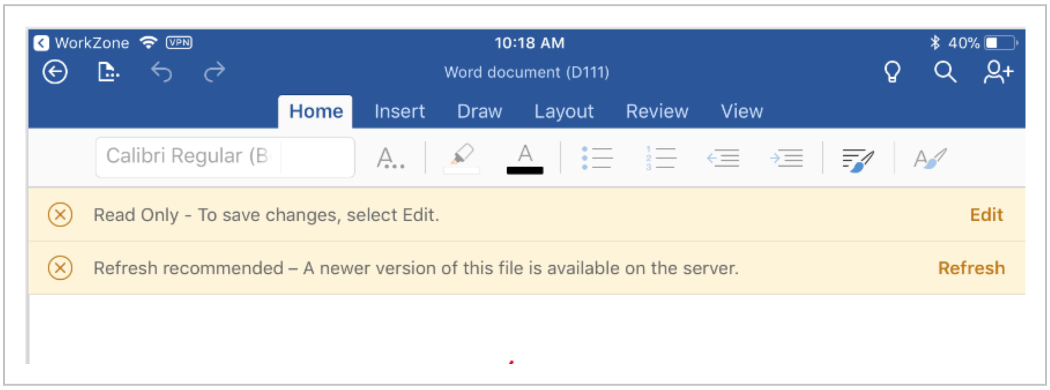
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

Example: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

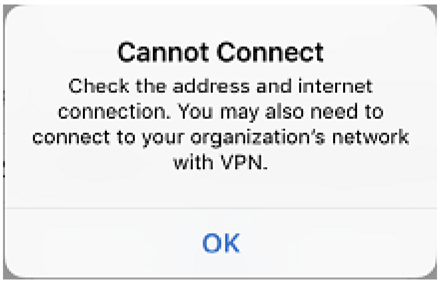
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE _Mobile

2021.3

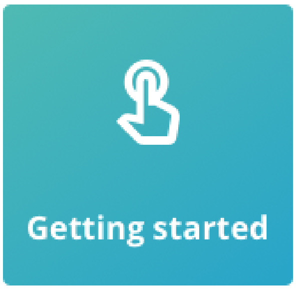
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ( )

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

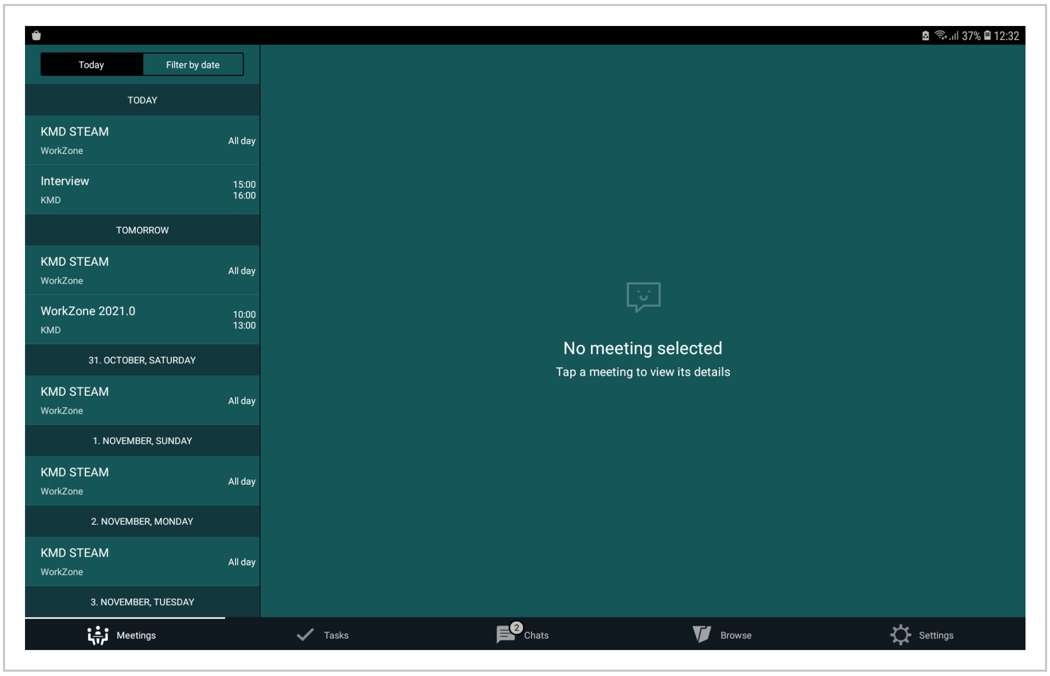
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

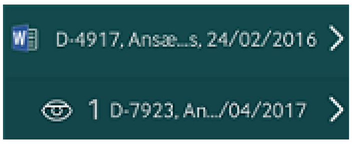
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

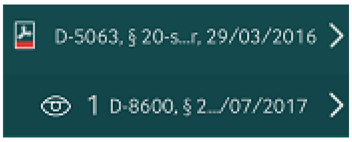
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

> you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about creating, editing, and sharing queries.

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

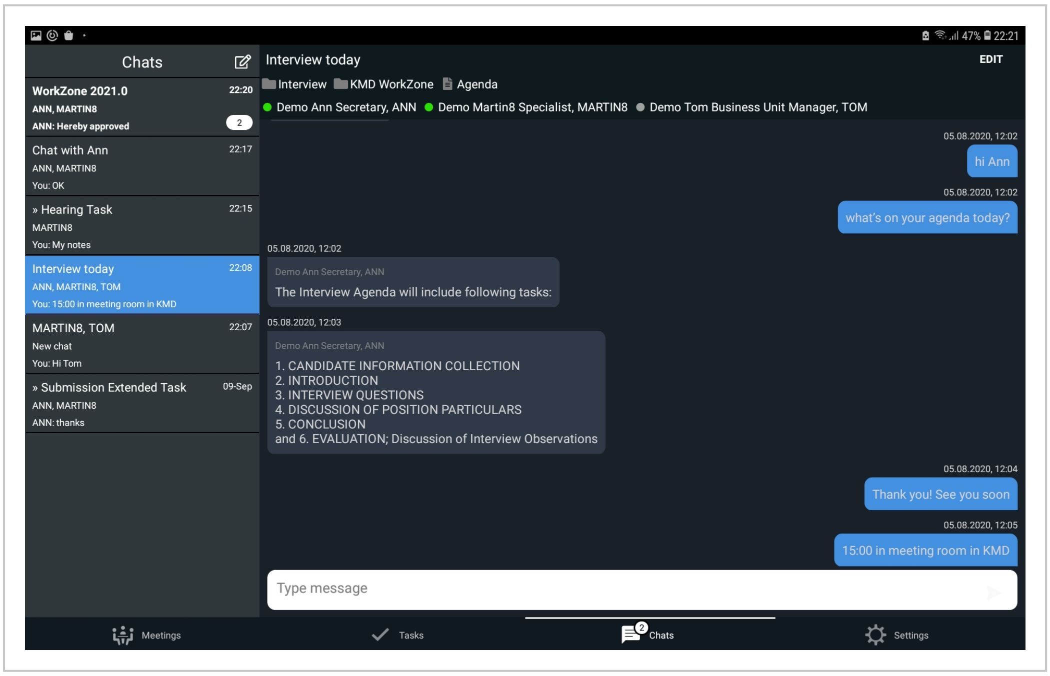
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

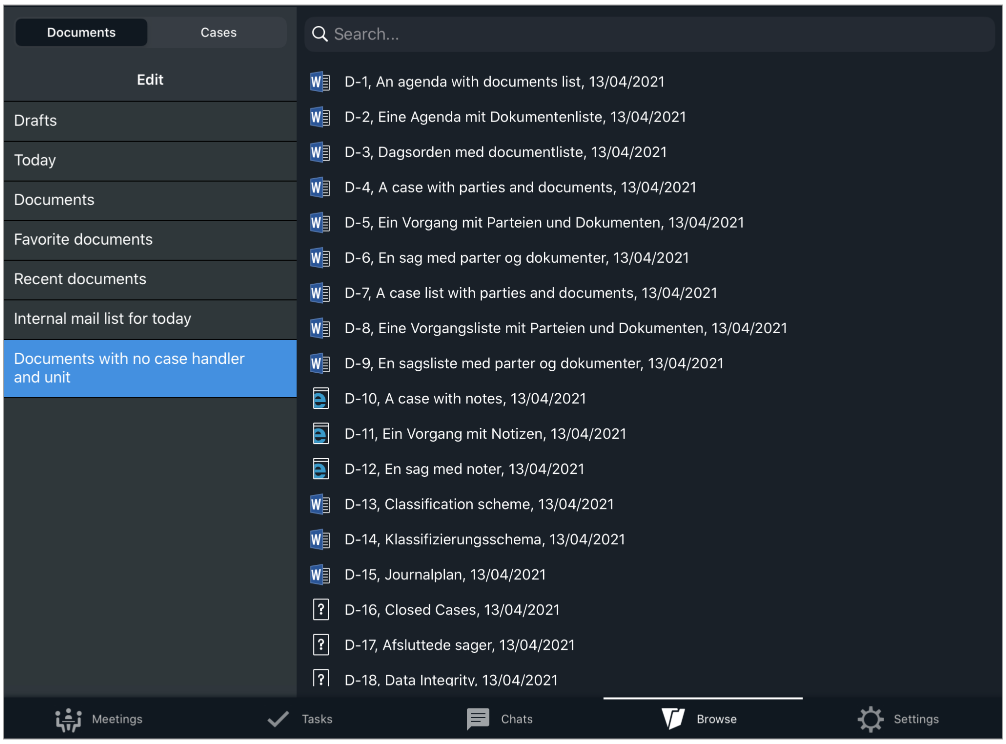
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
   - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
   - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

   > **Tip:**
   >
   > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
   > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
   >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
   >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:
   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

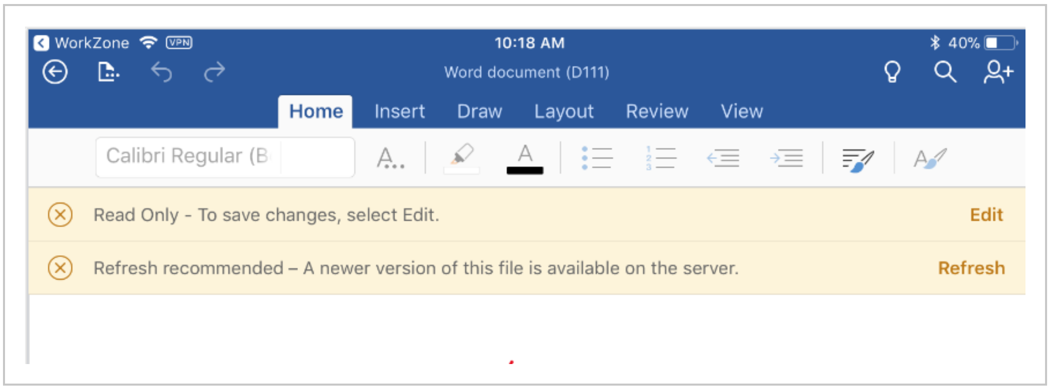
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

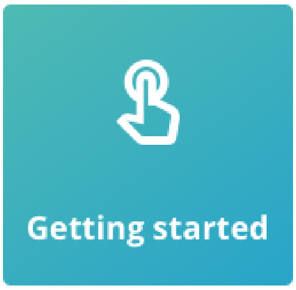
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ( )

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

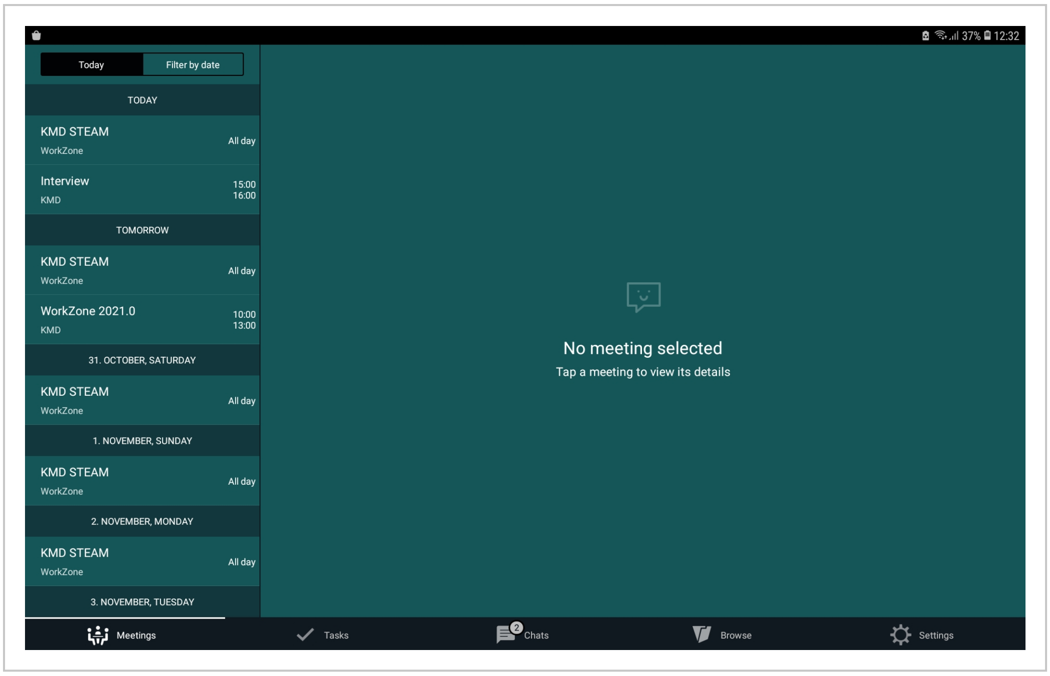
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

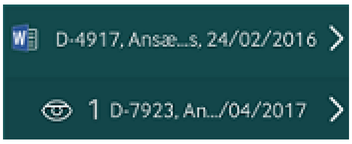
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

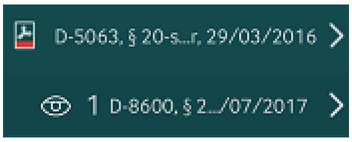
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries](#).

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

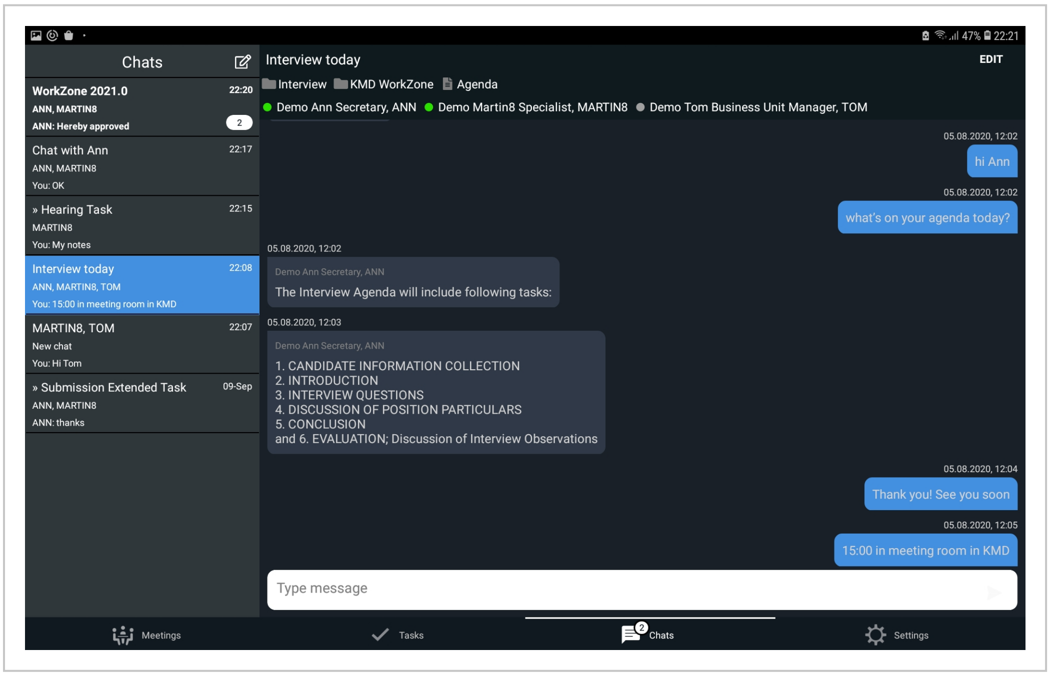
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or  .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap  at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

    - To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.
4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

- For documents:

  a. Tap the document title to open it in a preview mode.

  > **Tip:** Tap and at the top to view the previous or the next document on this chat.

  b. Perform the needed action:

  - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
  - To edit this document: Tap at the top right corner.
  - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

- For cases:

  a. Tap the case title to open its details.

  > **Tip:** Tap and at the top to view the previous or next case on this chat.

  b. Under **Documents**, you can view documents on this case (if there are any).

  > **Tip:**

- Tap a document to preview it, edit it, or view its metadata.

  -Or-

- Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

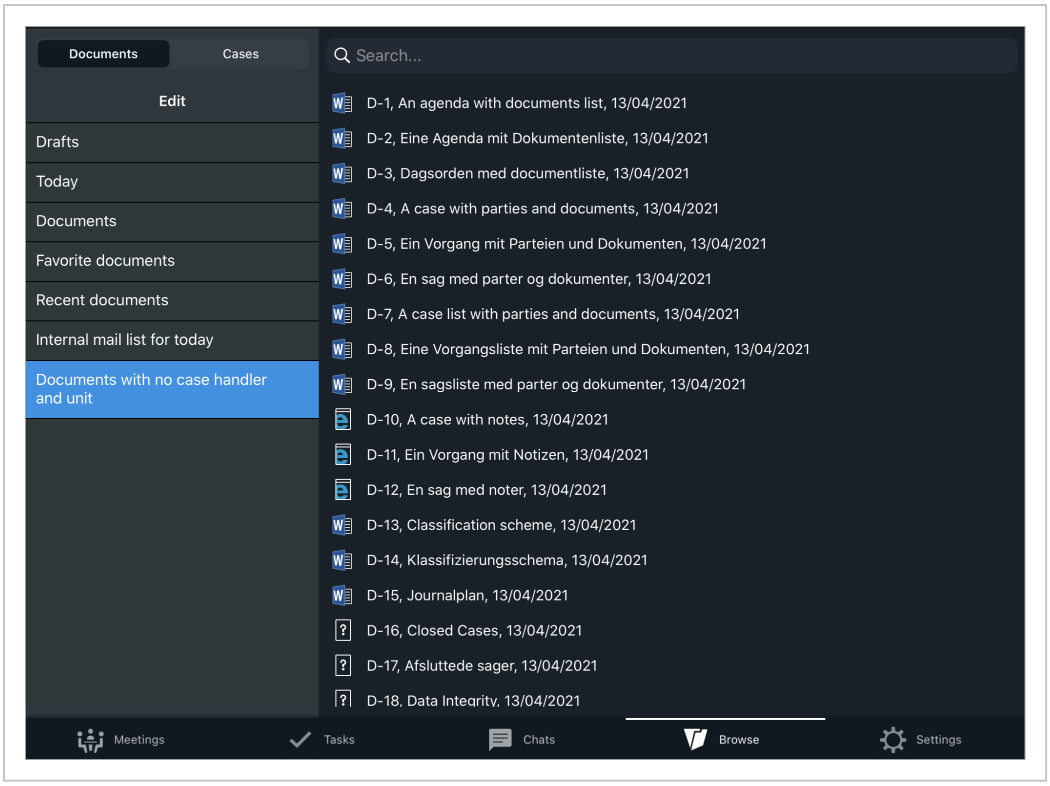
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
>   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

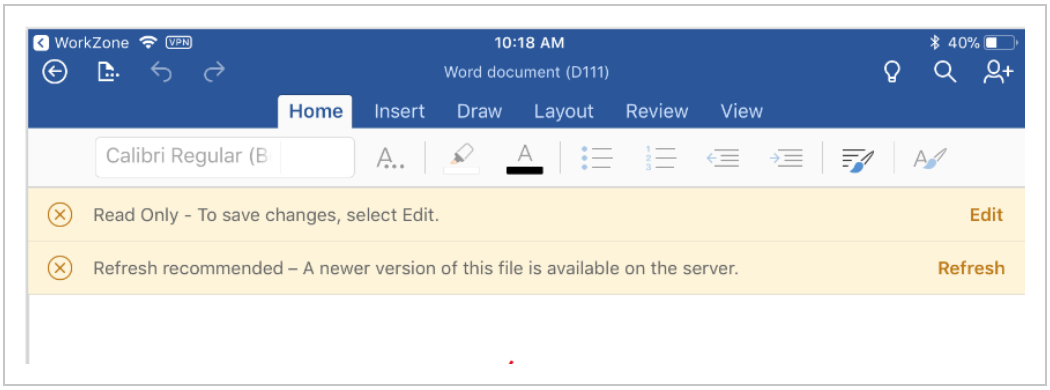
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

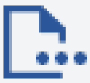
Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

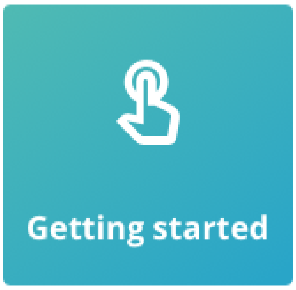
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ()

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

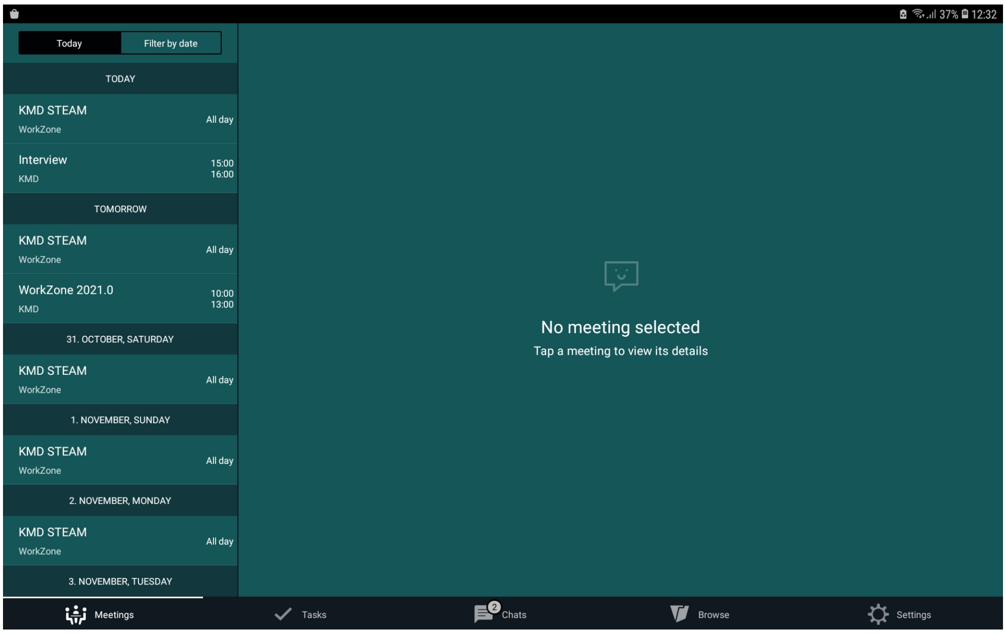
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

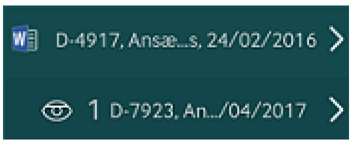
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

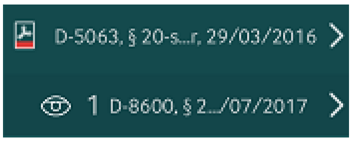
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

> you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See [WorkZone Client User Guide] for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

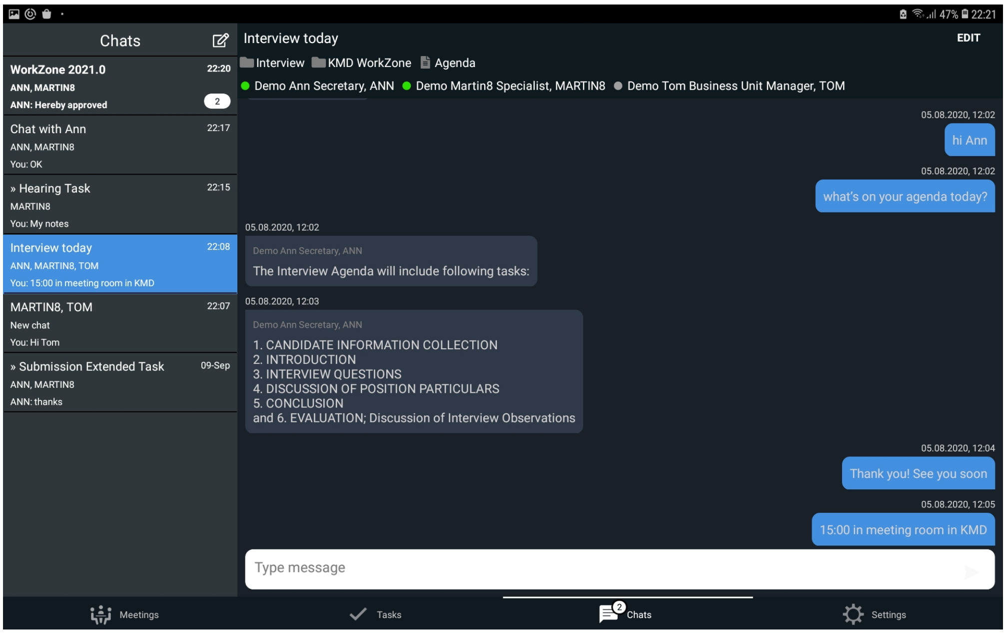
> **Note:** Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or  .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap  at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

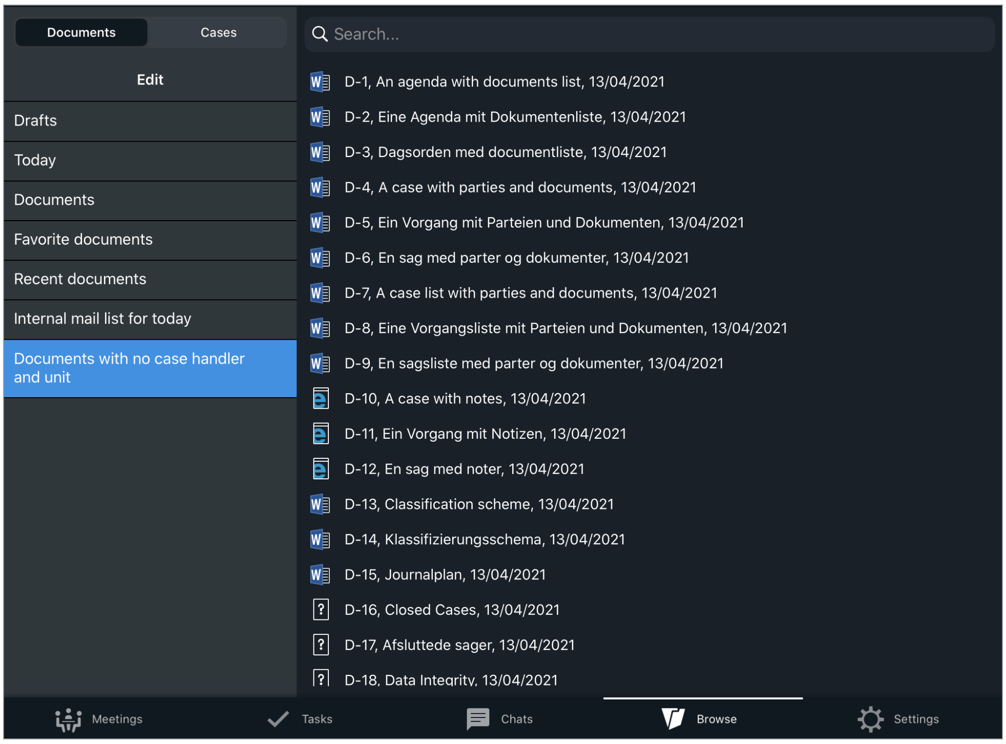
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

    > **Tip:**
    >
    > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
    >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
    >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap  at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

  > **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

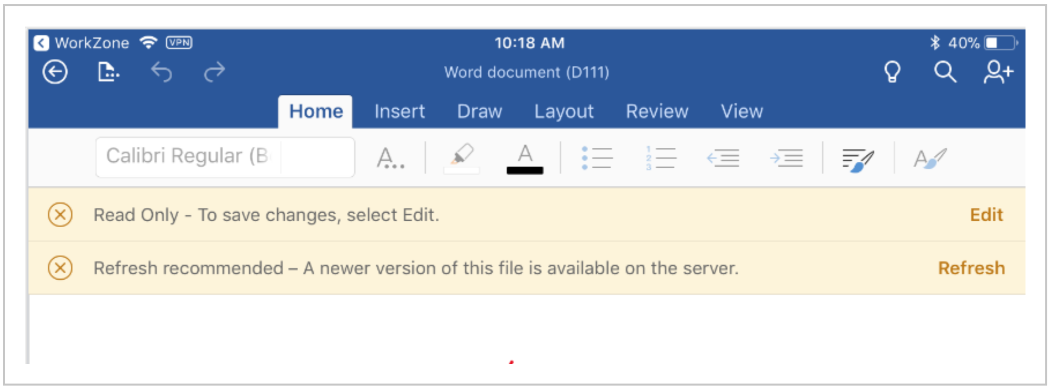
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

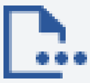
Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

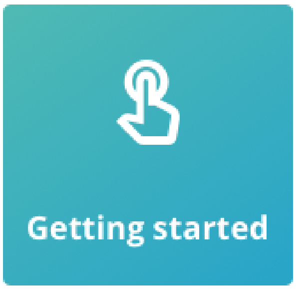
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ()

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

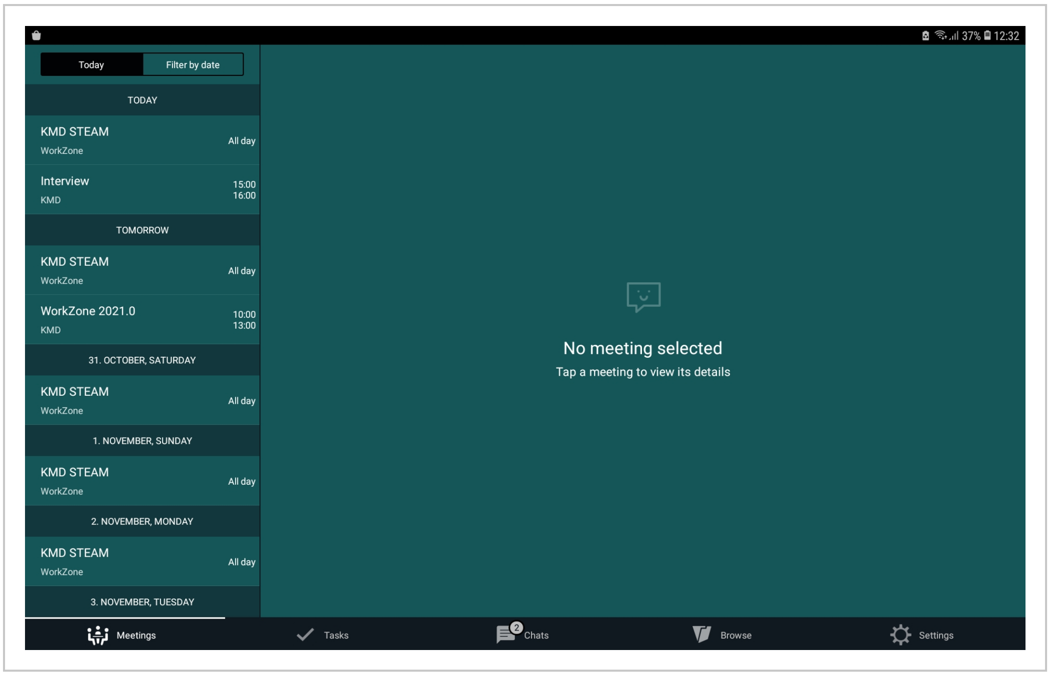
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

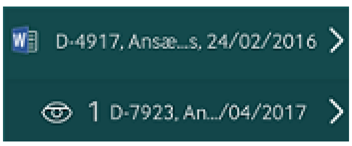
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

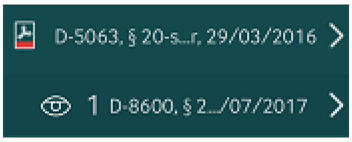
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See [Feature Settings] in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about [delegates].

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See [WorkZone Client User Guide] for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

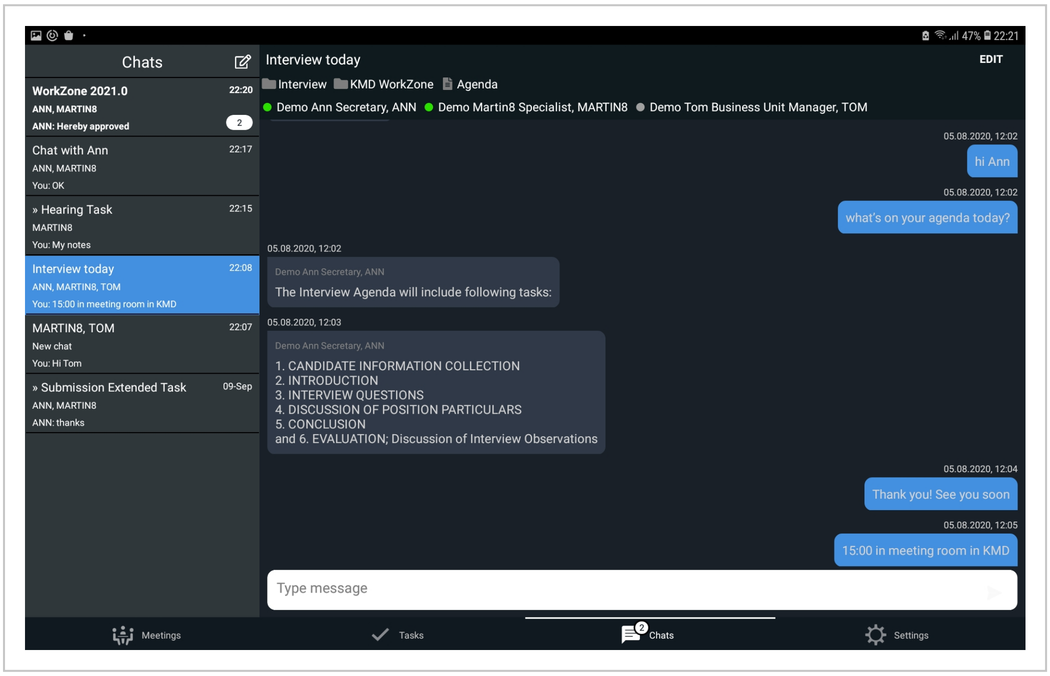
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap  in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

   - To add: Tap  **Add participant**,  **Add document**, or  **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

- Tap a document to preview it, edit it, or view its metadata.

  -Or-

- Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

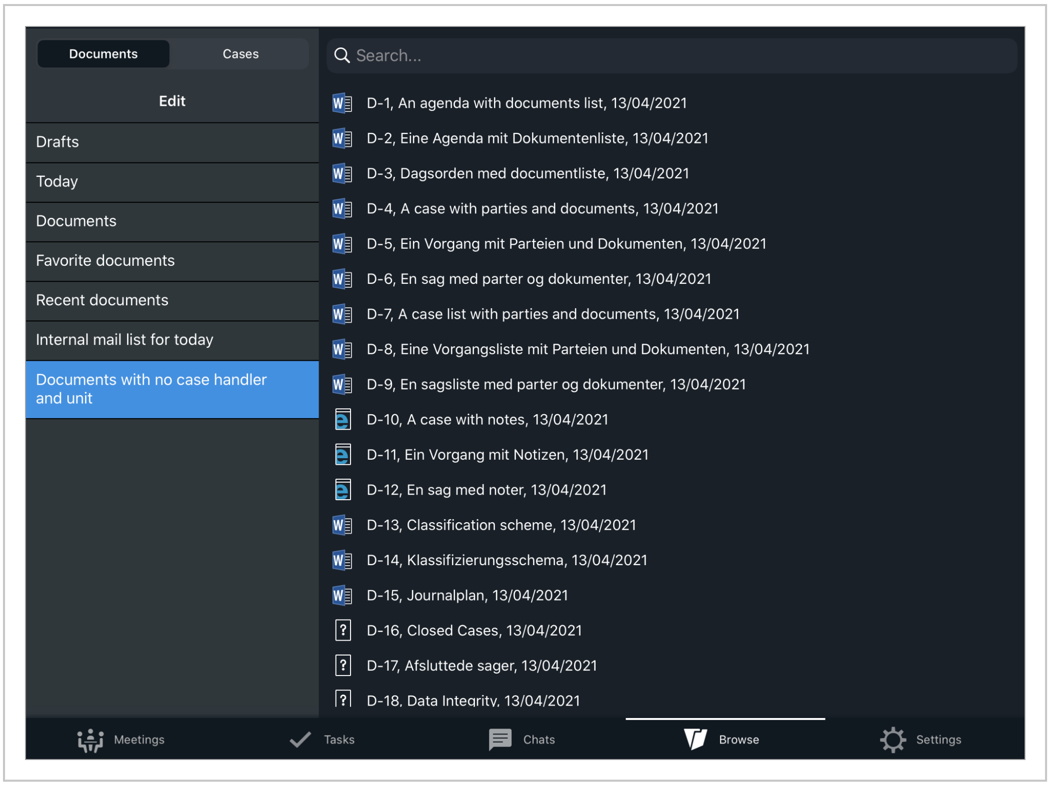
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

    Tip:

    - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
        - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
        - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

  > **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

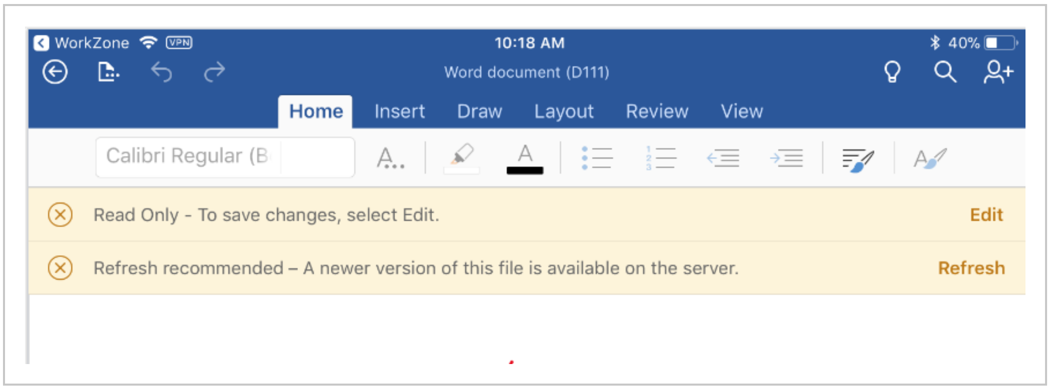
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

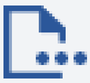
Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

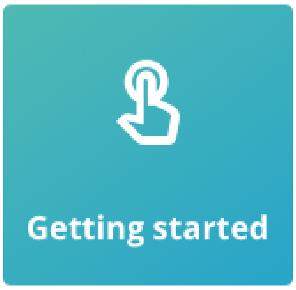
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

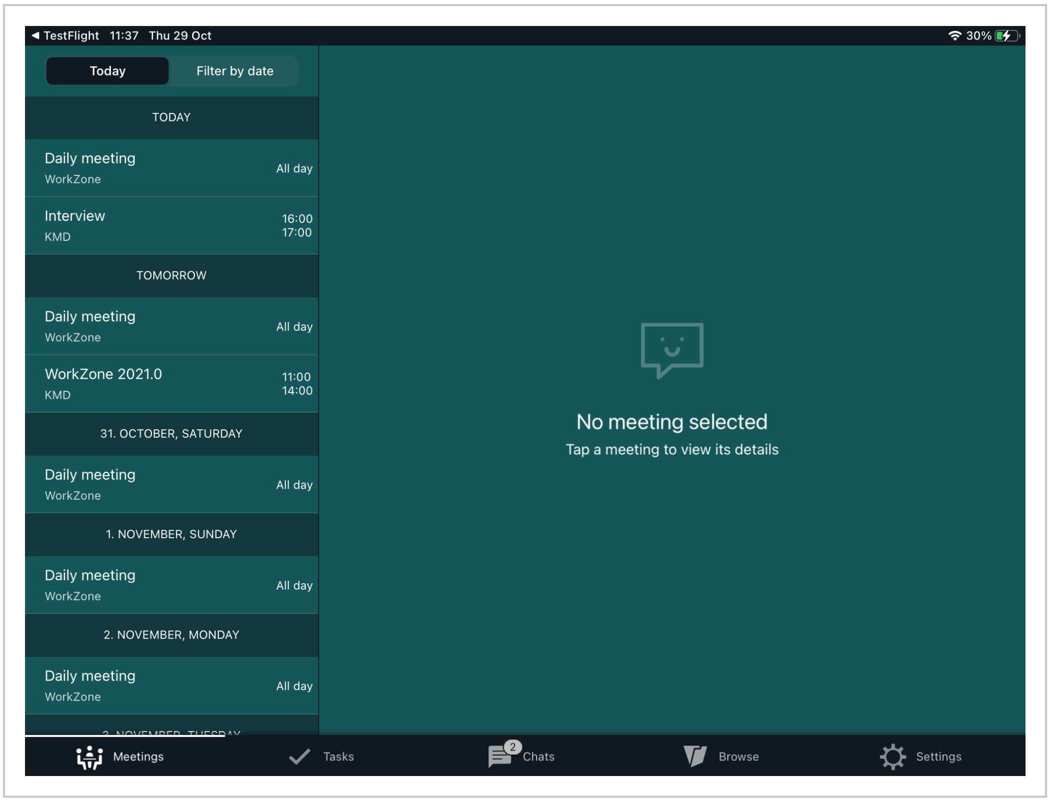
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> **Tip:** For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

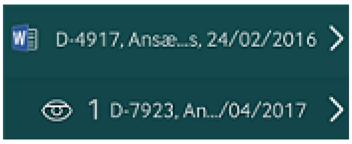
Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
   - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

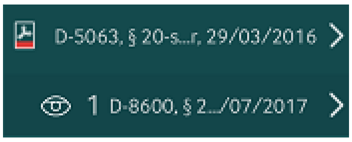
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about creating, editing, and sharing queries.

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap  next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

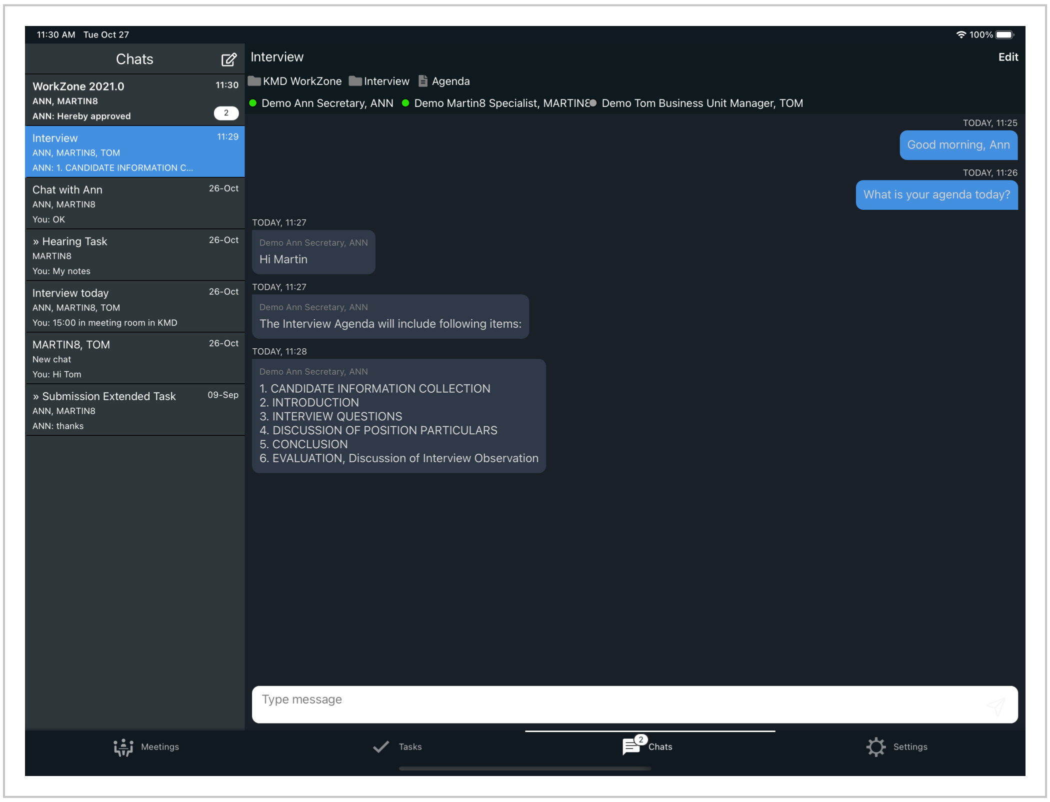
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See Feature Settings in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

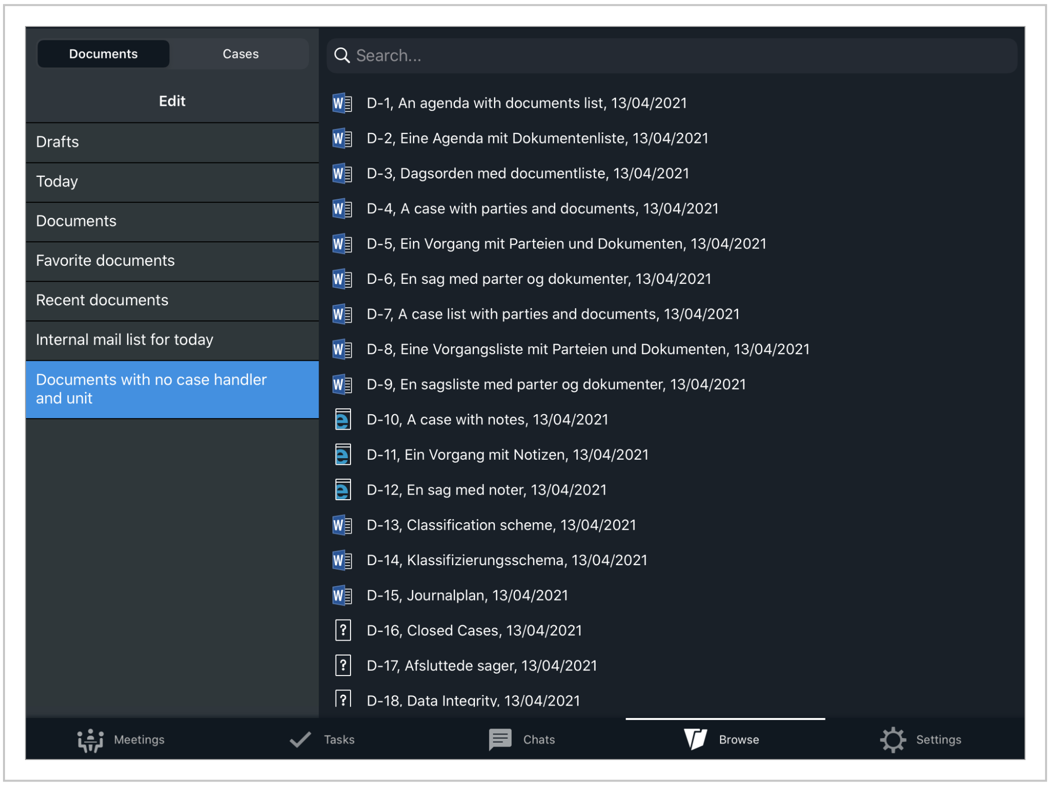
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:
    - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
    - To edit this document (if the document is editable): Tap at the top right corner.

      Note: You might need to install a relevant Office app to edit some document formats.

    - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

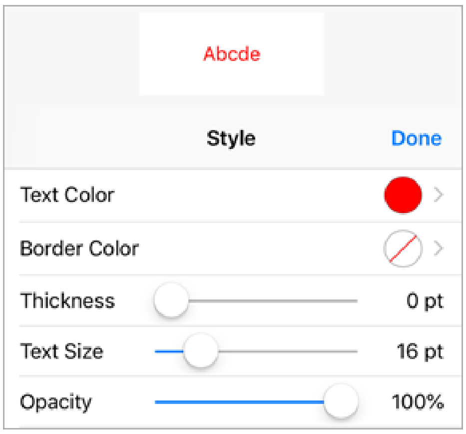
Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

> **Tip:** Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.



	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

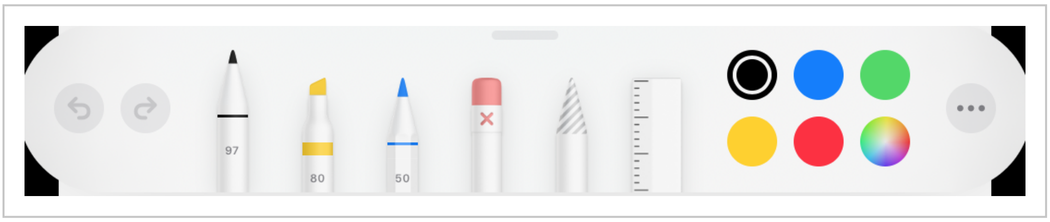
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

Erase previous free hand drawing or text marking.

Add text.

- Double-tap to edit text color, border color, thickness, text size, and opacity settings.

Draw arrows.

- Double-tap to edit arrow color, thickness, and opacity settings.

Draw straight lines.

- Double-tap to edit line color, thickness, and opacity settings.

Draw rectangles

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw ellipses

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw cloud-like polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw polylines.

1. Tap the edit icon.

	2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw straight lines with calibrated measures • Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.
	Draw calibrated polylines. 1. Tap the edit icon. 2. Select color, thickness, opacity, scale, precision, or snapping settings. 3. Tap **Done** to start drawing.
	Draw filled polygons. 1. Tap the edit icon. 2. Select color, thickness, opacity, scale, precision, or snapping settings. 3. Tap **Done** to start drawing.
	Draw curved lines. • Double-tap to edit line color, thickness, and opacity settings.
	Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.
	Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

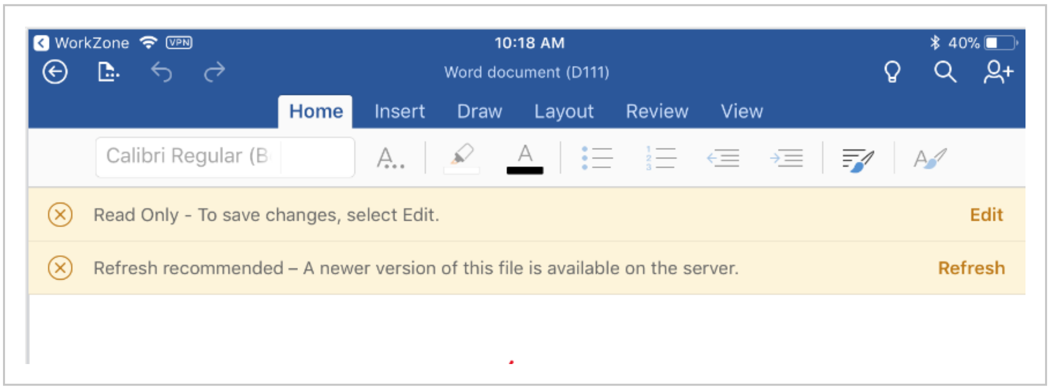
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

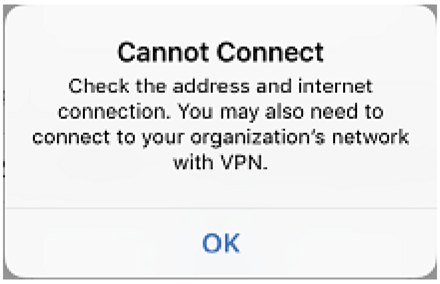
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

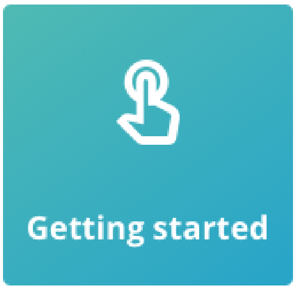
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ( )

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

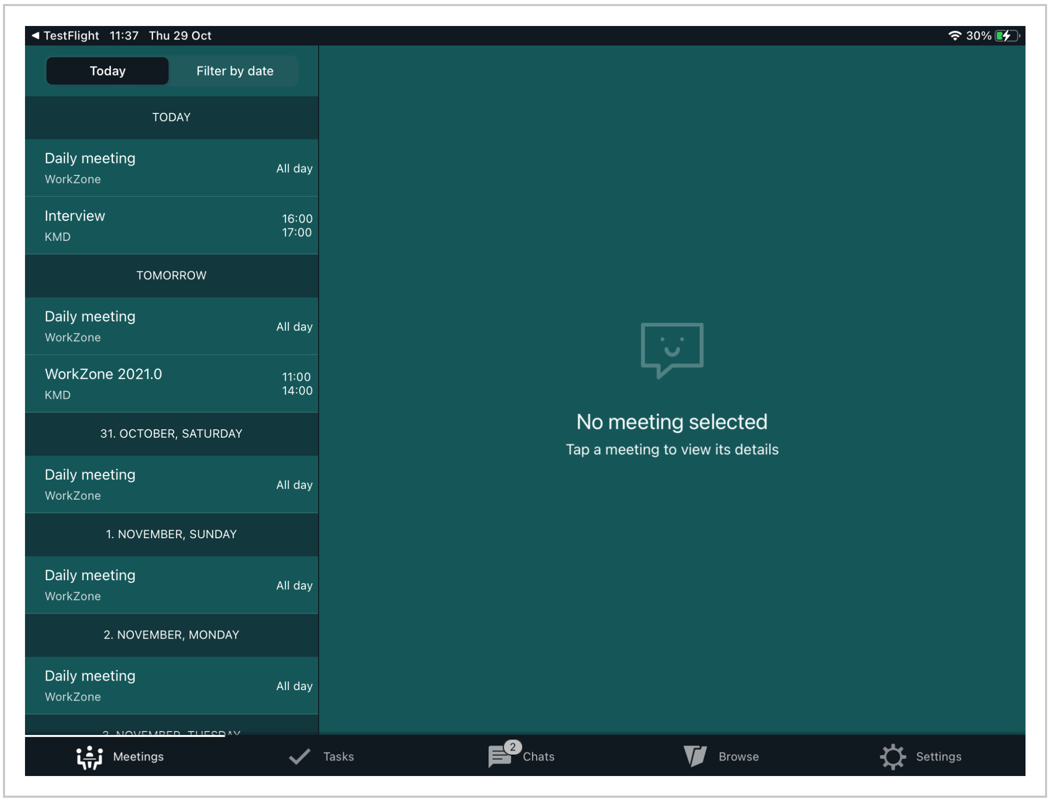
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

> **Prerequisite:**
>
> - Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> **Tip:** For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

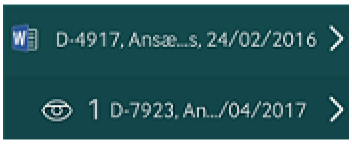
Edit Microsoft Office documents ()

> **Prerequisite:** You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
   - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

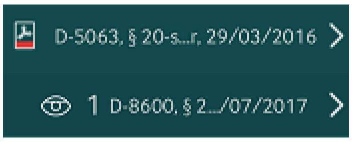
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

> **Note:** You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about creating, editing, and sharing queries.

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
   - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

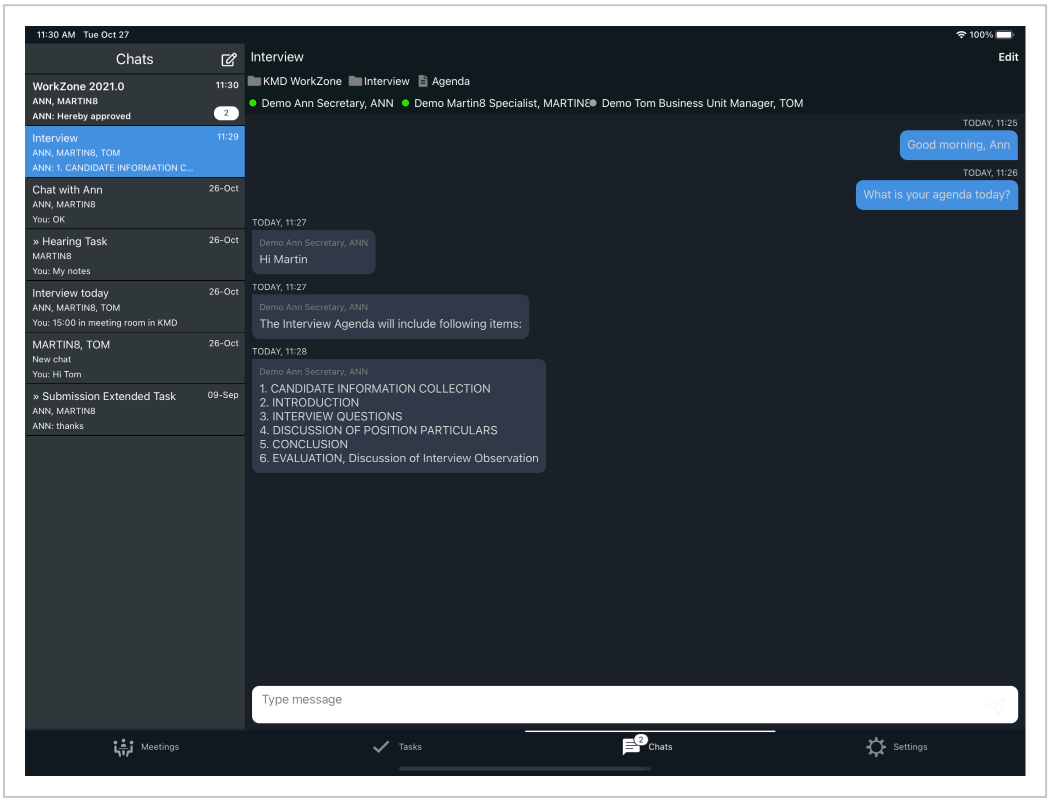
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

- Tap a document to preview it, edit it, or view its metadata.

  -Or-

- Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

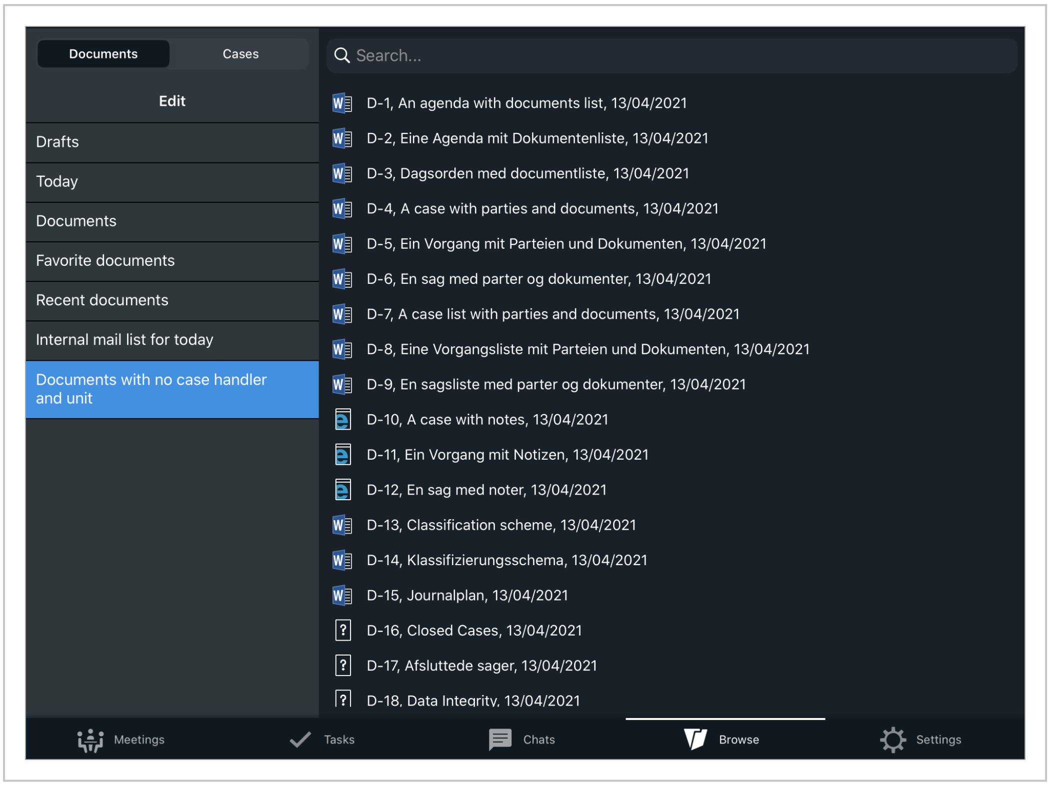
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     Note: You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> Tip: You can search for text in the document and see the outline and annotations for quick navigation.

> Tip: Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

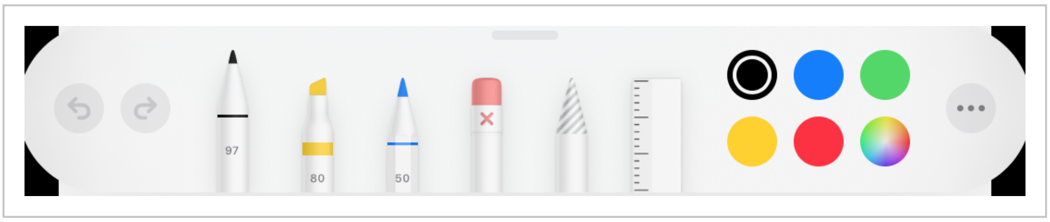
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

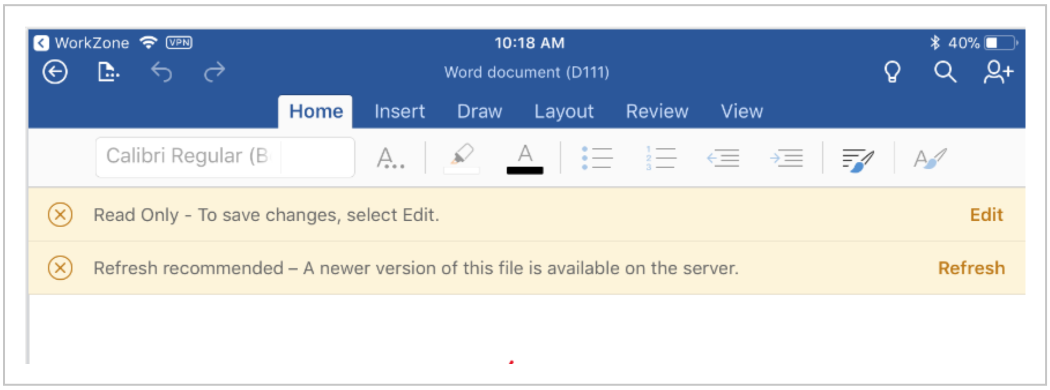
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

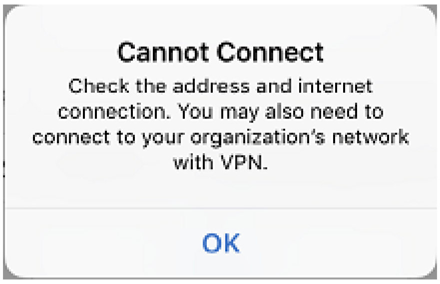
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.

7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE
_Mobile

2021.3

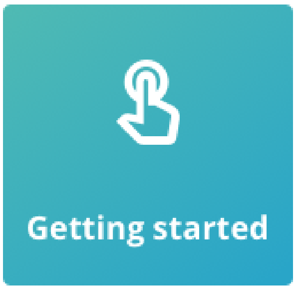
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ( )

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

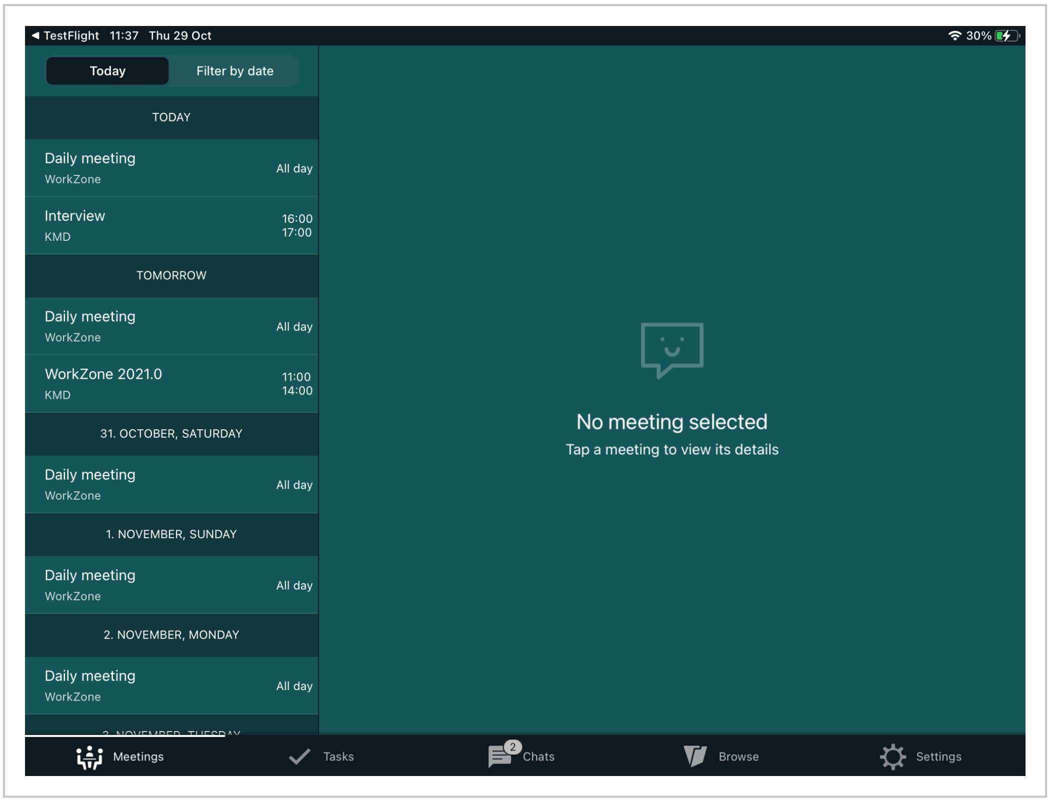
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> **Tip:** For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

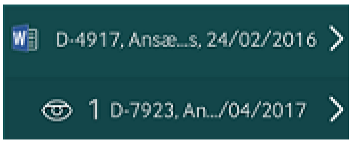
Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
   - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights] in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

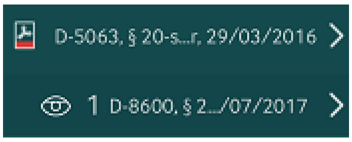
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See [Manage access rights] in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

> **Prerequisite:** You must have Microsoft Office 365 installed on your device.

> **Note:** You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

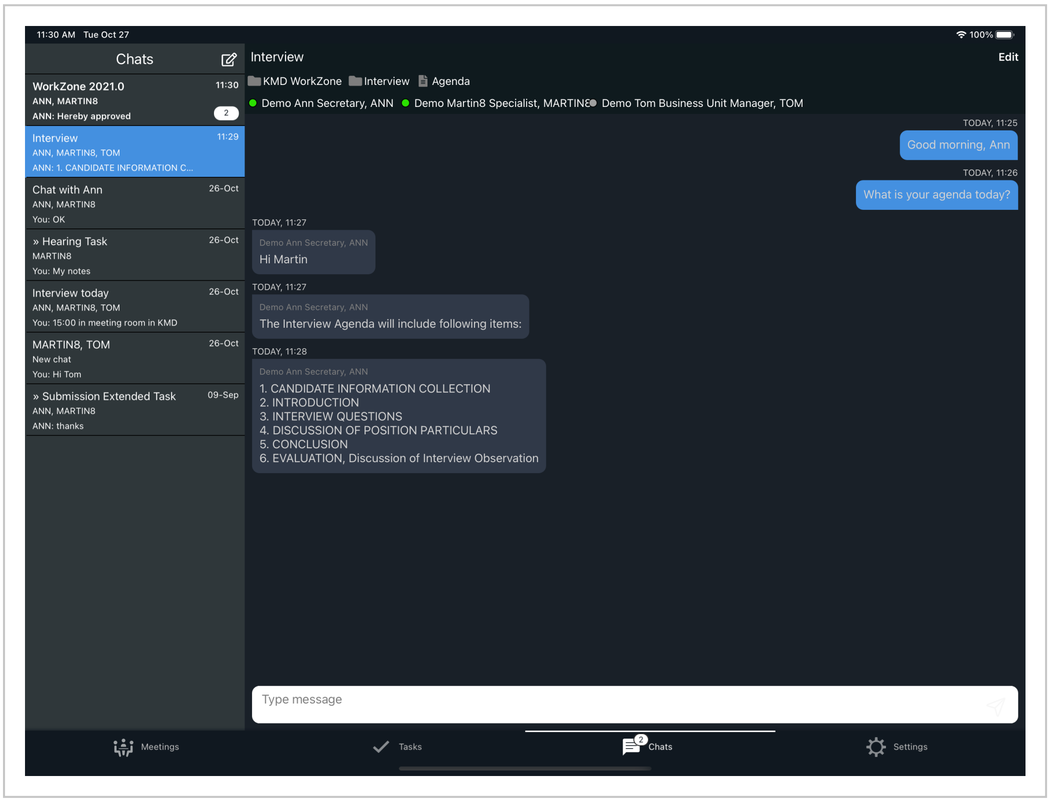
> **Note:** Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See Feature Settings in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

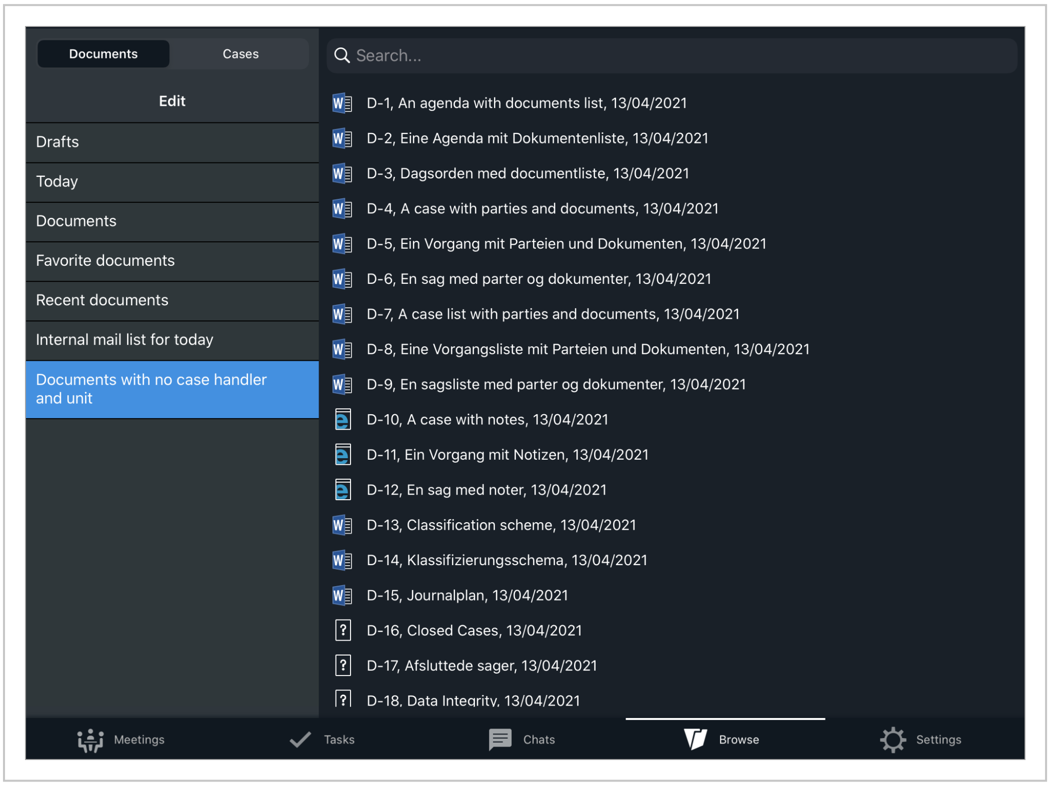
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:
    - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
    - To edit this document (if the document is editable): Tap at the top right corner.

      > **Note:** You might need to install a relevant Office app to edit some document formats.

    - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> Tip: You can search for text in the document and see the outline and annotations for quick navigation.

> Tip: Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

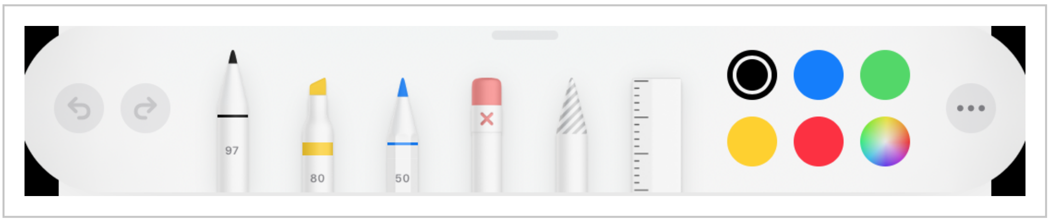
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

Erase previous free hand drawing or text marking.

Add text.

- Double-tap to edit text color, border color, thickness, text size, and opacity settings.

Draw arrows.

- Double-tap to edit arrow color, thickness, and opacity settings.

Draw straight lines.

- Double-tap to edit line color, thickness, and opacity settings.

Draw rectangles

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw ellipses

- Double-tap to edit stroke color, fill color, thickness, and opacity settings.

Draw polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw cloud-like polygons.

1. Tap the edit icon.
2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw polylines.

1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

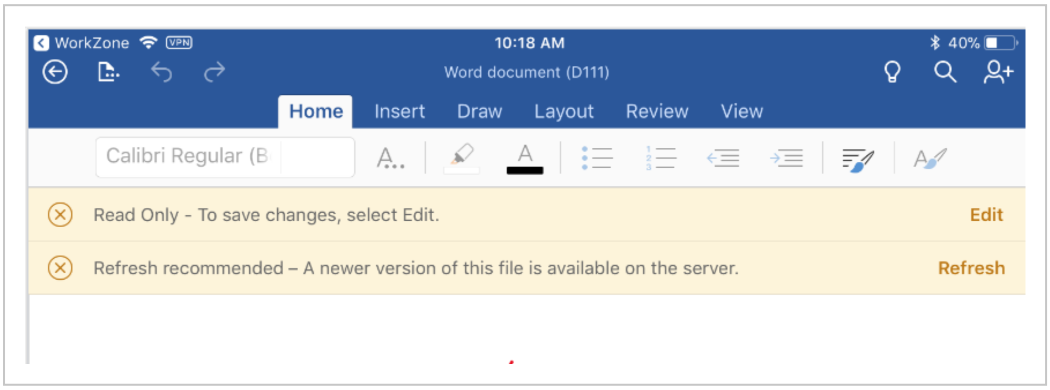
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

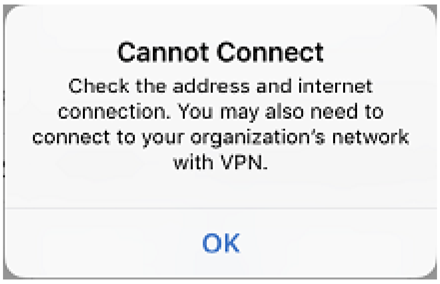
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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KMD WORKZONE

_Mobile

2021.3

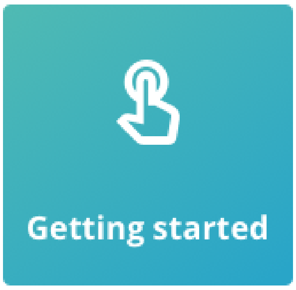
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

Editing WorkZone documents via Office 365 in Intune version ()

- WorkZone Mobile version for Intune now supports editing WorkZone documents with Microsoft Office 365.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2020.0

Improved synchronization for WorkZone meetings

- WorkZone Mobile now reflects meeting cancellations made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).
- WorkZone Mobile now reflects changes to the meeting agenda items made in Outlook using WorkZone Meeting or WorkZone 365 (desktop application or the web version).

See Work with meetings.

User settings improvements

- Use the new **Show upcoming tasks** and **Show closed tasks** settings to define if you want to see the upcoming and closed tasks in your task list.

- Enable the new **Share Analytics** setting to allow collecting user error logs for WorkZone Mobile, such as system information about network errors, errors for file loads in the background, and similar. Collected error logs do not contain any personal data.

See Set up WorkZone Mobile.

Security improvements

- Content in WorkZone Mobile becomes hidden, if user's password is no longer valid.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Rank your tasks in the order you want them to be processed. See Rank your tasks.
- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.
- Tap to view your task with its attached documents as a single PDF file. See View task as a PDF.
- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- The app crashes when you try to open it after updating to a new release – Corrected.
- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

This was new in WorkZone Mobile 2019.0

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

Performance improvements

The time that it takes to load assets, tasks, and documents has been reduced by 30%.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- Add photos from the photo library on your device to a task. See Add or remove documents.
- Take a photo or record a video and add the photo or video to a task at once.
- Performance improvements.
- Improved user interface on iPhone X.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Edit Microsoft Office documents (). In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

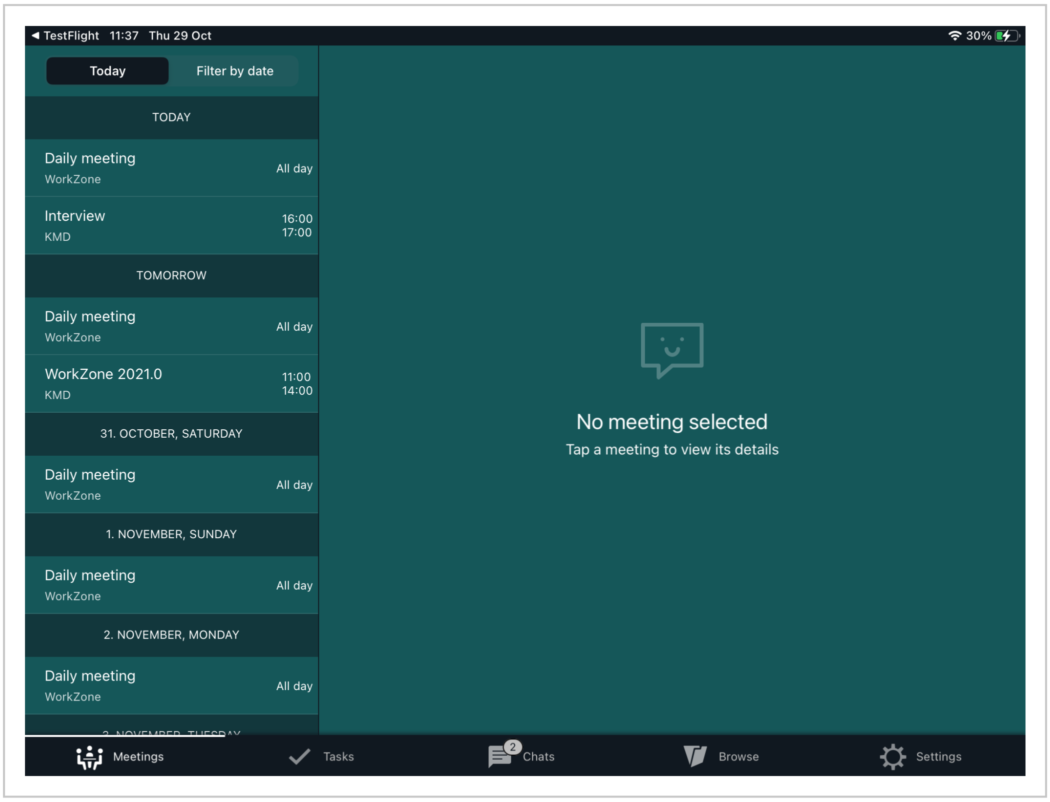
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

How can I receive notifications?

You can choose to receive notifications about the new tasks assigned to you or changes made to your existing tasks, for example, about changes to task deadlines or priorities. The notifications that you receive depend on your role in the process. For examples of notifications, see About task notifications in the WorkZone Process online help.

To turn on notifications on your device, go to **Settings** > **Notifications** > **WorkZone**, and then tap **Allow Notifications**.

Prerequisite:

- Push notifications must first be enabled by your administrator in WorkZone Configurator. See Process notifications in the WorkZone Process Administrator Guide.

- To make your task list and task content synchronize and refresh automatically, you need to turn on notifications. If you have not turned on notifications, you will have to refresh the task list manually. Pull the task list to refresh.

Note: Notifications are not available for the WorkZone Meeting module.

Log in and out

Log in

After launching WorkZone Mobile, the **Log in** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to a separate web screen where you can provide your user name and password. After that your password will be auto-filled for WorkZone Mobile.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

> **Tip:** For iOS devices, you can specify the server settings once and for all in your device settings. Tap **Settings** > WorkZone, and enter the URL of WorkZone in the **Address** field. Next time you log in, you will not need to enter server information again.

If WorkZone Mobile was installed using a Mobile Device Management system, the server settings are specified automatically. You can view the settings on your device. Tap **Settings** > WorkZone > **Settings** under **MOBILE APPLICATION MANAGEMENT**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Share analytics

Enable this setting to send user error logs (such as system information about network errors, errors for file loads in the background, and similar relevant data information) automatically. User error logs do not contain any personal data. This option is disabled by default.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show upcoming tasks

Select if you want to see the upcoming tasks in your task list. This option is enabled by default.

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format, except for Excel documents and some text file formats, such as `TXT` and `XML`, which open in Quick Look. Documents that cannot be converted to PDF, for example, video and audio files, open in their original format.

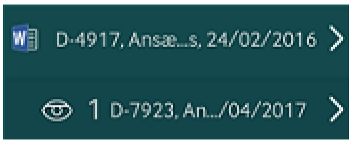
Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to edit the document in the corresponding Office app. You can choose to edit the document or create a copy of the document, and then edit the copy. The copy is only visible to you.
3. Make your changes and tap , then tap to return to the meeting.
   - If you did not turn on **AutoSave** in your Office app: make your changes and save the document. Then tap , and then tap to return to the meeting.

If you created a copy, it is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document (see Annotate PDF documents) or you can export the document to a relevant app for editing (see Share documents using other apps).

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate non-Microsoft Office documents like PDF, MSG, PNG, JPG, and so on, in PDF format. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

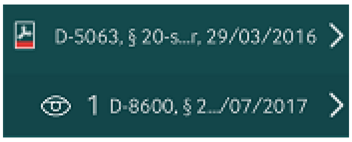
Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation.
    - The copy is only visible to you.
3. In the PDF editor, tap **Edit** to display a toolbar with different annotation options. Tap a button in the toolbar, and then tap a position in the document where you want to annotate it. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.
5. Tap **Back** to return to the meeting.

Note: You can only create one copy of each document. The next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.

The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. In the meeting you can see that your private copy has been added under the original document.



The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about creating, editing, and sharing queries.

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap next to the task you want to reorder, and then drag and drop that task as needed.
4. Tap **Save changes**.

View task as a PDF ()

Prerequisite:

- WorkZone PDF.
- You must be online to view your task as a PDF.
- Documents must have a PDF-convertible file format. See Supported document formats.
- Documents must be unprotected.

Tap at the top to display the summary of your task and its attached documents in a single PDF file.

- This PDF view is read-only.

View task documents

Prerequisite: WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format with the exception of Excel and some text file formats such as TXT and XML, which open in Quick Look. Documents that cannot be converted to PDF, for example video and audio files, open in the original format. See Supported document formats

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Add photos from your photo library. • Take a photo or record a video with your camera and add this photo or video to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add documents. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Edit Microsoft Office documents ()

Prerequisite: You must have Microsoft Office 365 installed on your device.

Note: You can only edit documents when you are online.

1. Tap the document you want to edit.
2. In the document viewer, tap **Edit** to open the document you want to edit in the corresponding Office app.
3. Make your changes, and tap to close the document. Then tap to return to the task.
    - If you have not turned on **AutoSave** in your Office app: make your changes and save the document. Then tap to close the document, and tap to return to the task.

If the document is not a Microsoft Office document, you can export the document to a relevant app for editing. See Share documents using other apps.

See also You cannot edit Office documents - Office 365 apps do not open the documents.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.

3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options.

   Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (iOS version).
4. Add your annotations, and then tap **Save**.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

The selected app opens a copy of the document. Note that you cannot save the document back to WorkZone.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.
3. Tap to return to the task and save or cancel your changes.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

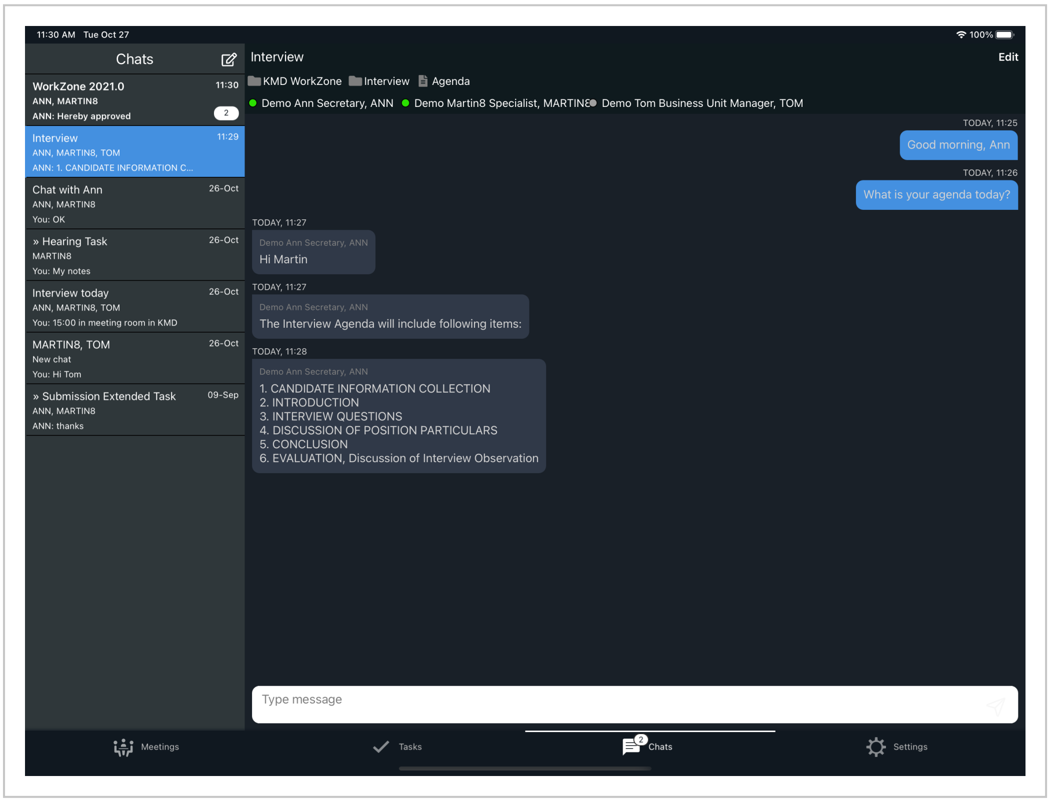
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last updated.
2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

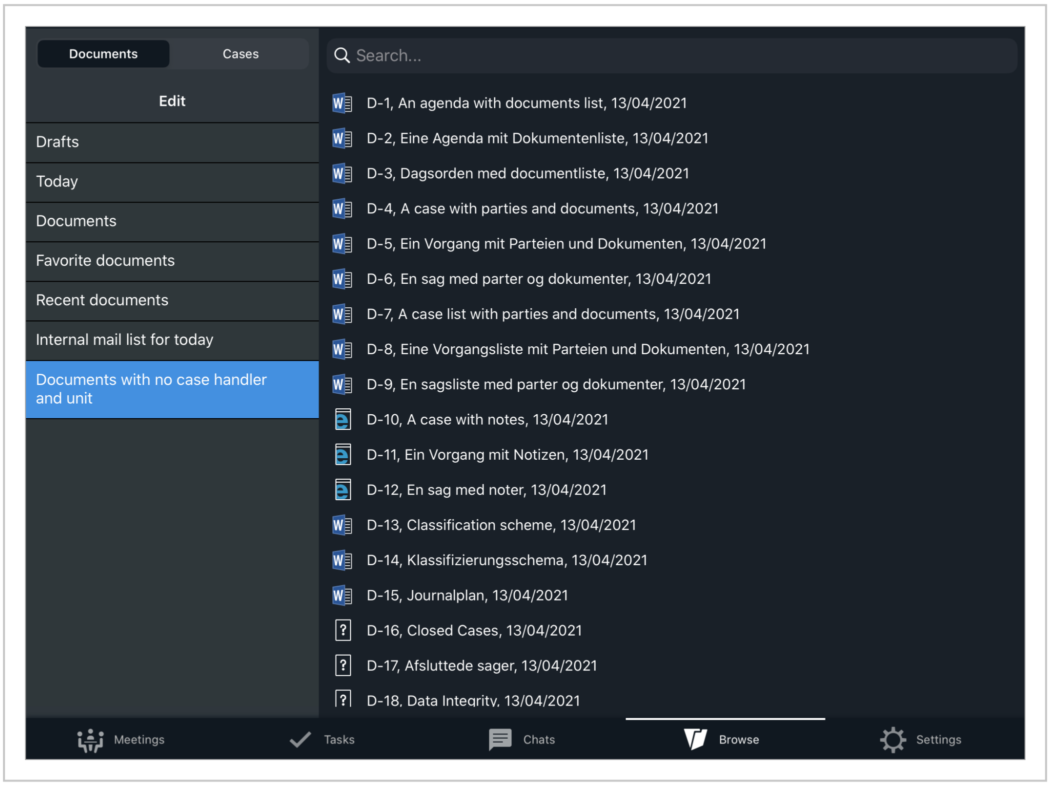
You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.

- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> Tip: For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
   - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
   - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

> **Tip:**
>
> - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
> - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
>   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.

> - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:
   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.
   - To edit this document (if the document is editable): Tap at the top right corner.

     Note: You might need to install a relevant Office app to edit some document formats.

   - To navigate to the related case and view its details and metadata: Tap at the top right corner.
5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (iOS version)

You can annotate PDF documents using the PDF editor.

1. In the document viewer, tap **Edit** to open the PDF editor.
2. Tap
3. Tap **Edit** to open the annotation toolbar.
4. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

> **Tip:** You can search for text in the document and see the outline and annotations for quick navigation.

> **Tip:** Tap the selected editing tool once again to change its additional parameters, such as color, thickness, opacity, fill color, stroke color, border color, and text size, when applicable. After adjusting relevant settings, tap **Done** to save your changes.

	Add a sticky note.
	Highlight the selected text. Tap and drag over the text to highlight it.

- Double-tap to edit the highlight color and opacity settings.

Strike through the selected text. Tap and drag over the text to strike out.

- Double-tap to edit strike-through color, thickness, and opacity settings.

Underline the selected text with a straight line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Underline the selected text with a curvy line. Tap and drag over the text to underline.

- Double-tap to edit underline color, thickness, and opacity settings.

Add a signature. You can create a new signature or use an already existing.

In the **Signatures** dialog:

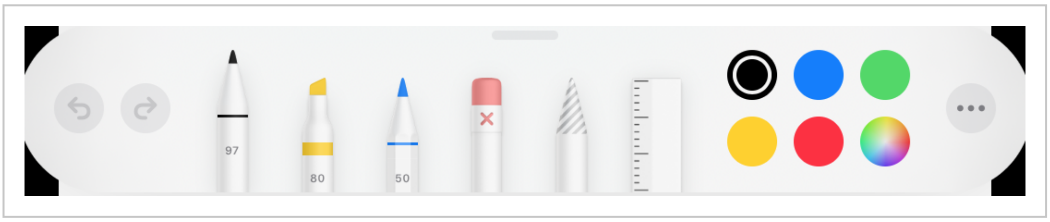
1. Tap an existing signature to use.

   -Or-

2. Tap **New Signature** to create a signature for multiple uses, or tap **One Time Signature** to create a one-time signature. Add your signature under **Sign Here**, and click **Sign**.

Draw free hand.

- Tap relevant drawing tool in the drawing toolbar at the bottom of the screen to select it or to change its parameters.



Note: The WorkZone Mobile version for Citrix has more simple free hand drawing tools than the regular version.

	Erase previous free hand drawing or text marking.
	Add text. • Double-tap to edit text color, border color, thickness, text size, and opacity settings.
	Draw arrows. • Double-tap to edit arrow color, thickness, and opacity settings.
	Draw straight lines. • Double-tap to edit line color, thickness, and opacity settings.
	Draw rectangles • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw ellipses • Double-tap to edit stroke color, fill color, thickness, and opacity settings.
	Draw polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw cloud-like polygons. 1. Tap the edit icon. 2. Select stroke color, fill color, thickness, and opacity settings. 3. Tap **Done** to start drawing.
	Draw polylines. 1. Tap the edit icon.

2. Select stroke color, fill color, thickness, and opacity settings.
3. Tap **Done** to start drawing.

Draw straight lines with calibrated measures

- Double-tap to edit color, thickness, opacity, scale, precision, or snapping settings.

Draw calibrated polylines.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw filled polygons.

1. Tap the edit icon.
2. Select color, thickness, opacity, scale, precision, or snapping settings.
3. Tap **Done** to start drawing.

Draw curved lines.

- Double-tap to edit line color, thickness, and opacity settings.

Switch to pan view for panning, zooming, or swiping pages, and for selecting annotations.

Close the annotation toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

Meeting synchronization does not work

Workaround

Restart your device and delete the WorkZone Mobile app. Then re-install the WorkZone Mobile app, and log in to WorkZone. If the issue still persists, report it.

Cannot open Office documents for editing

Attempts to open an Office document in the edit mode fail with the "Can't open file" error message.

Workaround

In your device settings, select relevant Office application, and tap **Reset Word/Excel/PowerPoint**. Toggle the **Clear All Documents/Workbooks/Presentations** and **Delete Sign-In Credentials** buttons, and close the Office application. After that re-try to open the needed Office document.

WorkZone Mobile app for Intune stops connecting (for Intune)

After some time the WorkZone Mobile application stops connecting, returning the “Not connected/Ikke tilsluttet” error message. Attempts to restart the application result with the “Connect/Tilslut” error message.

Workaround

Check the Wi-Fi settings on your device. Ensure that you use your regular internet connection (that is, the connection you have previously used to successfully connect to WorkZone).

Navigation tabs disappear (version for Citrix)

In rare scenarios it may happen, that all tabs, except for Online Help, disappear, making it impossible to navigate in the app.

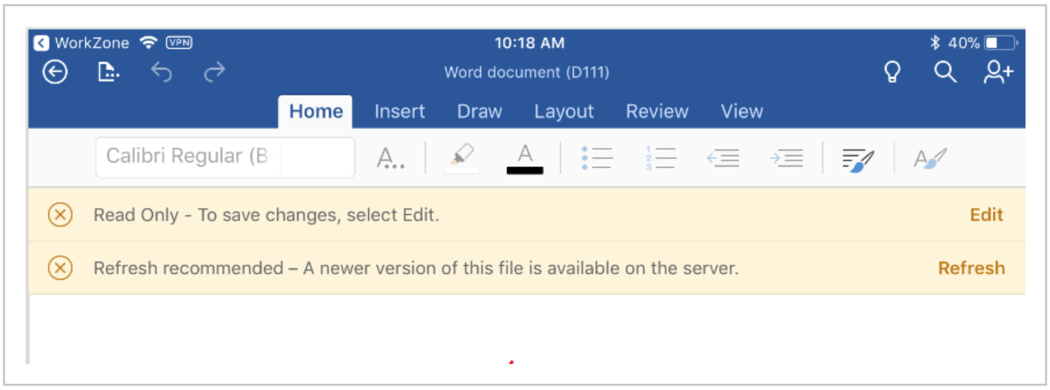
Workaround

Uninstall and completely reinstall the app from the Secure Hub.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



> **Tip:**
>
> - Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
> - Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

Sometimes a document cannot be uploaded to the WorkZone server and becomes read-only after one of the following actions:

- You have closed your Office app
- You have changed the language in the device settings
- You have reboot your device

How to continue

Do not reboot your phone and do not close the Office mobile app.

Once you see message "Can't upload – Please sign into your account", tap **More... > Sign in**. Then open the document from the **Recent** list in the Office app. The document is again available for editing.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

You cannot edit Office documents - Office 365 apps do not open the documents

You are trying to edit a document in an Office app, for example Word, but the app does not open the document due to log-in issues in the Office app.

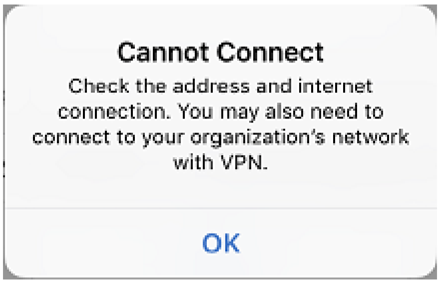
How to continue

The steps below describe how to solve this issue using Word as an example. The steps are identical for other Office apps. You only need to apply the steps for one Office app, and it will work for other Office apps as well.

> **Important:** Make sure that no Office apps are running on your device.

1. On your device, tap **Settings** > **Word**, and scroll down to **Reset Word** and then enable **Clear all documents** and **Delete Sign-in credentials**.
2. Open Word on your device.
3. Tap **Open** > **Add a place** > **SharePoint Site URL**.
4. Enter the URL for WorkZone Explorer, for example https://MyCompanySite/Explorer/.
5. Tap **Next** several times.
6. Enter your log-in credentials and tap **Sign in.**

   The log-in will fail with this message:

   However, your credentials are saved, and now you should be able to edit Word documents.
7. Tap **OK** in the message, and edit a document from WorkZone Mobile.

> **Tip:** The Office app may open with the **Places** screen on top of the document you want to edit. Tap **Cancel**, and then you will see the document.

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2021.3

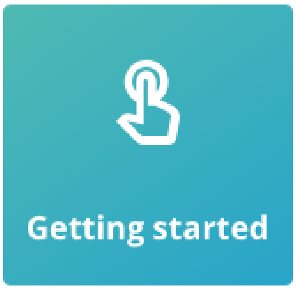
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ( )

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap
  .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

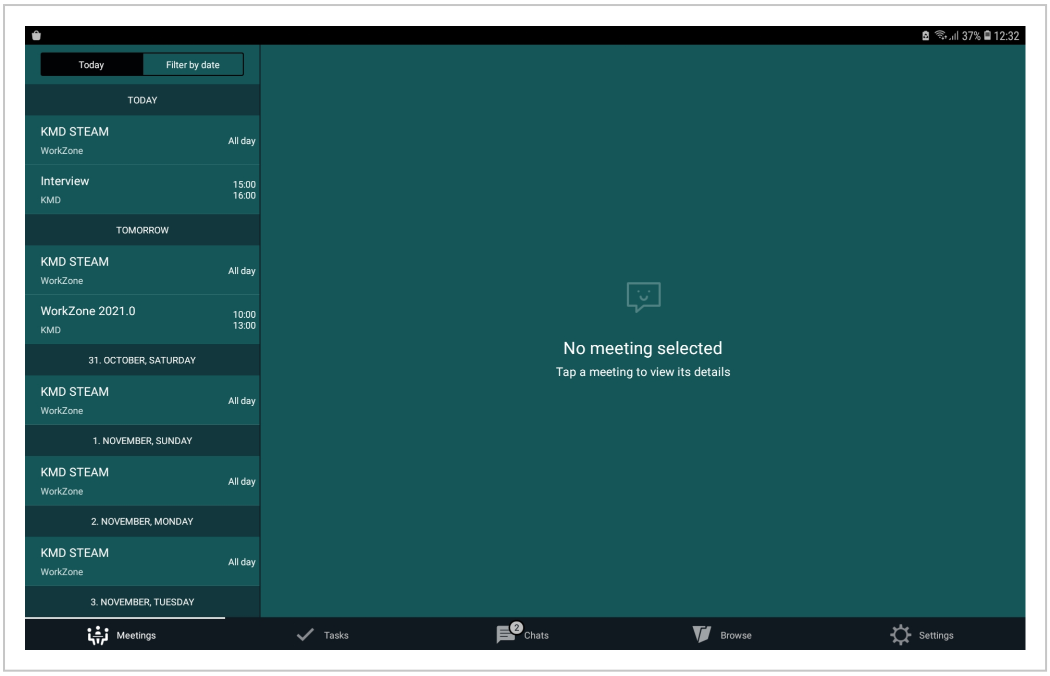
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

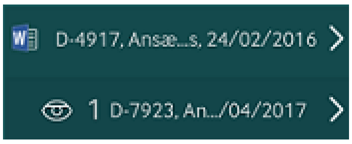
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

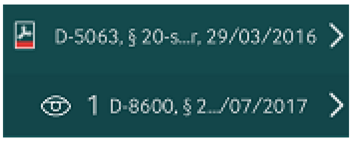
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

> **Prerequisite:**
>
> - The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
> - The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

> **Important:** A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

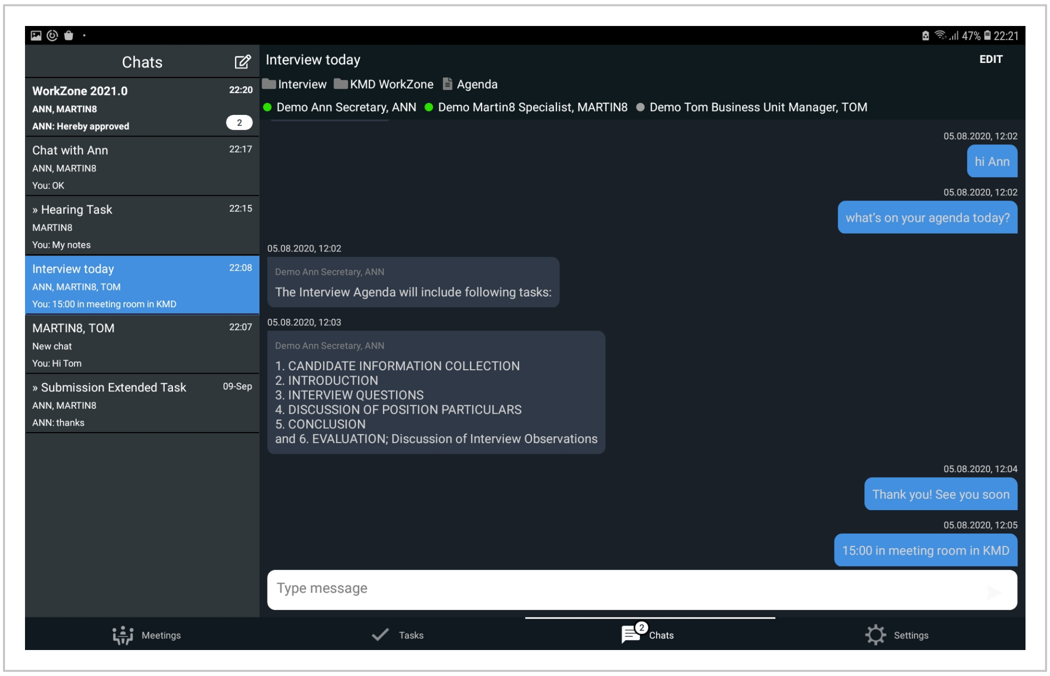
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or  .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap  at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

- Tap a document to preview it, edit it, or view its metadata.

  -Or-

- Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

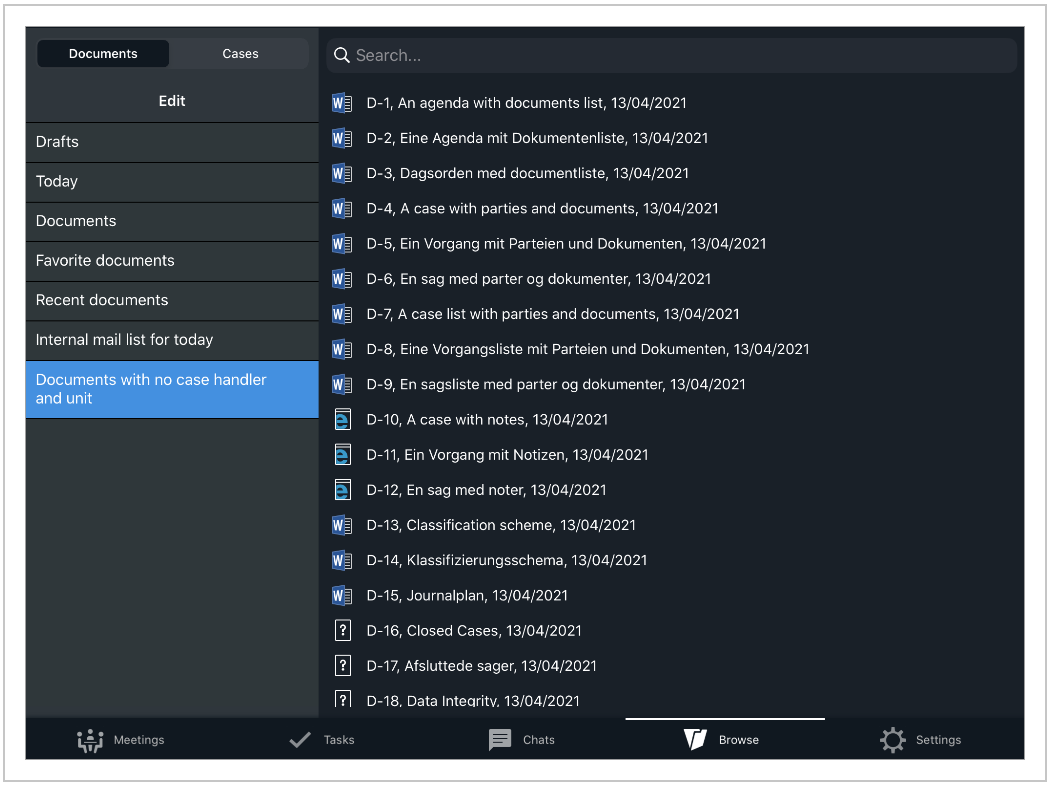
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
   - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
   - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

   > **Tip:**
   >
   > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
   > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
   >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
   >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

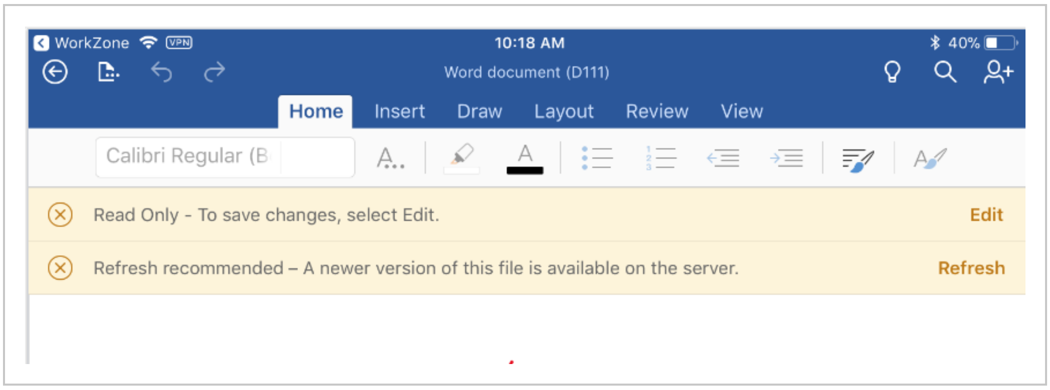
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

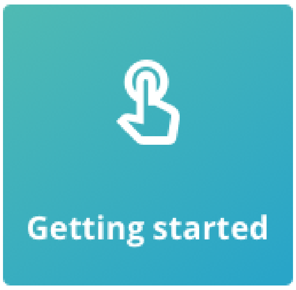
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ( )

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

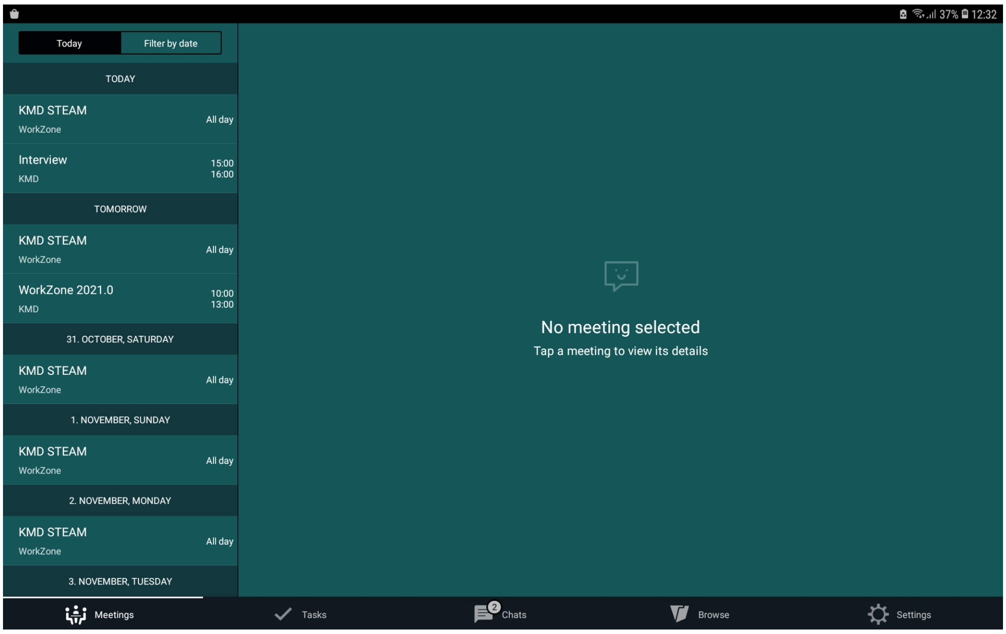
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

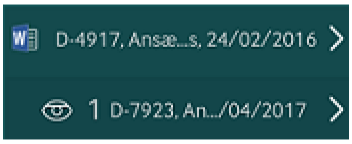
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

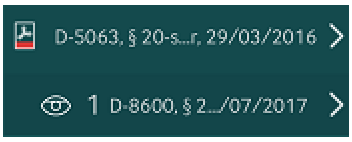
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

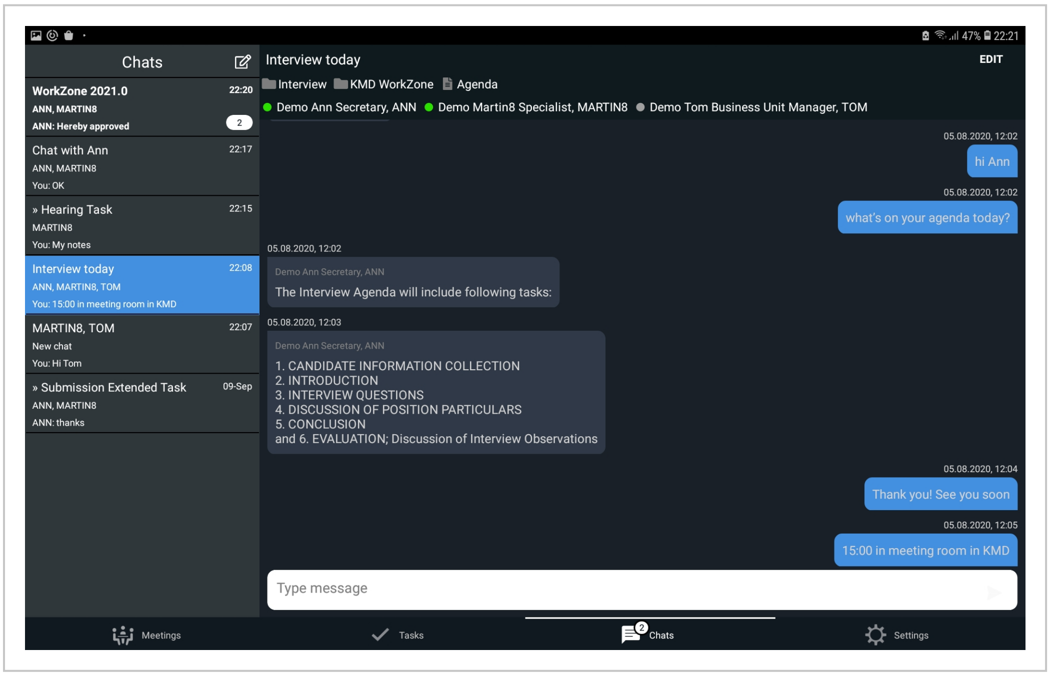
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
   - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

    - For documents:

        a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

        b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

    - For cases:

        a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

        b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

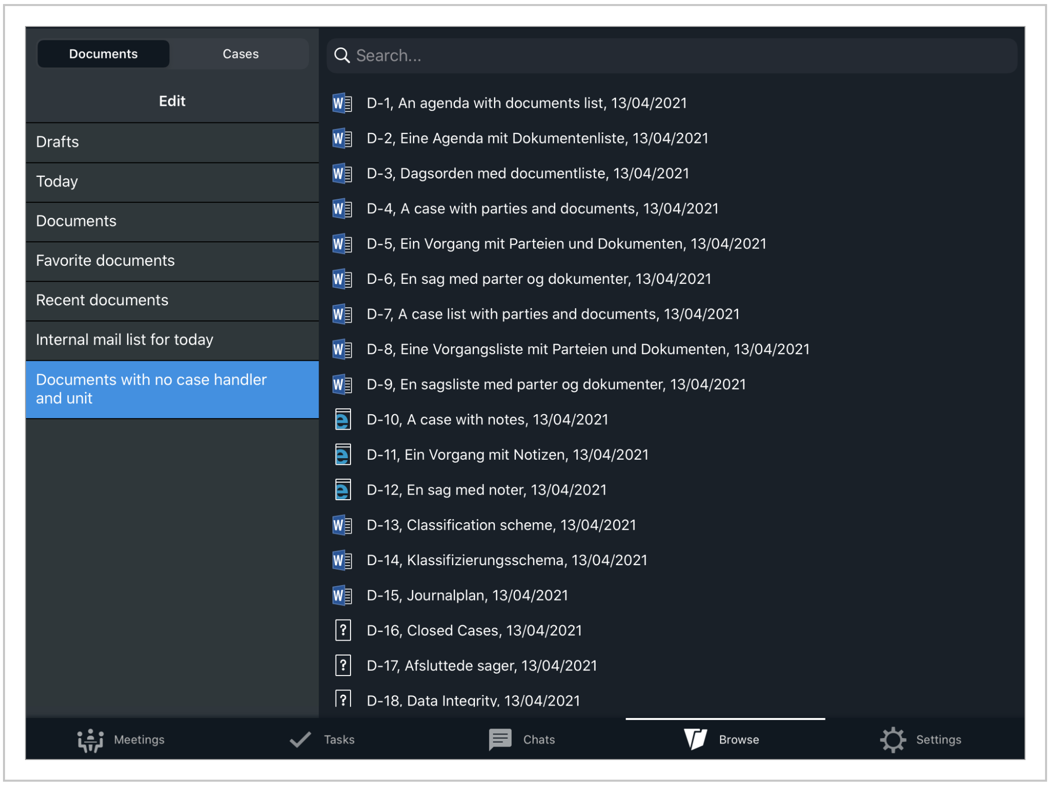
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold next to a list, and drag and drop it to a new position.

    Tip:

    - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
        - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
        - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

> **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

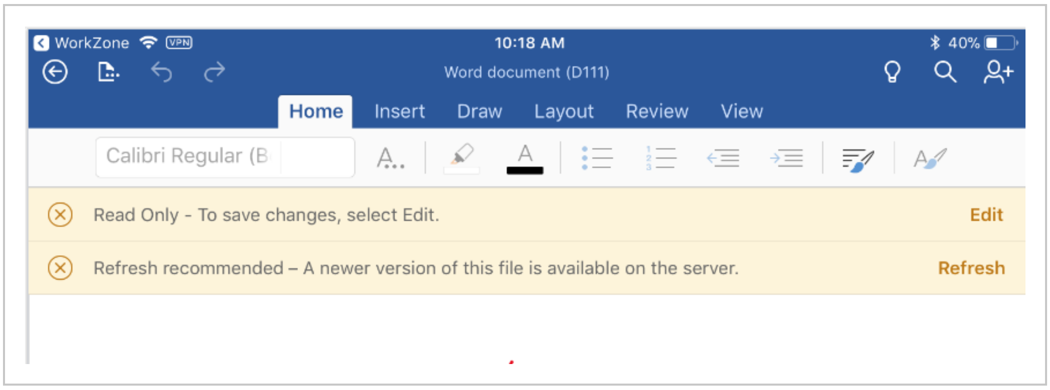
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

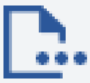
Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE _Mobile

2021.3

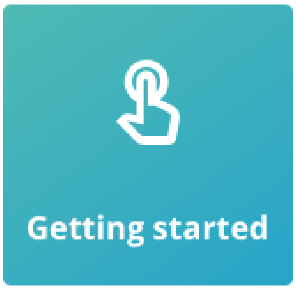
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ( )

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

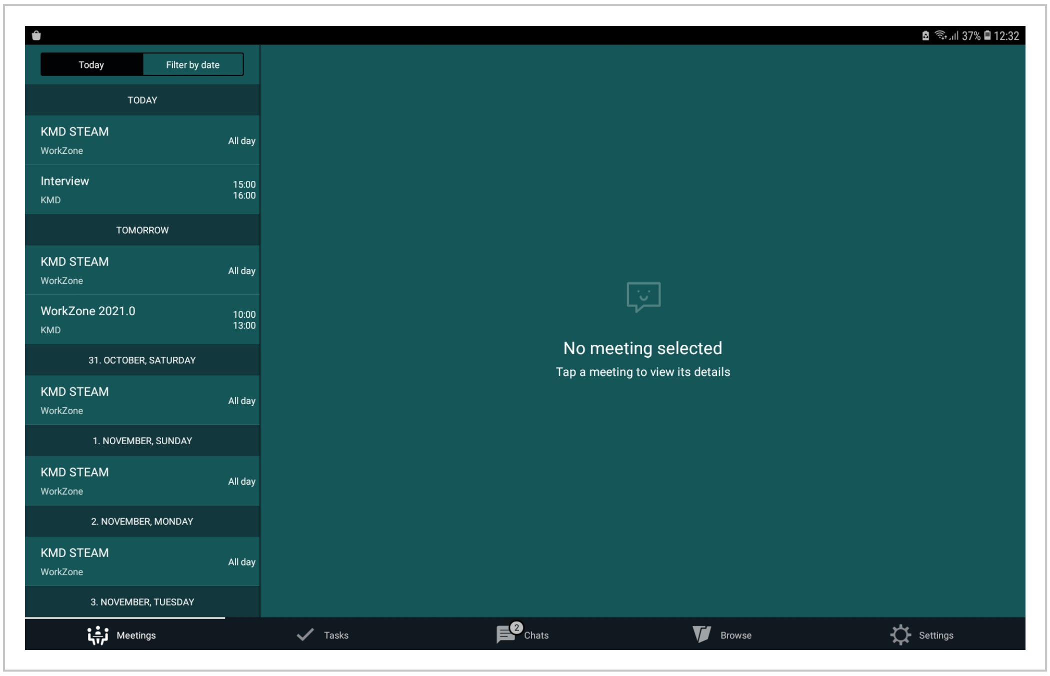
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

Prerequisite: WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

Prerequisite: WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

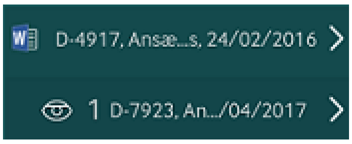
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

Important:

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
   - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

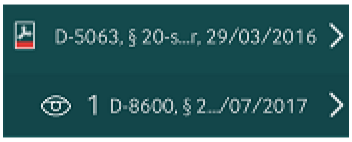
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries].

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

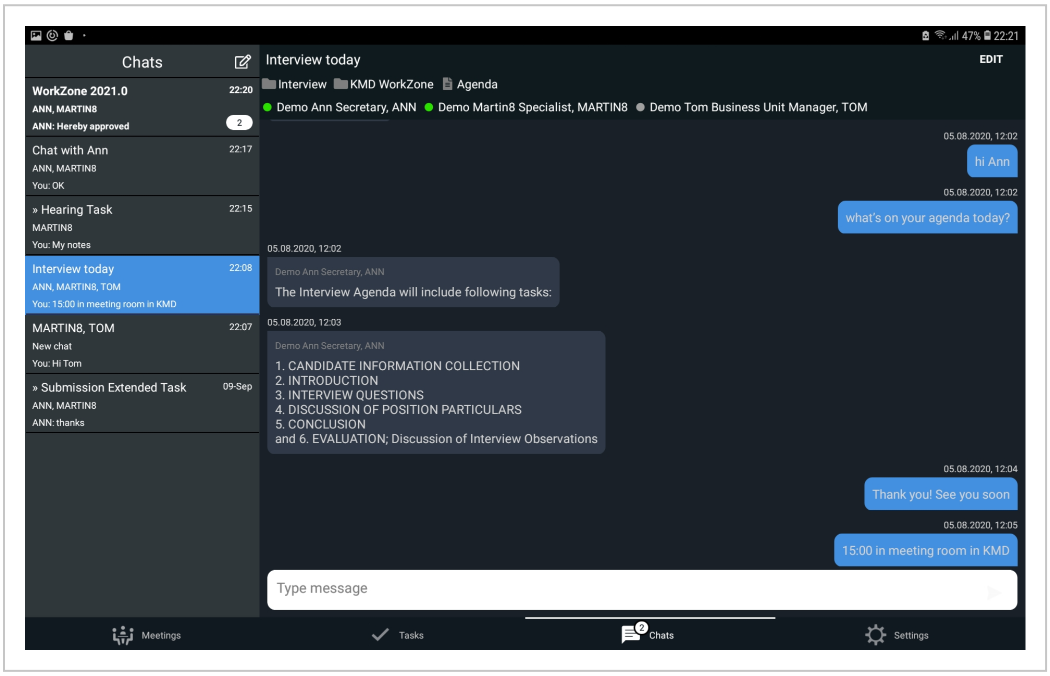
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See [Feature Settings]() in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See [WorkZone Client User Guide]() for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

> **Tip:**
>
> - If a chat about this process task already exists, it will be opened instead.
> - You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
> - If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.
    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap ⊖ next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

    - For documents:

        a. Tap the document title to open it in a preview mode.

        > **Tip:** Tap and at the top to view the previous or the next document on this chat.

        b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

    - For cases:

        a. Tap the case title to open its details.

        > **Tip:** Tap and at the top to view the previous or next case on this chat.

        b. Under **Documents**, you can view documents on this case (if there are any).

        > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

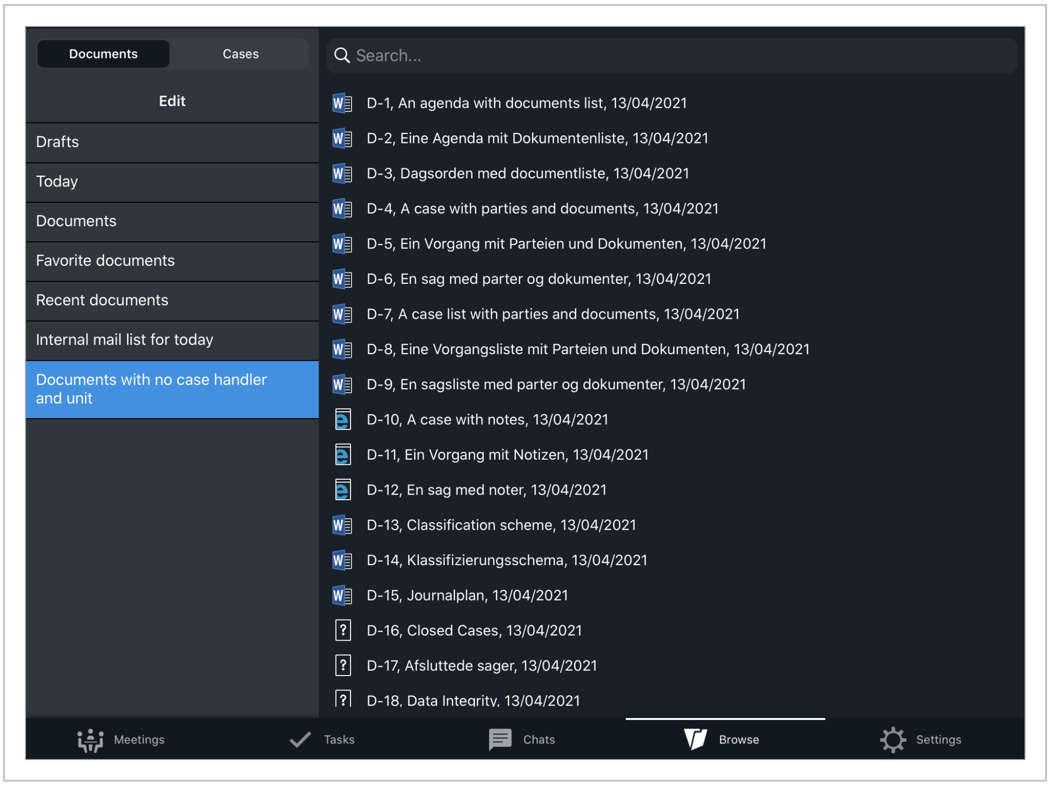
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
    - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
    - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

    > **Tip:**
    >
    > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
    > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
    >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
    >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:
   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

  > **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

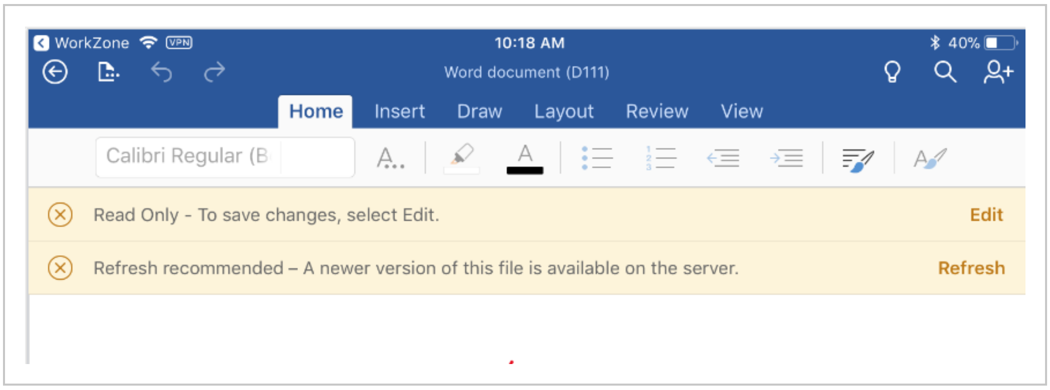
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

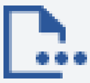
Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap  > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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KMD WORKZONE

_Mobile

2021.3

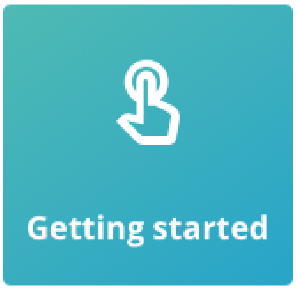
User Guide

Contents

WorkZone Mobile 2021.3

WorkZone Mobile gives you easy access to your WorkZone cases, documents, tasks, and meetings on your mobile device. This User Guide covers the iOS and Android versions of WorkZone Mobile.

Guidelines which apply only to iOS or Android version, are indicated with the (iOS) and (Android) icons.



FAQ

What happens if I am working offline?

You can perform a task even if you are offline. Such tasks are saved under **Unsent Tasks**. When you are online again and pull to refresh, the unsent tasks are sent.

Related product documentation

- WorkZone Process User Guide
- WorkZone for Office User Guide
- WorkZone Client User Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

No changes in this release.

This was new in WorkZone Mobile 2021.2

Browse using your WorkZone lists

You can now navigate in the Browse module using your predefined and custom WorkZone lists, and arrange them according to your needs. See Customize your displayed lists and Search for cases and documents.

This was new in WorkZone Mobile 2021.1

Navigate to a case from a document

From documents opened from the Browse module or from a chat, you can now navigate to the related case and view its details. See View details for chat documents and cases and View document details.

Work with your delegated tasks

If you are a delegate for any user, you can now switch to this user's task list and work with their tasks. See Work with your delegated tasks.

Custom filters for tasks

On your task list, you can now apply custom filters that are available to you. Custom filters are saved search lists created in the WorkZone OData QueryBuilder. See Filter your tasks using custom filters.

This was new in WorkZone Mobile 2021.0

New Browse module

- You can now browse through all cases and documents that are available to you in WorkZone from your mobile device. You can search for cases or documents, view their metadata, view existing documents on the selected case, preview, and edit

selected documents (only editable documents). See Browse WorkZone cases and documents.

Chat enhancements

- You can now create new chats directly from the **Chats** module. See Create a new chat (without a task).
- You can now view and edit case documents (if they are editable), and view case metadata for the cases on your chats. See View details for chat cases and documents.
- You can edit documents on your chats. See Edit a chat document.

UI improvements

- **Help** button is now located under **Settings**.

This was new in WorkZone Mobile 2020.3

Chat enhancements

- You can now preview documents on your chats. See Preview chat documents.
- You can view metadata for the documents on your chats. See View chat documents metadata.
- You can see if the users in your chats are currently online or offline. See View your chats.

This was new in WorkZone Mobile 2020.2

Log on to WorkZone Mobile using OAuth2

If your organization is using OAuth2 for user authentication, you can log in on WorkZone Mobile using OAuth2. See Log in and out.

Work with WorkZone chats

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats about existing processes from the related tasks, and add or remove chat participants. See Work with chats.

Task view improvements ( )

- Rank your tasks in the order you want them to be processed. See Rank your tasks.

Conflict notification for simultaneously edited PDF documents

If multiple users edit the same PDF document simultaneously, the second user will receive a document conflict notification with options to discard their changes or to overwrite changes made by another user. See Annotate PDF documents.

This was new in WorkZone Mobile 2020.1

- Bug fixes.

This was new in WorkZone Mobile 2019.3

Improved navigation

- The navigation pane is now displayed at the bottom of the screen. Tap a module to work with it.
- The **Log out** button is now found under **Settings**.
- Documents now open in the full screen.

Task view improvements

- Tap **Rank** at the top of your task list to sort tasks by their rank. See Rank your tasks.

- When viewing documents on a task, tap the and buttons to open the previous or next document on this task, or swipe to open the previous or next page of the document. See View documents.

This was new in WorkZone Mobile 2019.2

Bug fixes

You can define number of lines to display titles of meetings and tasks. See Set up WorkZone Mobile.

This was new in WorkZone Mobile 2019.1

Bug fixes

- Incorrect messages appear in the **Login** screen when you tap **Return** in the **Server** field and the **User name** field when using the keyboard – Corrected.

Support for password change

If your password expires while you are working in WorkZone, the **Log in** page will open, and after entering your new password, you can continue your work. See Log in and out.

This was new in WorkZone Mobile 2018.2

- When you have responded to a task, the next open task is now displayed automatically. See Work with tasks.
- Performance improvements.
- Bug fixes.

This was new in WorkZone Mobile 2018.1

- Bug fixes.

This was new in WorkZone Mobile 2018

- This is the first version.

General information

Getting started

Log in and out on WorkZone Mobile.

- View your upcoming WorkZone meetings (created in Outlook using WorkZone for Office or WorkZone 365).
- Tap in the navigation pane a module to work with. For example, tap **Tasks** to view a task list. Tasks are marked according to deadlines and priorities.

On a meeting, you can:

- Tap a meeting to view its details.
- In the meeting details, view information about date and time, location, attendees, agenda items, and attachments.
- View documents attached to a meeting. In the meeting details, tap a document to view it.
- Work with meetings. In the document viewer, tap **Edit** to edit the document.
- Annotate PDF documents, for example, PDF, MSG, PNG, and JPG in PDF format. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- Work offline.

On a task, you can:

- Tap a task under **UNSENT**, **OPEN**, **UPCOMING**, or **CLOSED** to view the task details.
- In the task details, view process information, such as the case number, the case handler, who started the process, the task and process deadlines, and other information.
- only: View task with its attached documents in a single PDF file. In the task, tap .

- View the documents attached to the process. In the task details, tap a document to view it.
- Add or remove documents to or from tasks.
- Work with tasks. In the document viewer, tap **Edit** to edit the current document.
- Annotate PDF documents. In the document viewer, tap **Edit** to edit the document.
- Export documents to other apps for editing. In the document viewer, tap **Share** and select an app.
- See who did what and when under **Process log**.
- Respond to a task using the response buttons.
- Create a new chat (from a task) or Reply in a chat to discuss this task.
- Work offline.
- only: Receive notifications when a task has changed or you get a new task.

Note: You may need to download and install a document viewer from App Store (for) or Google Play (for) to view certain document formats.

Set up WorkZone Mobile.

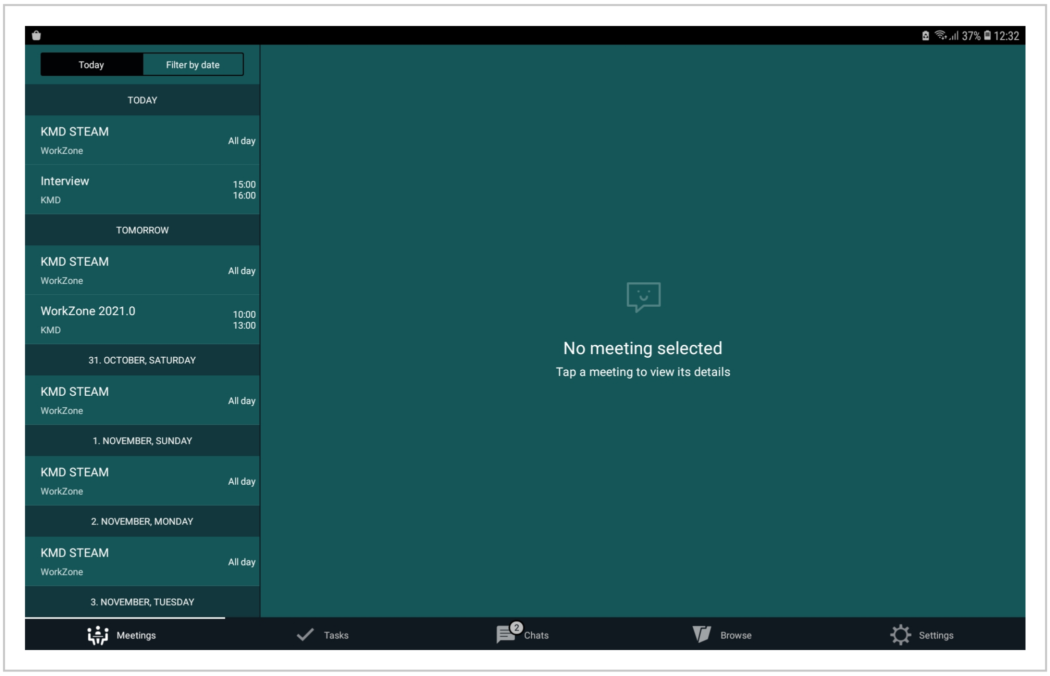
View your existing WorkZone chats and reply to them, or create new chats from the related tasks. See Work with WorkZone chats.

Use WorkZone Mobile

When you start WorkZone Mobile the first time, your meeting list is displayed. If you do not have WorkZone Meeting installed, your task list is displayed.

How do I navigate?

The navigation pane is available at the bottom of the screen. Tap **Meetings**, **Tasks**, **Chats**, **Browse**, or **Settings**, depending on what you want to do.



How do I refresh lists?

Pull down to refresh the meeting and task lists.

Log in and out

Log in

After launching WorkZone Mobile, the **Log on to WorkZone Mobile** page is displayed.

- If your organization is using OAuth2 for user authentication, you will be prompted to the **Allow WorkZone to access your contacts** screen, where you must select **Allow**. Then you will be prompted to a separate web screen where you can provide your WorkZone user name and password. After that your password will be auto-filled for WorkZone Mobile. If you have problems with signing in, see OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt.

1. Enter the URL of WorkZone in the **Server** field, and tap **NEXT**.
2. In the **Sign in** dialog, enter your user name in the **User name** field and your password in the **Password** field (typically, it is the same as your network user name and password), and tap **LOG IN**.

Password expiration

At login

If your network password has expired, the error message "Wrong user name or password" appears when you try to log in to WorkZone. Change your network password, and then enter your new password in WorkZone.

While you work

If your network password expires while you are working in WorkZone, the error message "Something is wrong. Please re-enter your password to continue using WorkZone" will appear. Tap **OK** and the **Log in** page opens. Change your network password, and then enter your new password in WorkZone to continue working where you left off.

Log out

1. Tap **Settings**.
2. Tap **Log out**.

- For devices using OAuth2 authorization, you will be prompted to a logout web screen. Tap the provided link to return to the WorkZone Mobile app.

Work offline

You can view meetings and perform tasks even if you are offline. Tasks are saved under **UNSENT TASKS**. Your unsent tasks will be sent as soon as you are online again.

Refresh the meeting list after being offline

If you have been offline, pull to refresh the meeting list when you are online again. This action will update meetings that have been changed while you have been offline.

Filter meetings on a date

You need to be online to filter your meetings by a specific date in the past. While offline, you can see past meetings, but only if they were loaded while you were online.

WorkZone Mobile stores meetings offline from the date you selected when you were online and 6 days forward as well as future meetings.

Changed connection state while working on a task

If the connection to the server changes from online to offline and vice versa while you are working on a task, you are notified and asked if you want to reload the task.

- If you tap **Yes**: The task is reloaded and you will lose any unsaved work (for example, comments), and you will not be able to edit documents or actors.
- If you tap **No**: You can still continue working on the task and reply using the response buttons.

Set up WorkZone Mobile

You can set up WorkZone Mobile by tapping **Settings** in the navigation pane.

View release and login information

On the settings page, you will find information about WorkZone Mobile release number and login information.

> **Tip:** If you contact KMD support regarding an issue with WorkZone Mobile, please include a screenshot of this information.

Automatic error reporting

Enable this setting to report errors automatically. Reported errors do not contain any personal data.

Edit meeting documents

Select the default document editing behavior of meeting documents. You can choose to edit the original document or create a copy for editing when you tap the **Edit** button in the document viewer.

Select **Always ask** to choose between the options when you tap the **Edit** button.

Checkout time for documents

The amount of time allotted for a document to be checked out for editing outside WorkZone Mobile. This setting apply when you open a WorkZone document for editing in a third party app.

The checkout time is reset every time you make changes to a document, and when a document is saved automatically by an app.

The default checkout is 30 minutes.

> **Example**: You open a Word document. The document is checked out, and the checkout time is started. After 30 seconds, the document is autosaved by Word. The checkout time is reset. After 15 minutes you close Word, and after 15 minutes the document will be checked in.

Number of lines displayed in title

If titles of your tasks and meetings are long and do not fit in one line, you can increase the number of displayed lines. To do this, tap . To decrease number of displayed lines, tap .

Show closed tasks

Select if you want to see the closed tasks in your task list. This option is enabled by default.

Keep closed tasks

This option is only selectable, if **Show closed tasks** setting is enabled. Select for how many days or weeks you want to keep the closed tasks in your task list. The default selection is 2 days.

View online help

Click **Help** to open the WorkZone Mobile User Guide.

Work with meetings

> **Prerequisite:** WorkZone for Office/WorkZone 365.

You can view your WorkZone meetings created in Outlook using WorkZone for Office or WorkZone 365 (either the desktop application or the web version).

WorkZone Mobile opens with a list of today's meetings at the top, followed by tomorrow's meetings and future meetings. You can also tap **Filter by date**, and then select a specific date to view meetings 7 days forward from the selected date.

- Tap a meeting to view its details.
- Pull to refresh the meeting list and view meetings that were created or modified after you logged in (or after your last refresh).

View documents

> **Prerequisite:** WorkZone PDF.

Meetings may have documents attached to the agenda items.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

Annotate PDF documents

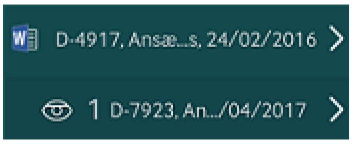
You can annotate PDF documents. The maximum size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**

- You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
- If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the document you want to annotate.
2. In the document viewer, tap **Edit** to annotate the document in PDF format. A PDF copy of the document is created and opens in the PDF editor.
    - If the original document is a PDF document, you can choose to annotate the original document or create a private copy for annotation. The copy is only visible to you.
3. In the PDF editor, tap **Edit** to open the toolbar with different annotation options. Tap a button in the toolbar, and then tap a place in the document where you want to add annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.
5. Tap **BACK** to return to the meeting.

The document copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler. You can see it on the meeting under the original document.



- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed, you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

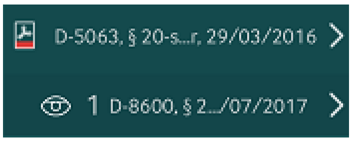
The copy is saved on the agenda item on the meeting case in WorkZone with you as the case handler.

Note:

- You can only create one copy of a document. Next time you want to annotate the document, the existing copy will be used. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- You cannot create a copy of a copy.

If the document is not an Office document, you can annotate a PDF copy of the document, see Annotate PDF documents, or you can export the document to a relevant app for editing. See Share documents using other apps.

See also FAQ.



Note:

- You can only create one copy of each document. The next time you want to annotate the document, your existing document copy will open. Only if you have changed the state of the copy to **Locked** or **Archived** in WorkZone Client, a new copy will be created.
- The icon indicates the number of employees who can access your document copy. By default, only you will have access to your document copy. If needed,

you can open your document copy in WorkZone Client and give other employees access to it. See Manage access rights in the WorkZone Client User Guide.

Share documents using other apps

1. Tap the document that you want to export.
2. In the document viewer, tap **Share** and then select a relevant app.

The selected app opens a copy of the document. You cannot save the document back to WorkZone.

Work with tasks

When you have received a task in WorkZone Mobile, you can respond to it. Depending on the type of task, you can, for example, Accept, Forward, Skip, Approve or Reject, or confirm the task.

Before you respond, you can edit the documents on a task, add or remove documents and actors, write a comment. You can also Rank your tasks, or Create a new chat (from a task) to discuss this task process with relevant people.

If you are a delegate for any user, you can switch to this user's task list and Work with your delegated tasks.

View a task

1. Tap **Tasks** in the navigation pane to view a task list.
2. Tap a task to view or edit its details.
3. Tap a response button to respond to a task or make changes to a task or its documents.

Respond to a task

These are examples of how you can respond to tasks of various process types.

Accept

If you accept ownership of, for example, a distribution task, you become the case handler.

Forward

If you cannot or do not want to perform a task, you can forward it to someone else.

1. Tap **Forward to**.
2. Start typing a name, and then select it from the list.
3. Tap **Forward**.

Skip

You can skip some types of tasks. If you, for example, skip a task in a submission process, the task is forwarded to the next person in the approval order.

Approve or Reject

A task may involve approving or rejecting something, for example, a document. The case handler is notified of your action, and the process can start over or move to the next phase.

OK

If you, as a process owner, receive a response to your process, you will be asked to confirm receiving the response. The user tasks are then updated in the **Processes** overview and in Outlook, and the process will be closed.

Once you have responded to a task, the next open task is displayed. If there are no open tasks, the task list is displayed instead.

Other actions on a task

These are examples of actions you can perform on a task.

Filter your tasks using custom filters

Prerequisite:

- The Custom filters functionality is supported from WorkZone Mobile version 2021.1 and forward.
- The **Custom filters** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Custom filters**). See Feature Settings in WorkZone Configurator Administrator Guide.

On your task list, you can apply custom filters that are available to you. Custom filters are saved search lists (queries) created in the WorkZone OData QueryBuilder.

Important: A saved query will become available to you as a custom filter, if it has the entity **WzpUserTasks** and has been shared with you by the filter creator (or if you are the filter creator).

See WorkZone Process Administrator Guide for more information about [creating, editing, and sharing queries]().

- By default, no filters are applied.
- If there are no filters available to you, the button will not be displayed.

1. Tap at the top of the task list.
2. From a list of available custom filters, tap the filter you want to apply.

   -Or-

   To remove the existing filter, tap **No filter**.
3. Tap **Done** on , or **OK** on . The selected filter is applied.

> **Important:** You will only see the tasks assigned to you.

Work with your delegated tasks

> **Prerequisite:**
>
> - The Delegated tasks functionality is supported from WorkZone Mobile version 2021.1 and forward.

- The **Delegated tasks** feature must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Task > Delegated tasks**). See Feature Settings in WorkZone Configurator Administrator Guide.

If you are a delegate for another user, you can switch to this user's task list and work with their tasks. See WorkZone Client User Guide for more information about delegates.

- You can only work with one task list (your tasks or another user's task) at the same time. By default, your own tasks are displayed.
- The **My tasks** option will only appear, if you are a delegate for at least one user.

1. Tap **My tasks** at the top of the task list.
2. From a list of users that you are a delegate for, tap the user whose tasks you want to work with.

   -Or-

   To switch back to your own tasks, tap **My tasks**.
3. Tap **Done** on , or **OK** on . The task list for the selected user is then displayed.

Rank your tasks

Prerequisite: WorkZone Process 2019.3 or later.

When a new process is started, user tasks are automatically assigned the next available ranking. Tap **Rank** at the top of your task list to sort your tasks by their rank assigned in WorkZone Client. See WorkZone Client User Guide for more information about task ranks.

You can change ranking for your tasks to define the order in which you want them to be processed.

Important: You cannot change ranking for a pending task.

1. Tap **Rank** at the top of the task list.
2. Tap **Edit**.
3. Tap and hold the task you want to reorder, and then drag and drop it as needed.
4. Tap **Save changes**.

View task documents

> **Prerequisite:** WorkZone PDF.

Most tasks have attached documents.

- Tap the document title to view its content.

The document opens in PDF format. Documents that cannot be converted to PDF cannot be previewed.

- From the document view, tap and at the top to open the previous or the next document on this task.
- Swipe up and down to open the previous or next page of the currently opened document.

Add or remove documents

1. Tap **Edit**, and then tap:

Search	Search in all documents on the current case and add documents.
Add	Add a document from your device. You can: • Browse and add documents from the device. • Take a photo with your camera and add it to the task. **Note:** You can only add documents when you are online.
Filter	Apply filters on your documents (not archived or closed) and add doc-

	uments. If you have added archived or closed documents to your **Favorite documents**, they will appear when you apply this filter. Note that this option only applies to extended processes.
Delete	Remove documents from the task.

2. Tap to return to the task, and then save or cancel your changes.

Annotate PDF documents

You can annotate PDF documents. The size of PDF documents that can be annotated depends on your organization's capacity and the network connection.

> **Important:**
>
> - You will not be able to save changes made to a large PDF document. If you try to save changes and the "Uploading 0 of 1" message is displayed in the status bar for a long time, close and delete the app, and then install it again.
> - If another user edits and saves the same PDF document before you could save your changes, you will receive a document conflict notification with options to discard your changes or to overwrite changes made by another user. If draft versioning functionality is enabled for your organization, you can always view and restore any previous document versions in WorkZone Client. See WorkZone Client User Guide for more information about draft versioning.

1. Tap the PDF document you want to annotate.
2. In the document viewer, tap **Edit**. The document then opens in the PDF editor.
3. In the PDF editor, tap **Edit** to open a toolbar with different annotation options. Tap the needed button in the toolbar, and then tap at the place in the document where you want to add an annotation. For example, tap **Sticky note** to add a sticky note to a specific section in the document. See Use PDF editor (Android version).
4. Add your annotations, and then tap **BACK**. You can now save or cancel your changes.

Share documents using other apps

1. Tap the document you want to share.
2. In the document viewer, tap **Share** and select a relevant app.

Add or remove actors

1. Tap **Edit**, and then tap:

Search	Search for employees and units that have email information registered, and add them as actors.
Actor sequence	Search in actor sequences and add sequences. Note that this option only applies to extended processes.
Delete	Remove actors.

2. Tap to return to the task and save or cancel your changes.

Change order of documents and actors

1. Tap **Edit**, and then tap **Change order**.
2. Drag a document or an actor to a new position to change the order of, for example, documents and approvers in a submission task.

About task deadlines and priorities

The tasks on the task list are marked according to their deadlines and priorities. By default, the tasks are sorted by deadline. Tap **Priority** or **Updated** at the top of the list if you want to sort the tasks by priority or their last updated date.

Deadlines

A task is marked with a colored bar to the right:

- Green – The process is in progress.
- Yellow – The process deadline is close.
- Red – The process deadline is overdue.

Deadlines are shown next to the tasks. Open a task to view more information about its deadline.

Priorities

- An exclamation mark "!" indicates that this task has high priority.
- A bullet "•" indicates that this task has low priority.

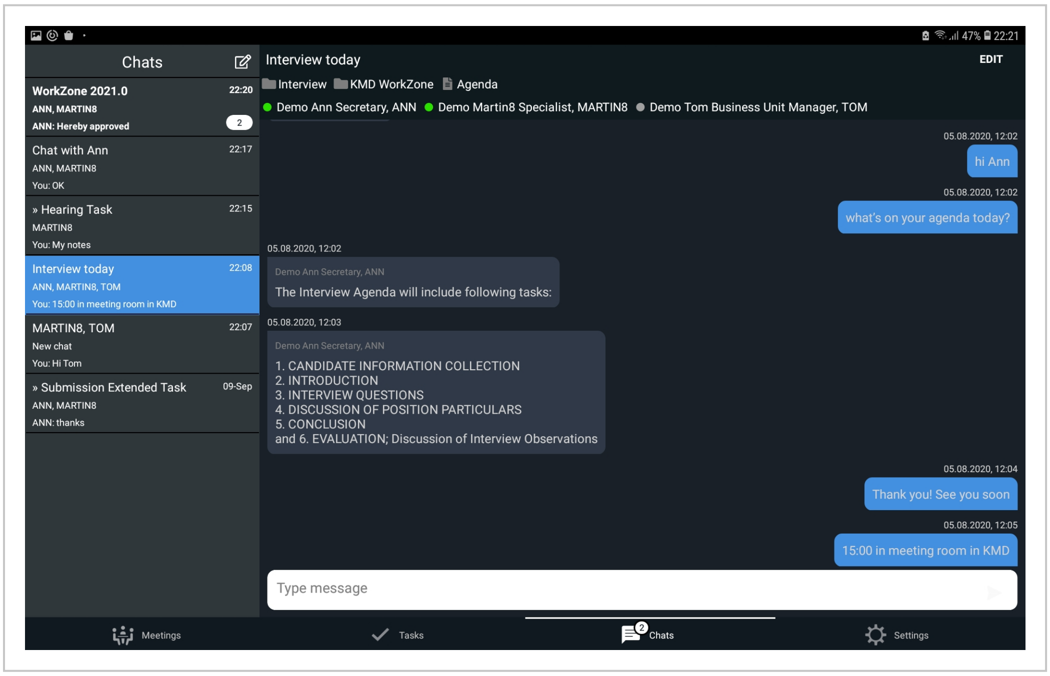
Note: Only extended processes can have priorities.

Work with WorkZone chats

Prerequisite:

- Chat functionality is supported from WorkZone Mobile version 2020.2.
- The **Chat** module must first be enabled by your administrator in WorkZone Configurator, both for WorkZone Client (**Configurator** > **Global** > **Feature Settings** > **WorkZone Client** > **Chat**) and WorkZone Mobile (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Chat**). See Feature Settings in WorkZone Configurator Administrator Guide.

In WorkZone Mobile, you can view your existing chats and reply to them, create new chats, manage chat references (add or remove cases, documents and participants), preview and edit chat documents (only editable documents), navigate to related cases, and view metadata for chat documents and cases. See WorkZone Client User Guide for more information about chats.



View your chats

1. Tap **Chats** in the navigation pane to view the list of chats where you are either the creator or a participant. Your chats will be sorted by the dates they were last

updated.

2. Tap a chat to open it. In the chat, you will see chat details such as participants, references, and messages.

> **Tip:**
>
> - A number on the **Chats** icon in the navigation pane indicates how many unread messages you have across all of your chats.
> - A number on a particular chat in the chat list indicates how many unread messages you have in this chat.
> - A green dot next to a chat user name indicates that this user is currently online. A grey dot indicates that this user is offline.

Reply in a chat

1. Tap **Chats** in the navigation pane.
2. Tap the chat you want to reply to.
3. Type your message in the input field, and tap or .

> **Tip:** You can continue writing your chat messages while you are offline. They will be sent automatically, once you are online again.

Create a new chat (from a task)

1. Tap **Tasks** in the navigation pane.
2. Tap the task that you want to create a chat for.
3. Tap at the top right corner. A new chat about this task is created. Task case and task documents will automatically be added as chat references.

Tip:

- If a chat about this process task already exists, it will be opened instead.
- You can add or remove chat cases, documents, or participants as needed. See Manage chat references.
- If the task case or task document is protected by an access code, only users who have this access code will be able to see this case or document in the chat references.

Create a new chat (without a task)

1. Tap **Chats** in the navigation pane.
2. Tap in the **Chats** list (top left corner of the screen). You are then prompted to add chat participants.
3. Add chat participants, and tap **Done**. The new chat is then created.
4. Optionally, tap **Edit** to add chat cases and documents. See Manage chat references.

Manage chat references

You can add or remove chat cases, documents, or participants in your chats.

- You must be online to add or remove chat cases, documents, or participants.

1. Tap the chat in which you want to add or remove documents, cases, or participants.
2. Tap **Edit** under the chat title.
3. Select the case, document, or user you want to add or remove.

    - To add: Tap **Add participant**, **Add document**, or **Add case**, and then type the name of the case, document, or user to add.

- To remove: Tap next to the existing case, document, or user to remove them from the list.

4. Tap **DONE**.

Preview a chat document

1. Tap the chat with the document you want to preview.
2. Tap the document title to preview its content.

> **Tip:**
>
> - Tap and at the top to open the previous or the next document on this chat
> - Swipe up and down to open the previous or next page of the document.

3. Tap **Back** to close the preview and return to the chat.

Edit a chat document

- You must be online to edit chat documents.

1. Tap the chat with the document you want to edit.
2. Tap the document title.
3. Tap at the top right corner to edit this document.

> **Note:** You might need to install a corresponding Microsoft Office app to edit some document formats.

4. Save your changes, and tap **Back** to return to the chat.

View details for chat documents and cases

You can view details of the documents and cases on your chats.

1. Tap the chat with a document or a case.

   - For documents:

     a. Tap the document title to open it in a preview mode.

     > **Tip:** Tap and at the top to view the previous or the next document on this chat.

     b. Perform the needed action:

        - To view document metadata: Tap at the top right corner. Document metadata is displayed. Tap to return to the document preview.
        - To edit this document: Tap at the top right corner.
        - To view related case: Tap at the top right corner. Tap **Back** to return to the opened document.

   - For cases:

     a. Tap the case title to open its details.

     > **Tip:** Tap and at the top to view the previous or next case on this chat.

     b. Under **Documents**, you can view documents on this case (if there are any).

     > **Tip:**

> - Tap a document to preview it, edit it, or view its metadata.
>
> -Or-
>
> - Tap **Metadata** to view metadata of this case (you must be online to view case metadata).

2. Tap **Back** to return to the chat.

Browse WorkZone cases and documents

Prerequisite:

- Browse functionality (currently available in experimental mode) is supported from WorkZone version 2021.0.
- The **Browse** module must first be enabled by your administrator in WorkZone Configurator (**Configurator** > **Global** > **Feature Settings** > **WorkZone Mobile** > **Browse**). See **Feature Settings** in WorkZone Configurator Administrator Guide.
- You must be online to use the **Browse** module.

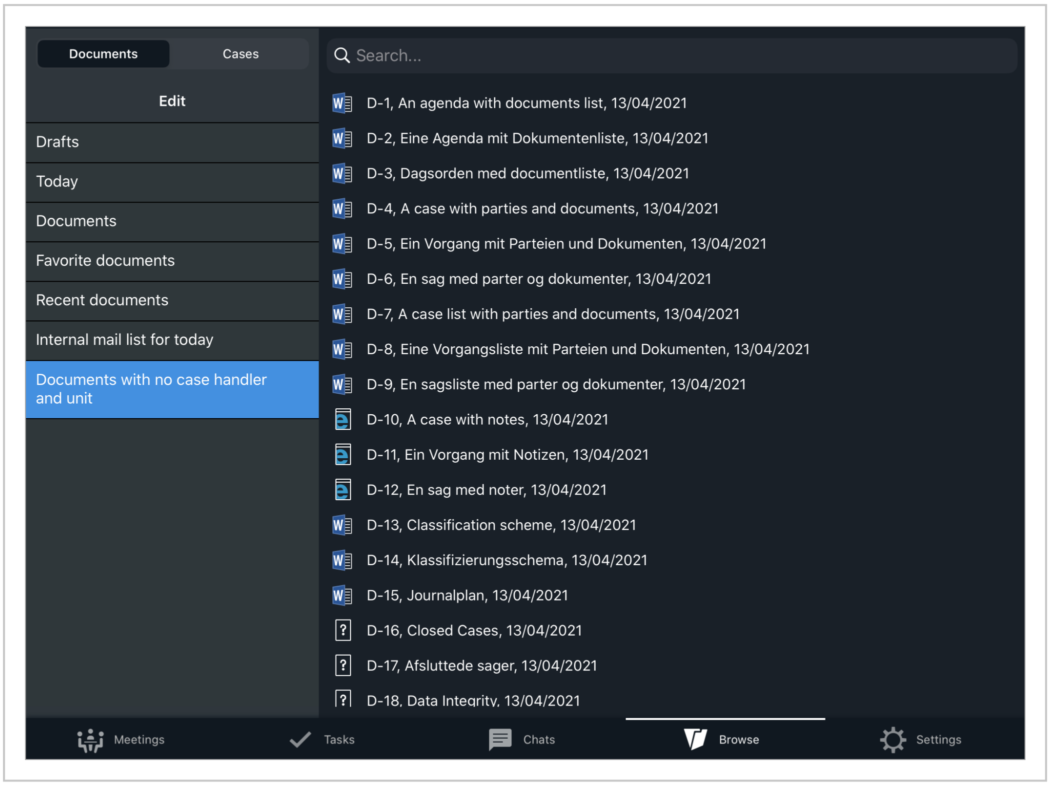
You can quickly browse through your case lists or documents lists (that is, your WorkZone lists, including predefined filters and custom filters) and view their items. See User Guide for WorkZone Client for more information about WorkZone lists.

You can search for cases and documents available to you in WorkZone and view their details.

- For cases: You can view documents on the selected case, preview or edit their content (for editable documents), view their metadata, and view metadata of the case itself.
- For documents: You can preview or edit the documents (if they are editable), view their metadata, and navigate to the related cases to view their details and metadata.

Important:

- To edit some document formats, you might need to install a corresponding Office app.
- Regular WorkZone access restrictions will apply: you will only see and be able to edit the items you have access to.



Search for cases and documents

You can search for WorkZone cases and documents, and view their content and details.

1. Tap **Browse** in the navigation pane.
2. Tap the needed tab (**Documents** or **Cases**). A list of your WorkZone lists of documents or cases (depending on the selected tab) is then displayed, including your predefined filters and custom filters.
3. Tap the needed list to see its items.

> **Tip:** For lists with many items, use the search bar to find a document or a case within that list.

4. Tap a case or a document to view its details and references. See View case details and View document details.

Customize your displayed lists

You can customize which WorkZone lists will be displayed when you open the Browse module, or rearrange their order.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** or **Documents** tab.
3. Tap **Edit**. A list of your existing WorkZone lists is then displayed, divided into two sections:
   - **Selected filters**: shows your WorkZone lists that are currently selected to be displayed by default.
   - **Search results**: shows predefined or custom filters (depending on the selected tab) that you can select to be displayed when you open the Browse module.
4. To add or remove a list from your currently selected filters, or change the order or your displayed lists, Tap and hold ☰ next to a list, and drag and drop it to a new position.

   > **Tip:**
   >
   > - Double-tap a list to move it from **Selected filters** to **Search results** or the other way.
   > - Tap **Predefined filters** or **Custom filters**, and then type a search request into the search bar to search for a specific predefined or custom filter.
   >   - Predefined filters are your WorkZone lists automatically set up by your organization. Searching for predefined filters is case-sensitive.
   >   - Custom filters are your WorkZone lists, including saved searches, created in WorkZone Client. Searching for custom filters is case-insensitive.

5. Tap **Done** to save your changes, or **Cancel** to discard them.

View case details

In the **Browse** module, you can view cases that are available to you and their metadata, view documents on the selected cases, preview or edit their content (for editable documents), and

view document metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Cases** tab. A list of WorkZone case lists that are available to you is then displayed.
3. Tap the needed case list, and select the needed case. Search for cases and documents, if needed.
4. Tap **Documents** to see all documents (available to you) on this case.

> **Tip:**
>
> - Tap a document to preview it, edit it (if the document is editable) or view its metadata. See steps 4-5 in View document details.
> - Tap **Metadata** to view the metadata of this case.

5. Tap **Back** to return to the selected case list.

View document details

You can preview WorkZone documents that are available to you, edit them (for editable documents) and view their metadata, as well as navigate to the related cases and view their details and metadata.

1. Tap **Browse** in the navigation pane.
2. Tap the **Documents** tab. A list of WorkZone document lists that are available to you is then displayed.
3. Tap the needed document list, and select the needed document. Search for cases and documents, if needed. The document is then opened in a preview mode.
4. Perform the needed action:

   - To view the metadata of this document: Tap at the top right corner. Tap to return to the document preview.

- To edit this document (if the document is editable): Tap at the top right corner.

  > **Note:** You might need to install a relevant Office app to edit some document formats.

- To navigate to the related case and view its details and metadata: Tap at the top right corner.

5. Tap **Back** to return to the **Documents** tab.

Use PDF editor (Android version)

Use the PDF editor to annotate PDF documents.

- In the document viewer, tap **Edit** to open the PDF editor.

You can search for text in the document and see the outline and annotations for quick navigation.

- Tap **Edit** to display the annotation toolbar.

The toolbar lets you add different types of annotations in your PDF document. Tap the tool that you want to use, and then tap the position in the document where you want to make an annotation.

	Add a sticky note.
	Highlight text. Tap and drag over the text.
	Strike out text. Tap and drag over the text.
	Underline text. Tap and drag over the text.
	Squiggly line. Tap and drag over the text.
	Add a signature.
	Draw free hand.
	Erase what you have drawn in free hand.
	Write text.
	Draw arrows.
	Draw lines.
	Draw ellipses.
	Draw rectangles.

	Select an area.
	Close the toolbar.

FAQ

This section contains a list of frequently asked questions (FAQ) and possible solutions for WorkZone Mobile.

App might become unstable on devices where the default language is not English or Danish

Workaround

If possible, change your device's default language to English or Danish.

OAuth2 authentication mode – Cannot sign in to the WorkZone Mobile app via the Chrome login prompt

Your credentials are valid, but you get the authentication error message "Wrong user name or password". This is a Google Chrome redirect issue.

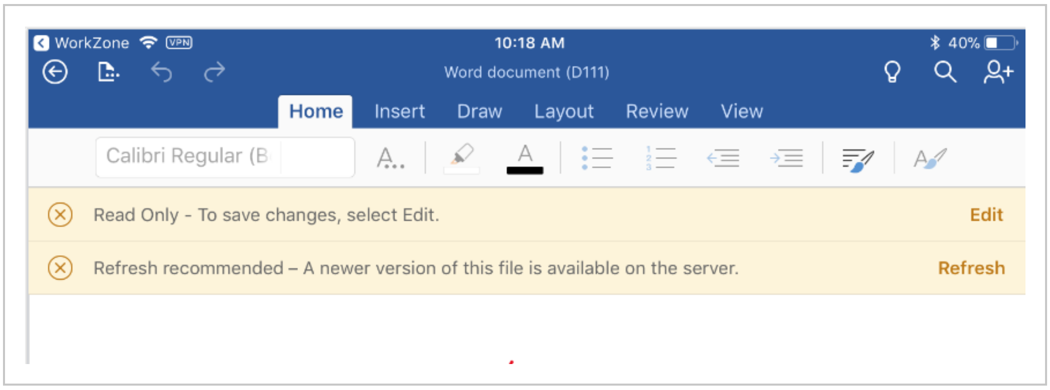
Workaround

Tap **BACK** or close the browser. You will be signed in to WorkZone without reentering your credentials.

Office 365 messages in WorkZone Mobile

The following messages may appear at the top of the screen in Office 365 when you open documents for editing from WorkZone Mobile. Click relevant message below to get additional information about the message and how to continue.

> **Example**: Office messages in Word



Tip:

- Tap **Recent** in your Office application to see the state of documents that you have opened recently. For example, you can see if a document is uploaded or downloaded correctly. A warning is shown if there are issues with the document.
- Please also refer to the Office Help for information. Open a document in the Office app, and then tap > **Help and Support** to open the Office Help.

Refresh recommended - A newer version of this file is available on the server

You are trying to edit a document which is open on another client (phone, tablet, laptop) at the same time. The document has become read-only.

How to continue

Tap **Refresh** to see the latest changes.

Can't upload – Please sign into your account

You have shut down your Office app or you have changed the language in the device settings, and the document cannot be uploaded to the WorkZone server. The document has become read-only.

How to continue

A "Can't upload – Please sign into your account" message is shown. Tap **Sign in** and open the document again in the Office app.

Can't upload – Something's wrong and your changes can't be uploaded

You are probably trying to edit a locked or an archived document. See Edit document state in the WorkZone Client User Guide.

How to continue

You can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. The copy will only be saved locally.

Can't upload – Someone else is editing this file

You are trying to edit a document that another user is already editing.

How to continue

You can wait for the other user to finalize editing and close the document or you can save a copy of the document, and then edit the copy. Tap **Save a copy** in the message. This copy will only be saved locally.

This version of Excel can't run with VBA macros

You have opened an Excel document that contains macros. Office 365 does not support macros.

How to continue

Tap **Close** in the message to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

This file has macros that won't work with this version of Word. The macros will be preserved with the file so you won't lose them

You are trying to open a Word document that contains macros. Office 365 does not support macros.

How to continue

Tap **Dismiss** to close the message. You can continue working on the document but macros are ignored. Changes will be saved.

Allow file conversion?

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Excel displays the message "To open, export to, and print certain types of files, Excel needs to convert the file using Microsoft online service." Tap **Allow** to convert the document to xlsx. You can also open the document on a desktop and save it in the xlsx format, and then add this document to a WorkZone case, task, or meeting (depending on what you are working on).

Can't open file. This file type is unsupported by this version of Office

You are trying to open a document in Excel but Excel does not support this file format.

How to continue

Tap **Close** to close the message. You can open the document on a desktop or a laptop and save it as an xlsx file, and then add this document to the case, task, or meeting (depending on what you are working on).

Read Only – To save changes, select Edit

On mobile devices, the message is shown every time you open a document.

How to continue

Tap **Edit** in the message to open the document for editing.

Read Only - Someone else has this file open. You can save changes to a copy or open the file later

You are trying to edit a document that another user has already opened for editing. The document is locked by the other user.

How to continue

Tap **Save a copy** to create a copy for editing or **Cancel** if you want to wait for the other user to finalize editing so that the document becomes editable for you. The copy is only saved locally.

Read Only – This is an older file format. Changes can only be saved to a copy of the file

You are trying to edit a document with an old document format that is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it in a new document format, such as xlsx, docx, or pptx.
3. Add the document to the case, task, or meeting (depending on what you are working on).

The Excel 95 "Workbook Sharing" was enabled on this workbook. To edit this file, save a copy (we'll remove workbook sharing)

You are trying to edit an Excel 95 document with "Workbook Sharing", which is not supported by Office 365.

How to continue

1. Tap **Cancel** in the message.
2. Open the document on a desktop and save it as an xlsx file.
3. Add the document to the case, task, or meeting, depending on what you are working on.

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