KMD WORKZONE
_for Office

2021.3

User Guide

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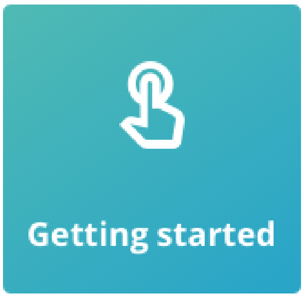


Related product documentation

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

WorkZone links

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

What's new

2021.3

No changes in this release.

2021.2

No changes in this release.

2021.1

No changes in this release.

2021.0

- You can save emails with a digital signature to WorkZone.

2020.3

WorkZone for Office supports OAuth2 authentication.

2020.2

- WorkZone Meeting functionality has been deprecated from WorkZone for Office. We have released this functionality as part of our new WorkZone 365 add-in. For more detailed information, see User Guide.
- Export to Microsoft Excel from WorkZone Client is excluded from WorkZone for Officeand, thereby, export no longer depend on the add-in. If you have some files previously exported to Excel, you still needWorkZone for Office to refresh them. See Refresh an exported list from Excel.

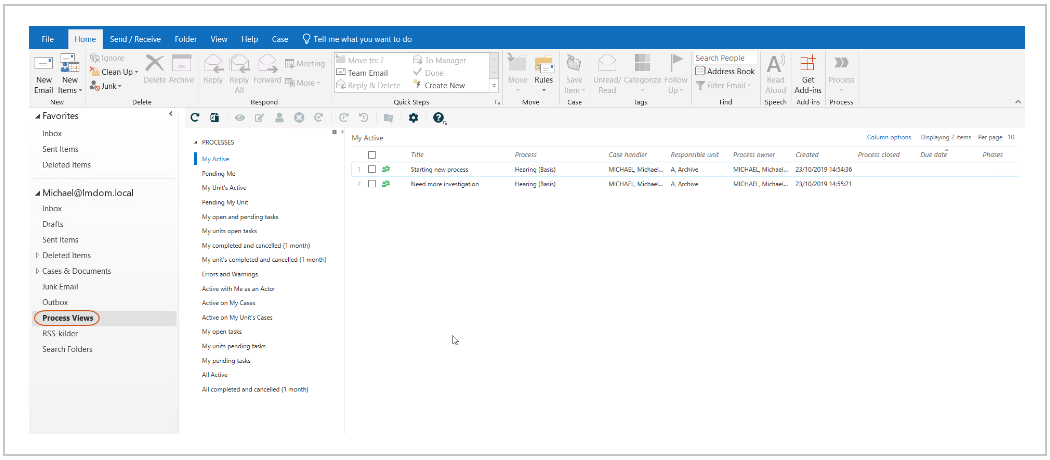
2020.1

No changes in this release.

2020.0

- The Process overview has been improved. Now you can see all lists on processes in a way they look in WorkZone Client. To do this, click **Process Views**. For more detailed information, see the WorkZone Process User Guide.

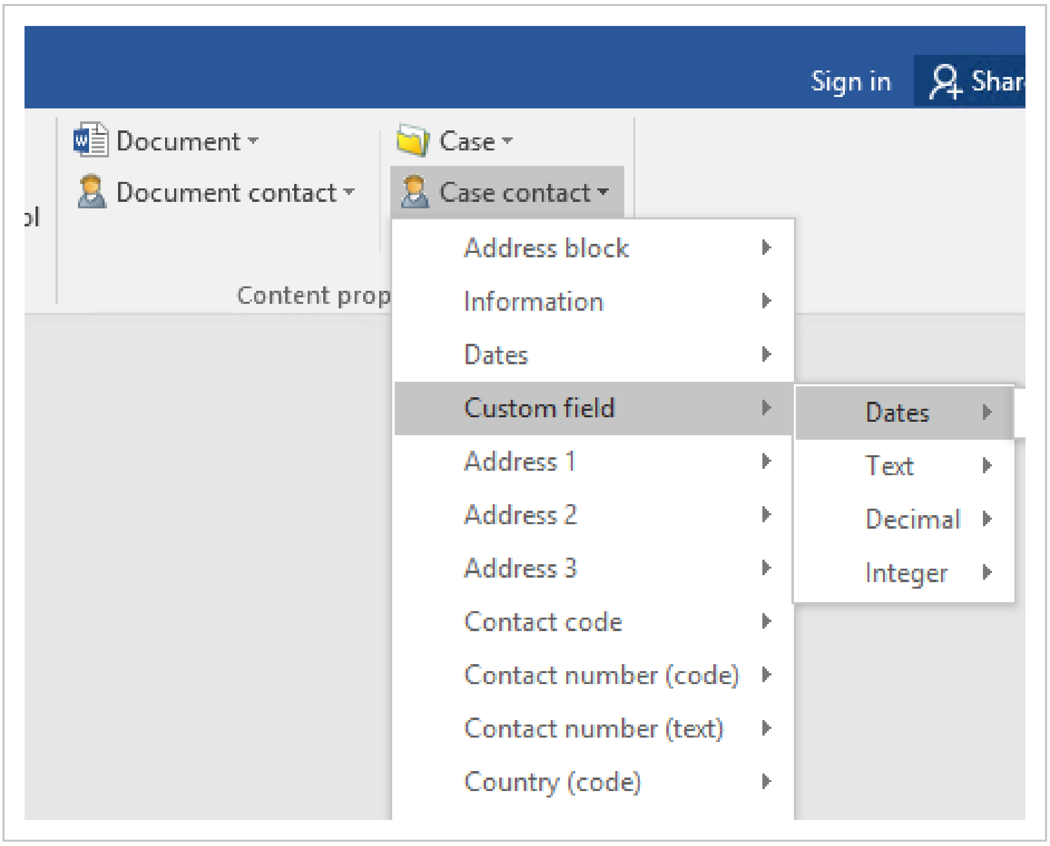
Note: If you used any process lists/folders in the previous version of WorkZone for Office, they will be preserved and will work together with the new process overview.



- A description of how to detect Captia content controls and replace them with the WorkZone content controls is added. See [Replace Captia content controls].

2019.3

- In Outlook, when you save multiple emails on a case, you can now specify the needed classification value for them.
- To start a process from an archived or locked document, you must save the document on case.
- The behavior of starting a process from a document has been enhanced. Now if you start a process from a document that contains unsaved changes, the changes will be saved automatically.
- New fields are available for merging:
    - Custom fields on case contacts
    - Custom fields on document contacts



2019.2

No changes in this release.

2019.1

- When creating a new case, you must now select a case category. **Case Category** is a new mandatory field for the **New case** dialog box, and it aims to ensure improved classification of cases.

2019.0

- WorkZone for Office now supports multiple databases. It brings a number of benefits such as workload distribution among several databases and possibility to open and view documents from a historical database.
- WorkZone Meeting is now a part of WorkZone for Office documentation. See sections WorkZone Meeting to create new WorkZone meetings, manage agenda items, and generate meeting reports.

2018.2

- WorkZone's document control has been replaced with Microsoft Office’s document management and co-authoring functionality to manage multiple users editing a document at the same time. Users can now select to work on the same Microsoft Office document (Word, Excel, or PowerPoint) concurrently and merge their changes back into the document.

  The office document is still locked by the first user who opens the document, but when the first user saves and closes the document, the document lock is passed on to the next user who can then save and merge any changes to the document.

  There are no check in/check out procedures and you cannot take over another user's document.

  Users can still select to work on a local copy of the document and either manually merge changes or upload their edited document as a new document.

  For more information, see Document co-authoring.

- Starting with this release, you can open Office documents with the registration pane via WorkZone Explorer and edit Title, Case Handler, and other meta data fields there.

2018.1

No changes in this release.

2018

EU GDPR requirements

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

With this release, WorkZone introduces the following functionality to meet the GDPR requirements:

- **Document classification** orders and prioritizes data based on its sensitivity. For example, some documents can be available to everybody, while others might contain information that cannot be shared with a wide audience. Starting with this release, document classification code is a required field for each document and it defines its sensitivity level. You can specify the classification code during document registration.

> **Note:** Documents created in WorkZone for Office 2017 and earlier versions are not classified automatically. You can apply classification codes to them manually.

Other features

- Repeating content controls. You can now create templates that contain repeating sections. Each case or document can have multiple parties with a specific role, for example, Sender or Recipient. If you want to extract information from multiple parties and insert it into a content control, you must use a repeating content control.
- Merge of specific content controls has been adjusted: if you merge contact's address information, which is protected, the address information will not be inserted into the document.

User interface improvements

- Improved navigation between older and newer versions for Word, Excel, and PowerPoint documents.
- Some fields have been renamed to be compliant with WorkZone Client. **Class** has been renamed **Case group**; **Sub.No** has been renamed **Child case group**.

2017

- You can search for a party among recent, favorite, and all contacts in the **Add/Remove Parties** dialog box.
- The WorkZone Process add-in has been merged with the WorkZone for Office add-in. If WorkZone Process is not installed on the server, the **Process** button is disabled.
- You can start a process from a document.
- You can insert content controls for custom fields into templates.

Getting started

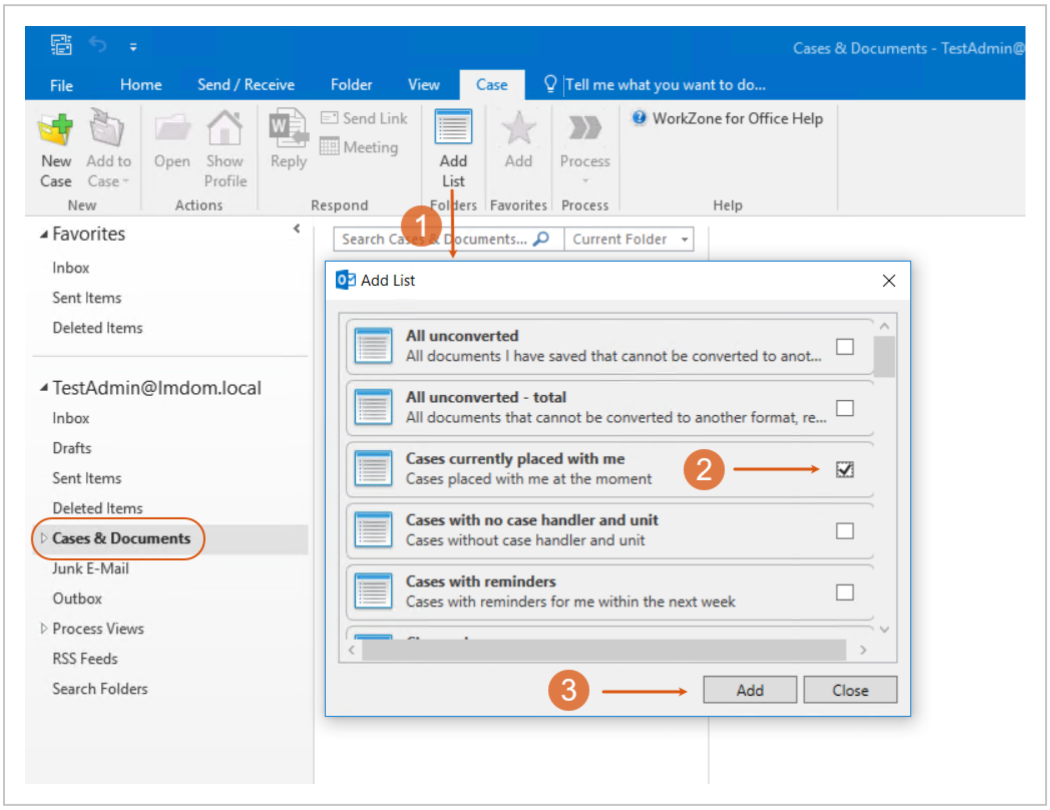
Learn about the basics in WorkZone for Office.

> **Prerequisite:** To view the videos, you need to have the Adobe Flash Player installed on your computer.

Use lists of cases and documents in Outlook

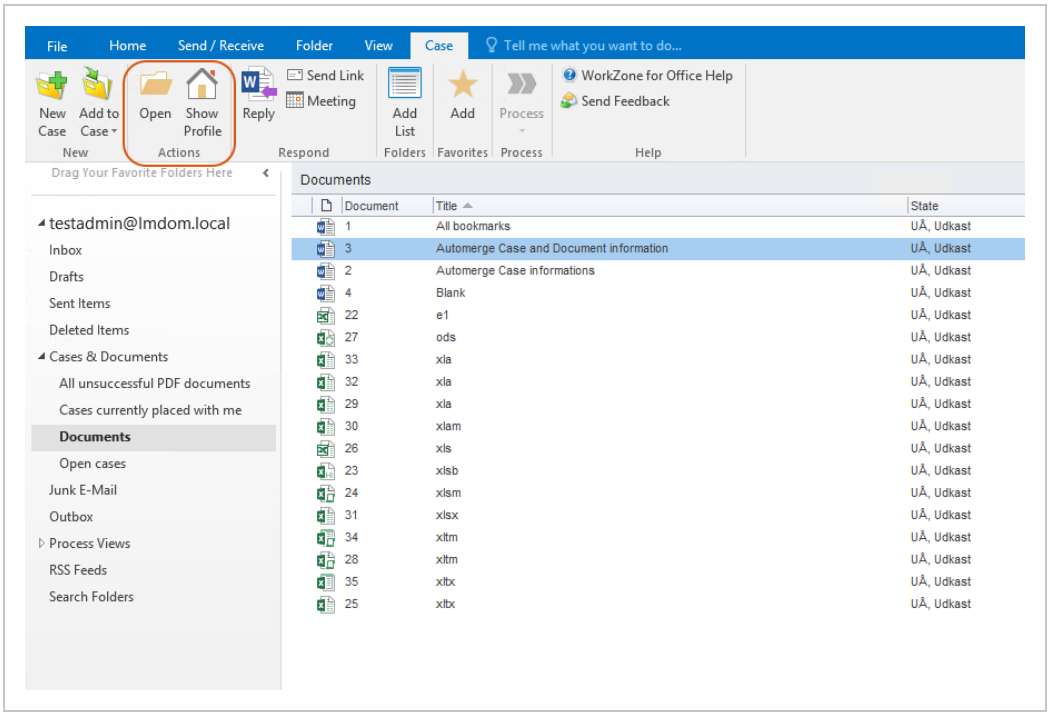
You can add lists of cases and documents to your **Cases & Documents** folder in Microsoft Outlook. To do this, click the **Add List** button on the **Case** tab, select the desired lists, and click **Add**. You can now view a desired list in Microsoft Outlook with a single mouse click.

- The lists are defined in WorkZone Client.



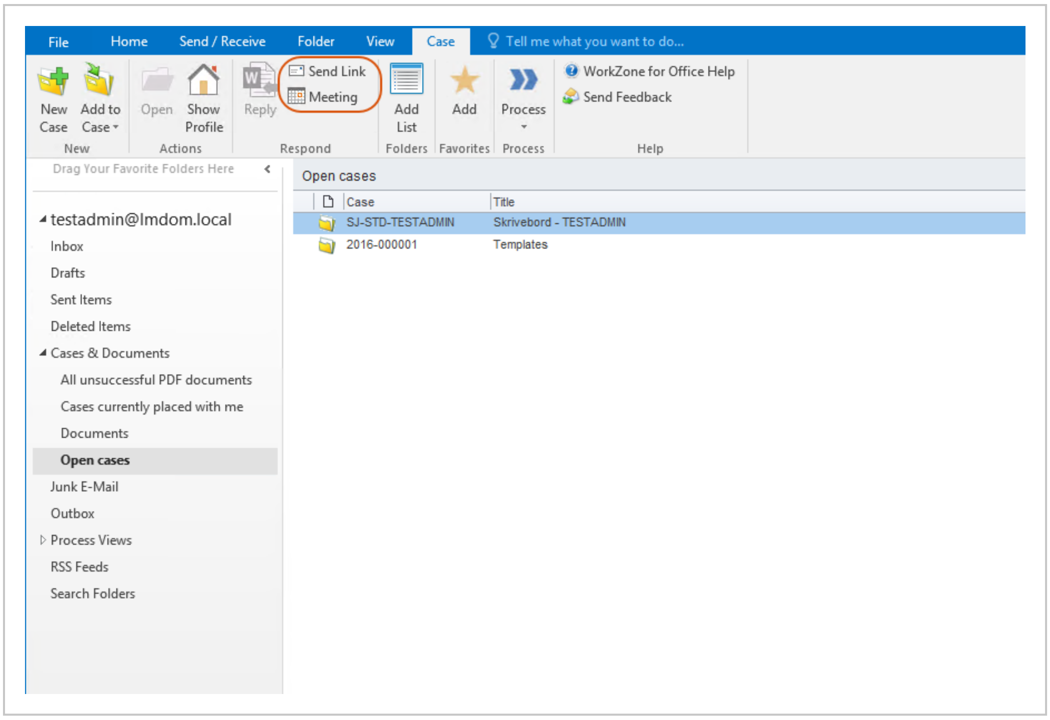
Open and edit case documents from the overview

In the case or document overview in Microsoft Outlook, you can open a document in, for example, Word to edit the contents. Or you can open the case or document profile in WorkZone Client.



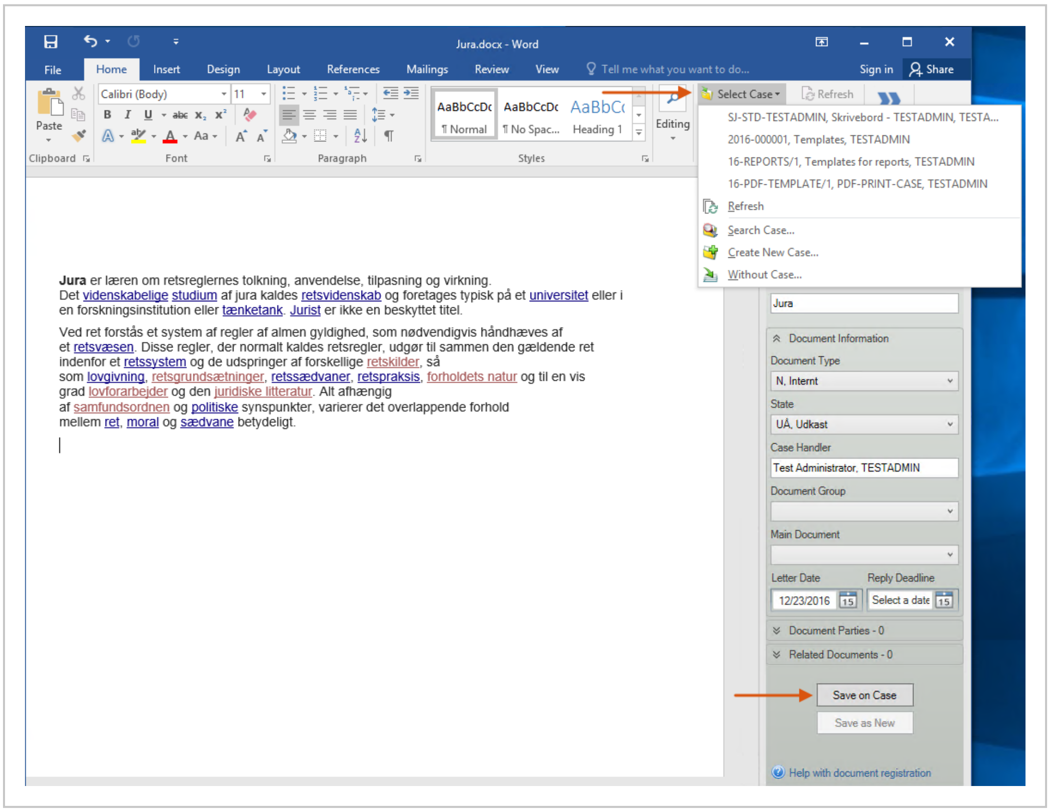
Share a link to a document or a case

You can insert a link to a case or document in a new email or meeting request. If you share a link to a document, two links are inserted: The first one opens the document in WorkZone Client, and the second one is a download link.



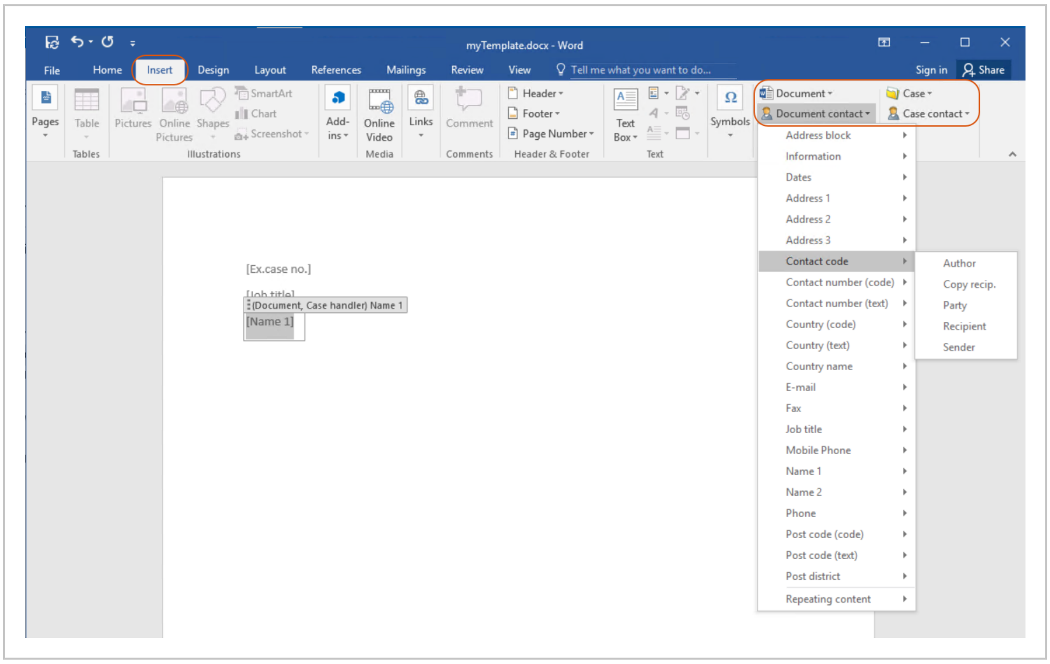
Save document on a case

To save a document on a case, you first need to select a case or create a new one. You then register information on the document in the **Document Registration** pane.



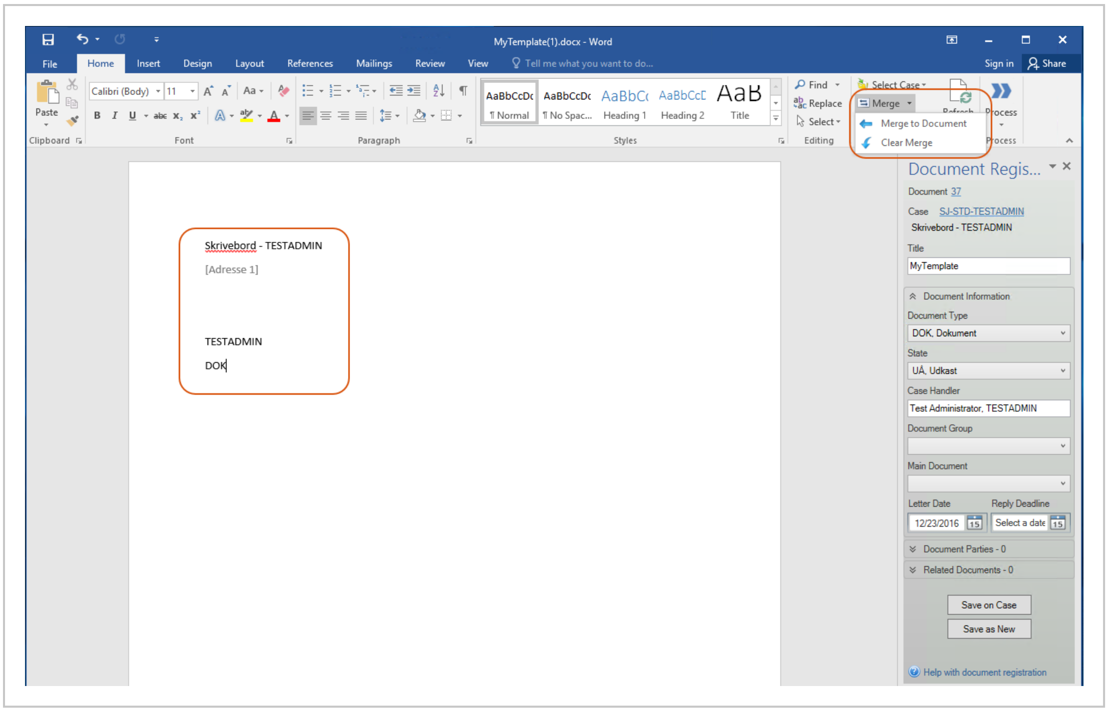
Create document templates in Word

Use content controls to build your document templates. This allows you to merge information about cases, documents, and contacts into the template. In addition, you can enable the template to automatically set default values, perform a merge, and show dialog boxes using VBA macros.



Merge information about cases, documents, and contacts into your documents

In Microsoft Word, you can use the merge function to insert information into the content controls that are inserted into the document, for example, about the case selected for your document.


MyTemplate(1).docx - Word
File
Home
Insert
Design
Layout
References
Mailings
Review
View
Tell me what you want to do...
Sign in
Share
Merge
Merge to Document
Clear Merge
Skrivebord - TESTADMIN
[Adresse 1]
TESTADMIN
DOK
Document Regis...
Document 37
Case SJ-STD-TESTADMIN
Skrivebord - TESTADMIN
Title
MyTemplate
Document Information
Document Type
DOK, Dokument
State
UÅ, Udkast
Case Handler
Test Administrator, TESTADMIN
Document Group
Main Document
Letter Date
Reply Deadline
12/23/2016
Select a date
Document Parties - 0
Related Documents - 0
Save on Case
Save as New
Help with document registration

Word, Excel, PowerPoint

In WorkZone for Office, you can create, save, view, and edit your own or your colleagues' documents:

- Microsoft Excel spreadsheets
- Microsoft Word documents
- Microsoft PowerPoint presentations

If your organization uses OAuth2 for user authentication

- Enter your credentials in the Internet Explorer window that opens when you start working in the application. You will need to enter the credentials for each application: Word, Excel, and PowerPoint. For automatic authentication, add the WorkZone site to the local intranet zone in the Internet Explorer settings (**Tools** > **Internet options** > **Security tab** > **Local intranet** > **Sites** > **Advanced** > type the domain and click **Add**).
- If you get a warning dialog that Microsoft Office 365 has blocked the sign-in dialog because the sign-in method may be insecure, please ask your administrator to enable the form-based authentication in Office 365 apps.
  You can unblock yourself by changing a security setting in the Office Trust Center. You can do so proactively by going to **File** > **Options** > **Trust Center** > **Trust Center Settings** > **Form-based sign-in**, or you can wait until you have been prompted to open Trust Center via a warning dialog.
  In the **Trust Center** > **Form-based Sign-in** panel, change **Block all sign-in prompts** to **Ask me what to do for each host** and save the changes. The list of safe hosts will be auto-populated based on your future actions.
  After you have made this change in the Trust Center, Office will not block future sign-in prompts. Instead, it will show a dialog asking if you want to continue signing in. If yes, Office will show the sign-in prompt immediately. In the future, Office will provide sign-in prompts for this allowed host, which will be added to the list of **Hosts allowed to show sign-in prompts** in the **Trust Center** > **Form-based Sign-in**.

Save a document on a case

To save a document on a case, two key steps must be completed:

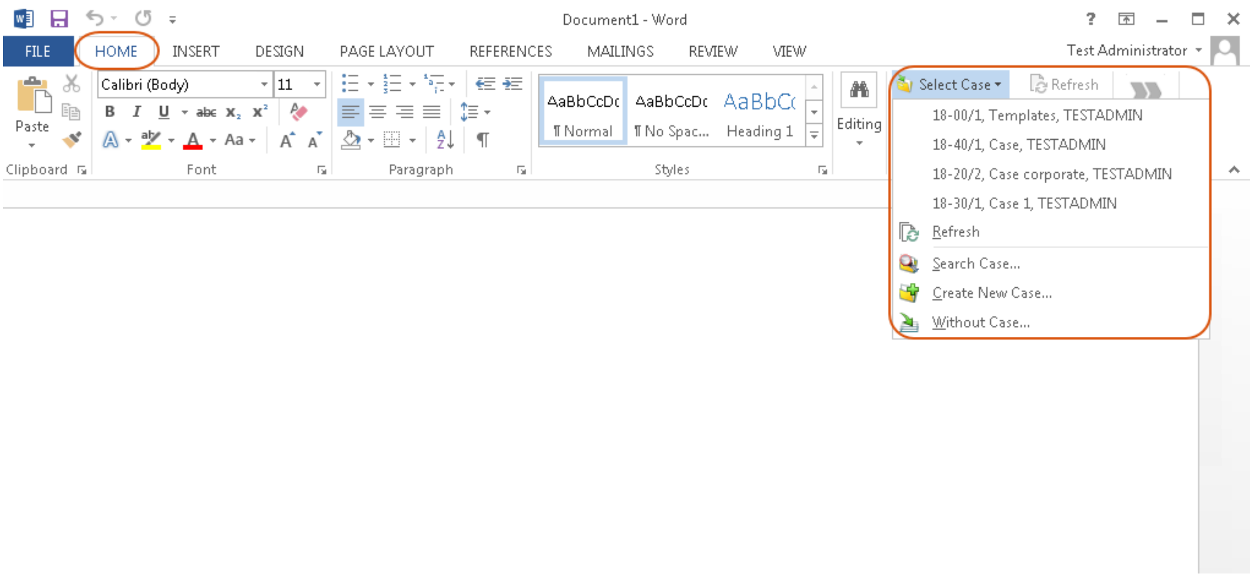
1. Select a case
2. Register the document

A document becomes a case document when you save it on a case.

Select a case

You can attach a case in one of the following ways:

- Select an existing case
- Select no case (in reality this option means that you select your desktop case)
- Create a new case



Select an existing case

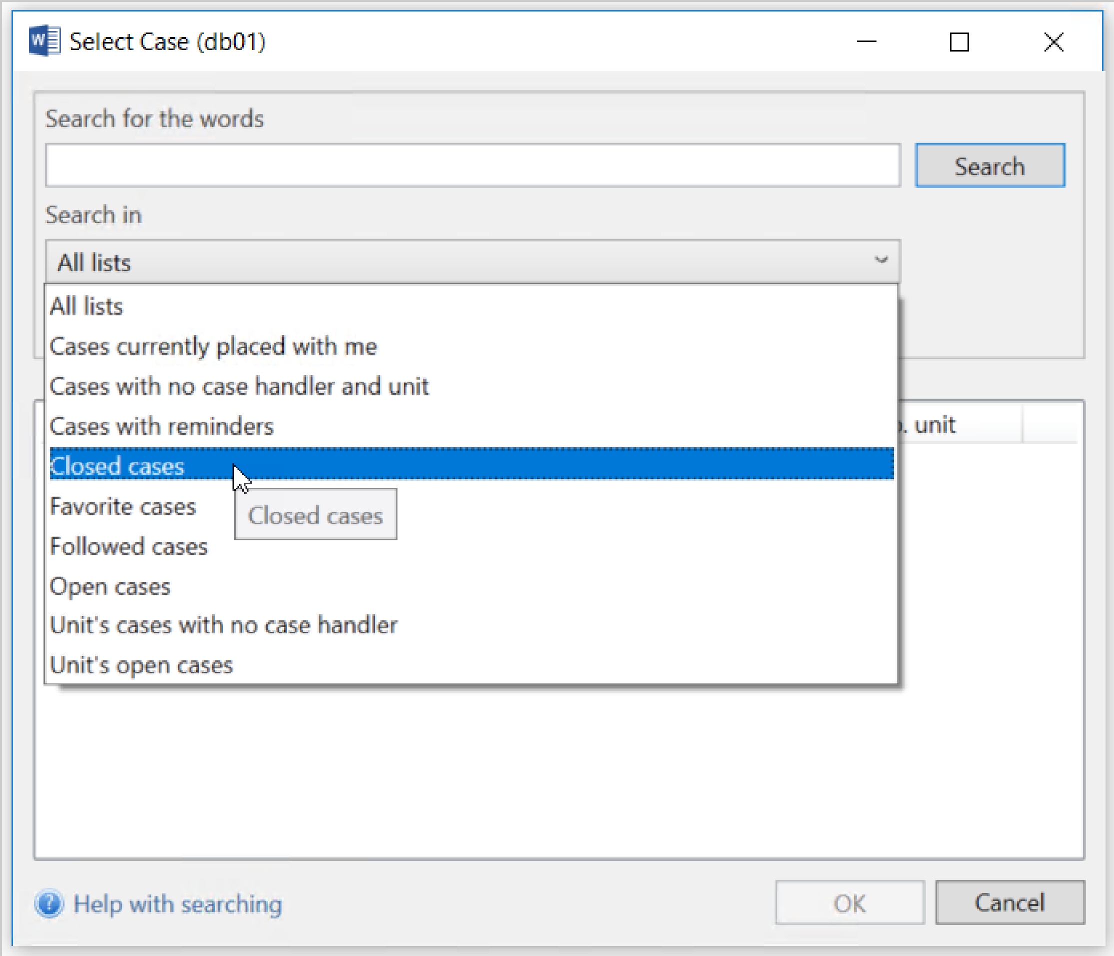
1. On the **Home** tab in the **Case** group, click **Select Case**. A list with options is displayed.
2. Select a case among recent cases.

   \- Or -

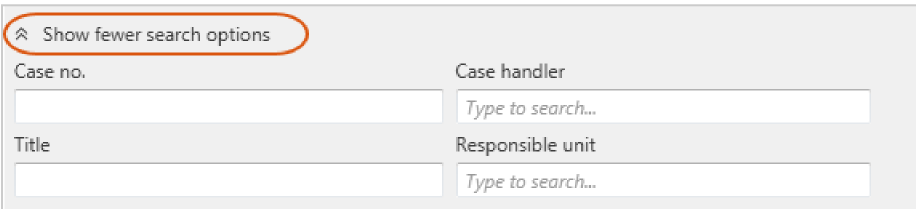
   Click **Search Case** to find a required case. Enter a search criterion in one or more of these fields and then click **Search**:

   - To find a case by any word in it, type free text in **Search for the words**.
   - To display a specific group of cases, select a filter from **Search in**.

   > **Note:** When you save a document on a closed case, the case will be re-opened.



- To search by case number, title, case handler, or responsible unit, click **Show more search options**. Click **Show fewer search options** to collapse this section.



Select a desktop case

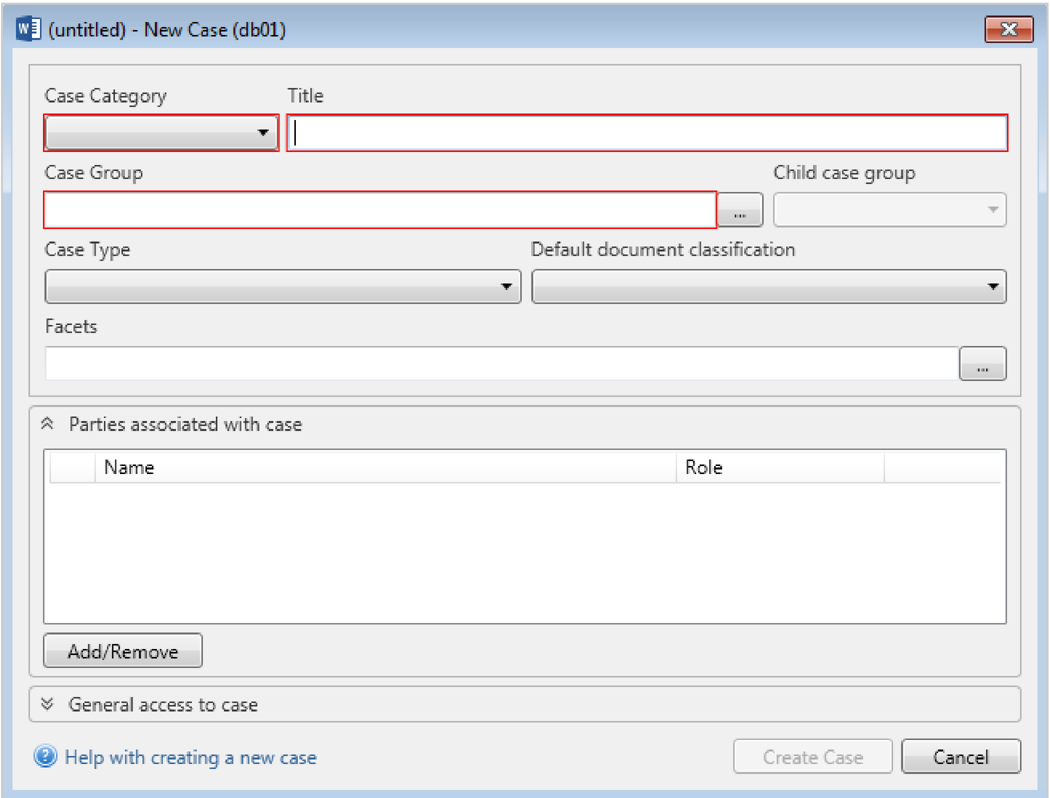
You can save a document to your desktop case. This is relevant if, for example, the document is a draft, or if you want to attach it to a case later. See The desktop case.

1. On the **Home** tab in the **Case** group, click **Select Case**. A list with options is displayed.
2. Click **Without Case**.

Create a new case

You can create a new case from WorkZone for Office and then save the document on it.

1. On the **Home** tab in the **Case** group, click **Select Case**. A list with options is displayed.
2. Click **Create New Case**.
3. Enter relevant information about the case, including the required fields marked in red.



- **Title** - Title of the new case.
- **Case Category**, **Case Type**, **Case Group**, **Child case group** - These fields are defined by your organization and used to classify the case. The better you classify the case, the easier to find it, follow workload, and

conduct other actions. See About cases and Case groups and child case groups in the WorkZone Client User Guide.

- **Default document classification** - Classification code to be inherited by case documents. Classification orders and prioritizes data based on its sensitivity. Default classification code is inherited from the case group or from the global value that are set by administrator. You can override this code by selecting the desired classification from the list.
- **Facets** - Use facets as a complimentary way to classify your cases. Facets are enabled and defined by your organization. Select the desired facets and click **Apply**.

> **Note:**
>
> - At least one facet should be selected in each required facet group.
> - You can select more than one facet in each field.
> - To remove a facet, double-click the facet, or press **DEL**.

- **Parties associated with case** - Click **Add/Remove** to add or remove case parties. Note that you can change the case party's role in the **Role** drop-down list.
- **General access to case** - Select appropriate access to case (*Full*, *Department*, or *Personal*).

4. Click **Create Case**, or press **Enter**.

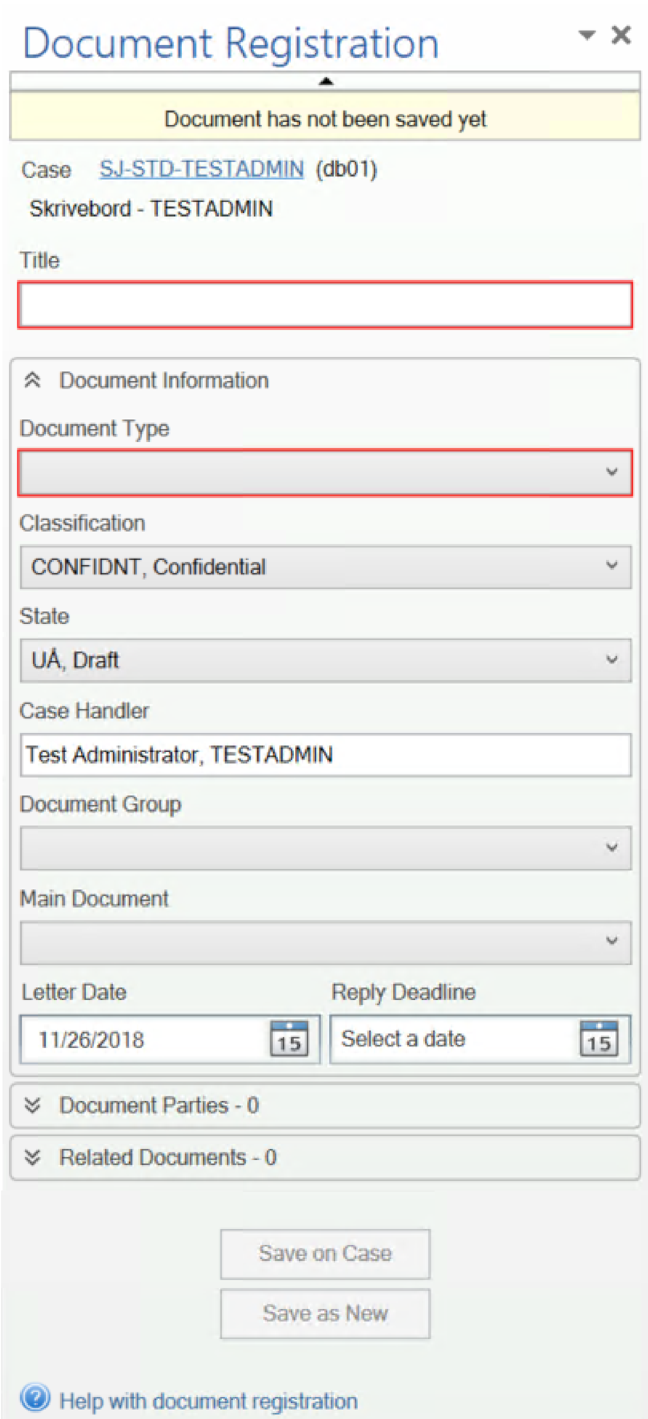
The new case is created in WorkZone. The **New Case** dialog is closed, and the **Document Registration** pane opens, which allows you to save your document on the new case.

Register a document

You can register a document by using the **Document Registration** pane. To do this, fulfill the needed fields and click **Save on Case**.

Tip: Remember that you must select a case prior to registration.

Document information



- **Title** - Enter title of the document.
- **Document Type** - The document type indicates whether the document is, for example, incoming, outgoing, or internal.
- **Classification** - Classification orders and prioritizes data based on its sensitivity. By default, classification code is inherited from the selected case, but you can change it in this field. Note that supplementary documents inherit classification code from their main documents.

> Important:
>
> - Classification on the unsaved document is updated every time you change its main document or case.
> - Classification on the saved documents is not automatically updated when you change classification on the documents' case or main document.

- **State** - Document state shows what you can do with the document: who can see and edit it, and what can be edited. The document state is reflected in the document's life cycle.
  - **Personal draft - UP**. Can be viewed, edited and deleted by the creator only.

    > Tip: To allow other employees view, edit and delete your personal draft document, you must change the state to **Draft**.

  - **Draft - UÅ**. When you save a document as a draft, you and other people in your department or organization can edit the document in its native program.
  - **Locked document - UL**. The document itself cannot be edited by anyone, but document information can be edited by anyone.
  - **Archived - ARK**. The document itself cannot be edited by anyone, but document information can be edited by anyone. To edit the document information, you need to open the document in WorkZone Client. Once saved, you cannot revert the document state to draft.

- **Case Handler** - Responsible contact for the document. By default, this is the contact who created the document. To assign another contact, remove the contact's name and start typing the required contact's name.
- **Document Group** - Select the group to which the document belongs, for example, *Decision*, *Confirmation*, *Consultation*.
- **Main Document** - If your document is a supplementary document, select a main document.

> Note: When your document is saved in the archive as a supplementary document, the **Main document** drop-down list is locked. If you want a different main document, you must select it in WorkZone Client.

- **Letter Date** - Click the calendar icon to change the letter date. Its default value is the current date.
- **Reply Deadline** - Click the calendar icon to type the date on which the document should be answered.

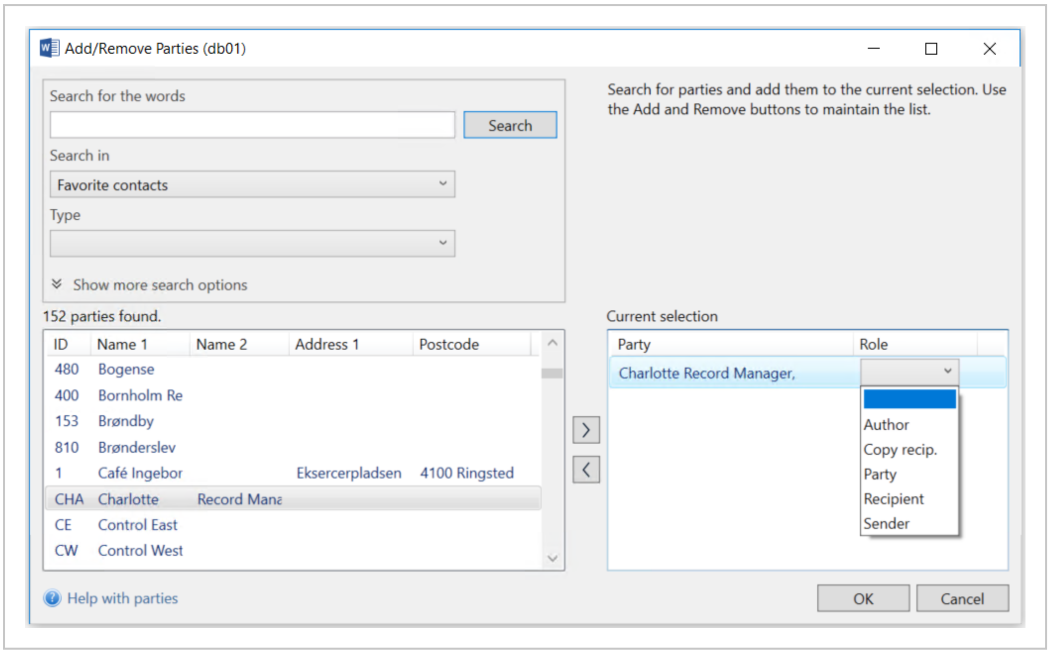
> Note: If you have specified a letter date and a reply date, you should also add a sender and a recipient. See Add or remove document parties.

Manage document parties

Document parties are the contacts that relate to the document. The contact's role (for example, *Sender*, *Author*) defines how the contact relate to the document.

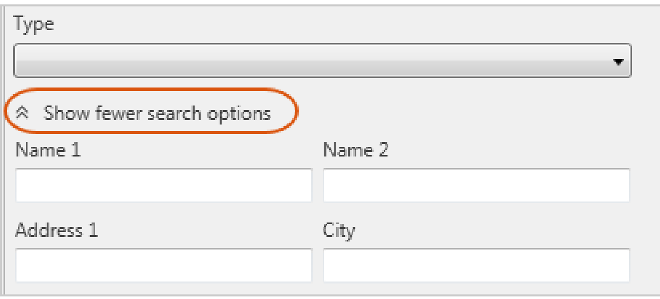
Add document parties

1. In the **Document Parties** panel, click the **Add/Remove** button.



2. Search for the required contacts:

   - To find a contact by any word in its meta data, type free text in **Search for the words** and click **Search**.
   - To display a specific group of contacts, select a filter from **Search in**.
   - To display contact of a specific contact types, select a filter from **Type**.
   - To search by name, address, or city, click **Show more search options**. Click **Show fewer search options** to collapse this section.



3. In the lower left pane, select a party and click the right-arrow button . Repeat this step for each party you want to add.

4. If necessary, specify roles for the parties.
5. Click **OK**.

Remove document parties

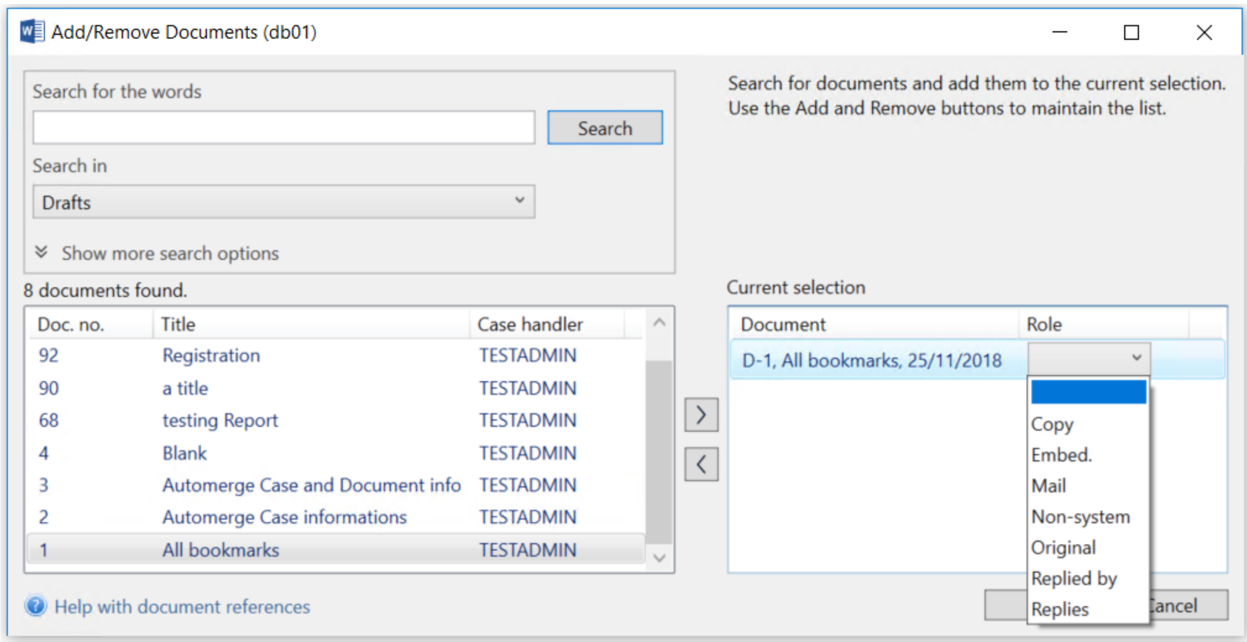
1. Select the document party you want to remove in the **Current selection** pane.
2. Click the left-arrow button .
3. Click **OK**.

Manage document references

Document references are the documents that relate to the current document. The role (for example, *Copy*, *Mail*) defines how the documents relate to each other.

Add document references

1. In the **Related Documents** panel, click the **Add/Remove** button.



2. Search for the required documents:

- To find a document by any word in its meta data or body, type free text in **Search for the words** and click **Search**.
- To display a specific group of documents, select a filter from **Search in**.
- To search by document number, case handler, or title, click **Show more search options**. Click **Show fewer search options** to collapse this section.

3. In the lower left pane, select a document and click the right-arrow button .
   Repeat this step for each document you want to add.
4. If necessary, specify roles for the documents.
5. Click **OK**.

Remove document references

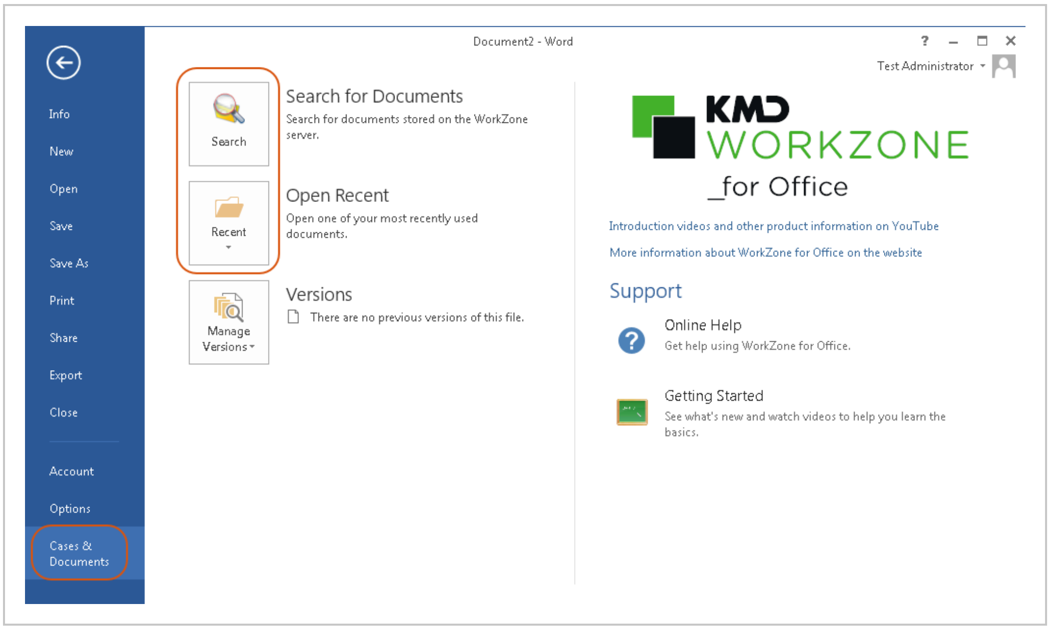
1. Select the document reference you want to remove in the **Current selection** pane.
2. Click the left-arrow button  .
3. Click **OK**.

Manage documents

Open a document

You can open a case document by using the **Search for Documents** function or from the list **Open Recent**.

1. Open the relevant Microsoft Office application.
2. Click **File** > **Cases & Documents**.



Search for a document

1. Click **Search**.
2. In the **Select Document** dialog box, enter your search criteria. See Search operators, text fields, and free text fields.
3. Click **Search**. The search results are displayed in the lower pane.
4. Select the relevant document, and click **OK**.

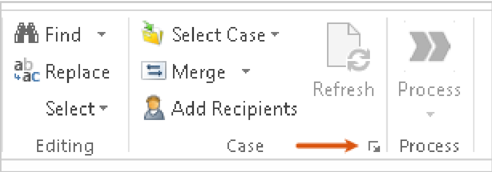
Open a recent document

1. Click **Recent**.
2. Select the relevant document.

Open the Document Registration pane

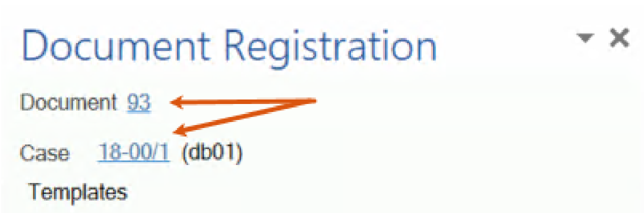
In the **Document Registration** pane, you can view and edit document information.

1. To open the **Document Registration** pane, click the right-arrow button in the **Case** group on the main ribbon.



Open case or document in WorkZone Client

WorkZone Client provides a broader list of actions on changing the case and document details. For example, you can define access codes or move a document to a different case. To open cases and documents in WorkZone Client, click the links displayed in the **Document Registration** pane:



Refresh registration information for a document

You can get the latest registration information for a saved case document from the server.

1. Open a document for which you want to get the latest registration information.
2. On the **Home** tab in the **Case** group, click **Refresh**. All registration information for this document is updated from the server.

> Important: If you click **Refresh**, all your unsaved changes to this document will be lost.

Copy document

You can reuse an existing Word, Excel, or PowerPoint document saved on a case, and save it as a new document on another case or on the same case.

> **Tip:** If you want to move the document to another case, you can do it in WorkZone Client. See Move a document.

1. Open a document that you want to copy.
2. Open the Document Registration pane.
3. Click **Save as New**.
4. Apply search criteria and select a case to which you want to copy this document.
5. Click **OK**.
6. Optional: Make your changes to a document.
7. Fill in the required fields in the **Document Registration** pane. See Register a document.
8. Click **Save on Case**.

Share a document

You can send a case document by email. The new email inherits the case context from the document. This means that you are requested to save the email on the case after sending it.

> **Important:** Before you perform this task, you need to select a case for the document. See Select a case.

1. On the **File** tab, click **Share** > **Email**.
2. Select one of these options:
   - **Send as Attachment**
   - **Send as PDF**
   - **Send as XPS**

   An email window appears where subject and attachment are inserted.
3. Add recipients.

4. Add contents to the email, and click **Send**. The **Save Outlook Item** dialog box appears.
5. If you do not want to save the document, clear the check box.
6. Click **Save**.

Draft versioning

Prerequisite: Versioning must be permitted in the WorkZone Configurator settings.

Important: Versioning only applies to draft documents - specifically documents with the state UÅ (Draft) or UP (Personal draft).

Enable or disable versioning

When working with documents, you can enable or disable versioning functionality for the selected document, disregarding default configuration of the draft versioning.

Note:

- You cannot enable or disable versioning for the locked documents.
- Your administrator can limit the maximum number of versions.

Enable versioning

1. Open a document for which you want to enable versioning.
2. Optional: For a new document, click **Save on Case**.
3. Click **File**> **Cases & Documents** > **Manage Versions** > **Enable versioning**.

Disable versioning

1. Open a document for which you want to disable versioning.
2. Optional: For a new document, click **Save on Case**.
3. Click **File** > **Cases & Documents** > **Manage Versions** > **Disable versioning**.

Open a previous version

You can view a list of previous versions of the Word, Excel, or PowerPoint document draft you are currently working with, and open any of its previous versions.

Note: Previous versions will open as read-only and with the **Registration Pane** disabled.

1. Open a document whose versions you want to view or open.
2. Click **File** > **Cases & Documents**. A list of previous versions is displayed under **Versions**.
3. Click the version that you want to open. The selected version will be opened in the read-only mode and with the **Registration Pane** disabled.

   Tip: When the document has more than 10 versions, use buttons **Show newer** and **Show previous** to navigate between the versions.

Compare two versions

You can compare any previous version of the Word document draft with the latest version of this document.

1. Select a document whose versions you want to compare.
2. Click **File** > **Cases & Documents**.
   A list of previous versions is displayed under **Versions**.
3. Click the previous version that you want to compare with a current version.
4. Click **Compare** in the information bar at the top of the document.
   A standard Microsoft compare window with the latest version of this document opens right next to the selected version. All changes between the selected document version and the latest version are highlighted.

Restore the previous version

You can restore any previous version of the Word, Excel, or PowerPoint document draft as the latest version of this document.

Note: You cannot restore previous versions for the locked documents.

1. Select a document whose version you want to restore.
2. Click **File** > **Cases & Documents**. A list of previous versions is displayed in the **Versions** section.
3. Click the previous version that you want to restore to current version.
4. Click **Restore** in the information bar at the top of the document. A new editable Word, Excel, or PowerPoint document opens with the contents of the restored version automatically inserted to it and the **Registration Pane** enabled. This new document becomes the latest version of this document.

Delete previous versions

You can delete all previous versions of the selected Word, Excel, or PowerPoint document.

1. Select a document for which you want to delete all previous versions.
2. Click **File** > **Cases & Documents**.
3. Click the **Delete all previous versions** button in the **Manage Versions** section.
   All previous versions of this document are deleted.

Document co-authoring

Document co-authoring

WorkZone for Office uses Microsoft Office's version and document control (WebDAV protocol and URI scheme) to manage multiple users editing a document at the same time.

No check in / check out

There are no check in or check out procedures. A user opens the document in the Microsoft Office application to lock the document and prevents other users from saving their versions of the document on the server. When the user closes the document, the document lock is released and assigned to the next user in line (if any). That user's changes can then be saved to the document which is still locked to all other users.

Saved on the server

The document is edited on a local Microsoft Office application but saved on the server, thereby respecting the document lock.

Document lock expiry

It is not possible to revoke the document lock from another user or take over a locked document from another user.

The document lock is however temporary and will expire after a certain period of time (a timeout period) of no less than one hour, releasing a previously locked document. A locked document that has expired can regain its document lock if the document has not been opened by another user in the meantime.

Locked document

When a document is opened by a WorkZone user, the document will be locked for saving on the server. The user who opened the document can save the document to the server but all other WorkZone users cannot save their changes to the server.

When other users open the locked document, the most recent version of the document on the server will be opened.

If the user who opened the document has saved his changes, any user who opens the document afterward can see the updates.

Users that already had opened the locked document before the first user had saved the document will not see the changes from the first user in their currently open documents.

When a document is locked by a user, other users can:

- Edit the document and merge the contents when the document is available.
- Open the document in read-only mode

Save the document as a local document

The server document can also be saved as a local document on the local machine. You can edit it locally and then do one of the following action:

- When the server document is available, the local document and the server document can be manually compared and merged by using the Microsoft Office’s Compare functionality.
- The local document can be uploaded to WorkZone as a new document.

Release the lock

When a locked document is closed, the document will be released and becomes available to the next user if the document has been opened by other users. Effectively, the next user takes over the document lock as the document still is locked to all other users. The user now may save the document to the server and close the document.

The document is only released when it is closed. Saving the document to the server will not release the document.

Saving the document as a local document will release the lock.

Merge changes

When the document is released to the next user, any changes can be merged and saved into the document. All added content made to the document is highlighted, enabling the current user to react to the changes if necessary.

> **Note:** Only content that has been added is highlighted. Deleted content is not highlighted or displayed.

Content added or removed from the document by previous users is not protected and subsequent users may remove or add content to the document without restrictions unless prevented so by other Microsoft Office content-protection functionality.

Scenarios for document co-authoring

The following three scenarios illustrate some of the possible options and outcomes when using and not using Microsoft Office's document management and co-authoring functionality in WorkZone.

Scenario definitions

- Andrew: The first user who opens the document.
- Bill: The second user who opens the document.
- Chris: Hypothetical user who opens the document before Bill can.

Throughout all scenarios, Andrew opens the document first and the document is therefore initially locked for any changes Bill might want to save.

Scenarios

Scenario 1: Edit and merge into server document

Scenario 2: Local copy: Manually merge or upload new document

Scenario 3: Edit read-only and merge into server document

Scenario 1: Edit and merge into server document

In this scenario, Andrew and Bill both edit the same document. Andrew saves the document during his work but Bill cannot save his work. Bill can merge the content and save the document when Andrew closes the document.

Step	User actions	Document status
1	Andrew opens the document in WorkZone by clicking the **Open** button.	The document opens for editing in Andrew's Microsoft Office application.
2	Andrew edits the document, adding and removing content in various places.	Andrew's document is updated.
3	In Microsoft Office, Andrew clicks the **Save** button	Andrew's changes are saved to the server document.
4	Bill opens the document in WorkZone by clicking the **Open** button. As the document is locked and assigned to Andrew, a dialog is displayed when Microsoft Office opens, prompting Bill to either view a read-only copy or edit the file and merge changes with the server file when it becomes available.	
5	Bill selects to edit the file and merge changes.	The document is opened in Bill's Microsoft Office application. The document contains Andrew’s last updates from step (4) above as Andrew saved his changes to the document before Bill opened it.
6	In Microsoft Office, Andrew edits the document, adding and removing content in various places.	Andrew's document is updated.
7	In Microsoft Office, Andrew clicks the **Save** button	Andrew's changes are saved to

Step	User actions	Document status
	and the changes are saved to the document.	the server document.
8	In Microsoft Office, Bill edits the document, adding and removing content various places.	Bill's document is updated. Andrew's changes are not updated in Bill's document.
9	In Microsoft Office, Bill clicks the **Save** button but a prompt is displayed with the information that the document is locked for editing by another user.	Bill's changes to the document cannot be saved.
10	In Microsoft Office, Andrew is finished editing and clicks the **Save** button to save all changes. Andrew closes the document.	Andrew's changes are saved to the server document. The document lock is released and assigned to Bill.
11	In Microsoft Office, Bill continues work on the document and is informed that document is now available for editing. Bill clicks the **Save** button.	Bill's document is refreshed with the server version of the document. The document now reflects Andrew's changes which are indicated in colored overlays, enabling Bill to react to the new document content.
12	Bill adjusts the document content and clicks the **Save** button again to save all changes	Bill's document is saved to the server with all changes.
13	Bill closes the document.	The document lock is released, enabling the next user who opens the document to edit and save any changes.

Scenario 2: Local copy: Manually merge or upload new document

In this scenario, Andrew and Bill both edit the same document, but Bill chooses to save a local copy of the document and either manually merge the content after Andrew closes the document or uploads the local copy as a new document.

Step	User actions	Document status
1	Andrew opens the document in WorkZone by clicking the **Open** button.	The document opens for editing in Andrew's Microsoft Office application.
2	Andrew edits the document, adding and removing content in various places.	Andrew's document is updated.
3	In Microsoft Office, Andrew clicks the **Save** button.	Andrew's changes are saved to the server document.
4	Bill opens the document in WorkZone by clicking the **Open** button. As the document is locked and assigned to Andrew, a dialog is displayed when Microsoft Office opens, prompting Bill to either view a read-only copy or edit the file and merge changes with the server file when it becomes available.	
5	Bill selects to view a read-only copy and clicks **Edit document** when the document is displayed as he wants to edit the document.	The document is opened in Bill's Microsoft Office application. The document contains Andrew's last updates from step (4) above as Andrew saved his changes to the document before Bill opened it.
6	In Microsoft Office, Andrew edits the document, adding and removing content in various places.	Andrew's document is updated.
7	In Microsoft Office, Andrew clicks the **Save** button and the changes are saved to the document.	Andrew's changes are saved to the server document.
8	In Microsoft Office, Bill edits the document, adding and removing content in various places.	Bill's document is updated. Andrew's changes are not updated in Bill's document.
9		Bill's changes to the document

Step	User actions	Document status
	In Microsoft Office, Bill clicks the **Save** button but a prompt is displayed with the information that the document is locked for editing by another user.	cannot be saved.
10	Bill decides to save the document as a local document instead and clicks **File** > **Save** to save the document on the local machine.	Bill's document is saved as a local document on Bill's machine. The server document is still locked but Bill's local document is not locked.
11	In Microsoft Office, Andrew is finished editing and clicks the **Save** button to save all changes. Andrew closes the document.	Andrew's changes are saved to the server document. The document lock is released but not assigned to Bill who is working on his local document.
11		If another user (Chris) opens the document right after Andrew, Chris will be assigned the document lock and not Bill. The server document and its newly changed content will still be unavailable to Bill, who is working in his local document.
12	In Microsoft Office, Bill continues work on the document, clicks the **Save** button to save all changes to the local document and closes the document.	Bill's changes are saved to his local document. The server document is not updated, regardless of who has opened or is editing the server document.
13	When Bill is finished, he can either upload his local document as a new document or manually merge his changes into the server document.	Bill's local document exists only on his local machine and not in WorkZone.

Step	User actions	Document status
13a	**If Bill wants to upload his local document, in WorkZone:** In WorkZone, Bill selects the case the document is attached to and then clicks **Document** > **Import Document** to import his local document to the case.	The local document is imported into WorkZone. There are now two versions of the original document: The server version which Andrew (and maybe Chris) worked on and Bill's document.
13b	**If Bill wants to merge his changes into the server document:** Bill opens the server document and his local document in Microsoft Office and uses Microsoft Office's Compare functionality to manually merge the content of the two documents into Andrew's document. If Chris also added content to the server document, Bill must now merge his local document content into the sever document which contains updates by both Andrew and Chris.	The server document is opened and locked by Bill.
14	In Microsoft Office, Bill is finished merging and clicks **Save** to save the document	The server document is updated and saved with Bill's merged content.
15	Bill closes the document.	The document lock is released, enabling the next user who opens the document to edit and save any changes.

Scenario 3: Edit read-only and merge into server document

In this scenario, Andrew edits the document and Bill initially only want to read it. Bill decides to edit the document as well but can only merge the content when Andrew closes the document, releasing the document to Bill.

Step	User actions	Document status
1	Andrew opens the document in WorkZone by clicking the **Open** button.	The document opens for editing in Andrew's Microsoft Office application.
2	Andrew edits the document, adding and removing content in various places.	Andrew's document is updated.
3	In Microsoft Office, Andrew clicks the **Save** button.	Andrew's changes are saved to the server document.
4	Bill opens the document in WorkZone by clicking the **Open** button. As the document is locked and assigned to Andrew, a dialog is displayed when Microsoft Office opens, prompting Bill to either view a read-only copy or edit the file and merge changes with the server file when it becomes available.	
5	Bill selects to view a read-only copy and starts read-ing the document.	The document is opened in Bill's Microsoft Office applic-ation. The document contains Andrew’s last updates from step (4) above as Andrew saved his changes to the doc-ument before Bill opened it.
6	In Microsoft Office, Andrew edits the document, adding and removing content in various places.	Andrew's document is updated.
7	In Microsoft Office, Andrew clicks the **Save** button and the changes are saved to the document.	Andrew's changes are saved to the server document.
	In Microsoft Office, Bill finds something that needs changing and clicks **Edit document** in order to be able to edit the document.	

Step	User actions	Document status
8	In Microsoft Office, Bill edits the document, adding and removing content various places.	Bill's document is updated. Andrew’s changes are not updated in Bill’s document.
9	In Microsoft Office, Bill clicks the **Save** button but a prompt is displayed with the information that the document is locked for editing by another user.	Bill’s changes to the document cannot be saved.
10	In Microsoft Office, Andrew is finished editing and clicks the **Save** button to save all changes. Andrew closes the document.	Andrew's changes are saved to the server document. The document lock is released and assigned to Bill.
11	In Microsoft Office, Bill continues work on the document and is informed that document is now available for editing. Bill clicks the **Save** button.	Bill’s document is refreshed with the server version of the document. The document now reflects Andrew’s changes which are indicated in colored overlays, enabling Bill to react to the new document content.
11	Bill adjusts the document content and clicks the **Save** button again to save all changes.	Bill's document is saved to the server with all changes.
12	Bill closes the document.	The document lock is released, enabling the next user who opens the document to edit and save any changes.

Templates and content controls

You can create your own templates and use existing templates, for example, letter templates and information templates. You can also retrieve and insert case, document, or contact information into a template or document, or to update registered document information.

Each template includes content controls. **Content control** represents an information field of a case, document, or contact (party); for example, *(Case, Case handler) Name 1*, *(Document) Title*, and so on. When you merge a template with a certain case or document, content controls extract the related values from the case or document. For example, *(Case, Case handler) Name 1* can obtain value *Ann*, *(Document) Title* can obtain value *Application form*, and so on.

Note: If content controls are displayed in multiple languages, please see After switching the language in WorkZone Client, some content controls in the Content properties group on the Insert tab of Word remain in the language selected before.

Create a new template

1. Create a new Word document.
2. Type the common text and add content controls.
3. Click **Files** > **Save As**. The **Save As** dialog box is displayed.
4. Select a location for your template.
5. In the **Save as type** field, click  > **Word Template**, and click **Save**.

Add content controls

In WorkZone for Office you can add content controls for the custom field types *Date*, *Text*, *Decimal*, and *Integer*.

1. Select the **Insert** tab.
2. In the **Content properties** group, click **Case** or **Document** to add content controls with case or document properties. Click **Case contact** or **Document contact** to add content controls with case party or document party properties.

Tip: Some content controls have two options:

- If the property name is followed by **(code)**, for example, **Case handler** > **Contact type (code)**, it refers to the three-letter code identifying the case handler.
- If the property name is followed by **(text)**, for example, **Case handler** > **Contact type (text)**, it refers to case handler's full name.

There are two additional options how you can benefit from content controls:

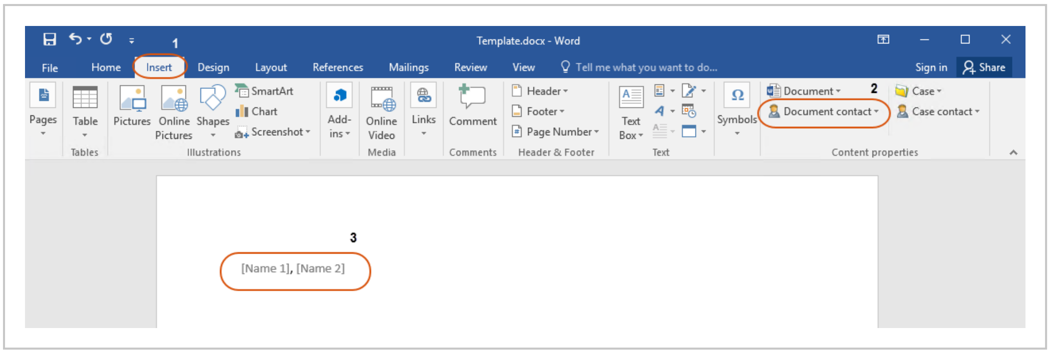
Insert multiple information for multiple parties with the same role (the repeating content functionality)

This is another way how you can use and benefit from content controls. Each case or document can have multiple parties with a specific role, for example, *Sender* or *Recipient*. If you want to extract information from multiple parties and insert it into a content control, you must use a *repeating content control*.

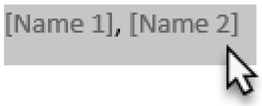
Important:

- A party on the case or document, content control and repeating content control must have the same role in order to insert repeating information.
- Apart from parties, you can also repeat text, images, and other types of information that is surrounded by a repeating content control.
- For the correct operation, it is strongly recommended that you follow the instructions in the order listed.

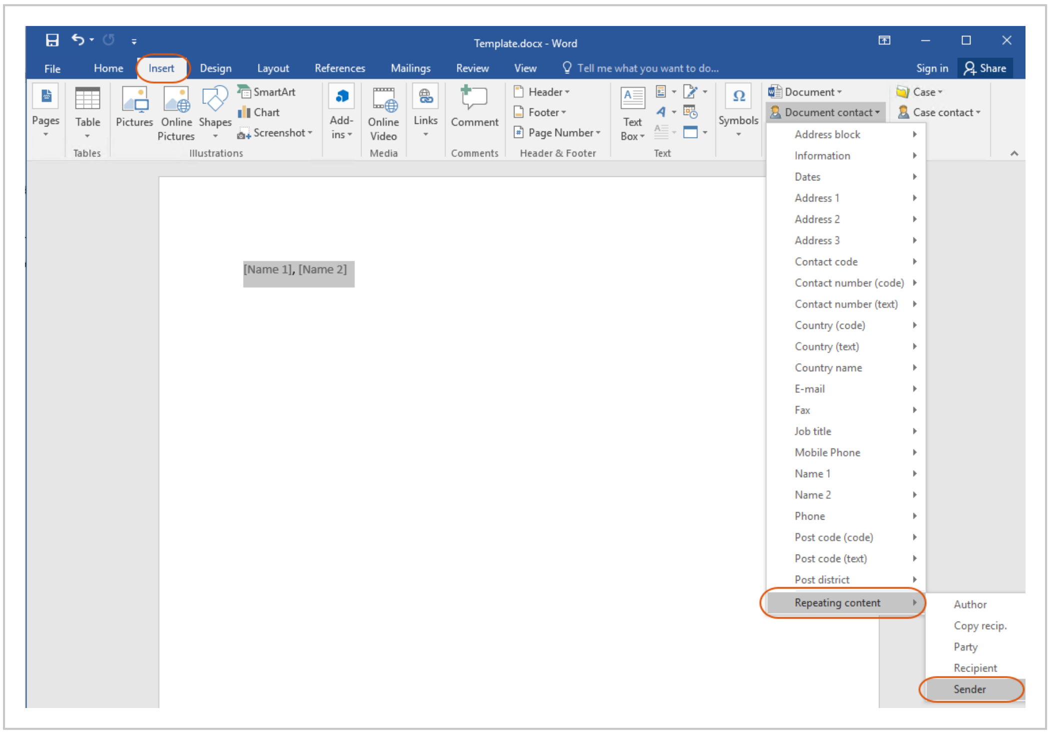
1. On the **Insert** tab, in the **Content properties** group, click the content control from the relevant group, and select a property you want to insert. For example, if you want to insert names of all parties with the **Sender** role, you must add content controls *Name 1* and *Name 2* with the **Sender** role.



2. Use the left mouse button to select the content controls on the template.

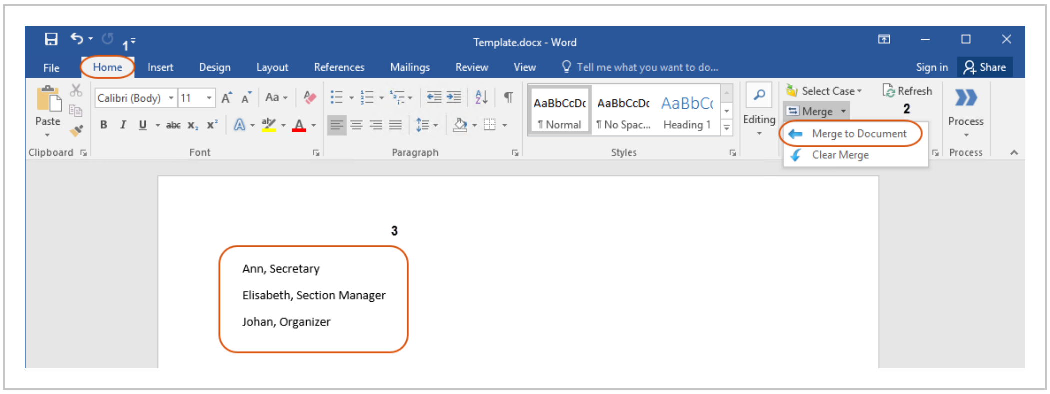


3. Click **Document contact** or **Case contact**, open the **Repeating content** menu and select the required role.



Tip: To view information about the repeating content control, click it and view the information in the title.

4. When you then merge, content controls will be populated with relevant information, each on a new row.



Insert text for each Recipient on a new page

Consider a situation when you need to send identical letters to different recipients. At the same time, you want to include specific information for each recipient, such as name, address and so on. To generate a separate text for each recipient, your template must meet two conditions:

- The template contains at least one content control with the **Recipient** role (without a repeating content control).
- The case or document you merge the template with has at least two parties with the **Recipient** role.

When you click **Merge**, a new document is created. Text from the template with the specific values for each recipient will be inserted on a new page.

Note: The new document with some values cannot be cleared after merging. However, you can edit initial template, if needed, and merge it again.

Merge case, document, and contact information

> **Prerequisite:** Before merging case, document and contact information, content controls must be inserted into the template, and document information must be registered. See Registering document information.

1. Open the relevant template.
2. On the **Home** tab, click **Merge** > **Merge To Document**.

   > **Note:** If you merge contact's address information, which is protected, the address information will not be inserted into the document. This is true only for the content controls created in WorkZone for Office 2017 and later versions.

Remove case, document, and contact information

1. On the **Home** tab, click **Merge** > **Clear Merge**.

Update registered document information

You can update registered document properties by editing the contents of content controls inserted into a template or document:

- Document title
- Letter date
- Reply deadline

For example, if you change the document title in the **Title** content control, the document title will automatically be updated in the **Document Registration** pane.

> Important: If you change the information in the **Document Registration** pane, you need to click **Merge** > **Merge To Document** to update the document.

Format of content control titles

From version 2014 R2, the format of content control titles has been changed to:
`(ItemType,[Relation],[Type]) Label (format)`

For example:

`(Case) Type(Case, Casehandler) Name1(Case, Caseparty) Name1(Document, Recipient, Date) Birthday(Case, Primary Contact, Information) Hobby`

This means that content controls added in version 2014 R2 and later will be displayed in the new title format, whereas already existing content controls (added before version 2014 R2) will be displayed in the old format.

Replace Captia content controls

Captia content controls are no longer supported in WorkZone. To make templates with Captia content controls work, you need to replace the Captia content controls with WorkZone content controls. The instructions describe how to check if a template uses old content controls and how to replace them with new content controls.

Check for Captia content controls

1. Make a copy of the.docx file.
2. Change the extension to.zip (you may have to wrap the name of the file with " " or enable Windows to display extensions of known file types).
3. Unzip the file, and then go to the /Word sub folder.
4. Open the document.xml file using an XML editor, for example, Visual Studio Code or Notepad++.

   Headers and footers may also contain Captia content controls. Open the header*.xml and footer*.xml files where * refers to a number.

5. Search for `w:dataBinding w:prefixMappings.`
6. If the mapping is `w:dataBinding w:prefixMappings="xmlns:ns0='Captia'"`, it is an old content control.
7. Note the value of `w:alias w:val` for all Captia content controls. You can check for the value in the content control properties on **Developer** tab in **Design** mode in Word.

As the Captia content controls are different than those of WorkZone, you cannot just replace Captia with WorkZone. You need to replace the Captia content controls with WorkZone content controls.

Replace Captia content controls

1. Open the template in Word with a newer version of the WorkZone for Outlook add-in.
2. Delete the Captia content control and then add it again using the corresponding WorkZone content control.

> **Tip:** It is easier to manage and work with content controls by enabling **Design Mode** on the **Developer** tab in Word. In Word, click **File** > **Options**, click **Customize Ribbon**, and select the **Developer** check box. After that close the **Word Options** dialog, click the **Developer** tab and enable **Design Mode**.

Refresh an exported list from Excel

You can refresh an exported list from Excel to get the latest version of this list in WorkZone Client.

1. Open the Excel document with an exported list.
2. On the **Data** tab, click **Refresh All** in the **Connections** group.

Processes

You can work with processes associated with cases from a Word, Excel, or PowerPoint document. To process a document in WorkZone Process, the document must be saved on a case. A document can be included in more than one process.

A process is always based on a case. When you start a process from a document, the process starts on the case of the current document.

You can find detailed information about working with processes in the WorkZone Process User Guide.

1. About WorkZone Process
2. Start a new process
3. Work with tasks

Troubleshooting

Click an issue below to see the solution or workaround.

Error when working with embedded Excel spreadsheets in Word

If you are working with embedded Excel spreadsheets in Word and the following error message is displayed: *The program used to create this object is Excel. That program is either not installed on your computer or it is not responding. To edit this object, install Excel or ensure that any dialog boxes in Excel are closed.*

To work around this issue:

Close all open instances of Excel and repeat your action.

After switching the language in WorkZone Client, some content controls in the Content properties group on the Insert tab of Word remain in the language selected before

To work around this issue, please clear cache in the Internet Explorer:

1. In the upper-right corner of the Internet Explorer window, select **Tools** > **Internet options** > **Settings** > **View files**.
2. Delete the files in the INetCache folder.

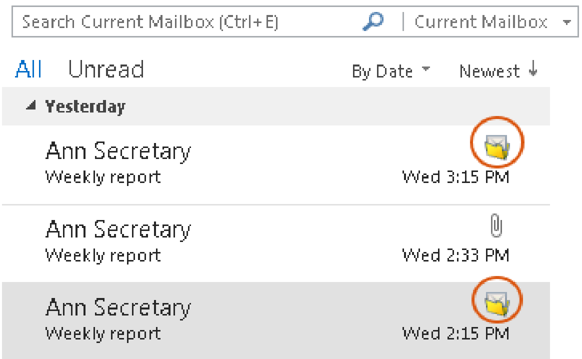
Working with Outlook items

If your organization uses OAuth2 for user authentication, enter your credentials in the Internet Explorer window that opens when you start working in Outlook. For automatic authentication, add the WorkZone site to the **Local intranet** in the Internet Explorer settings (**Tools** > **Internet options** > **Security tab** > **Local intranet** > **Sites** > **Advanced** >enter the domain and click **Add**).

Save an Outlook item on a case

The Outlook item is a sent or received email, or your appointment from the calendar.

The case icon informs you that the emails are saved on a case:



Save one Outlook item

To save an Outlook item on a case, two key steps must be completed:

1. Select a case (select an existing case or create a new one)
2. Register information

Note:

- You can select a case both when you compose a new email or when the email is sent/received.

- Optionally, you can attach documents to the email.
- You can only save appointments from the **Calendar**. That is, you cannot save meeting requests or responses, for example, from the **Inbox** or **Outbox** folders.
- When you save an email signed with digital certificate (marked in Outlook with the icon), Outlook will prompt you with a request to remove the digital certificate from a copy of the email. To save the copy of the email to WorkZone you must agree to remove the digital certificate and click "Yes" in the following dialog. The email body without digital certificate will be saved to WorkZone, and the documents attached to the email will be saved as supplementary documents if another option was not be selected on saving dialog. The original email will remain signed, and no case icon will be shown for it. However, if you open the email, you will see the case on which the email has been saved in the email form region.

An Outlook item becomes a case document when you save it on a case.

Save multiple Outlook items

Prerequisite: You can edit field values for multiple Outlook items only if this functionality was enabled on the server.

When you save multiple Outlook items, you can edit their common meta data information directly in the **Save multiple Outlook items** dialog box.

1. Select more than one email or appointment.
2. Select a case.
3. The **Save Multiple Outlook Items** dialog box is displayed. Select values in the required fields, and click **Save**.

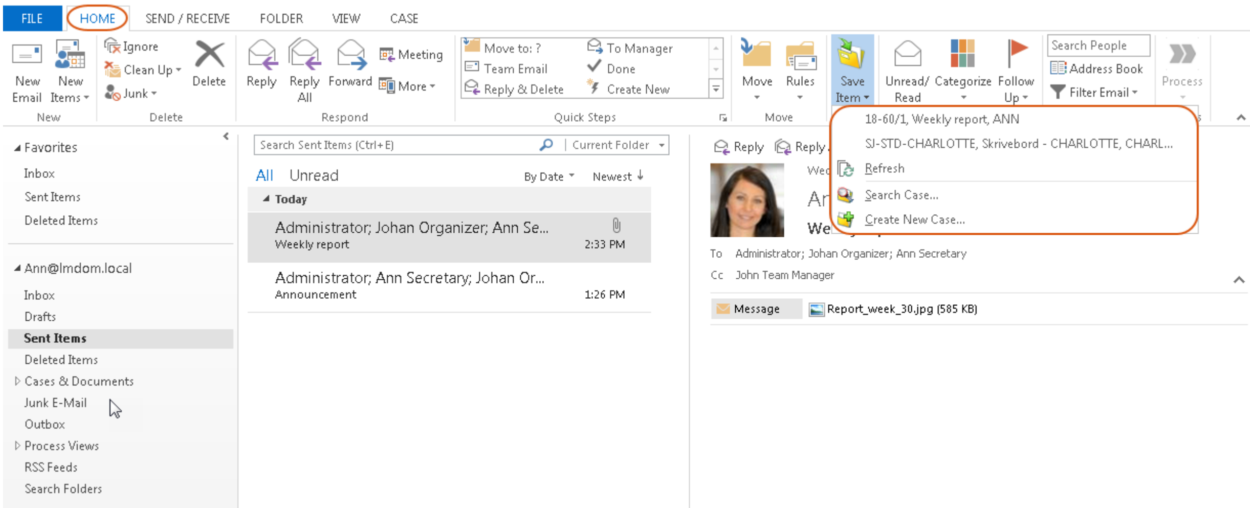
- The selected emails or appointments are saved as main documents, whereas attachments are saved as supplementary documents.
- Document references are only saved if **Cached Exchange Mode** is activated.

- Contacts from the **To**, **From**, and **Cc** fields are only saved on the case if they are already registered in the system.
- The emails signed with digital certificates can only be saved individually and not by multiple selection.

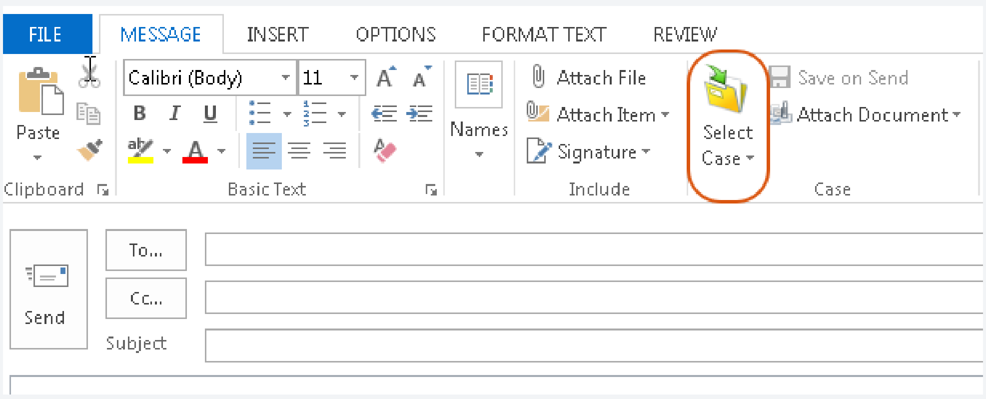
Select a case

You can attach a case in one of the following ways:

- Select an existing case
- Create a new case



Note: If you select a case when you compose a new email, the button is called **Select case**:



Select an existing case

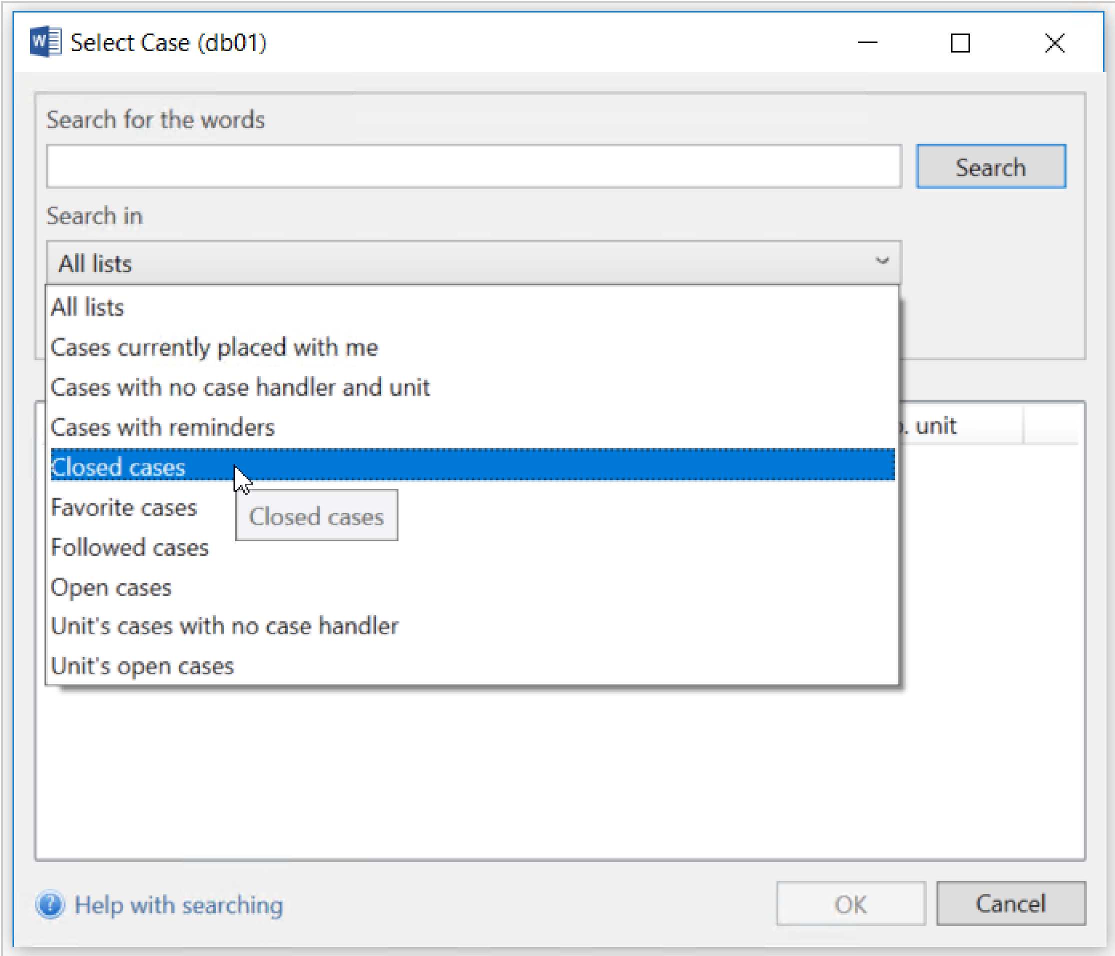
1. Select the Outlook item that you want to save.
2. On the **Home** tab, click **Save Item**.
3. Select a case among recent cases.

   -Or-

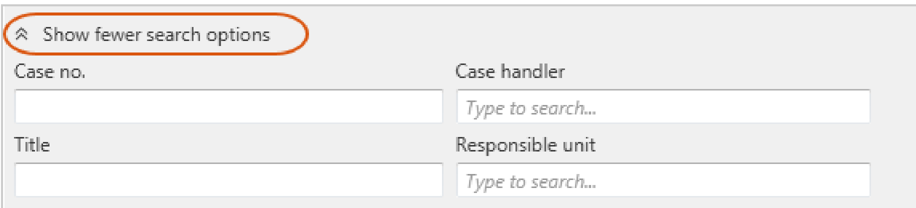
   Click **Search Case** to find a required case. Enter a search criterion in one or more of these fields:

   - To find a case by any word in it, type free text in **Search for the words**.
   - To display a specific group of cases, select a filter from **Search in**.

   > **Note:** When you save a document on a closed case, the case will be re-opened.



- To search by case number, title, case handler, or responsible unit, click **Show more search options**. Click **Show fewer search options** to collapse this section.

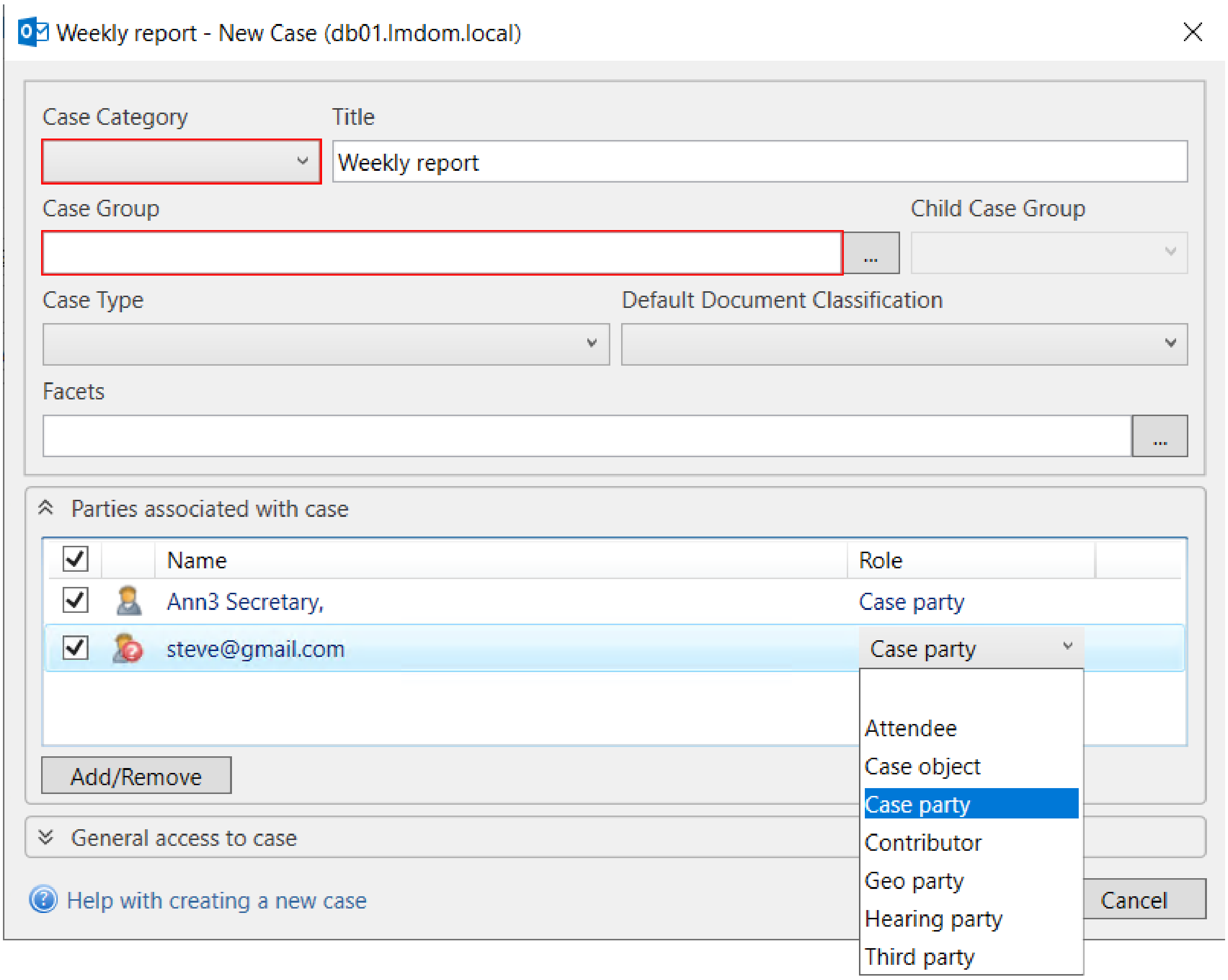


4. Click **Search**. You see a list of found cases.
5. Select a case and click **OK**.

Create a new case

You can create a new case from Outlook at any time, independently of saving Outlook items. To do this, click **New Items** on the ribbon and then **Case**.

1. Select the Outlook item that you want to save.
2. On the **Home** tab, click **Save Item** > **Create New Case**.
3. Enter relevant information about the case, including the required fields marked in red.



- **Title** - Title of the new case. By default, it takes the title of email or appointment.
- **Case Type**, **Case Group**, **Child case group** - These fields are defined by your organization and used to classify the case. The better you classify the

case, the easier to find it, follow workload, and conduct other actions. See Case groups in the WorkZone Client User Guide.

- **Default document classification** - Classification code to be inherited by case documents. Classification orders and prioritizes data based on its sensitivity. Default classification code is inherited from the case group or from the global value that are set by administrator. You can override this code by selecting the desired classification from the list.
- **Facets** - Use facets as a complimentary way to classify your cases. Facets are enabled and defined by your organization. Select the desired facets and click **Apply**.

> **Note:**
>
> - At least one facet should be selected in each required facet group.
> - You can select more than one facet in each field.
> - To remove a facet, double-click the facet, or press **DEL**.

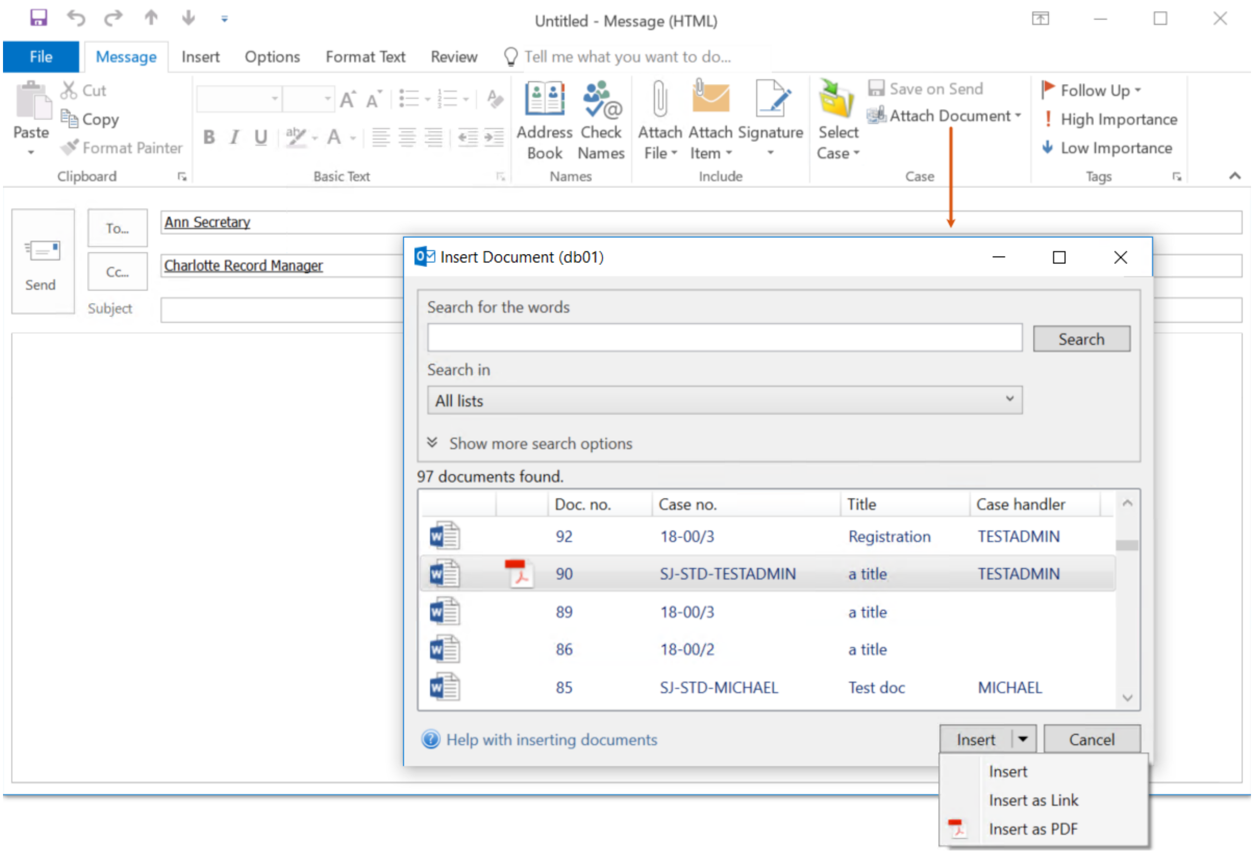
- **Parties associated with case** - Click **Add/Remove** to add or remove case parties.

  - By default, all contacts that relate to the email or appointment are preselected. Clear the check boxes to exclude them from case parties.
  - You can change a case party's role in the **Role** drop-down list.
- **General access to case** - Select appropriate access to case (*Full*, *Department*, or *Personal*).

4. Click **Create Case**, or press **Enter**.

Attach documents

You can attach documents to the email. When you save the email on a case, the documents will be suggested to be saved the case, too.



1. In the **Case** group, click **Attach Document**.
2. Select a document from the list. The document is inserted as an attachment.

   -Or-

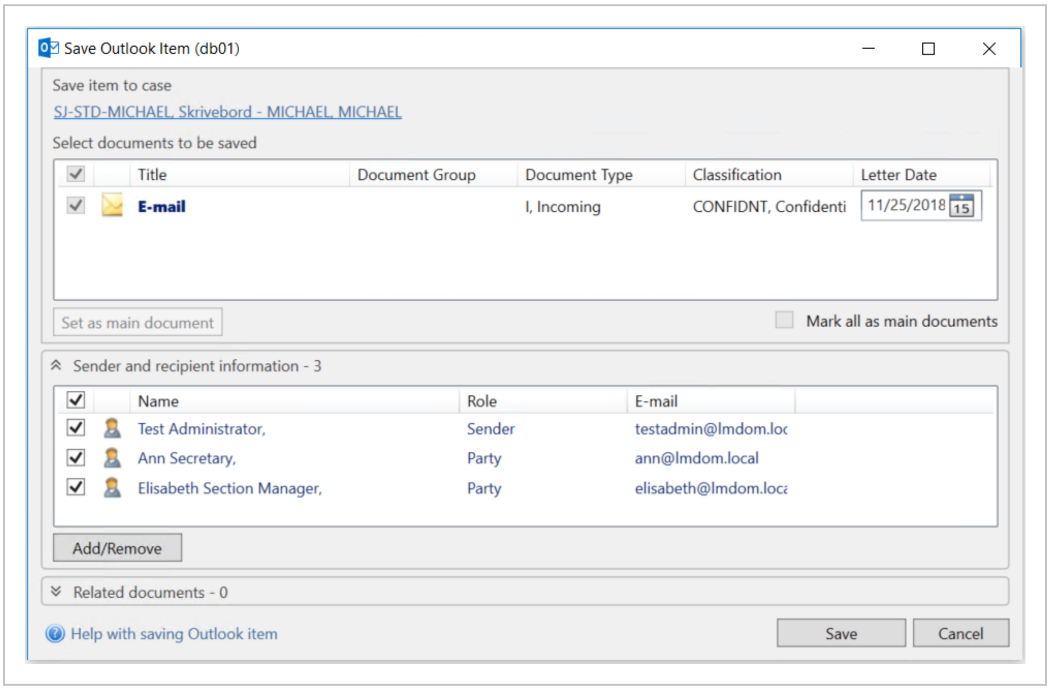
   Click **Search Document**. The **Insert Document** dialog box is displayed.
3. If you selected the second option in step 2, you must enter search criteria and click **Search**. Select a document.
4. Expand options of the **Insert** button and click one of them:
   - **Insert** - Inserts the document to the email as attachment.
   - **Insert as Link** - Inserts a link that opens the document's detail page in WorkZone Client and a download link.
   - **Insert as PDF** - Inserts the PDF version of the selected document.

Note: **Insert as PDF** is only available for a document if its PDF version has been generated in WorkZone Client. The icon indicates that the PDF version exists.

Register information

When you save an Outlook item on a case, you need to register the item's information.

Tip: Remember that you must select a case prior to registration.



Select documents to be saved

You can see the Outlook item and its attachments in the upper pane. By default, they are preselected.

The attachments are automatically saved on the same case as supplementary documents. You can view and manage the attachments as any other supplementary documents from the navigation pane under the **Cases & Documents** folder.

Note: Outlook is synchronized with WorkZone Client. If you later add or remove some of the supplementary documents from the case in WorkZone Client, they will also be added or removed in the Outlook email.

1. Clear the check boxes to exclude unwanted document.
2. Specify main documents:
    - If you want all attachments to be saved as main documents on a case, select **Mark all as main document**. Clear the check box, if you want only the Outlook item itself becomes a main document.

    -Or-

    - Select the document you want to set as the main document and click **Set as main document**.

Define document parameters

- **Title** - By default, the title inherits the subject of email, but you can change it.
- **Document Group** - Select the group to which the document belongs, for example, *Decision*, *Confirmation*, *Consultation*.
- **Document Type** - The document type indicates whether the document is, for example, incoming, outgoing, or internal.
- **Classification** - Classification orders and prioritizes data based on its sensitivity. By default, classification code is inherited from the selected case, but you can change it in this field. Note that supplementary documents inherit classification code from their main documents. If these values are not defined, global classification code will be applied.

  Important:

> - Classification on the unsaved document is updated every time you change its main document or case.
> - Classification on the saved documents is not automatically updated when you change classification on the documents' case or main document.

- **Letter Date** – By default, the letter date is the sent date of the saved email or appointment. Click the calendar icon to change the letter date.

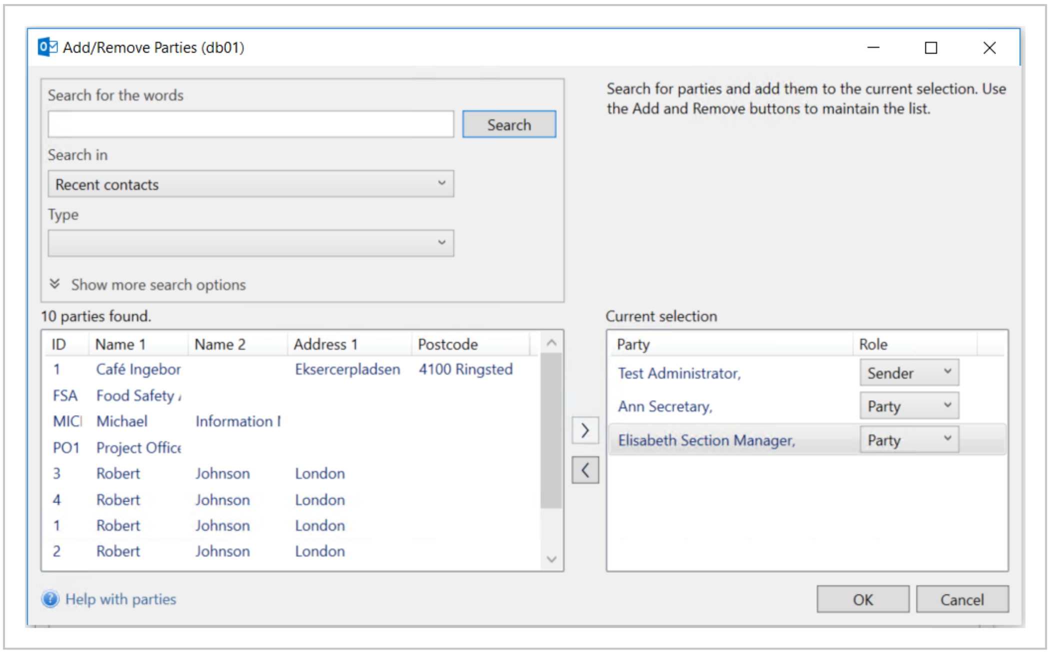
Sender and recipient information

The contacts listed in the **To**, **Cc**, and **From** fields of the saved Outlook item automatically become document parties. Besides that, when you save an Outlook item to a case or create a new case, the system will search for additional matching contacts to use in the registration.

- The system will not suggest adding contacts based on **Cc** recipient information.
- Registered contacts that match the sender, recipient and **Cc** recipient information will be added to the **Sender** and **Recipient** information list.
- If the system can detect a relationship between additional contacts, they may be added or suggested for adding.
- If the sender or the recipient on an Outlook item can be uniquely matched to a party on the case where you save the Outlook item, the party will be added in the registration dialog box as a known contact.

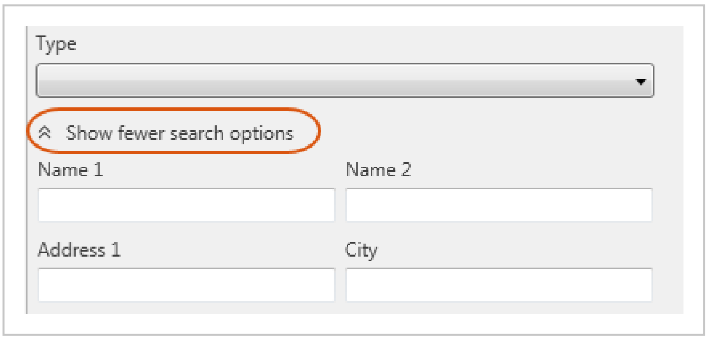
Add document parties

1. Click the **Add/Remove** button.



2. Search for the required contacts:

   - To find a contact by any word in its meta data, type free text in **Search for the words** and click **Search**.
   - To display a specific group of contacts, select a filter from **Search in**.
   - To display contact of a specific contact types, select a filter from **Type**.
   - To search by name, address, or city, click **Show more search options**. Click **Show fewer search options** to collapse this section.



3. In the lower left pane, select a party and click the right-arrow button . Repeat this step for each party you want to add.

4. If necessary, specify roles for the parties.
5. Click **OK**.

Remove document parties

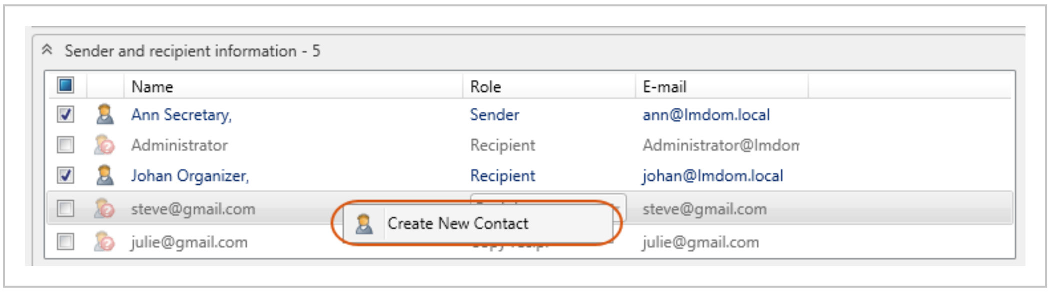
1. Select the document party you want to remove in the **Current selection** pane.
2. Click the left-arrow button .
3. Click **OK**.

Create a new contact

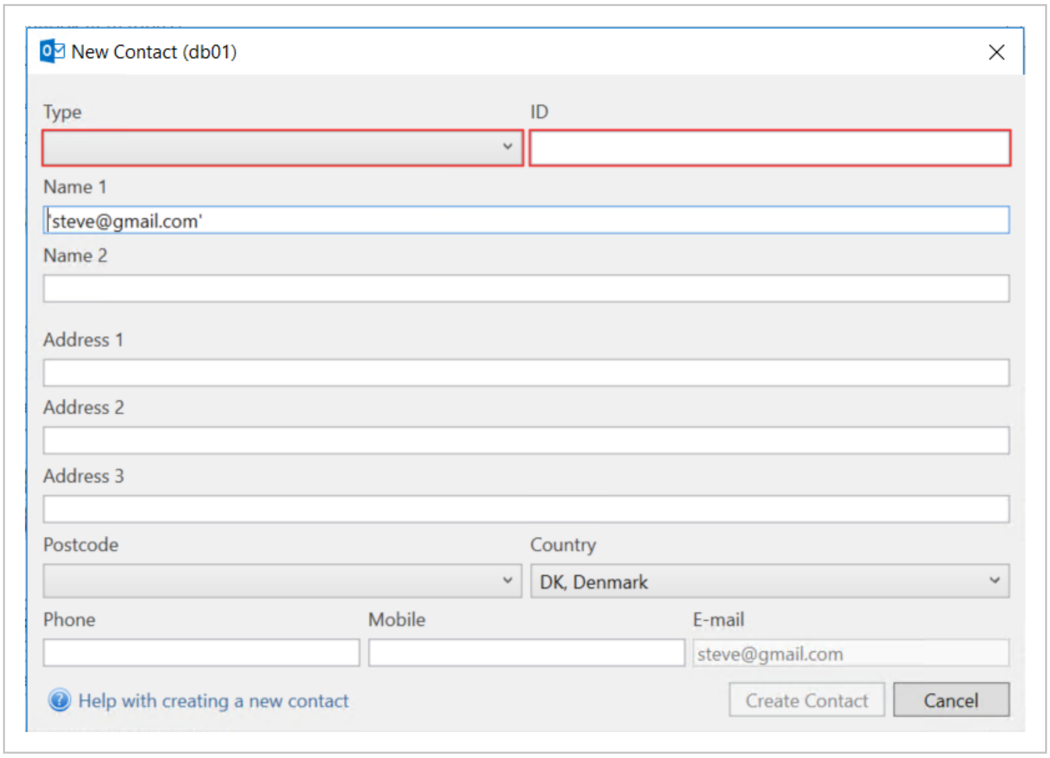
If the Outlook item contains an unknown contact (that is, a contact with an email address that does not match any existing contact), you can save this contact as a new contact.

> **Note:** If this functionality is not available, it means that your organization has configured the automatic creation of new contacts.

1. In the **Save Outlook Item** dialog box, right-click the unknown contact icon under **Sender and Recipient information**.



2. Click **Create New Contact**. The **New Contact** dialog box is displayed. The email address field is automatically filled in.



3. Fill in the required fields:

    - **Type** - Contact type is a mandatory attribute of each WorkZone contact. Contact types help group contacts in the Contact register and define the contacts' ID format.
    - **ID** - The ID field depends on your choice in the **Type** field. For example, if you choose Persons (with CPR) in the **Type** field, you must enter a CPR number in the **ID** field.

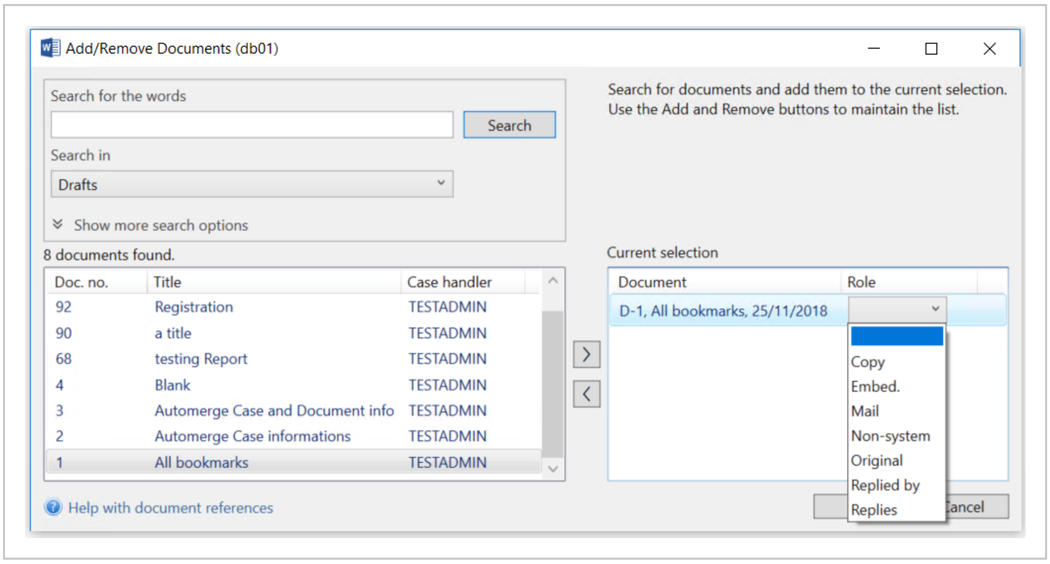
4. Click **Create Contact**. The contact you have created is now displayed as a known contact.

Manage document references

Document references are the documents that relate to the current document. The role (for example, *Copy*, *Mail*) defines how the documents relate to each other.

Add document references

1. In the **Related Documents** panel, click the **Add/Remove** button.



2. Search for the required documents:

   - To find a document by any word in its meta data or body, type free text in **Search for the words** and click **Search**.
   - To display a specific group of documents, select a filter from **Search in**.
   - To search by document number, case handler, or title, click **Show more search options**. Click **Show fewer search options** to collapse this section.

3. In the lower left pane, select a document and click the right-arrow button. Repeat this step for each document you want to add.
4. If necessary, specify roles for the documents.
5. Click **OK**.

Remove document references

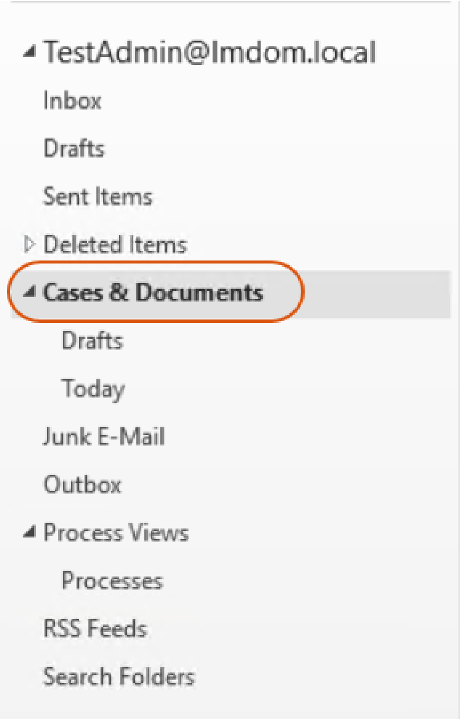
1. Select the document reference you want to remove in the **Current selection** pane.

2. Click the left-arrow button.
3. Click **OK**.

Cases & Documents

You can perform the most important actions by using the buttons on the Outlook ribbon. For example, you can open documents in Word, Excel, or PowerPoint; reply to documents; add new documents to cases; share document or case links, and so on.

You apply these actions by selecting a case or a document from a list in the **Cases & Documents** folder. This folder is added to the navigation pane when you open Microsoft Outlook for the first time after the installation.



Some of these actions are also available on the Outlook ribbon when you select an Outlook item that has been saved on a case.

Add a list

You can add various lists of cases or documents to the **Cases & Documents** folder. Similar to other folders in Outlook, you can remove them later.

1. On the **Case** tab, click **Add List** in the **Folders** group.

   -Or-

   Right-click your root mail folder, and select **New Case or Document List**. The

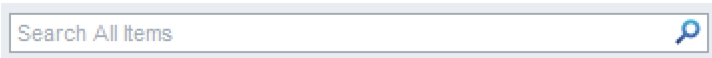
Add List dialog box is displayed with the lists you can add.

2. Select the check box for each list you want to add.
3. Click **Add**. Now you can see the selected lists under **Cases & Documents**.

> Tip: To delete a list item, right-click it and select **Delete Folder** from the menu.

Search in a list

1. In **Cases & Documents**, click a list where you want to find cases or documents.
2. Insert search criterion in the **Search** bar.



- To clear the current search, click close.
- You can also sort cases or documents by clicking the relevant column.

Open a document

1. Click a list that contains the document you need.
2. Double-click a case to see its documents.
3. If there are any supplementary documents, the expand arrow button is displayed. Click the button to expand the document list and view supplementary documents.
4. Double-click the document or supplementary document that you want to open. The document will open in the program which was used to create this document, for example, Outlook, Word, Excel, or PowerPoint.

Create a document on case

In Outlook, you can create new Microsoft Word, Excel, or PowerPoint documents and add them to the case.

1. Under the **Cases & Documents** folder, select a case on which you want to create a new document.
2. On the **Case** tab, select **Add to Case** > **New Document** (or **New Spreadsheet**, or **New Presentation**).
3. Edit and save the new document. The document is saved on the selected case.

> Note: The **New Document** (or **New Spreadsheet**, or **New Presentation**) button is disabled if the appropriate module is not installed.

Share a link in email or appointment

You can quickly send a link to cases or documents in an email or insert it to the new appointment.

1. Under the **Cases & Documents** folder, select a case or a document.
2. On the **Case** tab in the **Respond** group:
    - To create a new email with the link, click **Send Link**. A new email window with the link is opened.
    - To create a new appointment with the link, click **Meeting**. A new appointment window with the link is opened.

Reply to a document

You can reply to documents in the same way as you reply to an email. When replying to a document, Microsoft Word opens and you need to select a blank document or a template. The case, document parties, and document references associated with the original document will be added to your reply document automatically.

1. Under **Cases & Documents**, select the document to which you want to reply.
2. On the **Case** tab, click **Reply** in the **Respond** group. Word opens and the **New** dialog box is displayed.

3. Double-click the **Blank Document** icon.

   -Or-
   Select a template for the new document.

   A new document opens with the following information from your original document in the **Document Registration** pane:

   - The document type is set to **Outgoing**.
   - Senders of the original document are used as **Recipients**.
   - A document reference is created from your original document.
4. Add content to the new document.
5. Fill in the required fields, and click **Save on Case** in the **Document Registration** pane.

> **Tip:** If the document you want to reply to is an email saved on a case, you can simply select the email in the Explorer view and click **Reply**.

Open in WorkZone Client

You can open cases or documents in WorkZone Client from the Outlook ribbon.

1. In the navigation pane under **Cases & Documents**, select a case or a document.
2. On the **Case** tab, click the **Show Profile** button. WorkZone Client opens in a web browser, and you can view and edit the relevant case or document detail page.

Processes

> **Prerequisite:** To use the process overview and work with processes associated with the cases, the WorkZone for Outlook add-in must be installed.

You can work with processes associated with the cases and use the process overview directly from Microsoft Outlook. For information about processes, see About WorkZone Process.

Manage processes

Here you can find detailed information about processes and actions on them you can conduct.

Start a process from Outlook

Use the Processes Overview

Work with tasks

Take over a task from another user

> **Prerequisite:** To take over a task from another users, you must have the PROCESSADM access code.

If you open a smartmail with a task that another user is already working on, the smartmail is displayed with all process options disabled and with the notification that this task is already used by another user. But if needed, you can select to take over the control of this task.

1. Open a smartmail with a task that another user is already working on.
2. Click **Take over** in the notification message.

Refresh a changed task

There may be situations where a smartmail with a task is updated after you have opened it. In this case, you will see a notification saying that this task has been changed and an option to get the latest version of this task from the server.

- Click **Refresh** in the notification displayed for the changed smartmail.

Customize Outlook

In WorkZone for Office, you can add extra columns to your mail folders. This makes it possible to view additional information about your Outlook items without opening them. You can also set up conditional formatting rules: apply different colors, highlight, or enlarge the messages that are most or least important.

Tip:

- You can customize your **Search Folders** to show the Outlook items that you have saved on a case. You do this in the same way as when you customize any other folder in Outlook.
- You can customize your message rules to clean up the emails and appointments saved on a case. You do this in the same way as when you customize any other message rule in Outlook.

Add a column to a folder

You can add **Case** and **Case Document** columns to your email folders to see more information about your emails or appointments.

The **Case** column shows which cases your Outlook items are saved on, and the **Document** column displays the IDs of the main documents assigned to your saved Outlook items.

Prerequisite: The reading pane must be deactivated in order to view the added columns. On the **View** tab, click Reading **Pane** > **Off**.

1. Click your mail folder (for example, **Inbox**).
2. On the **View** tab, select **View Settings** > **Columns**.
   The **Show Columns** window is displayed.
3. Select **User-defined fields in Inbox** from the **Select available columns from** drop-down list.
   A list of available columns is displayed.
4. Select the column that you want to add, for example **Case**, from the **Available columns** list, and click **Add ->**. The **Case** column is moved to the **Show these columns in this order** list.
5. Click **OK**. The **Case** column is displayed in the **Inbox** folder.

Note: If you add a column to any other folder than **Inbox**, the drop-down item is called **User-defined fields in folder**.

Use advanced registration pane

Alternatively to the standard registration pane, you can use an advanced Outlook registration pane when you save emails. By using the advanced Outlook registration pane, you can register additional information such as **Case Handler**, **State**, **Reply Deadline**, and **Responsible Unit**.

To use the advanced Outlook registration pane, proceed with the following steps:

1. Go to **File** > **Cases & Documents**.
2. Select **Use advanced registration pane**.

Use search

When you make a search, you enter search criteria in a text field or in a free text fields. Searching in text fields is different from searching in free text fields.

- Text fields are case sensitive. For example, if you search for *petersen*, you will not find *Petersen*.
- Free text fields are not case sensitive. For example, if you search for *petersen*, you will also find *Petersen*.

In both cases, search operators can be typed with small letters, capital letters, or a mix. The search is the same.

Search operators

Operator	Name	Used where?	Description
*	Wild card	Free text fields and text fields	Replaces one or more characters. **Example**: If you type: • day* - the search finds cases where a word in a text field or in a free text field starts with day. For example, **day**light. • *day* - the search finds cases where a word in a text field or in a free text field contains day. For example, nowa**day**s. • *day - the search finds cases where a word in a text field or in a free text field ends with day. For example, birth**day**.

Operator	Name	Used where?	Description
			Note: Using prefixed wild cards is not recommended in free text searches, for example **day* and **day**. This type of search can generate numerous search results and take very long time to perform.
?	Question mark	Free text fields	Replaces exactly one character. **Example:** If you type *Pe?ersen* in the **Free text** field of the **Add/Remove Parties** dialog box, the search finds all parties with the name *Petersen* or *Pedersen* but not *Pettersen*.
^	Hat (circumflex)	Text fields	Disregards casing. **Example:** Text field **Title** If you type *^*sun**, the search finds cases where a word in the **Title** field contains *sun*, for example, *Sunday* and *sunlight*.
=""	Empty field	Text fields	Searches for items where the field is empty. **Example:** Text field **Address 1** in the **Add/Remove Parties** dialog box. If you type *=""*, the search finds cases where an address has not been specified.
| OR	OR	Free text fields:	Searches for items where one or more of the entered words occur.

Operator	Name	Used where?	Description
		|and OR Text fields: |	A free text search for documents will search in fields and in the document itself. **Example**: Find all documents where at least one of the words *currency* or *exchange* occur by typing *currency OR exchange*.
& AND	AND	Free text fields: & and AND Text fields: AND	Searches for items where all entered words occur. **Example**: Find all documents where the words *currency* and *exchange* occur by typing *currency AND exchange* (the words may exist as document properties or as indexed free text). • If you want to search for the character *&*, not as an operator but, for example, as part of a contact, insert a backslash in front of the character, *\&*. • If you want to find Liebestraum, Immergut & Co, type *Liebestraum, Immergut \& Co*.
~ NOT	NOT	Free text fields	Searches for items where words you type after the operator do not occur. **Example:** Find all documents where *interest* but not *bank occur* by typing *interest NOT bank*.

Operator	Name	Used where?	Description
			You should always search for an item containing *this but not that*. That is, searching for only *NOT bank* will not return results.

Multiple words or sentences

You can type one or more words in the search field:

- If you type one word, search results will contain this word.
- If you type multiple words, search results will contain exactly these words. For example, a sentence without operators: *Does surface activity of the sun influence our climate*.
- If you do not know the exact wording, it is recommended that you search for single words combined with search operators.

Example

If you type in a combination of words that does not exist in the database, for example, *Does surface activit* of the sun influence our climate,* there will be no search results. The chance of finding what you are looking is greater if you type *surface activity* AND sun**.

Stop words

Stop words are common words that are used so often that they have no value as search criteria in a free text search. Stop words are, for example, "and", "are", "is", and "often". When you do a free text search, stop words are ignored.

If you want to use words that are normally defined as stop words in a free text search, they must be removed from the list of stop words. Stop words are registered in the **Stop word** module of the WorkZone Configuration Management program. Here, stop words can be added, removed, and edited.

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