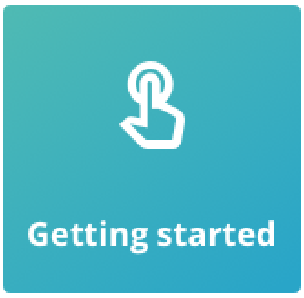
2022.0

WorkZone Client

User Guide

Contents

User Guide for WorkZone Client 2022.0



Related product documentation

- WorkZone Client Administrator's Guide
- WorkZone for Office User Guide
- WorkZone Process User Guide

WorkZone links

- WorkZone support
- WorkZone website
- WorkZone portal

Prerequisites

WorkZone is a complex product that consists of smaller WorkZone applications and modules. Some organizations do not use all WorkZone functionality and do not need to enable all WorkZone modules.

This table provides an overview of dependencies between WorkZone Client functionality and other WorkZone applications and modules.

Functionality	Required products
• Sending a case in an email • Sending a document as a link or as attached file • Exporting a list to Excel	WorkZone for Office
• Working with WorkZone meetings • Configuration of a meeting search detail page	WorkZone Meeting
• Opening a case in Windows explorer	WorkZone Explorer
• Working with processes • Working with case activities • Working with delegates	WorkZone Process
• Creating PDF files to print case documents and case notes • Using reports	WorkZone PDF Engine
• Working with notes	The Notes module

What's new in WorkZone Client

WorkZone Client 2022.0

Contacts

Contacts can now be write-protected

Users can define both read access and write access restrictions to contacts as a new **Write access** field has been added to the contact meta data. The field is displayed on the Contact detail page. The **Write access** field is also available on contact search pages and contact lists, including filtering options.

The read and write restrictions on contacts behave in the same way as read and write restrictions on cases and documents. Users that do not have read access to a contact, cannot open that contact's detail page and cannot view contact data from that contact. Users must be assigned read access to a contact to open the contact detail page and view contact data for that contact. Users must be assigned write access to a contact to change contact data for that contact.

Default Contact Read access and Contact Write access

Default read and write access codes for contacts can be defined for each contact type in WorkZone Configurator > **Contact** > **Contact types**. During contact creation in WorkZone Client, the **Read access** and **Write access** fields in the contact detail page will initially be populated with the defined default access codes.

The default access codes can be changed during contact creation or later if the user is assigned sufficient permissions. Any read or write access codes specifically defined in the configuration of the contact type detail page will be applied instead of the default contact access codes.

> **Note:** Clearing the access code fields during contact creation will result in the default access code defined in WorkZone Configurator being applied to the contact again when

> the contact is saved. After the contact has been created, the access code fields can be cleared and the contact can be saved without the default access code values being applied.

WorkZone Chat Chat

New chat information box

New chat messages and chat messages that were received while the user was offline, are displayed more prominently in a blue information box located in the upper right- hand corner of the browser used for WorkZone Client. Clicking the blue information box will open the chat in the chat form.

WorkZone Client 2021.3

Cases

Character limit in Case text field removed

The 4,000 character limit has been removed for the **Case text** field, enabling case workers to enter longer detailed descriptions for the case.

Contacts

Update CVR contacts using the CVR Update module

A new update feature has been introduced to WorkZone which uses the CVR Datafordeler to automatically update all Company (with CVR) or Production unit contacts in WorkZone with any changes from the Danish Central Business Register. The following core data is updated: Company name, address and industry code.

Once enabled, CVR Update will perform the update once an hour, ensuring all Company (with CVR) or Production unit core contact data is continually up-to-date with the Danish Central Business Register.

CVR Update is part of the CVR Online feature set and must be enabled separately in WorkZone Configurator > **Global** > **Feature Settings** > **Content Server** > **CVR** > **CVR Update**. **CVR Update** utilizes the KMD Logic cloud service to administer and manage connection to the CVR Datafordeler and both the KMD Logic cloud service and Datafordeler connection must also be configured correctly. Currently, both the KMD Logic cloud service and CVR Datafordeler may be accessed and used free of charge.

If the **CVR Online** feature has been enabled and the **CVR Update** feature is not enabled, users will still be able to import core CVR data from Danish Central Business Register during contact creation but any subsequent changes made to the contact data in the Danish Central Business Register will not be automatically imported into WorkZone.

> Note: The **CVR Update** feature is by default disabled after the initial installation of WorkZone.

Documents

Advanced PDF viewer full version

The **Advanced PDF** feature is no longer an experimental feature and changes saved to PDF documents will no longer contain a PDFTron viewer watermark.

System administrators can activate individual features of the **Advanced PDF** feature set in WorkZone Configurator > **Global** > **Feature settings** > **Annotations**. Separate licenses for the **Advanced PDF** feature must still be purchased for legal use of the feature set.

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Cases

Change case group and child case groups for multiple cases

Users can change the case group and the child case group for multiple cases in a case list, for example after updating the classification scheme for the case taxonomy where the case group of existing cases needs to be changed. Previously, each case had to be updated individually but now users can search for cases and mass-update their case groups from the search results tab.

Select the cases in the list, click **Edit** > **Case groups** and then select the new case group and/or child case group to apply for all the selected cases.

Contacts

References to deleted cases or documents detail tabs

Two new read-only detail tabs have been introduced to the contact details page: **References to deleted documents** and **References to deleted cases**.

Each detail tab displays all references of the active contact to documents or cases respectively that have been deleted and are currently in the recycle bin. The new tabs can be used with the existing **Case references** and **Documents** detail tabs on the contact detail page to get an overview of a contact's references before deleting the contact.

The new detail tabs are not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.

CPR Batch and guardians without CPR numbers

When importing CPR contact data from CPR Online or updating CPR contact data using CPR Batch, guardians that do not possess a Danish CPR number (for example legal companies acting as interim guardians) are now automatically imported into WorkZone as a Person (without CPR) contact. A reference with the Guardian role is also automatically created between the contact and the guardian.

> **Note:** The default contact type (known as Name types) of guardians without CPR numbers can be changed to better suit your organization's requirements.

If CPR Batch is employed

If a new guardian without CPR number is assigned to the contact, the next CPR Batch update will create the new guardian in WorkZone along with a new reference with the Guardian role.

The old guardian contact will not be deleted from WorkZone but the reference between the old guardian and the contact will be removed.

CPR Batch subscriptions

A subscription to CPR Batch update is now first created when a contact is imported into WorkZone. Previously, a subscription to the CPR Batch update was automatically created for a contact when a user performed a search for the contact.

Contact data is only updated if a contact has been imported into the WorkZone database and also subscribes to CPR Batch imports.

CPR number updates

If a contact's CPR number is updated, for example if the contact has registered a gender change, the contact's CPR number in WorkZone will be updated automatically if CPR Batch is subscribed to and set up correctly. If a subscription to CPR Batch is not active, the contact's CPR number can be updated manually through CPR Online.

When updating a contact's CPR number, regardless of how it is done, the contact's previous CPR number is stored in the **Previous name code** field to help users search for the contact using the previous CPR number as well as the new one. The **Previous name code** field is not displayed by default and must be added manually to the contact searches, contact detail pages and contact lists.

The **Previous name code** field is read-only and cannot be updated through user interaction.

Searches

Changed free text search behavior

The behavior of free text searches has been changed.

If three search words or less are entered in the free text search field, the entire search expression will be interpreted as containing an AND operator between each search word. The automatically applied AND operators will not be displayed in the free text search field. Since free text searches look up in all indexed text, the values in the Name 1 and Name 2 fields can be searched for more effectively.
For example, entering *Anne Fingerton* in the free text search field will display the contacts

named *Anne Marie Fingerton Smythe* and *Anne Marie Fingerton Smith* in the search results tab when the search is executed.

Exceptions

If any search operators (AND, OR, NOT, etc) are manually applied to the search words in the free test search field (for example “Frank OR Lloyd OR Wright”), the free text search expression will not be interpreted as containing an AND operator between each search word and the search expression will be applied as it is entered in the field.

If four or more search words are specified in the free text search field, all the individual search words will be joined into one single search expression – for example entering *Anne Marie Fingerton Smythe* in the free text search field will result in a search for “*Anne Marie Fingerton Smythe*”. When the search is executed, the contact named *Anne Marie Fingerton Smythe* will be displayed in the search results tab but the contact named *Anne Marie Fingerton Smith* will not be displayed.

Documents

Copy documents to other cases and register as archived

Documents can be copied to other cases and registered as archived during the copying process. This enables archived documents can be copied to other cases and still retain their archived states on the new cases.

Copied archived documents are created as drafts in the case they are copied to by default, but you can select to register the document as archived on the new case when you copy it.

Annotate, redact and edit PDF documents

PDF documents can be annotated, redacted and edited using the new Advanced PDF functionality. Advanced PDF replaces the Advanced PDF viewer introduced in WorkZone 2020.3 all aspects.

Separate Advanced PDF licenses are required to annotate/redact and edit PDF documents. A free version of the Advanced PDF is however available and installed by default. The free version of Advanced PDF can only be used to read PDF documents and the default WorkZone PDF Viewer is still installed and enabled for all users.

> **Note:** Licensed versions of Advanced PDF must be enabled in WorkZone Configurator.

The Advanced PDF license consists of three tiers. The first tier is installed by default and is free of charge. The second tier includes annotation and redaction features while the third tier contains annotation, redaction and advanced PDF editing features. The PDF Viewer is still available by default and enabled for use.

Both the **Advanced PDF** and **PDF Viewer** panes are opened from the preview pane. By default the preview pane contains and displays the **PDF Viewer** pane, but the preview pane must be configured to also display the **Advanced PDF** pane.

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

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

> **Note:** Advanced PDF editing is not supported by the Internet Explorer 11 browser.

Miscellaneous

Updated pinned tabs behavior

Pinned tabs are now collapsed and grouped in the far left of the tab row, freeing up space for the detail page tabs. Pinned and unpinned tabs can be rearranged by dragging the tabs to new positions within in the tab groupings (pinned or unpinned). Pinned and unpinned tabs cannot be mixed in the tab row. A tooltip text is displayed when hovering a mouse cursor over a pinned tab.

Pinned tabs as well as their tab order are restored whenever WorkZone Client launches and can be used as a quick way to have a set of favorite or important pages ready for work when WorkZone Client is opened.

To pin, unpin as well as close a tab, right-click the tab and select the relevant option from the menu. Closing a pinned tab will also unpin it.

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Cases

Updated fields available for Case searches

Three new search fields are available for general and type-specific case searches:

- **Updated by**: The WorkZone user who last updated the case meta data fields.
- **Updated date from**: The start date used when searching for updates to cases within a specific time period.
- **Updated date to**: The end date used when searching for updates to cases within a specific time period.

The new search fields are not displayed on the case search page by default and must be manually added to the page.

These search fields (**Updated by**, **Updated date from** and **Update date to**) have been available for document searches in previous WorkZone versions but have been added to case searches in this version.

Dashboard

Users can display an aggregated value of a field in the dashboard widget by selecting an aggregation function and then selecting a field to apply the function to in the widget. The selected aggregation function reduces the values of the field it is applied to, down a single value.

Only number fields (Integer or Decimal) can be aggregated.

Number (Integer and decimal) fields are not by default present in WorkZone and have to be created using custom fields or custom type fields.

Aggregate functions can be applied to cases, contacts and documents. Aggregate functions cannot be applied to meeting cases, or to widgets and lists that do not contain number fields that can be aggregated, for example WorkZone Process-related widgets.

> Note: Fields with the value 0 are included in the aggregation but fields that are empty (do not contain any value) are not included.

The aggregation function can be applied to the following widgets:

- Donut chart
- Bar chart
- Time line
- Speedometer
- Counter

The following aggregate functions can be applied in the widgets:

- **Avg:** (Average): The average (arithmetic mean) value of the selected field.
- **CountDistinct:** (CountDistinct): The number of unique values in the selected field.
- **Max:** (Maximum): The highest value of the selected field.
- **Median:** (Median): The median value of the selected field.
- **Min:** (Minimum): The lowest value of the selected field.
- **Stddev:** (Standard Deviation): The statistical standard deviation of the selected field.
- **Sum:** (Sum): The sum of the selected field.
- **Variance:** (Variance): The statistical variance of the selected field.

WorkZone Search

When creating a free text search, users can toggle between normal and extended searches as a search parameter to the **Free text** field.

- **Normal searches** will exclude any leading asterisk wildcard characters (*) from the search term and is the default setting.
  For example the search term **Case** will be treated as *Case**.
- **Extended searches** will include any leading asterisk wildcard characters (*) to the search term.
  For example the search term **Case** will be applied directly to the search as **Case**.

If the **extended search** parameter is selected, the search can produce a large number of results, consume noticeable system resources and take significantly longer to display the search results as all WorkZone elements in the search are traversed for all full and partial occurrences of the search term.

Documents

New **Pages** field on Document lists

A new **Pages** field has been added as a selectable field (column) to all document lists. The **Pages** field displays the number of pages in the PDF rendition of the document.

If the document does not yet contain a PDF rendition, the value in the **Pages** field will be empty. This does not mean the document itself is empty or does not contain any pages. It only means there is no current PDF rendition of the document and the field therefore cannot display any value.

The **Pages** field is not displayed in document lists by default and each individual document list must be edited to include the **Pages** field.

Process

Templates for advanced submissions

Templates for advanced submissions have been introduced in this version. A template consists of a series of process steps that indicate actions which one or more WorkZone users must complete in order to complete the process the template is applied to. The templates are created and maintained in the **Templates for advanced submissions** detail tab on the user's User Profile page.

Applying a templates to a advanced submissions adds a larger degree of adaptability in defining and completing the actions required of the submission. Each step can be assigned its own relative deadline.

The template's process steps can be defined as either sequential or parallel steps. Sequential steps must be completed in strict order, one after the other, while parallel process steps can be completed independently of all other process steps, including sequential process steps.

Other WorkZone users' access to a template can be restricted by defining access codes for Read and Write access to the template and its steps.

Only users assigned the STEPSUBMISSION access code may create, edit or delete templates for advanced submissions.

WorkZone Client 2021.0

Cases

Filter child cases

A new filter called **Filter Child cases** that can be applied to custom detail tabs has been introduced. The filter enables a user to create a custom detail tab on the case detail page with a filter on the custom detail tab that displays all child cases belonging to the active case.

Create new child case option

Users can create a child case directly on the case detail page by clicking **New** on the **Child case** detail tab or a custom detail tab that contains the **Filter Child cases** filter.

In previous versions, users first had to create child cases as ordinary cases and then add the newly-created cases as child cases on the **Child case** detail tab on the case detail page of the parent case. It is still possible to create and assign child cases like this, but now users can create the child cases directly from the parent case.

User access lists for the case

Two new lists have been introduced for display in the case detail tabs: **Users with read access** and **Users with write access**. The tabs display all users registered with read and write access on the case.

The tabs are not displayed by default and must be added by the detail, either manually or as part of a WorkZone configuration.

Auto purge respects defined the retention period

To prevent premature automatic deletion of soft deleted cases and documents, the retention period for deleted cases and document is now by default respected by the Auto-purge and Auto-delete Retention policy options. Users assigned sufficient rights (SOFTDELETE for ordinary deletion and RETENTIONADM for permanent deletion) can still manually delete cases and documents.

Previously, users with SOFTDELETE rights could delete a case or document by sending it to the recycle bin before the retention period expired. Once in the recycle bin, the case or document could be automatically deleted permanently after the purge period. Since the purge period was typically shorter than the overall retention period, a case or document could be permanently deleted inadvertently.

Documents

New fields in documents list

Three new fields have been added to all documents lists:

- **Extension:** Displays the file extension of the document.
- **Locked by:** Displays the WorkZone user who has locked the document.
- **Lock expires:** Displays the date and time when the current document lock expires.

The new fields are not displayed in the list by default and the list must be edited to display the fields. As with all fields in the list, you can filter and sort the list using the fields.

The **Locked by** and **Lock expires** fields can be combined with the **Checked out** and **Checked out by** fields to display who has opened and saved a particular document and whether or not it is available for you to edit.

User access lists for the document

Two new lists have been introduced for display in the Document detail tabs: **Users with read access** and **Users with write access**. The tabs display all users registered with read and write access on the document.

The tabs are not displayed by default and must be added by the detail, either manually or as part of a WorkZone configuration.

Miscellaneous

New **Process created** field in the list **My Open tasks**

Users prioritizing their tasks can use the **Process created** field in the list **My Open tasks** to sort and filter the list.

The **Process created** field is not displayed by default and the **My Open tasks** list must be edited to display the field.

New Personal configuration export/import functionality

WorkZone users not assigned the CONFGIGADM access code can export their own Personal and Private configurations to JSON file and import their own or another user's Personal and/or Private configuration files from the file system into their own Personal and/or Private configuration.

Importing configurations into other configuration types (Organizational, Unit, etc) still requires the CONFIGADM access code.

Users assigned the CONFIGADM access code can, in addition to all other configuration export and import rights, export and import Personal configurations into their own and the original owner's Personal configuration.

WorkZone Client 2020.3

Cases

Quickly execute a case activity multiple times

Recurring case activities can be executed multiple times without opening the **Confirmation** form by clicking the recurring check box (■), located to the left of the activity icons. Previously, a user could only execute a recurring case activity once without the **Confirmation** form being opened. If the user subsequently executed the activity again, the **Confirmation** form was opened and the user had to click again to close the form to continue.

View case activity history

A list of all actions performed on an activity can be displayed in the activities preview pane, allowing users to filter the list to gain an overview of past actions on the activity.

The activity history displays the activity name, the action performed, WorkZone user who performed the action, when the action was registered and any comments the user added when performing the action.

New **All Processes** case detail tab

The new **All Processes** case detail tab displays all processes registered on the case, including active, ended and expired processes. The **All Processes** case detail tab contains the same functions as the **Processes** case detail tab: Users can create a new process, edit a process, export selected processes to Microsoft Excel, open a selected process in a preview pane and finally cancel a selected process. Users can also refresh the tab in order to update the tab and display any changes made to your processes by other users.

Create filters for the Case references detail ribbon tab

On the Case detail page, users can create a filter and apply the filter to the **Case references** detail ribbon tab in the same way filters can be applied to the **Documents** detail ribbon tab and the **Case parties** detail ribbon tab. An existing saved search can also be applied to the **Case references** detail ribbon tab if necessary.

WorkZone Explorer for the Google Chrome browser

The **Explore** button is now displayed in the Main ribbon of the active case when using the Google Chrome browser. Due to the security model of the Google Chrome browser, the Windows File Explorer is not opened automatically when you click the **Explore** button. Instead, you must open the Windows File Explorer manually and then press **CTRL+V** in the address bar to open WorkZone Explorer for the active case.

The link address is automatically copied to your clipboard when you click the **Explore** button.

In previous versions, the **Explore** button was removed when using the Google Chrome browser.

Documents

New advanced PDF viewer enables extended PDF document editing

The advanced PDF viewer is an experimental feature that enables you to edit PDF documents directly. When you save your changes to the document, the document will be stamped with a PDFTron viewer watermark.

If your organization has enabled the advanced PDF viewer and also updated your WorkZone Client configuration to include the **View editable PDF version** pane in the preview pane, you can edit a PDF document directly in the preview pane, for example from the Documents detail tab on the case detail page.

An overview of all changes to documents is displayed in the **Versions** detail tab on the case details page.

The advanced PDF viewer enables you to edit the PDF document by:

- adding a comment (annotating)
- highlighting text passages
- adding freehand and predefined regular shapes
- adding a signature
- removing (erase) your edits

Note: Additional advanced PDF viewer editing features such as adding free text blocks, stamps and call-outs are currently not supported in WorkZone.

PDF documents that are locked for editing, archived , deleted, attached to closed cases, have been re-journalized, or which the current user does not have editing rights to, cannot be edited using the advanced PDF viewer (**View editable PDF version**). These documents can be read unless read access is also prevented.

You can make the advanced PDF viewer the default PDF viewer on the preview pane by placing the **View editable PDF version** pane before the **View PDF version** pane.

New advanced print options on the case report

Users can specify whether or not annotations, comments and revisions are to be included in the documents when creating a print out of case documents.

In the **Print case** form in the **Advanced** tab, users can specify whether or not to include comments and notes to the Word, Excel, PowerPoint and PDF documents of the report as well as display, accept or reject any revisions made to Word or Excel documents. You can also specify whether or not to flatten any PDF forms included in the report.

The advanced print options will override the default values defined in WorkZone Configurator > **PDF** > **Engine configuration** to the current report only.

Contacts

Municipality code field can be displayed in detail tabs and Contact searches

The municipality field (called **Municipality code** in WorkZone Client) now can be displayed in the **Address** detail tab on the Contact detail page, the **Parties** detail tab on the Case detail page and added to Contact searches using the **Show all fields** button. The **Municipality code** field can also be added in contact reference selectors.

Miscellaneous

System messages

System messages created by system administrators are displayed in the upper right-hand corner of the browser whenever the browser is opened or loaded. The content of each system message is defined by the system administrator and can inform users of any important information, for example if the system will be offline for maintenance in the near future.

System messages can be displayed to all WorkZone users as well as only displayed to users that match the access codes defined in the system message parameters.

Users can close a message by clicking on it, although system messages can be set up to prevent users closing the message.

There are three types of system messages:

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

WorkZone Client 2020.2

Cases

Searching for old case numbers

Old case numbers can now be used as search criteria when conducting a case search. If the case group is a part of the case number and the case group was changed on a case, the case would receive a new case number. You can use the old case number as a search criteria when conducting a case search by specifying which case number to use as criteria in the **Case number** field on the **Case search** page. **[actual]** uses the current search number while **[history]** uses a old (historical) case number.

New fields in the case life cycle detail tab

The **Case number** and **Responsible unit** fields can now be selected and displayed in the case life cycle detail tab, enabling users to see any changes made to these fields.

Documents

New field in the document life cycle detail tab

The **Responsible unit** field can now be selected and displayed in the document life cycle detail tab, enabling users to see any changes made to this field.

Generating PDF reports

Users can monitor the progress of their own PDF report generation requests in a new navigation list called **My reports today**. The **My reports today** list displays the status of all report PDF generation requests made by the user within the current day, including the progress of any report PDF generation requests currently in progress.

When PDF report requests are being processed, a red counter with the number of requests currently being processed will be displayed on the **Reports status** button.

The **My reports today** list can be added to the dashboard and navigation pane as well as opened from the **Reports status**button in the bottom panel of the browser page.

Lists

Enable hidden custom fields

If the cases, documents or contacts selected for mass editing contain hidden custom fields (custom fields that have been created but not added to the respective detail pages), you can enable these fields for mass editing by customizing the **Edit** menu in the main ribbon.

Exporting list results to Microsoft Excel

WorkZone Client no longer requires the WorkZone 365 plug-in to export list results to Microsoft Excel. Previously, the plug-in was used as an intermediary between WorkZone Client and the WorkZone server. Now, the export request is sent directly to the WorkZone server.

Export to Excel

The Export to Excel function has been changed and now uses Excel Power Query to manage the connection and data transfer between WorkZone and Microsoft Excel. Power Query is an improvement over the previous connection type but users must set up their Excel connection the first time they export a list from WorkZone to Microsoft Excel.

Once they have set up the connection, users only need to define the privacy level for the current spreadsheet the next time they export WorkZone data to Excel.

Miscellaneous

New system fields in custom lists

Four new system fields (columns) have been made available for all custom lists:

- Created: The date and time the row in the custom list was created.
- Updated: The date and time the row in the custom list was last updated.
- Updated by: The user who last updated the row.
- Created by: The user who created the row.

The new system fields are not added to custom lists by default and must be added manually by a user or administrator.

WorkZone Configurations

The functionality for editing and deploying (previously called distributing) WorkZone configurations has been simplified and streamlined.

Users not assigned the CONFIGADM access code can still customize and reset their Personal configurations but the functionality, menu options and user interface texts have been redone for improved usability and ease-of-use.

A user can now also open an overview of all the changes made to configurations the user is affected by: Organizational, Unit, User and Personal configurations. Users and other interested parties (administrators, consultants, super-users, etc) can navigate the list and see which changes have been made to the elements of each configuration type.

The overview will be empty if no changes have been made to these configurations.

Read access text strings displayed in drop-down lists for searches and filters

When filtering lists or when specifying read access codes in the Read access code field for case, document and contact searches, all existing read access codes for cases, contacts or documents respectively will be displayed as a text string in a drop-down list. This enables users to select from and/or filter the drop-down list instead of creating a new access code solely used for searching or filtering.

The **Read access** search field is a new field and will be displayed by default on all search pages. If your search pages were configured to hide the old **Read access** search field, you will have configure the same search pages to hide the new **Read access** search field.

> **Note:** The read access code text string is ordered alphabetically and filtered from left to right and filter terms are also applied from left to right. For example if a user filters the read access code drop-down list with "aaa bbb ccc", the access code "aaa ccc bbb" will not be displayed. If the filter applied is "aaa ccc" instead, the access code "aaa ccc bbb" will be displayed.

> **Important:** This change will invalidate any saved searches or saved filters that contain the **Read access** field. On filters, the **Read access** field will appear to be updated with the read access text string, but will not work as expected. On saved searches, the **Read access** field will be empty and still not work as expected.
>
> Users must manually update the read access filter or search criteria and update the

> filter or search in order to trigger the new functionality.

Filtered detail ribbon tabs must contain filter criteria

Users can add their own tabs in the detail ribbon on a detail page (case, document, or contact) and specify a custom search to apply to and filter the tab. Previously, empty searches (searches not containing search criteria) could be saved and applied to the tab. Now, searches must contain search criteria if the user wants to save and apply it to the detail ribbon tab.

WorkZone configuration editing changes

As a result of the redesign of WorkZone configuration editing, filtered tabs and the default dashboard cannot be removed (meaning deleted from the configuration). You can chose not to display a filtered tab or the default dashboard, but you cannot remove them.

Custom types

If there is only one custom type field that can be used as a reference, the name of the field will not be displayed in the **Tab selector** form when adding a custom type to a case, contact or document detail tab.

WorkZone Client 2020.1

Cases

Display all documents in a case hierarchy

A new **Documents in hierarchy** detail tab is now available for the case detail page. The **Documents in hierarchy** tab displays all documents attached to the active case as well as all documents attached to any child cases of the active case. In previous versions of WorkZone, users had to create a custom search for all documents in a case hierarchy, specifying search filters and criteria to obtain the same document list as the new tab displays automatically.

The **Documents in hierarchy** tab is not displayed by default and must be manually added to the case detail page.

Public access report

A new case report **Public Access, print out of the case documents** has been introduced and is accessible in the **Advanced** tab of the **Print case** form. The report creates a PDF with all case documents and a list of document parties on the case for public access requests from citizens.

The report is opened from the ribbon on the case detail page > **Print** > **Advanced** > **Template**.

Documents

Deleting documents and cases

Cases containing references to documents and documents containing references to cases and other documents can now be sent to the trash bin and deleted from the trash bin. Previously cases and documents containing references to other documents and cases could not be deleted. This also affects the automatic deletion of cases and documents if this functionality is used.

Automatic deletion of cases and documents

WorkZone can be configured to automatically send a case or document to the recycle bin when the defined retention period for the case or document expires. The automatic deletion parameter is set for each individual retention policy in WorkZone Configurator > **Retention**> **Retention Policies**.

Automatic deletion of cases and documents from the recycle bin

Cases and documents can be automatically deleted from the recycle bin after a predefined grace period, set as the number of days after the case or document initially was deleted (sent to the recycle bin). The grace period can be defined for each retention policy and is set up in WorkZone Configurator**Retention** > **Retention policies**. Items deleted from the recycle bin are deleted permanently.

Cases and documents will not be automatically deleted from the recycle bin if the grace period has not been defined for their retention policies.

Cases and documents that are to be deleted from the recycle bin will contain a date in the **Purge date** field in the respective recycle bin lists. If the **Purge date** field is empty, the case or document will not be automatically deleted from the recycle bin.

Improved document list search/filter

All document lists and document detail tabs now display a **Search in list** field on top of the list. The **Search in list** field is a free text search field where users can enter free text search criteria to filter the displayed documents list. The **Search in list** field accepts all WorkZone search operators, such as wildcards (*) and question marks (?) and pressing **Enter** will apply the search to the list.

When a search criteria is applied to the document list, the **Search in list** field will be displayed with a yellow background to indicate that the items in the list have been filtered.

Clear the **Search in list** field to load normal unfiltered document list.

Importing supplementary documents from other WorkZone databases

When importing main documents with supplementary documents from another WorkZone database, the supplementary documents were always imported with the original access code despite the **Import without access codes** check box setting.

Now, the **Import without access codes** check box is ignored for supplementary documents. Supplementary documents are always imported without any access codes and automatically restricted by case and restricted by (main) document.

Supplementary documents imported as main documents still respect the **Import without access codes** check box and are treated as main documents with regards to assigning access codes.

Create a document from Templafy

If the organization uses Templafy to store and manage its Microsoft Office templates, documents (Word, Excel, or Powerpoint) can be created based on the Templafy templates.

The document is created from the ribbon using the **Create from Templafy** menu option. A Templafy template is then selected and applied to the document.

The document is opened in the relevant Microsoft Office application and the user can add any relevant text. After the document has been completed, it can be saved back on the case again.

Note: Valid Templafy log-in credentials (User name and password) must be available, and the Templafy connection must be set up correctly in **WorkZone Configurator** > **Global** > **Templafy settings** before documents can be created using Tempalfy templates.

Important:
For Microsoft Internet Explorer: Integration with Templafy (3rd party product) using the https protocol is not supported.
For Google Chrome and Microsoft Edge: Integration with Templafy (3rd party product) using the http protocol is not supported.

Using the Safari browser

If you are using a Safari browser, 3rd party cookies must be enabled to use the Templafy integration in WorkZone Client.
3rd party cookies are enabled by clearing the **Prevent cross-site tracking** Privacy setting in the Safari browser settings. The **Prevent cross-site tracking** setting is fully implemented from Safari version 13.1 but present in Safari browsers from version 11.0.3 (3604.5.6).
For earlier versions of the Safari browser (before version 11.0.3(3604.5.6)), the **Prevent cross-site tracking** setting is not present.
While Templafy integration might work with other Safari versions, only the Safari browser, version 13.1 was used for testing Templafy integration.

Dashboard

Group by Custom field types

Donut and Bar widgets displaying contact data in a dashboard can be grouped by the following custom field types: Employee, Contact, and Unit

New widget display option - Use short label

A new display option has been introduced to the Donut and Bar chart widgets - **Use short labels**. Use the **Use short labels** check box to display the code of the grouping selected in the **Group by** field instead of the name. The **Display Legend** check box must also be selected in order to display the short labels.

New widget display option - Data ordering

A new display option has been introduced to the Bar chart widgets - **Data ordering**. Use the **Data ordering** to display the bars in the bar chart by ascending or descending order, going from left to right.

WorkZone Chat

This version of WorkZone introduces a new generally available module called WorkZone Chat to help WorkZone users increase collaboration and improve coordination in their daily work.

WorkZone Chat is an internal communication tool which enables WorkZone users to communicate about specific cases or documents, add additional case and document references, or remove existing references. WorkZone Chat can also be used to communicate more informally with other WorkZone users without being associated to a case or document.

WorkZone Chat can only be used to communicate with other WorkZone and can only be used internally through WorkZone.WorkZone Chat cannot be used to communicate with other parties or contacts externally. If you need to communicate with an external contact or party, you must use another 3rd party chat program.

Note: WorkZone Chat is disabled by default and must be enabled by a system administrator in **WorkZone Configurator** > **Global** > **Feature settings** > **Client** > **Chat**.

WorkZone Chat can be opened from the bottom of the browser page or from any case or document the chat contains references to. If the chat is opened from the bottom of the browser page, all chats for the user are displayed, and if a chat is opened from a referenced case or document, only that specific chat with the case or document reference is displayed.

WorkZone Chat respects all existing case and document read and write permissions. Users will not be able to view chat references to cases or documents they do not have read access to. Users will still be able to participate in chats, but will not be able to access cases or documents they do not normally have access to.

Chats can be created from the bottom of the browser page or directly from a case or document. If a chat is created from a case or a document, a reference to the case or document has already been created. The user can then add participants and start chatting. If the chat is created from the bottom of the browser page, the user must manually add any relevant references and add participants.

Any chat participant can edit a chat, and case and/or document references as well as participants can be added and removed during the chat. Additionally, chat details, such as title and description can be changed by any chat participant at any time.

A WorkZone Chat can be defined to be retained, which means that the chat cannot be deleted. Ordinary (unretained) chats can be deleted manually and are also automatically deleted from the system after a predetermined amount of days. Chat can be toggled between retained and ordinary chats by any chat participant.

Miscellaneous

New counter on detail tabs

A new counter has been introduced as a configurable setting on the case, document and contact detail tabs. The counter displays all unread items on the tab and uses the MRU (Most Recently Used) and Reading lists to determine whether or not an item (document, chat, processes, case references, parent cases, child cases, document references, documents in hierarchy, supplementary documents, and items in the recycle bin) has been opened by the current user. The counter is red in order to differentiate it between the other (light blue) counter on the detail tab which displays the number of items on the tab.

> **Note:** Unread items are displayed in bold in the tab and in lists.

The unread items counter is by default enabled for the **Chats** detail tab and disabled for all other tabs.

You can enable or disable the unread items counter in the detail tab settings by toggling the **Display unread items counter** check box on the **Edit tab** form.

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Cases

Case activities

The **Deadline** column is now available to the **Activities** tab and displays the deadline defined in the DCR process for the activity. The **Deadline** column is not displayed by default and must be manually added to the **Activities** tab.

New list - My Open and Pending Tasks

A new list called **My Open and Pending Tasks** has been added to the Navigation pane lists in the **User Tasks** group. The new list combines the **My Open Tasks** list and the **My Pending Tasks** list into one list. You can right-click a task and jump to the case the task is registered on to continue work there.

Changing case group during case creation

A field on a case detail page will not be overwritten by the default values from a case group if the default values are undefined or empty. Case detail page fields where default values have been defined on the case group are still overwritten. This only applies when creating a new case. If you select another case group on an existing case, case group default values are not applied to any field.

Actor Sequences relocated

The menu item **Actor Sequences** has been relocated from the main ribbon to the User's user page and added as a new **Actor Sequences** detail tab. You can now add, edit and manage actor sequences from your user page.

Case Group default values

Applying a case group to a case will not overwrite any existing values in fields that normally are overwritten by case group default values as long as the selected case group does not contain default values for the fields in question.

In previous versions, selecting a case group without defined default values would result in the **Case handler** field being overwritten with the current user, the **Responsible unit** field being overwritten with the organizational unit of current user's and the **Case type** field being cleared if default values had not been defined for the **Case handler**, **Responsible unit**, or **Case type** fields.

Contacts

You can add a custom contact list that your system administrator has created to your contact detail tabs and afterwards enter contact information in the custom list fields for the list. When searching for contact information, custom list fields can also be added as search criteria to your search.

Custom contact lists can also contain references to other cases, documents, or contacts, and you can open these references in a new tab by selecting **Navigate to** and then the reference to open, or by right-clicking a row and selecting the reference to open.

Meetings

State field for meetings displayed

The **Meeting State** field for meetings can now be displayed in the two Meeting lists: **Meetings** and **Meetings organized by me**. The meeting status is also displayed on the Meeting detail page in the **State** field and can be added as a search criteria when searching for meetings (**Meeting state** search field).

The **State** field displays the current meeting status (Active or Canceled) and is updated automatically from Outlook (if you are using the Microsoft Office Web add-in for WorkZone) or manually from WorkZone (if you are using the VSTO-based Microsoft Office add-in for WorkZone).

The **Meetings** list is automatically filtered to only display active meetings (the **Meeting state** field equals Active) while the **Meetings organized by me** displays all meeting states but can manually be filtered to display selected meeting states.

Miscellaneous

Quick Searches

The Quick search functionality (**Go to**) has been relocated from the ribbon of the case, document, and contact pages to the **Open** button in the tab area. As a consequence of the relocation, the shortcut keys have been reassigned. The **CTRL+G** shortcut key now displays a menu at the **Open** button where you can select **Case**, **Document**, or **Contact** to open the corresponding **Go to...** form. You can also click the **Open** button to display the menu.

Notes

A new detail tab has been introduced to the detail tabs for the case, document, and contact detail page. The new tab is called **Notes**. The **Notes** tab contains all the notes created for the case, document or contact in question and replaces the old WorkZone functionality for creating and editing notes. The new **Notes** tab aligns the WorkZone notes functions with the current options for working with detail tabs such as selecting multiple items in the detail list, opening a preview pane, as well as creating, editing, and deleting notes. Users can also access a menu of options by right-clicking a note in the detail list. Likewise, a counter can be displayed on the tab to display all current items in the detail list of the tab.

As a result, the notes icon ( ) and functionality has been removed from the ribbon on case, document, and contact detail pages.

Character usage count in text fields

The total number of characters available for content in a text field is displayed in gray text in the upper right hand corner of the field. The number to the left of the slash is the number of characters used and the number to the right of the slash is the total number of characters available. Some text fields can contain 4,000 characters while other text fields can contain less, for example the **Case text** field can contain 4,000 characters while the **Note text** field can contain 2,000 characters.

For text field containing formatting options, such as **Note text** fields, the hidden formatting codes will also be included in the total amount of used characters.

Select tabs to view button in the detail tabs relocated

The **Select tabs to view** button in the detail tabs has been relocated to tabs-section on of the detail ribbon and a new image is now used as the button image. Previously, the **Select tabs to view** button was located to the far right of the detail ribbon and a sprocket icon ( ) was used as the button image.

Counter on detail tabs

A detail tab can contain many rows in the detail list and you can configure each detail tab to display a counter on the tab, showing the number of rows in the list. The counter displays the number of rows currently displayed in the list so any filters on the tabs will be respected.

The display counter is disabled by default for all tabs except the **Notes** tab but you can display the counter for each tab on the **Edit tab** form.

Custom types/custom case lists

Custom case lists have been expanded and renamed to Custom types. Custom types are collections of customizable fields that can be defined by a WorkZone administrator and applied to case, document, or contact detail pages.

Toggle maximized/minimized main ribbon

The main ribbon toggle function has been expanded. Previously you could only toggle between the maximized and minimized main ribbon by double-clicking the tab title. Now, new **Toggle** and **Toggle** icons have been introduced in the main ribbon which also enable you to toggle between the maximized and minimized main ribbon.

New shortcut keys for search pages, form and dialogs with drop-down lists.

If a field on a search page, form or dialog contains a drop-down list, you can press any **Arrow** key (Up, Down, Left, Right) or **Space** to open the drop-down list in the field. In previous versions, you could also press **Enter** to open the drop-down list in the field. This has been removed as pressing **Enter** in a Search page or dialog with search functionality will start the search.

In order to prevent searching the entire database and thereby negatively impacting performance, pressing **Enter** in a search page with no defined criteria will not start the search.

Columns that contain numbers in lists are right-aligned

If a custom field in a list is defined to contain a number (decimal or integer), the column will be displayed as right-aligned in the list. Text columns (fields) are still displayed left-aligned.

Many standard fields, while displayed as numbers, are not considered number fields for this purpose; for example case or document numbers are considered ID fields and not number fields despite potentially containing number values.

New shortcut key to toggle the Preview pane

In the Detail tab, select an item and press **p** to toggle between opening and closing the Preview pane for that selected item only.

Open the Select columns form directly

The **Select columns** form can now be directly opened from the detail tab list columns by clicking **Column** options in the right side of the list columns.

You can still right-click a column heading and select **More** to open the **Select columns** form.

Cases

Case activities

You can start and manage multiple case activities for a case by using the new **Activities** case detail tab.

The **Activities** tab lists all case activities created on the case and enables you to better manage the case activities. From the **Activities** tab, you can start a new case activity, open the **Case activities** pane where you can update activity tasks, refresh all activities on the case, delete an activity, and export selected activities to Microsoft Excel.

As a result of the new **Activities** case detail tab, the following changes have been made:

- The **Activities** button is no longer displayed in the case ribbon and the **Case activities** pane is no longer opened from the case ribbon.
- The open activities counter is no longer displayed on the button.
- The **Delete** and **Update** buttons have been moved from the **Case Activities** page to the **Activities** tab on the case details page.
- The deadline date and time of the activity is no longer displayed in the case detail page. Previously, the activity deadline date was displayed in the far right of the case title.
- Newly created activities will be displayed in a **Preview** pane by default.
- Required case activities (case activities that must be completed) are indicated by a blue exclamation mark in the far left column in the **Preview** pane.

Filter by status in the Activities list

All case activities are displayed in the **Activities** list, including inactive activities (for example Completed or Terminated). Use the **Status** column to filter the **Activities** list by the desired activity status.

Activity column removed from all case lists

The **Activity** column has been removed from all case lists in the navigation pane. The default column rows are now Title, Case Number, Created Date, Planned Completed, Reminder date and Closed date.

Lock access rights inheritance

WorkZone can be set up to lock access rights inheritance, preventing users from removing inheritance of access codes for documents. Inherited access rights are still displayed, but users will not be able to clear the **Restricted by case** and **Restricted by document** check boxes in the **Edit read access** and **Edit Write access** forms.

Access rights inheritance are locked by enabling the **Enforce Access Code Inheritance** feature setting, found in **WorkZone Configurator** > **Global** > **Feature settings** > **Content Server**.

Ditmer Agenda Management module

You can add multiple documents (called Enclosures in the Agenda Management module) to an agenda item. The documents can be added within WorkZone for example from the case you are creating an agenda item for or from the file system (outside of WorkZone.

Processes

Case handlers can now gain an overview of all processes on a case in the new **Processes** case detail tab.

The **Processes** case detail tab enables a user to:

- Create a new process based on the active case
- Export selected processes to Microsoft Excel
- Open a selected process in a preview pane
- Cancel a selected process.
- Refresh the tab in order to update the tab and display any changes made by other users.

Additional user task information has also been added to the Process lists on the Home Page in the Status column as well as providing a visual overview of the state of the task using user task icons (Green, Yellow, Red, indicating "in time", "near due", "over due").

Order user tasks by rank

When a new process is created, user tasks are automatically assigned the next available ranking but can be ordered and reordered in the **My Open tasks** list in the navigation pane and in the **User tasks** detail tab page in the current user detail page. The rank order of the tasks is displayed in far left column in the list. You can additionally display the **Rank** column in the list.

To reorder a user task, in the tab page drag the row to its new placement. You can only reorder your own user task or user tasks of user you are a delegate for.

Process Notifications

You can configure when to send notifications from WorkZone Process as emails and notifications on a mobile device in your personal settings. Your personal settings override the global process notification settings.

There are three types of notifications:

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

Documents

Restore document version

If you have restored an older version of a document and it is the current version being worked on, you cannot restore the older version again. The **Restore version** button will be inaccessible for the older version. You can still restore other older versions. Previously, the **Restore version** was still accessible for the old version of the document, even if the old version had been restored and was now the current version being worked on. The button was merely accessible, clicking the button would still not restore the old version again as long as it was the current version.

Reports

Two new reports have been introduced for cases and documents.

- A filtered case list with parties and documents
- A filtered document list with parties and supplementary documents

The **A filtered case list with parties and documents** report creates a PDF report of the case data for all cases in the list that satisfy the applied list filters. while the **A filtered document list with parties and supplementary documents** report creates a PDF report of the document data for all documents in the list that satisfy the applied list filters.

Both reports are available in all case and document lists. Filtered case and document list reports cannot be executed on document and case reference lists.

Lists

Editing field values in lists

When editing field values for items in a list (Cases, Contacts, Documents, Meetings, et. al.), the corresponding column no longer needs to be displayed in order to edit the value. Previously, users were required to display the column of the field they wanted to edit. Now, all editable fields can be accessed through the **Edit** button in the ribbon, either from the menu or from by right-clicking and selecting **Edit**.

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Custom case lists

You can add a custom case list that your system administrator has created to your case detail tabs and afterwards enter case information in the custom list fields for the list. When searching for case information, custom list fields can also be added as search criteria to your search.

Custom case lists can also contain references to other cases, documents, or contacts, and you can open these references in a new tab by selecting **Navigate to** and then the reference to open, or by right-clicking a row and selecting the reference to open.

Custom case lists can be copied along with other case references when copying a case.

Contacts

Maximum number of characters in Name & Address fields

The number of characters that the **Name 1**, **Name 2**, **Address 1**, **Address 2**, and **Address 3** fields can contain on the Contact detail page has been increased to 150 characters for each field. Previously, the maximum number of characters each field could contain was 60.

Customize Search results for each contact type-specific search

The Search results tab can be customized for each contact type that you base your search on. In this fashion, you can configure the **Search results** tab for each contact type you want to search for and display only the search results you need for each contact type.

Agenda Management

As an experimental version, WorkZone Client can integrate with the Agenda Management module produced by Ditmer, which enables you to create a meeting agenda from a WorkZone case in the Agenda Management database.

You can create agenda items for the meeting as well as upload meeting documents to each agenda item from WorkZone. The title and attached documents can also be edited from WorkZone.

Additionally, the Agenda Management module can be accessed normally by users who are registered in the Agenda Management module.

Installing and activating

The Ditmer Agenda Management module is installed by default during the initial installation of WorkZone but is not activated by default. If you want to use the Ditmer Agenda Management module, you must activate and configure the module.

When the Ditmer Agenda Management module is activated, the **Case preparation** detail tab will be available in the Case detail page. When you add the detail tab to your Case detail page, you can start using the module.

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Contacts

Contact types

When creating new contacts, you must select the contact type to be created in the **Contacts** menu.

Each contact type now has its own configurable contact detail page in order to enable super-users to customize each contact detail page to the contact type. The previous contact detail page contained the same layout, fields and custom properties for all contact types, despite requirements for layout, fields and contact information may be different from contact type to contact type. The contact data you might want readily available for a company may not be the same as the contact data you would want for persons, employees or municipalities.

Contact searches

Contact searches: You can create a search for a specific contact type by selecting the contact type in the **Contact** menu of the **New search** button in the Main ribbon. The contact type selected for the search cannot be changed when the search is run or if saved as another search. The contact type (the **Type** field) can be displayed and changed for general contact searches.

Cases

New default case

New default case: A new case, the Standard case has been introduced and is set as the default case. This means when a case is created using OData or WorkZone Explorer, a Standard case is automatically created. In previous versions, the Subject case was created by default. When manually creating a case, you must select the case category before creating the case.

Standard cases do not have a case category. When searching for Standard cases, all cases where the case category field is empty are therefore found.

The Standard case is a WorkZone system category and can be edited but not deleted.

A case category can be changed to any other category, for example changing a Standard case to a Subject case and back.
The case category of a case can also be cleared, effectively changing the case to a Standard case and changing the case template used for the case to the default case template.

Change case category, case group, and primary party

You can change the case category, case group, and child case group of an active case. If the active case has a primary party, you can also change the primary party

In the ribbon of the case detail tab page, the **Category** button has been moved into the new button called **Change** which now contains all change actions you can perform on a case:

- Change case category
- Change case group (and child case group)
- Change primary party

Note: Changing a case category is not new functionality, but is mentioned because the functionality has been moved to the new **Change** button.

The planned close date can be defined before the created date on a case

The planned closing date on a case can now be defined before the date the case was created (the **Created date** field). Previously, you could not define a planned closing date earlier than the date the case was created and an error message would be displayed. Now, you are informed of the potential error but not forced to change the date in the **Planned closing date** field.

Some organizations will in certain situations start work on a case, including estimating when the case is to be closed, before the case is physically created in the WorkZone.

The value in the **Created date** field is automatically generated by WorkZone when the case is created while the value in the **Planned closing date** field can be entered manually.

Additional columns displayed in the Case life cycle sub tab

The columns available for the **Life cycle** tab on the case detail tab have been increased and now include the **Case group**, **Child case group** and **Primary party** columns. The **Case group** column is displayed by default while the **Child case group** and **Primary party** columns can be added to the **Life cycle** tab if necessary.

New check box for case activities

A new check box has been introduced in the **Case activities** pane. The check box enables you to quickly complete an open or executed (recurring) activity without opening the process dialog.

The check box is only displayed for case activities which can be completed.

Case activities (Replicated from WorkZone Process)

- A new **Update** button in the **Case activities** pane, which updates the activity list to make sure that the list reflects data changes.
- You can now select **No filter** in the **View** list in the **Case activities** pane. if you select this filter, you will see all case activities including activities handled by the system.

Documents

Print PDF versions of documents without document classification

You can print PDF versions of existing documents that do not contain document classification without having to select a document classification for the documents. Documents without document classification values could exist after an upgrade to WorkZone 2018.0 or newer if the documents were not updated with document classification codes.

If you were operating on an older database created prior to WorkZone 2018.0 and the database you are operating on has been closed (preventing you from updating the document meta data with document classifications), you could not print documents from the database as PDF files.

If you print a PDF versions of existing documents that do not contain document classification and save the PDF back on the case, you must still select a document classification as well as other mandatory fields such as document title and document type for the PDF document. This is because the PDF document is now considered a separate document within the WorkZone case / document structure and must adhere to the document policies defined for your organization.

Generate PDF versions of documents on Closed cases

You can generate a PDF version for documents on cases that are closed. Previously, a case had to be reopened to generate a PDF of its documents and then closed again once the PDF file had been generated.

Document search in a case hierarchy

You can find for all documents in a case hierarchy by selecting a parent case in a document search query and setting the search behavior to search the case hierarchy. All documents on the parent case and any child cases will be listed in the search results. You can save your search query as usual for reuse as well as distribute (share) it to other WorkZone users.

The case hierarchy document search can only search downwards in a case hierarchy and you can only specify one parent case to base the hierarchy search on. Furthermore, the case hierarchy document search uses the **Case (simple)** field in the document search tab page to contain the parent case and can only contain one case when using the hierarchy search.

When creating a new document search query or editing an existing, you must select the search behavior in the **Case (simple)** field:

- **[case]**: Search by case only, can contain multiple cases.
- **[hierarchy]**: Searches downwards through the parent-child case hierarchy, can only contain one case.

Apply access code of the current case to documents imported from other WorkZone databases

When importing documents from another WorkZone database, you can apply the access code of the current case to all the documents selected for import by selecting the **Restricted by case** check box in the **Edit read access** form.

Miscellaneous

User tasks

You can now to see the date and time of the latest received user task. To do this, you must add the new **Updated** field as a column to the user task list. The values in the **Updated** field are displayed as a date and time. You can sort the **Updated** column in the list to list the most recent or oldest user tasks in the list.

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- The Case activities list contains a light blue comment counter for each activity in the list. This enables the case handler to quickly gain an overview of the number of comments on each activity in the entire list and see which activities have generated most comments.
- Shared searches can be reassigned to other WorkZone users. As a result, a new field called **Owner** has been created. The **Owner** field defines who the current owner of a saved search is and can be added to lists, for example Shared lists and My list in order to display ownership of searches.
  If you are the owner of a search, you can reassign the search to another WorkZone user, transferring ownership of that search to the user. You can also take over ownership of a saved search from an inactive WorkZone user if you have the same access code on the search as the old owner.
  This enables you to take over shared searches created by employees who no longer are with the organization. As the new owner, you can edit the searches, to ensure continued maintenance and making updating of the searches possible.

  For more information, see Reassign a shared search

- Searches can be used as a base for new searches by other users by saving the new search with a new name to avoid naming conflicts. Saved searches you own can be edited, updating the search itself, or saved as a new search.
  Shared searches not owned by you cannot be overwritten and can only be used as a base for creating a new search.
  This enables an organization to define several core searches which can then be re-used by other users and edited to fit their particular work flow.

  For more information, see Create a new search based on a saved search
- When applying a list filter, you can select to save the filter to your local configuration. The next time you open the list, the filter will automatically be applied. If you reset the configuration, all your list filters will also be reset. You can still edit the list filter and save it again.

  For more information, see Filter a list
- For Cases, Documents, and Contacts, right-clicking a list item will open a List menu with the same options as the Main ribbon but filtered to fit the list item type (case, document, or contact).
- When you delete a saved search which is used in one or more configurations, for example in lists or customized tabs, all configurations that use the search will be listed in a dialog box where you can cancel the deletion of the search or continue to delete.

  For more information, see The list menu
- List selectors for the Case, Document, and Contact detail pages can be customized, enabling you to add, re-arrange, and remove search fields for the searches for the following detail tab pages:
  - Parties
  - Case references
  - Document references
  - Child cases
  - Parent cases

  For more information, see Configure list selectors

- Meeting reports can be printed directly or printed and saved on the parent case. The meeting report must exist in PDF format before you can print it. You can define document meta data when printing the report to ensure that the meeting report is registered with the correct data when saving on a case.
  For more information, see Printing meetings
- Documents can be imported to an active WorkZone case from other WorkZone databases. Documents in the other databases can be searched for and selected for import. The case handler and/or responsible unit can be inherited from the imported document or reused from the case to contain the imported documents prior to importing. Generally, all document meta data is imported, with significant exceptions (custom properties, access codes, document references, document states and document types). Please refer to the online help for more details.
  You can use document lists to identify imported documents by their source database in the **Originates from** column.
  For more information, see Importing documents from other databases
- When using the Quick search, closed cases are also included in the search.
  For more information, see Quick Search
- Due to a new implementation of CVR integration, it is no longer possible to use a company's address or postcode as search criteria when importing company contact details using WorkZone's CVR integration. You can query the CVR online database by CVR number, P-number and/or company name and select only to display CVR number results.
- For WorkZone Content Server, Standard Edition:
  When browsing for access codes to apply to a case or document, you can apply a filter to display access codes by All codes, Term access codes or Organizational codes. For large organizations with many access codes, this can improve performance and overview by reducing the number of search results a user has to browse.
  If the access code name is known, a user can still enter the name in the Access code field to additionally filter the list.
  For WorkZone Content Server, Corporate Edition, no changes have been applied to the way access codes are selected and assigned.
  For more information, see Manage access rights
- Column selection has been improved. When selecting columns (fields) to display in lists and other WorkZone elements, you can see which columns are currently

available, which columns are currently displayed in the list as well as manually adjust their width, optimizing the list space used for displaying information.

WorkZone Client 2018.2

New User Interface

The user interface of the WorkZone Client has been updated with the following changes:

- New, sharper and more precise icons that retain their clarity when resizing the web page.
- Tab-page color-coding has been removed and replaced with small icons of the contents of the tab page.
- When items (Cases, Documents, Contacts, Meetings) on a tab page contain unsaved data, a small red marker is displayed on the title of the tab page. Previously, unsaved data was not displayed prominently.
- All items selected in lists are highlighted with a light blue overlay instead of an item-specific color.
- Counter icons are now light blue instead of red; they still display the number of selected items in the list.
- The labels of the ribbon groups in the main ribbon are no longer displayed, and some ribbon groups are collected in the **Manage** button if the web page is too small to display all the ribbon groups.
- Ribbon options that have prerequisites, for example sharing document links in e-mail messages, are not displayed if the prerequisites are not installed. In the example above, the share document link will not be displayed if WorkZone for Office is not installed on the server.
- Double-clicking the item tab will compact the main ribbon, displaying smaller icons and hiding button labels.
- The field labels are reduced in size and font, drawing attention to the field instead of the field label.
- Mandatory fields are underlined with red and displayed with red asterisks, drawing attention to the fields that require input. Previously, mandatory fields were displayed in red only, complicating use for color-blind users.

- Fields that have been selected (fields in focus) are outlined in light blue.
- In general, the use of bright colors has been toned down or reduced greatly, apart from places where user attention is considered important, in order to facilitate better overall orientation and to improve work flow.

Editing multiple items

- You can select multiple items (cases, documents or contacts) and add an Information or Date Type to or remove an Information type or Date type from the selected items by using the respective lists (Contact, Case or Document). For more information, see Edit multiple items in a list.
- You can select multiple items (cases, documents or contacts) and add contact references to and remove contact references from the selected items by using the respective lists (Contact, Case or Document) to select and update multiple items. For more information, see Edit multiple items in a list.
- You can change the case category for multiple cases in the case lists. To do so, you must first add **Case category** to the ribbon. For more information, see Change a case category.

Dashboard

- The Speedometer widget (sometimes called a Gauge chart) combines the Counter widget with a pie chart to indicate the number of a items in a list as well as visually indicate where the counter value is placed in a predefined range. For more information, see The Speedometer widget.

Search feature

- You can directly search for a case, document or contact by opening a quick search form and entering key search criteria such as case number, case title, document number, document title, contact name or contact ID. Quick Search supplements standard WorkZone search functionality by sacrificing multiple search criteria for speed and ease of use. For more information, see Quick Search

Microsoft Office Online Server

- If the Office Online Server is installed and set up to integrate with WorkZone, you can edit office documents in your browser, using all Office Online functionality instead of having a Microsoft Office Suite installed on the local machine. Office Online Server enables concurrent users to edit and save the same document but contains less advanced office functionality.

Documents

- You can change a draft document (UÅ) or Personal draft document (UP) to any of the four document states (UÅ, UP, UL or ARK). Locked documents can only be archived. The state of Archived documents cannot be changed.
- You can display the document size in Kb in document lists by selecting the **Size** field when adjusting the columns in a document list. For more information, see Add / Remove columns in a list
- You can keep, delete, and restore previous versions of your documents. For more information, see Draft versioning.

Other features

- The **Case text** column can now be displayed in the Case list. The Case text column is not by default a part of the Case list and must be manually added by right-clicking the column header and selecting **Case Text**. For more information, see Display or hide list columns.
- Any pinned detail tab pages are opened when the WorkZone Client is launched. This enables you to have a set of pinned tab pages always available whenever WorkZone Client opens. A new detail tab page menu enables you to pin or unpin all open tab pages or just the active open tab page as well as unpin all other tab pages. For more information, see About detail pages.
- You can use the favorites icon to add an item to or remove an item from the favorites list. In the detail tab page, click the favorite icon to toggle the item's favorite status. In the list, double-click the favorite icon to toggle the item's favorite status. For more information, see About favorites.

WorkZone Client 2018.1

Search features

- If you search for cases by a case group, you can include or exclude its child case groups in the search.
- If you search for cases or documents by a responsible unit, you can include or exclude its child responsible units in the search.
- If you search for documents by a case and you know which case(s) must be included to the search criteria, simply select these cases in the **Case (simple)** field.
- If you search for a case, document, or contact by a numerical field, you can define an interval of numbers as search criteria. For example, if there is a field that stands for floors of a building , you can search for buildings that have between 20 and 30 floors.

Print features

- Print case documents from the detail tabs. Use this functionality to easily print a specific subset of documents that you can collect in a custom document list and add as a detail tab.
- Print case notes to a PDF file.

Other features

- Delete contacts of any type except **Employee** and **Unit**.
- Possibility to restore a deleted document has been extended with new options:
  - you can restore the document with its original case;
  - you can restore only the document and move it to another case.
- Create custom tabs for parties to display parties only with a specific type and/or role. You can add such custom detail tabs on cases, documents, or contacts.

  Considering this change, the **Authors** detail tab on documents has become obsolete and is no longer available.

- You can filter case activities by **Role**.
- You can filter case activities by **State** and this filter is kept when you restart WorkZone Client.
- You can set a relative period for the time line widget.

New options to add and edit fields

- Edit case handler, responsible unit, read access, and retention code on a closed case.
- Change case category after case creation.
- Rename detail tabs on cases, documents, and contacts. Note that new titles on the case detail page are only applied to cases within the same case category.
- Edit **Acting unit** on case and document lists.
- Custom fields with integer and decimal values can be added to the case, document, and contact detail pages.
- Users who have the MULTIEDIT access code can see up to 500 list items on a page. This feature is design to help managers reorganize work scope between units.

User interface changes

- Multiple dashboards help you view and group even more widgets.
- Version format has been changed. Now it is unified among all WorkZone products.
- The **Report** button has a new icon.

WorkZone Client 2018.0

EU GDPR requirements

GDPR (General Data Protection Regulation) is the primary law on personal data protection in the 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:

- You can delete cases and documents temporally (so that they are stored in the recycle bin) or permanently.
- **Retention policies** define for how long a case or a document should be retained in the database. For example, some cases must be retained for 10 years after closure, while some cases can be deleted at any time. All these rules are defined and automated in the retention policies. Each retention policy has a retention code associated with it.
- **Document classification** orders and prioritizes data based on its sensitivity. For example, some documents can be available to everybody, while other documents might contain information that cannot be shared with a wide audience. Starting with this release, document classification code, that it defines its sensitivity level is a required field for each document.

Note: Documents created in WorkZone Client 2017 SP1 and earlier versions are not classified automatically. You can apply classification codes to them manually.

New features

- Meet new types of widgets available on the dashboard - counter, donut chart, time line and bar chart. Apple the most relevant widget type to a list and get extended information by a quick glance.
- The dashboard has become more flexible and functional. You can easily add, resize and reorder widgets to form the dashboard that you want.
- Cross-register search. Use this functionality when you have search requirements both to cases and documents. In other words, you can search for documents that belong to specific cases and you can search for cases that contain specific documents. For example, you can find emails that must be replied today and that belong to cases assigned to you.
- You can define two new settings for subscriptions:
  - number of items that you want to receive in emails, and
  - whether you want to see all items in the lists or only new ones.
- You can view all access codes assigned to you on the **My access codes** detail tab.

- Content-sensitive help. When you click **Help** in WorkZone Client, you see the relevant page in WorkZone Client documentation. This simplifies the search of the needed information.

Missing description of the existing functionality has been added to this guide:

- Concept of facets and case groups
- How to import contacts with CPR and CVR numbers
- Glossary. Find the list of terms and their definitions on the **Glossary** tab next to the **Contents** tab. If you meet a term written in green when you read the guide, click the term to read its definition in a pop-up window.

WorkZone Client 2017 SP1

- Case activities have been introduced in this release. Use the case activities functionality to track and manage workflows in WorkZone Client.

WorkZone Client 2017

Work with lists

- You can mark any case, document, or contact as unread in order to view it later in your **Reading list**. When you have viewed an item, it is removed from the list.
- In the case lists, you can expand a parent case to view its child cases. This enables you to see connections between cases on the same tab. Double-click the name of a child case to open its detail page on a new tab.
- In the document lists, you can expand a main document to view its supplementary documents. This enables you to see connections between related documents on the same tab. Double-click the name of a supplementary document to open its detail page on a new tab.
- You can export the lists that include custom fields to Microsoft Excel.

Work with PDF

- You can generate PDF reports to view or print information about cases and documents. See Reports.
- Sometimes PDF versions of documents may be not created due to technical issues. To view a list of such documents, add the **All unsuccessful PDF documents** and **My unsuccessful PDF documents** lists to the navigation pane.
- You can print main and supplementary documents of a case to a PDF document and save the PDF document on the case or on a local disk.

User Guide usability

- You can find extended information about each button in the Ribbons section.
- The User interface section has been restructured and simplified.
- The WorkZone Client configuration section now only contains descriptions and actions that are relevant for regular users. Information for administrators has been moved to the WorkZone Client Administrator's guide.

Other features

- You can start a process from a document detail page. The new process is connected to the case of the corresponding document and automatically includes this document.
- The "copy a case" functionality has been extended. Now you can copy a closed case or a case with contacts that no longer exist in the database. See Copy an existing case.
- You can create notes on contacts. This functionality works in the same way as notes on cases and documents.
- The **Archive approved** field is added. It informs whether the Danish National Archives accepts a document type. This field is read-only.

General usability

- The wrench icon , which was used in configuration mode, has been changed to a gear icon . It is now always visible in the user interface.
- New or changed cases, documents, and contacts on your reading list are now formatted in bold. The bold formatting disappears when you open them.
- When you search for a case, document, or contact in a list, the results will be ordered by most recently viewed. This means that the item you have viewed most recently will appear at the top of the search result list. See, for example, Add or remove case parties.
- When you add a party to a document, you can search for parties that exist on the case that the document belongs to. See Add or remove document parties.
- You can now scroll to see all items on lists, for example, in widgets or in search results of reference selectors. Previously, a list only showed a maximum of 20 items.

Edit from lists

- You can edit the reference type from lists that display document references and case references.
- You can edit the closed date from case lists, which enables you to close or re-open one or more cases from the list.
- You can edit read access (access code) from document and case lists, which enables you change read access for one or more items on the list.

See Edit multiple items in a list.

Manage documents

- The functionality **Move document** has been extended with the following functionality: **Move to case**, **Move to new main document**, **Change to main document**, and **Change to supplementary document**. See Move document.
- The new field **Postal date** is available for documents. To add this field, you must configure the document detail page. The field is also available on document lists. When

you save an e-mail from Outlook, the **Postal date** field will display the sent date for outgoing mail or the received date for incoming mail.

New Share button

- A new button, **Share**, has been added on the ribbons. The **Share** button contains the previous mail functions **Link**, **Attachment**, and **Attach PDF**. See Share document.
- A new function, **Copy to clipboard**, has been added. It enables you to copy links to cases, documents, and contacts in WorkZone. See Copy a document to the clipboard, Copy a case to the clipboard, and Copy a contact to the clipboard.

Optimized search

- You can add multiple criteria when you define a search by using criteria from a list. Thus you can, for example, search for documents with the document type “I, Incoming” Or “U, Outgoing”. If you add multiple criteria, you will by default perform an Or search, displayed by [or]. See Create a new search and Add or remove document references.

  On fields that can contain multiple values, such as **Keywords** and **Facets**, you can perform an And search, displayed by [and]. See Case search with multiple information or date criteria.
- You can add search filters to all lists, which enables you to search the lists. You can even filter a document list to only show main documents, supplementary documents, or main documents without supplementary documents. A filter icon has been added. See Filter a list.
- All users can share saved searches with other users, including users without the `CONFIGADM` access rights. See Share a saved search list.

Configuration

- You can configure which buttons are displayed on the ribbon. To hide or show buttons, click the arrow in the ribbon group to the right. The selection will be stored in the user configuration.

You must make this configuration on all ribbons, for example on the case ribbon, document ribbon, and the document list ribbon.

See Ribbons.

- When you add new parties to a case or a document, you can configure which columns are displayed in the search result list of the reference selector. See Add or remove case parties and Add or remove document parties.
- The configuration of the navigation pane has been extended, allowing you to add new panes, reorder panes, rename panes, and remove panes.

Integration to WorkZone Process

- You can add the two new lists, **My open tasks** and **My pending tasks**, to the navigation pane as widgets. The lists will show your tasks from WorkZone Process. You can open and solve the tasks from the lists.

WorkZone Client 2016

- The **WorkZone Meeting** module is added to WorkZone Client. You can view WorkZone meetings, including agenda items and documents, created for your Outlook appointments or meetings. You can also add, edit, or remove meeting agenda items and the documents saved on them. See Working with WorkZone meetings, Manage meetings and About fields on a meeting detail page.

  > **Prerequisite:** To work with WorkZone meetings, you must have the WorkZone Meeting module installed.

- If you have administrative rights, you can configure and distribute document detail pages and contact detail pages. That is, you can add, remove, configure, resize, or reorder fields on the contact, document, or meeting detail page. For a contact detail page, you can also set default values and required settings for the fields. Later you can share your configuration of the detail pages with selected users, units, or the whole organization. See Configure and distribute a case, document, or contact detail page. For the document detail page, new fields, **Acting unit** and **Archiving form**, have been added to the available fields.

- You can configure the contact search page, document search page, or a meeting search page. That is, you can add, remove, configure, resize, or reorder fields displayed on the contact or document search page. See Configure a case, document, contact, or meeting search page.
- You can copy multiple selected documents to a case. See Copy multiple selected documents to a case.
- You can preview PDF documents without having an Adobe reader installed.

> **Prerequisite:** To preview PDF documents without an Adobe reader installed, you must use Internet Explorer 11.

Interface changes and improved user experience

- The new fields **Acting unit** and **Archiving form** are added for document detail pages.
- When you select multiple cases or documents and edit them from a list, your selection remains after you have completed editing. This means that you can continue editing the items without selecting them again.

Getting started with WorkZone Client

Below you will find the links to the basic functionality in WorkZone Client.

Get to know the user interface

- Customize lists and widgets on the dashboard
- About detail pages and detail tabs
- About ribbon buttons
- Use keyboard navigation

Search and use the search results

- Learn how to search effectively

Cases, documents, and contacts

- About cases and case types
- About documents and document types
- About contacts

Work with the lists

- Open lists in a new tab
- Open a case, document, or contact detail page from a list
- Work with multiple list items
- Edit an item from a list
- View list item in the preview pane
- Share a search list
- Export a list to Excel

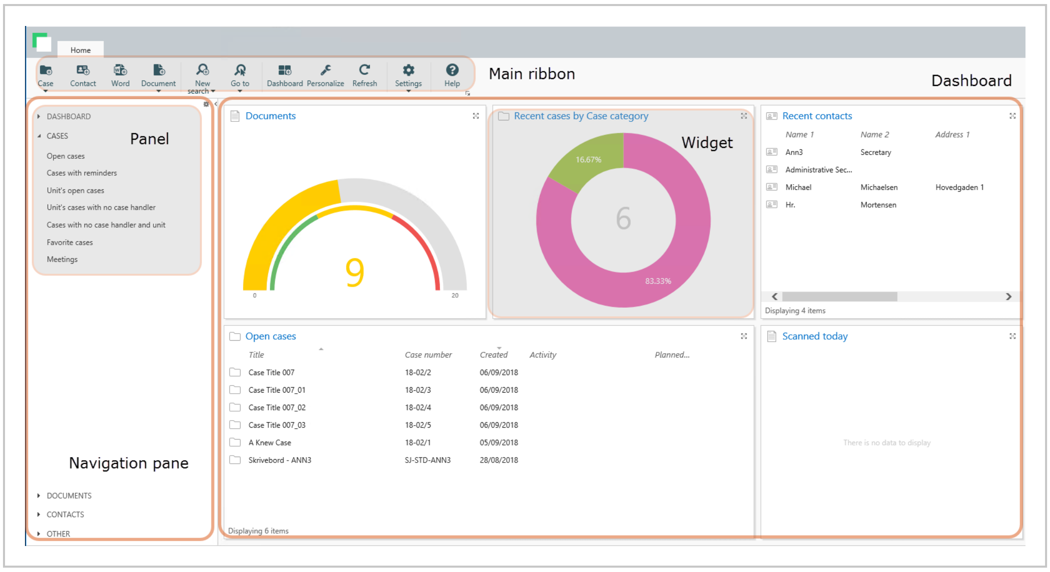
Advanced features

- Save and reuse search lists
- Manage subscriptions
- Work with favorites
- Work with followed items
- Work with reading lists
- Move document to another case
- Create a case reminder
- About access rights
- Work with WorkZone Client configurations
- Configure a case, document, contact, or meeting search page

User interface

You can customize the user interface of WorkZone Client to suit your daily needs.

- **Navigation pane and lists** contain some of the most commonly used lists and your own saved searches, so that you can access them easily when needed. Lists are logically grouped by the **panels**.
- **Ribbons** is a set of buttons that are relevant to the list or page that you view in a particular situation. Buttons on the main ribbon are grouped based on their functionality. Buttons containing similar functionality are grouped together for ease of navigation.
- **Dashboard** provides you with an overview and easy access to lists that are displayed in the form of **widgets**.
- **The Preview Pane** provides a preview of an item on a list. The preview panel contains different information depending on whether you open a case, a document or a contact.
- **Detail pages** provide detailed information on a particular case, document, contact, saved search, or another entity.
- **Bottom bar** informs about the currently active version of WorkZone Client and provides option to change the user interface language Starting with 2018 release, version follows format `YY.V.DDD.V`, where:
    - `YY` - The build Year, expressed with two digits in the build number and as a four digit number when denoting the WorkZone version, which is also the build year.
    - `V` - The Version number, expressed with a single digit. The WorkZone version number is commonly expressed as the 4-digit build year and the one digit version number for example WorkZone 2018.1.
    - `DDD` - The build Day, expressed as the number of days since January 1st of the build year.
    - `V` - The Build number. A sequential number of the build for the build day. A day can have multiple builds.



Navigation pane and lists

Navigation pane

About the navigation pane

The panels that are displayed in the navigation pane contain some of the most commonly used lists and your own saved searches. These lists are defined and configured on WorkZone Content Server. You can hide the navigation pane by clicking the arrow at the upper-right corner of the navigation pane.

By default, the navigation pane displays the following panels:

- Dashboard
- Cases
- Documents
- Contacts
- Other

Manage panels

You can add, change the order, or remove panels from the navigation pane.

1. Go to the **Home** tab, and click **Configure navigation** in the top right area of the navigation pane.
2. The following actions are now available:

   - Add a new panel: At the top of the navigation pane, click **Add new panel**. In the **Add panel** dialog box, type a name, and click **Save**.
   - Rename a panel: Click on the pane that you want to rename. In the **Rename panel** dialog box, type a new name, and click **Save**.
   - Reorder panels: Drag and drop the panel that you want to move.
   - **Remove** a panel: Click on the pane that you want to remove. Click **Remove panel**, and then click **Yes**.

Note: You can only remove the panels that have been added by you.

Lists

About lists

Each panel in the navigation pane contains additional standard lists. For example, the **Cases** panel displays the following lists by default:

- Open cases
- Cases with reminders
- Open cases on the unit
- Cases on the unit with no case handler
- Cases with no case handler and unit
- Favorite cases

When you click one of these lists, the search for the selected list is performed automatically, and the result is displayed on your dashboard. You can use the buttons on the ribbon to perform various operations on the search results.

Tip:

- You can easily open any list from the navigation pane in a new tab by double-clicking the title of the list.
- You can add more lists or change the order of panels by customizing the navigation pane. For example, you can add a list of your **Followed cases**, **Reading list cases**, and **Changed documents** to the navigation pane.

The list menu

Right-click a list item to open the list menu which displays all actions you can apply to the selected list item or to the selected list items if you have selected multiple list elements. If the list does not contain at least one item, the list menu will not be displayed.

All options in the list menu can also be found as buttons in the Main ribbon or the detail tab ribbon but buttons are collected in the list menu for quick access and ease of use.

List menu options that are not relevant for the current selection or that require the affected columns to be displayed in the list are displayed as inaccessible.

List menu options - Cases and Meetings

Menu Option	Description
Edit	Edit the following meta data for the case or meeting: • Case handler • Responsible unit • Acting unit • State • Case type • Planned close • Closed • Read access • Retention code • Default document classification

Menu Option	Description
	• Information • Date • Party The list you can select from may vary as additional fields may be available depending on the distribution mode, configuration of the ribbon and addition of custom fields. You can only edit contact meta data on columns that are displayed in the list. For more information, see Add / Remove columns in a list.
Preview	Open a preview pane with information, such as documents and parties, for the selected case or meeting.
Explore	Open a case as a folder in WorkZone Explorer and see the contents of a case. Due to the security model of the Google Chrome and Microsoft Edge Chromium browser, the Windows File Explorer is not opened automatically when you click the **Explore** button. Instead, you must open the Windows File Explorer manually and then press **CTRL+V** in the address bar to open the Explorer for the active case. The link address of the active case is automatically copied to your clipboard when you click the **Explore** button. If you are using the Microsoft Edge browser, you must be signed in to the WorkZone IdentityServer to enable integration to the Windows File Explorer. If you select the **Keep me signed in** check box during sign in, you will not be required to sign in again. The persistent cookie storage can however expire so you may be required to sign in later. If WorkZone Explorer has been deactivated, the **Explore** button will not be displayed, regardless of which web browser is used. WorkZone Explorer can be activated and deactivated by a system administrator in **WorkZone Configurator** > **Global** > **Feature Settings** > **Client** > **Explore**.
Bookmark	This option enables you to:

Menu Option	Description
	• Add or remove the selected cases or meetings from the favorites list. • Mark the case or meeting as read or unread. • Follow or stop following the cases or meetings. For more information see Case ribbons
Share	Send web links to the selected cases or meetings by e-mail and copy the title, related case, and the web link of the selected cases to the clipboard.
Report	Generate a PDF file that includes meta data, parties, and documents on the selected cases or meetings.
Recycle	Move the selected cases or meetings to the recycle bin, marking them for deletion. You can restore the cases if you have sent them to the recycle bin by mistake. **Note:** You cannot move the case to the recycle bin if the case contains documents. Recycle the documents first in order to recycle the case.

List menu options - Documents

Menu Option	Description
Edit	Edit the following meta data for the document: • Document type • Document group • Acting unit • Case handler • Responsible unit • Reply deadline • Read access

Menu Option	Description
	• Retention code • Classification • Information • Date • Party The list you can select from may vary as additional fields may be available depending on the distribution mode, configuration of the ribbon and addition of custom fields. You can only edit document meta data on columns that are displayed in the list. For more information, see Add / Remove columns in a list.
Archive	Assign the **Archived** state to the current document. Find a more detailed description of the Archived state in [Edit document state]().
Change	Change the document state.
Preview	Preview the document in a preview pane. For more information, see The Preview Pane
Open	Open a selected document in the application that corresponds to the format of the document.
Bookmark	This option enables you to: • Add or remove the selected documents to the favorites list. • Mark the selected documents as read or unread. • Follow or stop following the selected documents. For more information see Document ribbons
Share	Send selected documents by e-mail in one of the following ways: • Add web links to the documents.[1]

Menu Option	Description
	• Add documents as attachment.[1] • Add a PDF version of a document as an attachment.[1,2] Finally you can copy the title, related case, and the web link of the selected documents to the clipboard. [1] This option will not be displayed if WorkZone for Office is not installed on the server. [2] Only enabled if a PDF version has been generated.
To Case	Open the case of the selected document in a new tab.
Report	Generate a standard report as a PDF.
Move	This option enables you to: • Reassign the selected documents to a new case. • Reassign supplementary documents to another main document. • Convert a supplementary document to a main document. • Convert a main document to a supplementary document.
Copy	Copy a selected document. In the **Copy document** dialog box, you can select a different case for the document that you copy.
Create PDF	Create a PDF version of the selected document. If this option is inaccessible, a PDF version of the document already exists.
Reply	Create a new document as a reply to the selected document. The sender of the original document becomes the recipient, and the case information is inserted automatically. The new document receives the **Outgoing** type.
Recycle	Move the document to the recycle bin. You can restore it later if needed. **Note:** You cannot move the document to the recycle bin if it has sup-

Menu Option	Description
	plementary documents, document references, or case references.
Restore	Restores document from the recycle bin and makes it available again. You can restore the document to the case from which it was originally deleted, restore it and move the document to another case or restore both the document and the case if the assigned case is also in the recycle bin. This list menu option is only accessible from the **Recyle bin** document list.
Delete	Delete the document permanently. This list menu option is only accessible from the **Recyle bin** document list. **Note:** You cannot permanently delete the document if the document contains supplementary documents. You must delete all supplementary documents before deleting the document.

List menu options - Contacts

Menu Option	Description
Edit	Edit the following meta data for the contact: • Information • Date • Contact reference The list you can select from may vary as additional fields may be available depending on the distribution mode, configuration of the ribbon and addition of custom fields. You can only edit contact meta data on columns that are displayed in the list. For more information, see Add / Remove columns in a list.

Menu Option	Description
Preview	Preview the contact information in a preview pane. For more information, see The Preview Pane
Bookmark	This option enables you to: • Add or remove the selected contacts to the favorites list. • Mark the selected contacts as read or unread. • Follow or stop following the selected contacts. For more information see Contact ribbons
Share	Send web links to the selected contacts by e-mail and copy the title, related case, and the web link of the selected contacts to the clipboard.

List menu options - Actors in sequence

Menu Option	Description
Remove	Remove the selected actor from the sequence.
Reorder actions	Reorder all actors in the sequence.
Edit	Edit the relative task deadlines for the selected actors.
Preview	Preview a selected actor. You cannot preview multiple actors.
Bookmark	This option enables you to: • Add or remove the selected actors to the favorites list. • Mark the selected actors as read or unread. • Follow or stop following the selected actors. For more information see Document ribbons
Share	Send web links to the selected actors by e-mail and copy the contact name, ID and the web link of the selected actors to the clipboard.

List menu options - Parties

Menu Option	Description
Add related parties	Add a party related to the selected party to the case.
Remove	Remove the selected parties from the case.
Edit	Edit the following meta data for the selected parties: • External case number • Role • Information • Date • Contact reference The list you can select from may vary as additional fields may be available depending on the distribution mode, configuration of the ribbon and addition of custom fields. You can only edit document meta data on columns that are displayed in the list. For more information, see Add / Remove columns in a list.
Preview	Preview a selected party. You cannot preview multiple parties.
Bookmark	This option enables you to: • Add or remove the selected parties to the favorites list. • Mark the selected parties as read or unread. • Follow or stop following the selected parties. For more information see Document ribbons
Share	Send web links to the selected actors by e-mail and copy the contact name, ID and the web link of the selected parties to the clipboard.

List menu options - Shared lists

Menu Option	Description
Edit	Edit the selected shared search which is used to populate the list. You can save the edited search as a new search or overwrite the existing search.
Delete	Delete the selected list and the shared search used to populate the list. You can only delete lists owned by you.
Assign to	Assign the selected shared search another user.
Subscribe	Subscribe to the selected shared search and receive notifications when the search is edited.

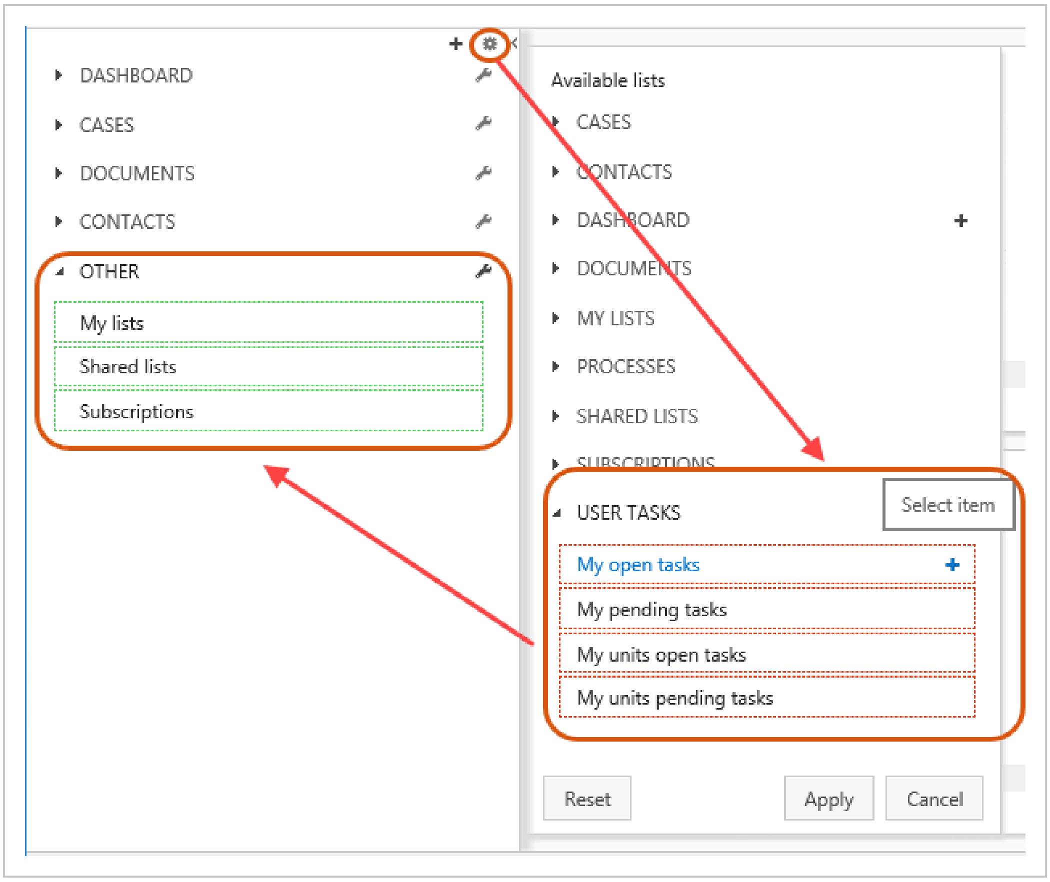
Manage lists

You can add new lists, remove existing lists and rearrange the lists in your navigation pane.

Customizing the Navigation pane

You can customize your navigation pane by clicking the **Configure navigation** icon in the navigation pane on the **Home** tab. The **Available lists** pane is displayed and you can edit the lists.

In the **Available lists** pane, left-hand column displays lists (framed in green) that are currently available from your navigation pane and right-hand column displays lists (framed in red) that you can add for quick access.,



To add new lists to the Navigation pane

1. Go to the **Home** tab, and click **Configure navigation** in the navigation pane to display the **Available lists** pane.
2. To add an available list to the navigation pane, in the right-hand column you can:
   - Double-click the list or
   - Click **Select item** on the list or
   - Drag the list from the right-hand column to the desired position in the left-hand column.
3. Click **Apply** to save your changes.

To remove lists from your Navigation pane

1. Go to the **Home** tab, and click **Configure navigation** in the navigation pane to display the **Available lists** pane.

2. To remove a list from to the navigation pane, in the left hand column you can:
    - Double-click the list or
    - Click **Deselect item** on the list or
    - Drag the list to the desired position from the left-hand column to the left-hand column.
3. Click **Apply** to save your changes.

To rearrange the lists in the Navigation pane

1. Go to the **Home** tab, and click **Configure navigation** in the navigation pane to display the **Available lists** pane.
2. Drag the list to the desired position in the left-hand column.
   You cannot drag a list to a panel which is not open.
3. Click **Apply** to save your changes.

> **Tip:** Click **Reset** to discard your changes and return to the default configuration of the navigation pane.

My reports today list

The **My reports today** list displays the status of all report PDF generation requests made by you within the current day, including the progress of any report PDF generation requests currently in progress. The display period of the list is from midnight the previous day to midnight today.

The **My reports today** list can be added to the dashboard and navigation pane as well as opened from the **Reports status** button in the bottom panel of the browser page.

> **Note:** When PDF report requests are being processed, a red counter with the number of requests currently being processed ( ) will be displayed on the **Reports status**

button in the bottom panel of the browser page.

Fields in the My reports today list

The list contains the following fields by default:

Field	Description
Report name	The name of report. The report name is typically the internal WorkZone name for the report.
Created	The date and time the PDF report generation request was submitted.
Created by	The WorkZone user who submitted the PDF report generation request
Report ID	The unique PDF report generation ID, expressed as a GUID. Use the unique report ID to locate the specific report when troubleshooting potential generation errors or failures. This column is not displayed by default and must be added manually.
Server	The WorkZone server that has processed or is processing the PDF report generation request. This column is not displayed by default and must be added manually.
Updated	The date and time the list was last updated. This column is not displayed by default and must be added manually.
Error description	Displays a detailed description of any PDF conversion errors retrieved from the server-based error messages and not always user-friendly. This column is not displayed by default and must be added manually.

Report status

The status of the reports in the list is displayed using the following icons:

Icon	Status
	The report has been generated without any errors discovered.
	The report is currently being processed and PDF report generation is ongoing.
	The PDF report generation has failed.

In the **My reports today** list, hover the mouse over a PDF report request to display a more detailed status of the selected report.

> Note: The **My reports today** list blinks regularly as the list is updated with the status of PDF report requests from the processing server.

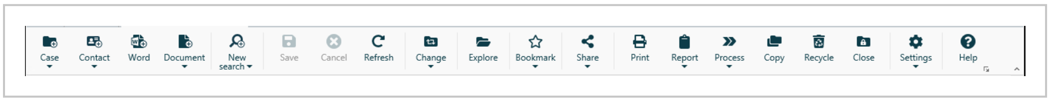
Ribbons

About ribbons

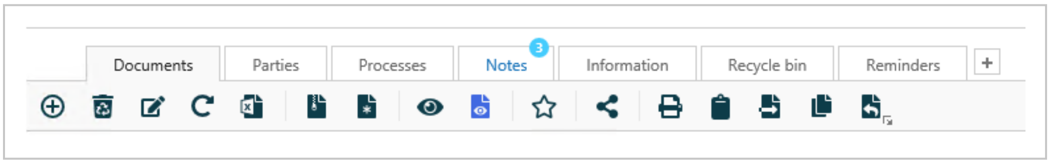
The ribbon contains buttons relevant to the list or page that you are working on in a particular situation. Some buttons are displayed on all ribbons and some buttons are only available on a certain list or page or if certain conditions are satisfied, for example if additional WorkZone modules are installed.

There are two types of ribbons in WorkZone Client:

- The **Main ribbon** is always located at the top of the screen. It contains buttons that relate to the following objects:
    - Dashboard
    - Lists
    - Detail pages



- The **Detail ribbon** is located under meta data on detail pages. It contains buttons that relate to the detail lists.



Minimize/Maximize the main ribbon

The main ribbon can be minimized to display smaller icons and no button text in order to increase your working screen area. If the main ribbon has been minimized, you can maximize it again, displaying larger icons and the button text.

Double-click the tab title or click the **Toggle** buttons (ˇ and ˆ) to toggle between the minimized and maximized main ribbon.

Counter icon in the ribbon

When multiple items have been selected in a list, a counter icon will be displayed on some ribbon buttons, displaying the number of selected items to which you can apply the function of the button. For more information, see Work with multiple list items.

Ribbon buttons

On this page, you find a brief description of each button. Expand the drop-down tables to read the descriptions.

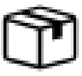
> **Note:** Some of the buttons are only available for certain lists

Case ribbons

Case ribbons apply to:

- Lists under the CASES panel.
- Case detail pages.

Icon	Name	Action
	Case	Select a case category and create new case. A case may include documents, involved people (parties), meetings, notes, and other related information. Note: Companies can create predefined templates for cases. Templates for cases are available in the drop-down list under the **Case** button. Contact your administrator to learn about the purpose of each template.
	Contact	Add a new contact to the system. When you create a new contact, you can specify information such as name and address. Contacts can be used as parties on cases, attendees in meetings etc.
	Word	Create a new Word document with meta data.
	Document	Create a new document. By default, a new document is assigned to your desktop case. If you create a new document from a case detail page, the new document will be assigned to this case.
	• **New information**	Create a document that only contains meta data, such as title and case handler. This document does not contain an actual file and it can only be opened in WorkZone Client.
	• **Import from file**	Create a document by uploading a file from your local disk. The new document will contain meta data and an

Icon	Name	Action
	system	actual file.
	• Import from WorkZone	Import a document from another WorkZone database.
	• Excel	Create a new Excel document with meta data.
	• PowerPoint	Create a new PowerPoint document with meta data.
	**More**	Select custom types that have been configured and made available to you for use by a system administrator. The **More** button is not displayed by default. You must manually display the button in the **Configure ribbon** form as well as select which independent custom types are to be displayed.
	**New search**	Start a new search. When you select an item in the drop-down list, a new search page opens in a new tab. This page provides all the relevant meta data parameters for an advanced search. The **More** search menu option is not displayed by default. You must manually display the menu option in the **Configure ribbon** form as well as select which independent custom types are to be displayed.
	• Case	Search for a case.
	• Document	Search for a document.
	• Contact	Search for a contact.
	• Meeting	Search for a meeting.
	**Refresh**	Reload the information on the current page.

Icon	Name	Action
		Note: The **Refresh** button on the detail tab reloads only the detail list.
	Explore	Open a case as a folder in WorkZone Explorer and see the contents of a case. Due to the security model of the Google Chrome and Microsoft Edge Chromium browser, the Windows File Explorer is not opened automatically when you click the **Explore** button. Instead, you must open the Windows File Explorer manually and then press **CTRL+V** in the address bar to open the Explorer for the active case. The link address of the active case is automatically copied to your clipboard when you click the **Explore** button. If you are using the Microsoft Edge browser, you must be signed in to the WorkZone IdentityServer to enable integration to the Windows File Explorer. If you select the **Keep me signed in** check box during sign in, you will not be required to sign in again. The persistent cookie storage can however expire so you may be required to sign in later. If WorkZone Explorer has been deactivated, the **Explore** button will not be displayed, regardless of which web browser is used. WorkZone Explorer can be activated and deactivated by a system administrator in **WorkZone Configurator** > **Global** > **Feature Settings** > **Client** > **Explore**.
	Change	Change the following meta data on a case: • **Category:** Change the case category of the active case. Select the new category from the list. The list doesn't contain the current case category.

Icon	Name	Action
		• **Case group**: Change the Case group of the active case. You can also change the child case group if a child case group has been defined for the case group. • **Primary party**: Change the primary party of the active case. You cannot remove a primary party from the case, leaving the **Primary party** field empty. The primary party option is only accessible if the current case contains a primary party. **See Also** Change a case category. Change case group and child case group Add or change the primary party
	Save	Save your changes to a case.
	Cancel	Cancel your unsaved changes to a case.
	Edit	Mass edit one or more fields on selected cases. Select the cases to be edited and then select the fields to be edited in the drop-down list under the button. You can only edit case meta data on columns that are displayed in the list. For more information, see Add / Remove columns in a list. This button is only displayed when working with cases in a list.
	Export to Excel	Open the Excel document that contains the selected list.
	Open in new tab	Open the selected list in a new tab.
	Preview	Open a preview pane with information, such as doc-

Icon	Name	Action
		uments and parties, for the selected case. **Tip:** Click to add or remove panes on the preview pane.
	Bookmark	Open a drop-down list with the following options:
	• **Add to favorites**	Get quick access to the selected case in the **Favorite cases** list.
	• **Remove from favorites**	Remove the selected case from the **Favorite cases** list.
	• **Mark as unread**	Add the selected case to **Reading list cases** in order to view it later. When you add an item to a reading list, it appears in bold in all the lists where it is included.
	• **Mark as read**	Remove the selected case from **Reading list cases**.
	• **Follow**	Add the selected case to the **Followed cases** list. If other employees make changes to a case that you follow, this case will appear on your **Changed cases** list. See [Working with followed items]().
	• **Unfollow**	Stop following changes made to a selected document.
	Chat	Open the chat window with the active case already added as a reference and the default case-based chat title.
	Share	Open a drop-down list with the following options:
	• **In mail**	Send selected cases by e-mail. This option will not be displayed if WorkZone for Office is not installed on the server.

Icon	Name	Action
	◦ **Link**	Add web links to the documents.
	• **Copy to clipboard**	Copy the title and the web link of the selected cases to the clipboard. You can then paste this information in the desired place.
	Process	Start a new process based on a selected case. Read more about process features and types of processes in Start a process from a case
	Copy	Create a copy of a selected case.
	Recycle	Move the selected cases to the recycle bin, marking them for deletion. You can restore the cases if you have sent them to the recycle bin by mistake. **Note:** You cannot move the case to the recycle bin if the case contains documents, document references, or case references. Recycle the documents first in order to recycle the case.
	Restore	Make the case available again. This action cancels its deletion into the recycle bin.
	Delete	Delete the case permanently. **Note:** You cannot permanently delete the case if the case contains documents. You must delete all documents before deleting the case.
	Print	Create a PDF file that contains information about the current case. In the dialog box, you can select information to be included in the PDF file.

Icon	Name	Action
	Close	Close the case. Once the case is closed, it cannot be edited. To find the closed case, click **New search > Case** and enter search criteria. The closed case can be reopened.
	Reopen	Reopen the case. A reopened case works in the same way as a regular case. **Note:** This button is only available for closed cases.
	Report	Open a drop-down list with the following options:
	• **General** ◦ **Classification scheme**	Generate a PDF file that contains a classification scheme for the existing case groups.
	• **A case list with parties and documents**	Generate a PDF file that includes meta data, parties, and documents on the selected case.
	Settings	Manage configurations. With a configuration you can customize the WorkZone Client web interface according to a user's needs.
	• **Reset configuration**	Reset your Personal configuration. If there are no changes to your Personal configuration, the organizational configuration will be applied. If you are assigned the CONFIGADM access code, you can reset the current configuration instead of only the Personal configuration.
	• **View con-**	Open an overview of all the changes to the configurations that have been applied and are available to you. The over-

Icon	Name	Action
	figuration	view lists the changes to the configurations by type and also by configuration type (User, Unit and Organizational).
	• **Edit configuration**	Edit the current configuration. **Note:** This button is only available if you are assigned the CONFIGADM access code. When you are editing a configuration, an orange information bar will be displayed on the page, displaying the name and type of the configuration currently being edited.
	Save configuration	Save your changes to the current configuration, overwriting the configuration and exit configuration editing. **Note:** This button is only available if you are assigned the CONFIGADM access code and currently editing a configuration.
	Save configuration as	Save your changes to the current configuration as another configuration and exit configuration editing. **Note:** This button is only available if you are assigned the CONFIGADM access code and currently editing a configuration. This option enables an administrator to customize another user's configuration as well as customize a Unit or Organizational configuration and overwrite the original configuration, making the changes available to other users, the unit or the entire organization.
	• **Exit con-**	Stop editing the current configuration and exit con-

Icon	Name	Action
	figuration editing	figuration editing without saving your changes. **Note:** This button is only available if you are assigned the CONFIGADM access code.
	• Import/Export	Manage exporting and importing of WorkZone Client configurations. The accessibly functionality depends on your access rights. • If you are not assigned the CONFIGADM access code, you can export your Personal and Private configurations to a single JSON file and also import an exported configuration JSON file that contains Personal or Private configurations , either from yourself or from other users, into your own personal or private configuration. • If you are assigned the CONFIGADM access code, you can export WorkZone Client configurations of all configuration types (Private, Personal, Unit and Organizational) to a single JSON file and also import the file into all configuration types for yourself or for other users. This functionality enables administrators to apply configurations to multiple users. **Note:** This button is only available if you are not currently editing a configuration.
	◦ Import from file	Apply configurations saved to a JSON file to users, units, and to an organization.

Icon	Name	Action
	◦ **Export to file**	Save configurations of all users, units, and an organization to a JSON file.
	Go to Meeting	Open the WorkZone meeting detail page. This button is only displayed on meeting cases.
	Help	Open the online help for the current version of WorkZone Client.
	Add	Create a new reference. The reference depends on the active tab.
	Add	Create new information, an address, a date, or a reminder. The type of information depends on the active tab.
	Remove	Remove the selected items from the list.

A Cases list menu is also available in the Cases lists by right-clicking on a case in the list. The list menu contains the same options as the main ribbon. See The list menu

Document ribbons

Document ribbons apply to:

- Lists under the DOCUMENTS panel.
- Document detail pages.

Icon	Name	Description
	Case	Create a new case. A case may include documents, involved people (parties), meetings, notes, and other related information. **Note:** Companies can create predefined templates

Icon	Name	Description
		for cases. Templates for cases are available in the drop-down list under the **Case** button. Please contact your administrator to learn about the purpose of each template.
	Contact	Add a new contact to the system. When you create a new contact, you can specify information such as name and address. Contacts can be used as parties on cases, attendees in meetings etc.
	Word	Create a new Word document with meta data.
	Document	Create a new document. By default, a new document is assigned to your desktop case. If you create a new document from a case detail page, the new document will be assigned to this case.
	• **New information**	Create a document that only contains meta data, such as title and case. This document does not contain an actual file and it can only be opened in WorkZone Client.
	• **Import from file system**	Create a document by uploading a file from your local disk. The new document will contain meta data and an actual file.
	• **Import from WorkZone**	Import a document from another WorkZone database.
	• **Excel**	Create a new Excel document with meta data.
	• **PowerPoint**	Create a new PowerPoint document with meta data.
	More	Select custom types that have been configured and made available to you for use by a system administrator. The **More** button is not displayed by default. You must

Icon	Name	Description
		manually display the button in the **Configure ribbon** form as well as select which independent custom types are to be displayed.
	New search	Start a new search. When you select an item on the drop-down list, a new search page opens in a new tab. This page provides all the relevant meta data parameters for an advanced search. The **More** search menu option is not displayed by default. You must manually display the menu option in the **Configure ribbon** form as well as select which independent custom types are to be displayed.
	• **Case**	Search for a case.
	• **Document**	Search for a document.
	• **Contact**	Search for a contact.
	• **Meeting**	Search for a meeting.
	Save	Save your changes to a document.
	Cancel	Cancel your unsaved changes to a document.
	Refresh	Reload the information on the current page. The **Refresh** button on the detail ribbon reloads only the detail list.
	Archive	Assign the **Archived** state to the current document. Find a more detailed description of the Archived state in Edit document state.
	Edit	Mass edit one or more fields on selected documents. Select the documents to be edited and then select the

Icon	Name	Description
		fields to be edited in the drop-down list under the button. You can only edit document meta data on columns that are displayed in the list. For more information, see Add / Remove columns in a list. This button is only displayed when working with documents in a list.
	Open in new tab	Open the selected list in a new tab.
	Change	Open the drop-down list, which contains the following options:
	• **Release personal draft**	Allow other employees to view, edit, and delete your personal draft document.
	• **Lock**	Assign the **Locked** state to the current document. Find a more detailed description of the Locked state in Edit document state.
	Preview	Open a preview pane with information, such as PDF version, parties and supplementary documents, for the selected document. Tip: Click to add or remove panes on the preview pane.
	Open	Open a selected document in the application that corresponds to the format of the document.
	Bookmark	Open a drop-down list with the following options:
	• **Add to favorites**	Get quick access to the selected document in the **Favorite documents** list.
	• **Remove from**	Remove the selected document from the **Favorite doc-**

Icon	Name	Description
	favorites	**uments** list.
	• **Mark as unread**	Add the selected document to **Reading list documents** in order to view it later. When you add a document to a reading list, it appears in bold in all the lists where it is included.
	• **Mark as read**	Remove the selected document from **Reading list documents**.
	• **Follow**	Add documents to the **Followed documents** list. If other employees change a document that you follow, you will see it in the **Changed documents** list. See Working with followed items.
	• **Unfollow**	Stop following changes made to a selected document.
	• **Disable versioning**	Disable draft versioning for the active document. If **Disable versioning** is inaccessible, draft versioning has been disabled globally or you might not have sufficient rights to access to the document.
	• **Enable versioning**	Enable draft versioning for the active document. If **Enable versioning** is inaccessible, draft versioning has been disabled globally or you might not have sufficient rights to access to the document.
	Chat	Open the chat window with the active document already added as a reference and the default document-based chat title.
	**Share**	Open a drop-down list which contains the following options:
	• **In mail**	Send selected documents by e-mail in one of the following ways:
	◦ **Link**	Add web links to the documents.

Icon	Name	Description
		This option will not be displayed if WorkZone for Office is not installed on the server.
	◦ **Attach document**	Add documents as attachment. This option will not be displayed if WorkZone for Office is not installed on the server.
	◦ **Attach as PDF**	Add a PDF version of a document as an attachment. This option is only enabled if a PDF version has been generated. This option will not be displayed if WorkZone for Office is not installed on the server.
	• **Copy to clipboard**	Copy the title, related case, and the web link of the selected documents to the clipboard. You can then paste this information in the desired place.
	Process	Start a new process from the current document. The process will be based on the case that the document belongs to. Read more about WorkZone Process in Start a process from a document
	To case	Open the case of the selected document in a new tab.
	To main document	Open the main document of the current document in a new tab. **Note:** This button is available only for supplementary documents.
	Export to Excel	Open the Excel document that contains the selected list.
	Delete	Delete the document permanently.

Icon	Name	Description
		Note: You cannot permanently delete the document if the document contains supplementary documents. You must delete all supplementary documents before deleting the document.
	Manage	Generate a PDF as a report, move a document to another case
	Report	Generate a standard report as a PDF. Reports are only available for the main documents.
	• **Power BI**	Generate a Power BI report. Microsoft Power BI must be installed in order to use the generate Power BI reports.
	• **General**	Generate a PDF file that contains a classification scheme for the existing case groups.
	• **A document information**	Generate a PDF file that contains a classification scheme for the existing case groups.
	Move	Open a drop-down list, which contains the following options:
	• **Move to case**	Reassign a selected document to another case.
	• **Move to new main document**	Reassign a selected supplementary document to another main document.
	• **Change to main document**	Select a supplementary document and click this option to make it a main document.
	• **Change to supplementary document**	Select a main document, and click this option to make it a supplementary document. A dialog box opens where you can select a new main document for this document.

Icon	Name	Description
	Process	Start a new process from the current document. The process will be based on the case that the document belongs to. Read more about WorkZone Process in Start a process from a document
	Copy	Copy a selected document. In the **Copy document** dialog box, you can select a different case for the document that you copy.
	Create PDF	Create a PDF version of the selected document. If this option is inaccessible, a PDF version of the document already exists.
	Reply	Create a new document as a reply to the selected document. The sender of the original document becomes the recipient, and the case information is inserted automatically. The new document receives the **Outgoing** type.
	Recycle	Move the document to the recycle bin. You can restore it later if needed. **Note:** You cannot move the document to the recycle bin if it has supplementary documents, document references, or case references.
	Restore	Restores document from the recycle bin and makes it available again.
	• **Restore**	Moves the document from the recycle bin and makes the document available again on the original case.
	• **Restore with case**	If the document and the case both were deleted, this option moves the document and the case from the recycle bin and makes the document and the case available again.
	• **Restore and**	Moves the document from the recycle bin and makes the

Icon	Name	Description
	move to another case	document available again on the original case. The **Move and restore documents** form is opened and you can assign a new case to the restored document.
	Disable versioning	Disable retention of previous versions of the current document.
	Enable versioning	Enable retention of previous versions of the current document.
	Check in	Performs a check-in of the document into WorkZone Content Server. Enables a user to unlock and perform a forced check-in of the document. Any existing changes made to the document will be lost. The button can be when a document has been checked out and no lock token exists in the WorkZone Content Server, leaving the document in a permanent locked state. The **Check in** button is only displayed if the document is currently checked out and there is no registered lock on the document.
	Settings	Use **Settings** to manage configurations. Configuration helps customize WorkZone Client web interface according to a user's needs.
	• **Reset configuration**	Reset your Personal configuration. If there are no changes to your Personal configuration, the organizational configuration will be applied. If you are assigned the CONFIGADM access code, you can reset the current configuration instead of only the Personal configuration.
	• **View configuration**	Open an overview of all the changes to the configurations that have been applied and are available to you. The over-

Icon	Name	Description
		view lists the changes to the configurations by type and also by configuration type (User, Unit and Organizational).
	• **Edit configuration**	Edit the current configuration. **Note:** This button is only available if you are assigned the CONFIGADM access code. When you are editing a configuration, an orange information bar will be displayed on the page, displaying the name and type of the configuration currently being edited.
	• **Save configuration**	Save your changes to the current configuration, overwriting the configuration and exit configuration editing. **Note:** This button is only available if you are assigned the CONFIGADM access code and currently editing a configuration.
	• **Save configuration as**	Save your changes to the current configuration as another configuration and exit configuration editing. **Note:** This button is only available if you are assigned the CONFIGADM access code and currently editing a configuration. This option enables an administrator to customize another user's configuration as well as customize a Unit or Organizational configuration and overwrite the original configuration, making the changes available to other users, the unit or the entire organization.

<table>
<tr><th>Icon</th><th>Name</th><th>Description</th></tr>
<tr><td></td><td>Exit configuration editing</td><td>Stop editing the current configuration and exit configuration editing without saving your changes.

Note: This button is only available if you are assigned the CONFIGADM access code.</td></tr>
<tr><td></td><td>Import/Export</td><td>Manage exporting and importing of WorkZone Client configurations.

The accessibly functionality depends on your access rights.
If you are not assigned the CONFIGADM access code, you can export your Personal and Private configurations to a single JSON file and also import an exported configuration JSON file that contains Personal or Private configurations , either from yourself or from other users, into your own personal or private configuration.
If you are assigned the CONFIGADM access code, you can export WorkZone Client configurations of all configuration types (Private, Personal, Unit and Organizational) to a single JSON file and also import the file into all configuration types for yourself or for other users.
This functionality enables administrators to apply configurations to multiple users.
Note: This button is only available if you are not currently editing a configuration.</td></tr>
<tr><td></td><td>Import from file</td><td>Apply configurations saved to a JSON file to users, units, and to an organization.</td></tr>
</table>

Icon	Name	Description
	◦ **Export to file**	Save configurations of all users, units, and an organization to a JSON file.
	Help	Open the online help for the current version of WorkZone Client.
	Add	Create a new reference. The reference depends on the active tab.
	Add	Create new information, an address, a date, or a reminder. The type of information depends on the active tab.
	Remove	Remove the selected items from the list.

A Documents list menu is also available in the Documents lists by right-clicking on a document in the list. The list menu contains the same options as the main ribbon. See The list menu

Contact ribbons

Contact ribbons apply to:

- Lists under the CONTACTS panel.
- Contact detail pages.

Icon	Name	Description
	Case	Create a new case. A case may include documents, involved people (parties), meetings, notes, and other related information. **Note:** Companies can create predefined templates for cases. Templates for cases are available in the drop-down list under the **Case** button. Contact your administrator to learn about the purpose of each

Icon	Name	Description
		template.
	Contact	Add a new contact to the system. When you create a new contact, you can specify information such as a name and an address. Contacts can be used as parties on cases, attendees in meetings etc.
	Word	Create a new Word document with meta data.
	Document	Create a new document. By default, a new document is assigned to your desktop case. If you create a new document from a case detail page, then the new document is assigned to this case.
	• **New information**	Create a document that only contains meta data, such as title and case handler. This document does not contain an actual file and it can only be opened in WorkZone Client.
	• **Import from file system**	Create a document by uploading a file from your local disk. The new document will contain meta data and an actual file.
	• **Import from WorkZone**	Import a document from another WorkZone database.
	• **Excel**	Create a new Excel document with meta data.
	• **PowerPoint**	Create a new PowerPoint document with meta data.
	More	Select custom types that have been configured and made available to you for use by a system administrator. The **More** button is not displayed by default. You must manually display the button in the **Configure ribbon** form as well as select which independent custom types are to

Icon	Name	Description
		be displayed.
	New search	Start a new search. When you select an item in the drop-down list, a new search page opens in a new tab. This page provides all the relevant meta data parameters for an advanced search. The **More** search menu option is not displayed by default. You must manually display the menu option in the **Configure ribbon** form as well as select which independent custom types are to be displayed.
	• **Case**	Search for a case.
	• **Document**	Search for a document.
	• **Contact**	Search for a contact.
	• **Meeting**	Search for a meeting.
	Save	Save your changes to a contact.
	Cancel	Cancel your unsaved changes to a contact.
	Refresh	Reload the information on the current page. **Note:** The **Refresh** button on the detail ribbon reloads only the detail list.
	Export to Excel	Open the Excel document that contains the selected list.
	Edit	Mass edit one or more fields on selected contacts. Select the contacts to be edited and then select the fields to be edited in the drop-down list under the button.

Icon	Name	Description
		You can only edit contact meta data on columns that are displayed in the list. For more information, see Add / Remove columns in a list. This button is only displayed when working with contacts in a list.
	Open in new tab	Open the selected list in a new tab.
	Preview	Open a preview pane with information, such as addresses and contact references, for the selected document. **Tip:** Click to add or remove panes on the preview pane.
	Bookmark	Open a drop-down list which contains the following options:
	• **Add to favorites**	Get quick access to the selected contact in the **Favorite contacts** list.
	• **Remove from favorites**	Remove the selected contact from the **Favorite contacts** list.
	• **Mark as unread**	Add the selected contact to **Reading list contacts** in order to view it later. When you add a contact to a reading list, it appears in bold in all the lists where it is included.
	• **Mark as read**	Remove the selected contact from **Reading list contacts**.
	• **Follow**	Add contacts to the **Followed contacts** list. If other employees change a contact that you follow, you will see it in the **Changed contacts** list. See Working with followed items.

Icon	Name	Description
	• Unfollow	Stop following changes made to a selected contact.
	Chat	Open the chat window with the active WorkZone user (Contact) already added as a reference and the default user-based chat title. You can only chat with WorkZone users. The Chat button will be inaccessible on contacts that are not WorkZone users.
	Share	Open a drop-down list, which contains the following options:
	Delete	Delete the active contact. Important: Contacts are permanently deleted immediately and cannot be restored. For more information, see Delete a contact
	• Copy to clip-board	Copy the name and the web link of the selected contacts to the clipboard. Then you can paste this information in the desired place.
	Settings	Manage configurations. With a configuration, you can customize the WorkZone Client web interface according to a user's needs.
	• Reset con-figuration	Reset your Personal configuration. If there are no changes to your Personal configuration, the organ-izational configuration will be applied. If you are assigned the CONFIGADM access code, you can reset the current configuration instead of only the Per-sonal configuration.
	• View con-	Open an overview of all the changes to the configurations that have been applied and are available to you. The

Icon	Name	Description
	figuration	overview lists the changes to the configurations by type and also by configuration type (User, Unit and Organizational).
	• **Edit configuration**	Edit the current configuration. **Note:** This button is only available if you are assigned the CONFIGADM access code. When you are editing a configuration, an orange information bar will be displayed on the page, displaying the name and type of the configuration currently being edited.
	• **Save configuration**	Save your changes to the current configuration, overwriting the configuration and exit configuration editing. **Note:** This button is only available if you are assigned the CONFIGADM access code and currently editing a configuration.
	• **Save configuration as**	Save your changes to the current configuration as another configuration and exit configuration editing. **Note:** This button is only available if you are assigned the CONFIGADM access code and currently editing a configuration. This option enables an administrator to customize another user's configuration as well as customize a Unit or Organizational configuration and overwrite the original configuration, making the changes available to other users, the unit or the entire organization.

Icon	Name	Description
	• **Exit configuration editing**	Stop editing the current configuration and exit configuration editing without saving your changes. **Note:** This button is only available if you are assigned the CONFIGADM access code.
	• **Import/Export**	Manage exporting and importing of WorkZone Client configurations. The accessibly functionality depends on your access rights. • If you are not assigned the CONFIGADM access code, you can export your Personal and Private configurations to a single JSON file and also import an exported configuration JSON file that contains Personal or Private configurations , either from yourself or from other users, into your own personal or private configuration. • If you are assigned the CONFIGADM access code, you can export WorkZone Client configurations of all configuration types (Private, Personal, Unit and Organizational) to a single JSON file and also import the file into all configuration types for yourself or for other users. This functionality enables administrators to apply configurations to multiple users. **Note:** This button is only available if you are not currently editing a configuration.
	◦ **Import from file**	Apply configurations saved to a JSON file to users, units, and to an organization.

Icon	Name	Description
	◦ **Export to file**	Save configurations of all users, units, and an organization to a JSON file.
	Help	Open the online help for the current version of WorkZone Client.
	Add	Create a new reference. The reference depends on the active tab.
	Add	Create new information, an address, a date, or a reminder. The type of information depends on the active tab.
	Add related parties	Add relations to an existing party. You can then view all party relations and their roles from any party list.
	Set as default address	Set the selected address to be the default address for a contact.
	Remove	Remove the selected items from the list.

A Contacts list menu is also available in the Contacts lists by right-clicking on a contact in the list. The list menu contains the same options as the main ribbon. See The list menu

Dashboard and other ribbons

These ribbons apply to:

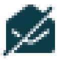
- Dashboard.
- Lists under the **OTHER** panel.
- The **My list** page.

Icon	Name	Description
	Case	Create a new case. A case may include documents, involved people (parties), meetings, notes, and other related information.

Icon	Name	Description
		Note: Companies can create predefined templates for cases. Templates for cases are available in the drop-down list under the **Case** button. Contact your administrator to learn about the purpose of each template.
	Contact	Add a new contact to the system. When you create a new contact, you can specify information such as name and address. Contacts can be used as parties on cases, attendees in meetings etc.
	Word	Create a new Word document with meta data.
	Document	Create a new document. A new document is assigned to your desktop case by default. If you create a new document from a case detail page, the new document will be assigned to this case.
	• **New information**	Create a document that only contains meta data, such as title and case handler. This document does not contain an actual file and it can be opened in WorkZone Client only.
	• **Import from file system**	Create a document by uploading a file from your local disk. The new document will contain meta data and an actual file.
	• **Import form WorkZone**	Import a document from another WorkZone database.
	• **Excel**	Create a new Excel document with meta data.
	• **PowerPoint**	Create a new PowerPoint document with meta data.

Icon	Name	Description
	More	Select custom types that have been configured and made available to you for use by a system administrator. The **More** button is not displayed by default. You must manually display the button in the **Configure ribbon** form as well as select which independent custom types are to be displayed.
	New search	Start a new search. When you select an item in the drop-down list, a new search page opens on a new tab. This page provides all the relevant meta data parameters for an advanced search. The **More** search menu option is not displayed by default. You must manually display the menu option in the **Configure ribbon** form as well as select which independent custom types are to be displayed.
	• **Case**	Search for a case.
	• **Document**	Search for a document.
	• **Contact**	Search for a contact.
	• **Meeting**	Search for a meeting.
	Personalize	Opens the **Dashboard setup** dialog box.
	Dashboard	Create a new dashboard. See Work with multiple dashboards.
	Refresh	Reload the information on the current page. **Note:** The **Refresh** button on the detail tab reloads only the detail list.

Icon	Name	Description
	Open in new tab	Open the selected list in a new tab.
	Edit	Mass edit one or more fields on selected items. Select the items to be edited and then select the fields to be edited in the drop-down list under the button. You can only edit item meta data on columns that are displayed in the list. For more information, see Add / Remove columns in a list. This button is only displayed when working with items in a list.
	Export to Excel	Open the Excel document that contains the selected list.
	Delete	Delete the selected list.
	Report	Open a drop-down list with the following options:
	• **General** ◦ **Classification scheme**	Generate a PDF file that contains a classification scheme for the existing case groups.
	Subscribe	Start receiving notifications about the changes in a selected list by e-mail. Select the frequency for the e-mails in a drop-down list. **Note:** You will only receive e-mails if a selected list has been updated.

Icon	Name	Description
	• **Daily**	Receive e-mails once per day.
	• **Once per 4 hours**	Receive e-mails twice per day.
	• **Weekly**	Receive e-mails once per week.
	**Unsubscribe**	Stop subscribing to a selected list.
	**Share**	Share a saved search result list with other units and individual colleagues. You can select the units and colleagues in the **Access code** field in the **Share search** dialog box.
	• **Copy to clipboard**	Copy the title and the web link of the selected items to the clipboard. You can then paste this information in the desired place.
	**Settings**	Manage configurations. With a configuration, you can customize the WorkZone Client web interface according to a user's needs.
	• **Reset configuration**	Reset your Personal configuration. If there are no changes to your Personal configuration, the organizational configuration will be applied. If you are assigned the CONFIGADM access code, you can reset the current configuration instead of only the Personal configuration.
	• **View configuration**	Open an overview of all the changes to the configurations that have been applied and are available to you. The overview lists the changes to the configurations by type and also by configuration type (User, Unit and Organizational).
	• **Edit con-**	Edit the current configuration.

Icon	Name	Description
	figuration	**Note:** This button is only available if you are assigned the CONFIGADM access code. When you are editing a configuration, an orange information bar will be displayed on the page, displaying the name and type of the configuration currently being edited.
	• **Save configuration**	Save your changes to the current configuration, overwriting the configuration and exit configuration editing. **Note:** This button is only available if you are assigned the CONFIGADM access code and currently editing a configuration.
	• **Save configuration as**	Save your changes to the current configuration as another configuration and exit configuration editing. **Note:** This button is only available if you are assigned the CONFIGADM access code and currently editing a configuration. This option enables an administrator to customize another user's configuration as well as customize a Unit or Organizational configuration and overwrite the original configuration, making the changes available to other users, the unit or the entire organization.
	• **Exit configuration editing**	Stop editing the current configuration and exit configuration editing without saving your changes.

Icon	Name	Description
		Note: This button is only available if you are assigned the CONFIGADM access code.
	• **Import/Export** s	Manage exporting and importing of WorkZone Client configurations. The accessibly functionality depends on your access rights. • If you are not assigned the CONFIGADM access code, you can export your Personal and Private configurations to a single JSON file and also import an exported configuration JSON file that contains Personal or Private configurations , either from yourself or from other users, into your own personal or private configuration. • If you are assigned the CONFIGADM access code, you can export WorkZone Client configurations of all configuration types (Private, Personal, Unit and Organizational) to a single JSON file and also import the file into all configuration types for yourself or for other users. This functionality enables administrators to apply configurations to multiple users. **Note:** This button is only available if you are not currently editing a configuration.
	◦ **Import from file**	Apply configurations saved to a JSON file to users, units, and an organization.
	◦ **Export to file**	Save configurations of all users, units, and an organization to a JSON file.

Icon	Name	Description
	Help	Open the online help for the current version of WorkZone Client.
	Add	Create a new reference. The reference depends on the active tab.
	Add	Create new information, an address, a date, or a reminder. The type of information depends on the active tab.
	Reorder actors	Open a dialog box where you can reorder actors in an actor sequence. To do this, drag and drop the items.
	Remove	Remove the selected items from the list.
	Assign to	Assign the list item to another user.

See Also

Customize the Main ribbon

Customize the Main ribbon

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

Lock main ribbon changes

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

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

Button options

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

- Global options
- Local options

Global ribbon options

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

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

There are following global ribbon buttons and options:

- Case
- Contact
- Word
- Document
- New Search

Local ribbon options

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

Major and minor ribbons

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

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

The following ribbons are major ribbons :

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

All other ribbons are considered minor ribbons.

The Configure ribbon form

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

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

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

Ribbon options

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

Buttons

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

Button	Type	Description
Save	Button	All changes to local and global ribbon options are saved to the current ribbon configuration only.
Save globally	Button option	All changes to local and global ribbon options are saved to the current ribbon configuration. Additionally, all changes to global ribbon options are applied to all other major ribbon configurations.

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

Change the order of the Main menu options

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

How to customize and save a ribbon configuration

To customize the current ribbon configuration

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

5. To change the display order of menu options, click ▷ to expand the menu title then drag each menu option to its new position.
6. Click **Save** to save your changes and exit the **Configure ribbon** form.
7. Save the configuration you are editing[1].

[1]See **See Also** section below.

To distribute global ribbon option changes to all major ribbons

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

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

[1]See **See Also** section below.

Customizing ribbon button labels

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

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

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

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

Create a custom ribbon button label

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

[1] where <button label> is the label of the currently selected button.

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

Casing and button label texts

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

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

Restore the default ribbon button labels

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

Restore default button labels

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

[1] where <button label> is the label of the currently selected button.

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

Exporting and importing custom button labels

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

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

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

Resetting the ribbon configuration

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

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

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

Manually reset the current ribbon configuration

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

To reset the current ribbon configuration

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

1. After you have opened the configuration for editing[1], navigate to the detail page you want to reset the ribbon configuration for.
2. In the Main ribbon, click **Configure ribbon** in the **Help** button to open the **Configure ribbon** form.
3. In the **Configure ribbon** form, click **Reset** to open the **Confirm** dialog.
4. In the **Confirm** dialog
    - Click **Yes** to reset the ribbon configuration and exit the **Configure ribbon** form or
    - Click **No** to return to the **Configure ribbon** form.
5. Save the configuration you are editing[1].

[1]See **See Also** section below.

To reset all ribbon configurations

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

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

[1]See **See Also** section below.

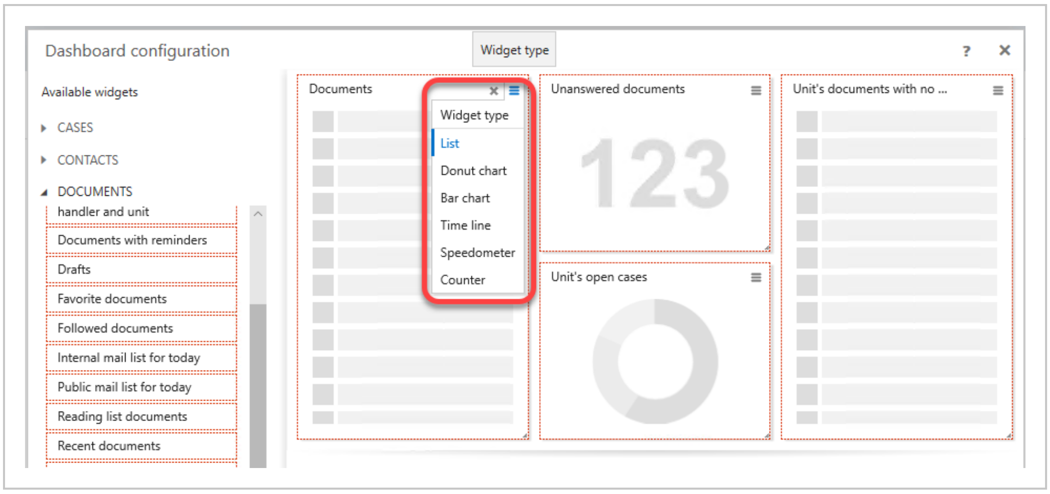
Dashboard

The dashboard is a start page of WorkZone Client and it is located on the **Home** tab. The dashboard provides you with an overview and easy access to lists that are displayed in the form of widgets. If you want to add other widgets, configure their types or change their location, you can configure the dashboard to suit your personal preferences.

Configure the dashboard

You can view the most common, saved, or shared lists in widgets that are displayed on the dashboard. You can select the widgets to be displayed and arrange their positions.

1. On the **Home** tab, select **Dashboard** on the **Navigation pane** and click **Personalize** on the main ribbon. The **Dashboard configuration** dialog box is displayed. The **Available widgets** pane shows the available lists that you can add to the dashboard. Next to them, you can see a scheme of the widgets (framed in green) that are currently displayed on your dashboard.



2. Configure the widgets:
   - To add a new widget, double-click or drag and drop the widget from the **Available widgets** pane to the desired positions on the dashboard.
   - To remove a widget from the dashboard, double-click it.
   - To resize a widget, hover the mouse over its green border and drag and drop it to the desired position.
   - To select the type of widget, click on the widget. See [Types of widgets](#).
3. Click **Save**.

> **Tip:** Click **Reset** to discard your changes and return to the default configuration of the dashboard.

Example: How to add a saved search to the dashboard

You want to see a list of your cases created within the last week on the dashboard.

1. [Perform a search](#) for cases with you as a case handler within the last week (type `-7` in the **Created date from** field).
2. [Save the search](#).
3. On the **Home** tab, click **Personalize** to open the **Dashboard configuration** form.

4. Open **My lists** and drag your saved search from step 2 to the dashboard.
5. Click **Save**. On the **Dashboard**, you can now see the search that shows the cases that you have created within the last week.

Work with multiple dashboards

If the widgets you want to view do not fit to one screen, you can configure multiple dashboards. Each dashboard may represent specific sets of widgets that you define. You can add, rename, hide, and delete dashboards.

Create a dashboard

1. Go to the **Home** tab and click **Dashboard** on the main ribbon.
2. Specify name for the new dashboard.
3. Click **Save**.

Rename a dashboard

1. Click in the navigation pane to open the **Available lists** pane.
2. In the **Dashboard** section, click the icon related to the relevant dashboard and select **Rename dashboard**
3. In the **Edit dashboard** form > **Dashboard name** field, specify the new name.
4. Click **Save** to save your changes and close the **Edit dashboard** form.
5. In the **Available lists** pane, click **Apply** to apply your changes.

Move a dashboard into and from the navigation pane

1. Click in the navigation pane.
2. Drag the dashboard name into or from the navigation pane

   \- Or -

Click **Deselect navigation item** to move a dashboard from the navigation pane.

3. Click **Apply**.

Remove a dashboard from WorkZone Client

1. Click in the navigation pane to open the **Available lists** pane.
2. In the **Dashboard** section, click the icon related to the relevant dashboard and select **Remove dashboard**
3. In the Confirm dialog, click **Yes** to remove the dashboard. The dashboard is no longer available and cannot be restored.
4. In the **Available lists** pane, click **Apply** to apply your changes. The dashboard is still removed and cannot be restored.

Widgets

Types of widgets

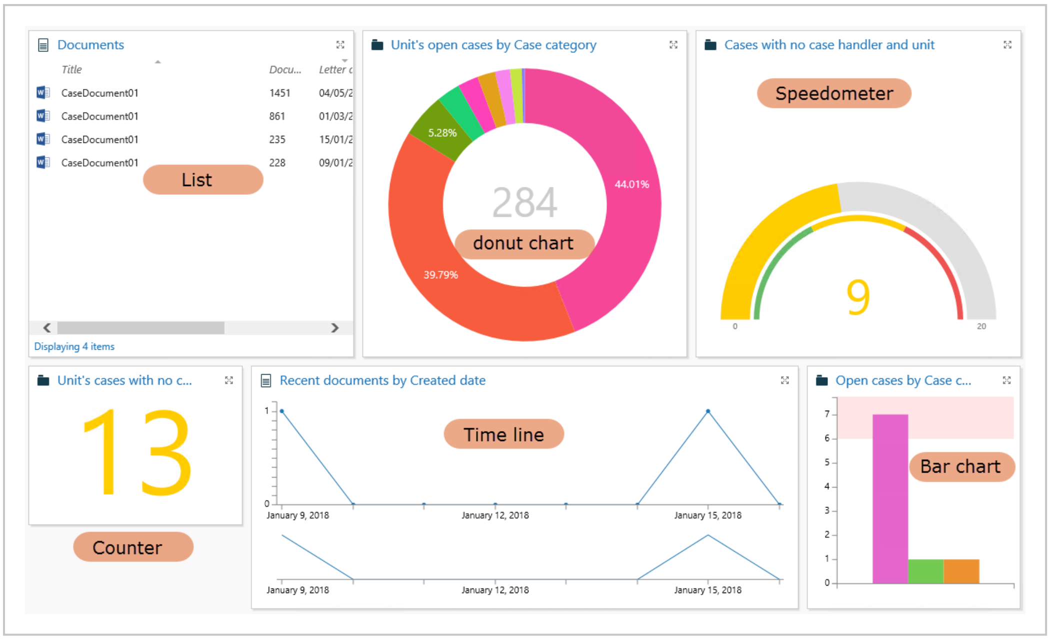
Widgets help you organize a big scope of data in the most convenient and informative way. Use them to view items in the lists, group and visualize statistics, and control the workload.

Types of widgets

There are six types of widgets available in the dashboard:

- **List:** Displays the selected information as a configurable table with columns and rows.
- **Donut chart:** Displays the selected information as a ratio between the defined data groupings in a donut diagram.
- :**Bar chart:** Displays the selected information as a ratio between the defined data groupings in a bar chart.
- **Time line:** Displays the selected information in a chart with the time along the X-axis.
- **Counter:** Displays the selected information in a list as a single number.

- **Speedometer:** Displays the selected information in a list as a single number with a visual depiction of the placement of the number within a particular predefined range of values.



Adjusting a widget in the dashboard

- To toggle the size of a widget (maximize/minimize) in the dashboard size, click in the upper-right corner of the widget.
- To open the full list of items on a separate tab, click the widget title.
- List widgets can be sorted by ascending or descending order by clicking the heading of the column you want to sort the data by and you can add or remove columns (fields) by right-clicking a column heading and selecting the field to add or remove. Finally, you can filter the list by clicking the filter in the heading of the column you want to filter the list by and then defining a filter value.

The Widgets

The List widget

List is the most traditional way to view items. Select list when you want to see basic information such as title, type and other details about each item.

- To view full information about an item on its detail page, double-click the item.
- To sort a list by values in a column, click the column heading. To sort the list in the opposite order, click the heading one more time.
- To show only those list items that meet specific criteria, click on the relevant column heading and define the criteria.

The Donut chart widget

Select the *donut chart* when you want to view the ratio between different groups in a list. You can select a parameter for grouping when you apply the donut chart type to a widget.

You can select the following display options for the donut chart widget:

- To group the bars in the chart, select a grouping in the **Group by** field.
- To view matching of groups and related colors, select the **Display legend** check box. Select the **Use short labels** to display the code of the selected grouping instead of the name.
  Codes and labels are defined in by a system administrator in WorkZone Client > **Taxonomy** > **Classification Scheme**.
  You must also select **Display Legend** in order to display the short labels.
- To view the group name and number of items in it, hover the mouse cursor over it.
- To view a group list on a separate tab, click the related piece of donut chart.
- To set how often the chart is recalculated and the widget is refreshed, select the relevant refresh rate from the list in the **Refresh Interval** field. The default value is none.
- To display an aggregated value, select the aggregate function and the field the aggregation is to be applied to.

The Bar chart widget

Bar chart represents different groups in a list in the alternative to the donut chart way. The bar chart provides an additional functionality - setting a threshold. Thresholds are convenient way to visually control the workload. When a specific bar exceeds the threshold, the background color above this threshold becomes pink. For example, you can add a widget with cases grouped by responsible unit. If the number of cases for a specific unit exceeds the set threshold, you can easily see it and allocate some cases to other units.

You can select the following display options for the bar chart widget:

- To display the bars by, select a grouping in the **Group by** field.
- To display a threshold area in the chart, set a value in the **Set threshold** field.
- To view matching of groups and related colors, select the **Display legend** check box. Select the **Use short labels** to display the code of the selected grouping instead of the name.
  Codes and labels are defined in by a system administrator in WorkZone Client > **Taxonomy** > **Classification Scheme**.
  You must also select **Display Legend** in order to display the short labels.
- To view the group name and number of items in it, hover the mouse cursor over it.
- To view a group list on a separate tab, click the related bar.
- To set how often the chart is recalculated and the widget is refreshed, select the relevant refresh rate from the list in the **Refresh Interval** field. The default value is none.
- To display the bars by ascending or descending aggregate values going from left to right, select **Order by values, ascending** or **Order by values, descending** respectively from the **Data ordering** field. If no value is selected in the **Data ordering** field, the bars will be displayed by the rank of the displayed items.
  Ranks are defined in the WorkZone Configurator, for example for case categories, case types, case states, document groups, and document types.
- To display an aggregated value, select the aggregate function and the field the aggregation is to be applied to.

The Time line widget

Time line is a valuable functionality that makes it possible to control and evaluate workflows by time. For example, you can easily check how many documents you must reply during the current week or you can evaluate efficiency of a certain unit for a specific period.

To configure a time line, select a parameter to group the values by and specify a time period:

- To specify a certain period, enter the dates or select them from the calendar, for example, 25/05/2018.
- To specify a relative period, for example the previous week, enter the relative dates:

Tip: See more options on How to set a relative date.

- By default, the time line presents a time period that was set during its configuration. If you want to view a line chart for a smaller period, use the left mouse button to highlight the needed dates in the history graph below.
- To view all items for a specific date on a separate tab, click the related point on the graph.
- To display an aggregated value, select the aggregate function and the field the aggregation is to be applied to.

The Counter widget

Counter displays the number of items in a list, allowing you to quickly gain an overview of the status of the list. The color of the number indicates where the counter value lies within a predefined range of values.

Counter thresholds

There are three ranges: Red, Yellow and Green which you can define threshold values for.

- Green: The counter value is less than the threshold value defined for the red color. The green color is classified as **Safe** in the widget configuration. The default value is 0-5.
- Yellow : The counter value is between the threshold value defined for the green color and the threshold value defined for the red color. The yellow color is classified as **Warning** in the widget configuration. The default value is 5-30.
- Red : The counter value is greater than the threshold value defined for the green color. The red color is classified as **Danger** in the widget configuration. The default value is 30-100.

Drag the sliders for each color to define the threshold values during the counter configuration.

Length of Scale

You can define the scale length in the **Length of Scale** field which determines overall range of the counter value in the widget. The default **Length of Scale** value is 100.

Refresh Interval

To set how often the counter is recalculated and the widget is refreshed, select the relevant refresh rate from the list in the **Refresh Interval** field.

Reverse thresholds

If higher counter values are preferred and lower counter values are candidates for warnings or require attention, select **Reverse thresholds** which associates the green color with higher threshold value and the red color with the lower threshold value.

Display aggregated values

To display an aggregated value, select the aggregate function and the field the aggregation is to be applied to.

The Speedometer widget

The *Speedometer* widget enables you to display the number of items in a list (a counter value) with a visual depiction of where the counter value is placed within a particular pre-defined range of values.

Counter thresholds

There are three ranges: Red, Yellow and Green which you can define threshold values for.

- Green: The counter value is less than the threshold value defined for the red color. The green color is classified as **Safe** in the widget configuration. The default value is 0-5.
- Yellow : The counter value is between the threshold value defined for the green color and the threshold value defined for the red color. The yellow color is classified as **Warning** in the widget configuration. The default value is 5-30.
- Red : The counter value is greater than the threshold value defined for the green color. The red color is classified as **Danger** in the widget configuration. The default value is 30-100.

Drag the sliders for each color to define the threshold values during the counter configuration.

Length of Scale

You can define the scale length in the **Length of Scale** field which determines overall range of the counter value in the widget. The default **Length of Scale** value is 100.

Refresh Interval

To set how often the counter is recalculated and the widget is refreshed, select the relevant refresh rate from the list in the **Refresh Interval** field. The default value is 2 minutes.

Reverse thresholds

If higher counter values are preferred and lower counter values are candidates for warnings or require attention, select **Reverse thresholds** which associates the green color with higher threshold value and the red color with the lower threshold value.

Display aggregated values

To display an aggregated value, select the aggregate function and the field the aggregation is to be applied to.

See Also

List actions

The aggregation function in dashboards

The aggregation function in dashboards

You can display an aggregated value of a field in the dashboard widget by selecting an aggregation function and then selecting a field to apply the function to in the widget. The selected aggregation function reduces the values of the field it is applied to, down a single value.

Only number fields (Integer or Decimal) can be aggregated.

Number (Integer and decimal) fields are not by default present in WorkZone and have to be created using custom fields or custom type fields.

You can apply aggregate functions to cases, contacts and documents. You cannot apply aggregate functions to meeting cases, or to widgets and lists that do not contain number fields that can be aggregated, for example WorkZone Process-related widgets.

> **Note:** Fields with the value 0 are included in the aggregation but fields that are empty (NULL value, do not contain any value) are not included in the aggregation.

Widgets

The aggregation function can be applied to the following widgets:

- Donut chart
- Bar chart
- Time line
- Speedometer
- Counter

Aggregate functions

The following aggregate functions can be applied in the widgets:

- **Avg:** (Average): The average (arithmetic mean) value of the selected field.
- **CountDistinct:** (CountDistinct): The number of unique values in the selected field.
- **Max:** (Maximum): The highest value of the selected field.
- **Median:** (Median): The median value of the selected field.
- **Min:** (Minimum): The lowest value of the selected field.
- **Stddev:** (Standard Deviation): The statistical standard deviation of the selected field.
- **Sum:** (Sum): The sum of the selected field.
- **Variance:** (Variance): The statistical variance of the selected field.

See Also

Widgets

The Preview Pane

When a case, a document or a contact is displayed on a list, you can quickly see part of the content and references in a preview pane. The preview pane contains different information depending on whether you open a case, a document or a contact.

The preview pane provides a preview of an item on a list. When you have selected, for example, a case in a list and clicked **Preview** , the case is displayed in the preview pane. You can also press **P** to toggle between opening and closing the preview pane for the selected item.

The following display options are available for the preview pane:

For Cases	For Documents	For Contacts
Documents*	PDF Viewer*	Addresses*
Parties*	Parties*	Contact references*
Case text*	Supplementary documents*	Case references*
Case references	Information	Documents*
Dates	Document references	Dates
Information	Office Online	Information
Reminders	Dates	
	Case references	
	Advanced PDF	

* Default information.

Note: When using the Microsoft Edge web browser and the PDF preview pane is expanded to the maximized mode, the preview pane will not be rendered correctly. Scrolling the preview pane in the maximized mode is also not possible.

Customize the preview pane

You can customize the preview pane for the list item, adding and removing display options as well as changing the order they are displayed.

The Advanced PDF pane

The **Advanced PDF** pane may contain advanced PDF annotation, redaction and editing options if additional PDF editing licenses have been purchased and enabled in your WorkZone installation. If licenses have not been purchased and enabled, the unlicensed **Advanced PDF** can only be used to read PDF documents and will not contain PDF editing functionality.

You can make the **Advanced PDF** the default PDF viewer on the preview pane by placing the **Advanced PDF** pane before the **PDF Viewer** pane.

To customize the preview pane

1. Open a list, for example **My open cases**.
2. In the list area, select a case and click **Preview** on the ribbon to display the case in the preview pane.
3. In the top right-hand corner of the preview pane, click **Configure preview** to open a display of available and applied panes. Panes that can be added to the preview pane are displayed in the Available panes (left pane) and applied panes are displayed on the right pane.
4. To add a new pane, select and drag a pane from the **Available pane** to the right pane or select the pane in the **Available pane** and click **Select item**.
5. To remove an applied pane, select and drag the pane from the right pane to the **Available panes** or select the pane you want to remove in the right pane and click **Deselect item**.
6. Click **Apply** to save your customized preview pane.

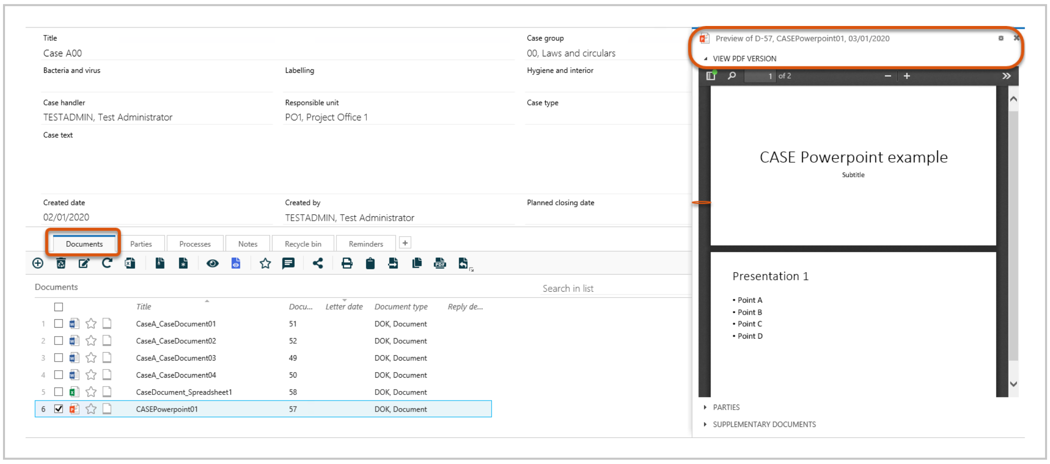
Reset the preview pane

You can reset the preview pane, clearing all customizations and restoring the default preview pane. Only the active preview pane is reset, not all preview panes in your configuration.

To reset the preview pane

1. Open a list, for example **My open cases**.
2. In the list area, select a case and click **Preview** on the ribbon to display the case in the preview pane.
3. In the top right-hand corner of the preview pane, click **Configure preview** to open a display of available and applied panes.
4. In the **Available panes** area, click **Reset** to open the **Confirm** dialog.
5. In the **Confirm** dialog, click **Yes** to restore the preview pane to the default, removing all customizations.

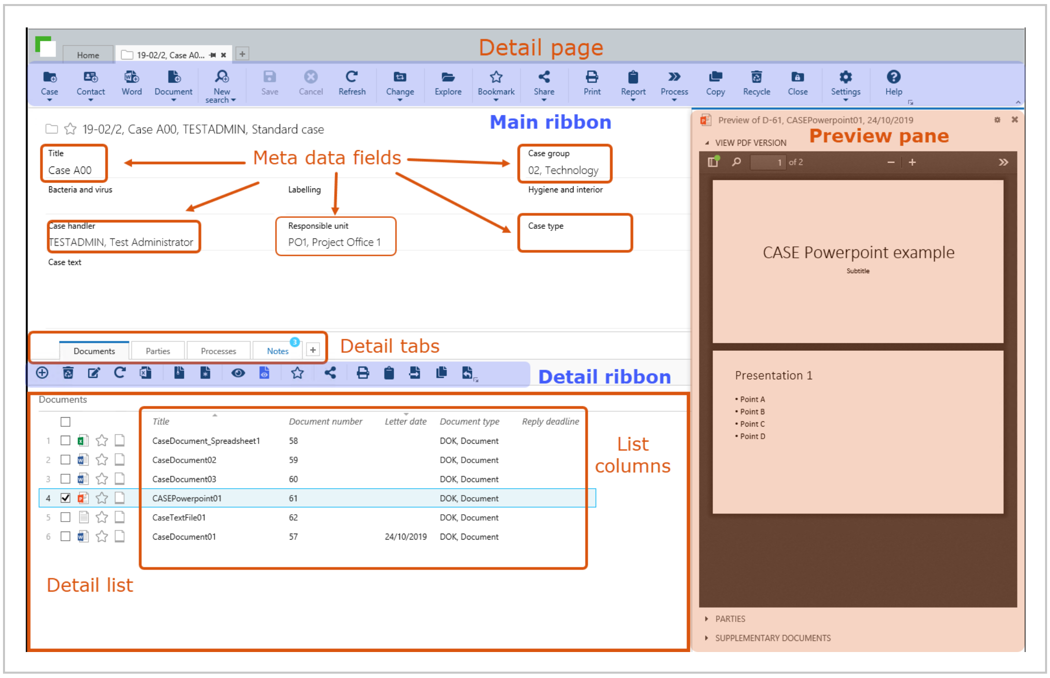
Tip: A blue line above a detail tab indicates which object is currently displayed in the preview pane. The line only appears on the detail pages. It is not displayed on the **Home** tab.
If you need to preview another object, open the relevant detail tab, select the desired item, and click **Preview**.



Detail pages

About detail pages

When you open, for example, a case, a document, a contact, or a saved search, its detail page opens on a new tab. You can have multiple detail pages open simultaneously, and you can work on multiple items at the same time.



The detail pages

Icons on the detail page titles

The icons on a detail page indicate what type of detail page the tab displays:

- Case detail page: A case folder icon
- Document detail page: An icon which depicts the type of document, for example a Word icon or Excel icon.
- Contact detail page: A business card icon

Unsaved work

You cannot close a detail page that contains unsaved work. You must save your work or click Cancel to discard any changes before you can close the detail page.

Arranging your detail pages

Open detail pages can be arranged as you like by dragging them with your mouse, placing them in the order you consider necessary.

Pinning detail pages

You can pin a detail page to the upper tab row of WorkZone Client. Pinned detail pages will be collapsed and grouped in the far left of the tab row, freeing up space for the detail page tabs. A tooltip text of the tab is displayed when you place your mouse cursor over a pinned tab.

Click on a tab (pinned or unpinned) to open the corresponding detail page. You can close a tab by right-clicking the tab and then selecting **Close**. Closing a pinned tab will also unpin it.

> Note: Detail pages are not the only elements you can pin. Many other elements can also be pinned, including lists opened in tabs, saved searches, and actor sequences.

Reorder tabs

You can rearrange the order of all tabs by dragging the tabs to new positions within in the tab groupings (pinned or unpinned). Pinned and unpinned tabs cannot be mixed in the tab row.

Restoring pinned tabs

Pinned tabs as well as the tab order will be restored whenever WorkZone Client launches and can be used as a quick way to have a set of favorite or important pages ready for work when WorkZone Client is opened.

The tab menu

Right-click the tab header to open the tab menu with the following options:

- **Pin**: Pins the active open detail page and moves the tab to the far left of the pinned tabs in the tab row. The **Pin** option is inaccessible if the page is already pinned.
- **Unpin**: Unpins the active open detail page and moves the tab to the far left of the unpinned tabs in the tab row. The **Unpin** option is inaccessible if the page is not pinned.
- **Pin all tabs**: Pins all open detail pages.
- **Unpin all tabs**: Unpins all open pinned detail pages.
- **Unpin all but this**: Unpins all open detail pages except the active detail page (the page you right-clicked to open the menu).

Note: Some pages cannot be pinned, for example dynamic lists and search pages.

Close detail pages

Detail pages can be closed by clicking the **X** icon in the upper right-hand corner of the page. You can also right-click the detail page to open the page menu and select how the page is to be closed:

- **Close**: Closes the active detail page. If you have unsaved work, you will be prompted to save or cancel the work.
- **Close all tabs**: Closes all open detail pages. If you have unsaved work on any of the pages, you will be prompted to save or cancel the work for each page containing the unsaved work. Detail pages that do not contain unsaved work will be closed.
- **Close all tabs but this**: Closes all open detail pages except the active open detail page (the detail page you right-clicked to open the menu). If you have unsaved work on any of the detail pages, you will be prompted to save or cancel the work for each page containing the unsaved work. Detail pages that do not contain unsaved work will be closed.

Note: Closing a pinned tab will also unpin it.

Adding or removing a detail page to the Favorites list

Click the favorite icon to add an item (case, document or contact person) to or remove an item from the Favorites list in the details page.

For more information, see About favorites

Meta data panel

The meta data panel on the detail page shows the meta data fields related to the case, the document, or the contact. Use the divider to display more or fewer fields on the meta data panel.

If you have the CONFIGADM access code, you can configure the case detail page (add, remove, resize, or reorder the displayed meta data fields.)

See [Working with WorkZone Client configurations].

Character counters on text fields

The total number of characters available for content in a text field is displayed in gray text in the upper right hand corner of the field. The number to the left of the slash is the number of characters used and the number to the right of the slash is the total number of characters available. Some text fields can contain 4,000 characters while other text fields can contain less, for example the **Case text** field can contain 4,000 characters while the **Note text** field can contain 2,000 characters.

For text field containing formatting options, such as **Note text** fields, the hidden formatting codes will also be included in the total amount of used characters.

The Detail tabs

At the bottom of each detail page for a case, document, or contacts, you will find detail tabs. Each of the detail tabs has a small ribbon with relevant features.

For example, if you have a document detail page open, the detail tabs display detail lists of the cases and contacts linked to this document. For searches, the list of search results is displayed.

See Also

The Detail tabs

About fields on the case detail page

About fields on a document detail page

About fields on a contact detail page

Detail pages

About detail pages

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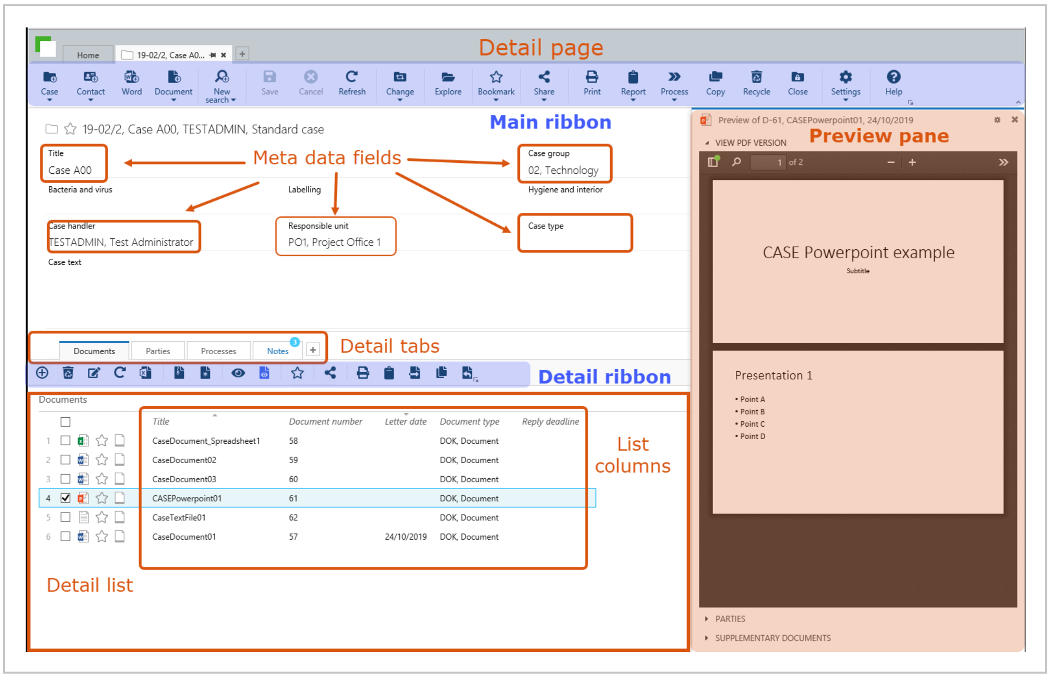

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Click on a tab (pinned or unpinned) to open the corresponding detail page. You can close a tab by right-clicking the tab and then selecting **Close**. Closing a pinned tab will also unpin it.

> **Note:** Detail pages are not the only elements you can pin. Many other elements can also be pinned, including lists opened in tabs, saved searches, and actor sequences.

Reorder tabs

You can rearrange the order of all tabs by dragging the tabs to new positions within in the tab groupings (pinned or unpinned). Pinned and unpinned tabs cannot be mixed in the tab row.

Restoring pinned tabs

Pinned tabs as well as the tab order will be restored whenever WorkZone Client launches and can be used as a quick way to have a set of favorite or important pages ready for work when WorkZone Client is opened.

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Right-click the tab header to open the tab menu with the following options:

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- **Unpin**: Unpins the active open detail page and moves the tab to the far left of the unpinned tabs in the tab row. The **Unpin** option is inaccessible if the page is not pinned.
- **Pin all tabs**: Pins all open detail pages.
- **Unpin all tabs**: Unpins all open pinned detail pages.

- **Unpin all but this**: Unpins all open detail pages except the active detail page (the page you right-clicked to open the menu).

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Close detail pages

Detail pages can be closed by clicking the **X** icon in the upper right-hand corner of the page. You can also right-click the detail page to open the page menu and select how the page is to be closed:

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- **Close all tabs**: Closes all open detail pages. If you have unsaved work on any of the pages, you will be prompted to save or cancel the work for each page containing the unsaved work. Detail pages that do not contain unsaved work will be closed.
- **Close all tabs but this**: Closes all open detail pages except the active open detail page (the detail page you right-clicked to open the menu). If you have unsaved work on any of the detail pages, you will be prompted to save or cancel the work for each page containing the unsaved work. Detail pages that do not contain unsaved work will be closed.

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Adding or removing a detail page to the Favorites list

Click the favorite icon to add an item (case, document or contact person) to or remove an item from the Favorites list in the details page.

For more information, see About favorites

Meta data panel

The meta data panel on the detail page shows the meta data fields related to the case, the document, or the contact. Use the divider to display more or fewer fields on the meta data panel.

If you have the CONFIGADM access code, you can configure the case detail page (add, remove, resize, or reorder the displayed meta data fields.)

See Working with WorkZone Client configurations.

Character counters on text fields

The total number of characters available for content in a text field is displayed in gray text in the upper right hand corner of the field. The number to the left of the slash is the number of characters used and the number to the right of the slash is the total number of characters available. Some text fields can contain 4,000 characters while other text fields can contain less, for example the **Case text** field can contain 4,000 characters while the **Note text** field can contain 2,000 characters.

For text field containing formatting options, such as **Note text** fields, the hidden formatting codes will also be included in the total amount of used characters.

The Detail tabs

At the bottom of each detail page for a case, document, or contacts, you will find detail tabs. Each of the detail tabs has a small ribbon with relevant features.

For example, if you have a document detail page open, the detail tabs display detail lists of the cases and contacts linked to this document. For searches, the list of search results is displayed.

See Also

The Detail tabs

About fields on the case detail page

About fields on a document detail page

About fields on a contact detail page

The Detail tabs

Detail tabs on cases

You can view and manage the following lists on case detail pages:

Name	Description
All main documents and supplementary documents	All documents associated with the case.
Activities	Manage multiple case activities. On this tab, you can start a new activity and open the activities preview pane for a selected activity. You can also export a selected activity to Microsoft Excel, refresh the activity list, delete a selected activity from the list, and mass update all activities on the case based on a set of predefined criteria. Deleted (Terminated) activities are not displayed in the **Activities** case detail tab. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration. See Also Work with case activities
All Processes	Displays all active and historical processes for the case and enables you to manage any processes. On this tab you can create a new process, edit a process, export selected processes to Microsoft Excel, open a selected process in a preview pane and finally cancel a selected process. You can also refresh the tab in order to update the tab and display any changes made to your processes by other users. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration. **See Also**Work with processes
Case Preparation	Create, edit and remove agendas and agenda items in the Agenda Management module. The **Case pre-**

Name	Description
	paration tab will only be available if the Agenda Management module is activated in WorkZone Configurator. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Case references	Cases that relate to the case indirectly. These cases are independent from the current case, but information about them complement the full picture about the case or can be useful. Child cases are not displayed in this tab but are instead displayed on the **Child cases** detail tab. You can create a case reference to a case that is a child case and have the reference displayed on the **Child case** tab as well as the **Case references** tab. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Chats	The Chats detail tab displays all chats associated with the active chat. From the Chats detail tab, you can open a preview of the chat in the chat window, create a new chat based on the active case, remove or edit an existing chat, export a selected chat to Microsoft Excel, and prevent the chat from being deleted.
Child cases	Cases that relate to the case directly. Child and parent cases can have reverse fields; apart from that, they relate as regular case references. General case references are not displayed in this tab but are instead displayed on the **Case references** detail tab. You can create a case reference to a case that is a child case and have the reference

Name	Description
	displayed on the **Child case** tab as well as the **Case references** tab. **Creating and adding child cases** • The **Case** button: Create a child case directly for the case active in the detail page. • The **Add** button: Add an existing case as a child case to the case active in the case detail page. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Contact reference history	A chronology of changes that have been applied to contact (party) references. You can see who has created, updated, or deleted the reference to a party, when this action was performed, and other additional information. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Dates	Dates that relate to the case. Use this tab to collect all relevant dates, for example, dates of phone conversations, local deadlines, and others. Note that date types are predefined by your administrator. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Document reference history	A chronology of changes that have been applied to document references. You can see who has created, updated, or deleted the reference to a document,

Name	Description
	when this action was performed, and other additional information. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Document references	Documents that relate to the case indirectly. These documents are independent from the case, but information about them complement the full picture about the case or can be useful. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Documents in hierarchy	All documents attached to the active case as well as all documents attached to any child cases of the active case. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Documents	Displays all main documents associated with the case.
Information	Additional information that relate to the case. Select an information type from the drop-down list, and specify a value. Note that information types are predefined by your administrator. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Life cycle	A list of changes made in the metadata of a case, for example, case state, case handler, read access, and others. The tab is not displayed by default and must be

Name	Description
	added to the detail page, either manually or as part of a WorkZone configuration.
Main documents history	A chronology of changes that have been applied to main documents of the case. You can see who has created, updated, or deleted the reference to a document, when this action was performed, and other additional information. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Notes	Create and share notes on cases with your colleagues. You can quickly view, create, edit, lock, and delete notes on selected cases as well as preview the note, export it to Excel and generate a PDF file of selected notes.
Parent cases	Cases that relate to the selected case directly. Child and parent cases can have reverse fields; apart from that, they relate as regular case references. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Parties	Contacts associated with the case. You can see party roles and other relevant information about contacts on this tab.
Processes	Displays all active processes for the case and enables you to manage your processes. On this tab you can create a new process, edit a process, export selected processes to Microsoft Excel, open a selected process in a preview pane and finally cancel a selected process.

Name	Description
	You can also refresh the tab in order to update the tab and display any changes made to your processes by other users. **See Also** Work with processes
Reminders	Displays all notifications that are related to the case. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Recycle bin	Documents on a case that have been deleted. Users always can restore documents from the recycle bin if needed. When users delete documents from the **Recycle bin** detail tab, the documents are deleted permanently from WorkZone. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration. **Note:** To restore the documents that have the status **Archived** or **Terminated**, you must have the SOFTDELETE access code.
Users with Read access	Displays all users registered as having Read access to the case. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Users with Write access	Displays all users registered as having Write access to the case. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.

Name	Description
Retention	The retention code defines a life cycle of cases. In particular, it defines for how long a case cannot be permanently deleted after its deletion to the trash bin. The retention functionality makes it possible to keep deleted cases in the database and restore them if needed. Retention codes are configured by an administrator. Each retention policy includes a list of users who are allowed to edit its retention code. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Various custom case types...	Custom case types are collections of customized fields created by system administrators in WorkZone Configurator and made available to users in WorkZone. Custom case types contain custom type fields, which can contain case data, much like custom fields. Custom case types are displayed by their name and the custom type field to be used to connect the custom type to the case. Custom types can be manually added to the case detail tabs by users or can be distributed as part of a configuration.

Detail tabs on documents

You can view and manage the following lists on case detail pages:

You can view and manage the following lists on document detail pages:

Name	Description
Case reference history	A chronology of changes that have been applied to

Name	Description
	case references. You can see who has created, updated, or deleted the reference to a case, when this action was performed, and other additional information. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Case references	Cases that relate to the document indirectly. These cases are independent from the current document, but information about them complement the full picture about the document or can be useful. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Chats	The Chats detail tab displays all chats associated with the active chat. From the Chats detail tab, you can open a preview of the chat in the chat window, create a new chat based on the active case, remove or edit an existing chat, export a selected chat to Microsoft Excel and prevent the chat from being deleted.
Contact reference history	A chronology of changes that have been applied to contact (party) references. You can see who has created, updated, or deleted the reference to a party, when this action was performed, and other additional information. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Dates	Dates that relate to the document. Use this tab to collect all relevant dates, for example, date of phone conversations, local deadlines, and others.

Name	Description
	Note that date types are predefined by your administrator. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Document references	Documents that relate to the given document indirectly. These documents are independent from the given document. However, information about them complement the full picture about the given document or can be useful. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Information	Additional information that relate to the document. Select an information type from the drop-down list, and specify a value. You can add or remove Information types from multiple items (cases, documents or contacts) in the Navigation pane. See Edit multiple items in a list **Note:** Information types are predefined by your administrator. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Life cycle	A list of changes in document metadata, for example, title, write access, and others. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.

Name	Description
Notes	Create and share notes on documents with your colleagues. You can quickly view, create, edit, lock, and delete notes on selected documents as well as preview the note, export it to Excel and generate a PDF file of selected notes.
Parties	Contacts associated with the document. You can see party roles and other relevant information about contacts on this tab.
Reminders	Display all notifications that are related to the document. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Supplementary documents	Supplementary documents associated with the given document.
Users with Read access	Displays all users registered as having Read access to the document. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Users with Write access	Displays all users registered as having Write access to the document. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Versions	List of versions for the current document. See Draft versioning. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.

Name	Description
Various custom document types...	Custom document types are collections of customized fields created by system administrators in WorkZone Configurator and made available to users in WorkZone. Custom document types contain custom type fields, which can contain document data, much like custom fields. Custom document types are displayed by their name and the custom type field to be used to connect the custom type to the document. Custom types can be manually added to the document detail tabs by users or can be distributed as part of a configuration.

Detail tabs on contacts

You can view and manage the following lists on contact detail pages:

Name	Description
Addresses	A list of addresses related to the contact.
Case reference history	A chronology of changes that have been applied to case references. You can see who has created, updated, or deleted the reference to a case, when this action was performed, and other additional information. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Case references	A list of cases that relate to the contact.
Contact reference history	A chronology of changes that have been applied to contact references. You can see who has created, updated, or deleted the reference to a contact, when this action was performed, and other additional information. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Contact references	A list of contacts associated with the given contact. You can see roles and other relevant information about contacts on this tab. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Dates	A list of dates related to the contact. Use this tab to collect all relevant dates, for example, date of phone conversations, local deadlines, and others.

Name	Description
	Note: Date types are predefined by your administrator. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Documents	A list of documents associated with the contact. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Document reference history	A list of documents related to the contact. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Information	A list of additional information that relate to the contact. Select an information type from the drop-down list, and specify a value. **Note:** Information types are predefined by your administrator. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Life cycle	A list of changes on contact state. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Notes	Create and share notes on contacts with your col-

Name	Description
	leagues. You can quickly view, create, edit, lock, and delete notes on selected contacts as well as preview the note, export it to Excel and generate a PDF file of selected notes.
References to deleted documents	Displays all references of the active contact person to documents that have been deleted and are currently in the recycle bin. This tab is read-only. New information cannot be added and existing information cannot be deleted or edited. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
References to deleted cases	Displays all references of the active contact person to documents that have been deleted and are currently in the recycle bin. This tab is read-only. New information cannot be added and existing information cannot be deleted or edited. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Various custom contact types	Custom contact types are collections of customized fields created by system administrators in WorkZone Configurator and made available to users in WorkZone. Custom contact types contain custom type fields, which can contain contact data, much like custom fields. Custom contact types are displayed by their name and the custom type field to be used to connect the custom type to the contact. Custom types can be

Name	Description
	manually added to the contact detail tabs by users or can be distributed as part of a configuration.

Manage tabs

You can add, rename, remove, and change the order of the tabs.

> **Tip:** You can create own custom tabs to display documents or parties based on your filter criteria. See the Save and reuse search as a custom tab section.

1. Open the detail page you want to adjust the detail tabs for.
2. On the detail tab area, click + **Select tabs to view** to open the **Tab selector** pane.
   The available tabs are displayed in the left pane and the tabs in use are displayed in the right pane.
3. In the **Tab selector** pane:
   1. Drag and drop the tabs to the desired position, either moving a tab from the right pane to the left tab to remove a tab and moving a tab from the left pane to the right pane to add a tab. You can also click + **Select item** in the left pane to add the tab or click ✖ **Deselect item** in the right pane to remove the item.
   2. To change the order of the tabs, drag and drop a tab to a new position in the right pane.
   3. To rename a tab, click **Rename** next to the tab title of the tab you want to rename to open the **Edit tab** form. In the **Edit tab** form > **Tab name** field, enter the new title.
4. Click **Save** to save your changes and exit the form.
5. Click **Save**.

> **Note:** If you rename a detail tab on documents or contacts, the new title will be applied to all document and contact detail pages, respectively. If you rename a detail tab on a case, the new title will be applied only to cases that belong to the same case category.

Add a filtered detail tab

Filtered detail tabs are detail ribbon tabs that display the results from an embedded saved search. You can also create a custom filter for the tab and when you apply the search and save the tab, your custom search will be saved as a saved search.

When you apply a search as a filter to a detail tab, the results will be automatically filtered to only display results connected to the active case, document or contact. If you use the same search to generate results in a list, all search results will be displayed.

> **Note:** You cannot save a search or a filtered detail tab that does not contain any search criteria.

You can edit the search, delete it or apply it to other tabs or lists as any other saved search.

The following filtered detail ribbon tabs can be added to the corresponding detail page:

- Case detail page: Filter documents, Filter parties, Filter case references, Filter Child cases
- Document detail page: Filter parties
- Contact detail page: Filter contact references

See Also

Save a search as a custom detail tab

Display or hide list columns

The lists in the detail tabs display the relevant item fields as list columns so you can get an overview of the most important information quickly. You can decide which columns you want to see on the lists and change their order. For example, you can change the sort order of the list, move the columns you use most often furthest to the left and remove columns you do not need.

Change the sort order of the list

By default the list is sorted by date of creation, but you can change the sort order by clicking a column heading to sort the list by that column. You can toggle between ascending and descending order by clicking the column heading.

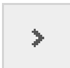
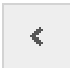
Rearrange the list columns

To rearrange the columns displayed in the list, select and drag the column heading to its new location. When the column heading changes background color from white to gray, you can drag the column.

Add or remove displayed columns

A number of columns are displayed by default in the list but there are more fields available than are displayed initially. You can fine-tune the list by adding new fields (columns) or removing columns from the list.

To add or remove columns in a detail tab list

1. In a detail tab list, click **Column options** in the list or right-click the column heading in a detail tab list and select **More** to open the **Select columns** form.
    - **Add columns:** In the **Select columns** form > **Available columns** pane, select the columns you want to display and click  to move the selected columns to the **Selected columns** pane.
    - **Remove columns:** In the **Select columns** form > **Selected columns** pane, select the columns you want to remove and click  to move the selected columns to the **Available columns** pane.
2. Click **Save** to save your changes and close the form.

You can also right-click the column heading in a detail tab list to open a menu and then select which the columns to display in the list. Clear the columns you do not want displayed in the list.

> **Tip:**

- Resize the columns in a list by dragging the arrow on the right edge of the column
  - or -
  Specify the column width in pixels in the **Width** field of the **Select columns** pane in the **Select columns** form.
- In the **Select columns** form, click **Reset** to restore the default configuration of columns in a list.

Display tab counters

A detail tab can contain many rows in the detail list and you can configure each detail tab to display counters on the tab. There are two configurable counters which you can enable or disable: The item counter and the unread item counter.

The item counter

The item counter is light blue and displays the number of rows in the tab or list. The counter displays the number of rows currently displayed in the list so any filters on the tabs will be respected.

The item counter is disabled by default for all tabs except the **Notes** tab but you can display the counter for each tab.

The unread items counter

The unread items counter is red and displays all unopened items on case and document lists that can be displayed in detail tab pages, including custom lists containing case or document filters. Only unopened cases or documents where you are the case handler are included in the count, for example new or existing cases or document you have not yet opened as a case handler.

Unopened items are additionally displayed in **bold** in the tab page or list.

The counter uses the MRU (Most Recently Used) list to determine if an item has been opened. When a case or document is opened, it will be registered as having been read.

The unread items counter is enabled by default for the **Chats** detail tab and disabled for all other tabs.

The following detail tabs contain the unread items counter:

- Documents
- Chats*
- Case references
- Parent cases
- Child cases
- Document references
- Documents in hierarchy
- Supplementary documents
- Recycle bin

*The unread items counter on the **Chats** tab displays the number of chats with unread messages.

To display the counter on a tab

1. Open a detail page that contains the tab you want a counter displayed on.
2. On the detail tab area, click **Select tabs to view** to open the **Tab selector** pane.
3. In either pane, locate the tab you want to display a counter on and click **Rename** next to the tab title to open the **Edit tab** form.
4. In the **Edit tab** form:
   - Select the **Display counter** check box to display the items counter or clear the check box to hide the item counter.
   - Select the **Display unread items counter** check box to display the unread items counter or clear the check box to hide the counter. The unread items counter may not be present on all detail tabs.
5. Click **Save** to save your changes and exit the form.

See Also

Reading lists

Your user profile

Shortcut keys

You can use your keyboard and a lot of useful keyboard shortcuts to navigate in WorkZone Client.

Use global shortcut keys

The following global keyboard shortcuts apply to WorkZone Client:

Shortcut keys		Description
Main ribbon	Detail ribbon	
Ctrl+S	Ctrl+Shift +S	Saves your changes.
Ctrl+R	Ctrl+Shift+R	Refreshes a page.
-	Ctrl+Shift+N	Adds item to a list.
-	p	Toggles between opening and closing the Preview pane for the selected item only.
Esc		Cancels your changes (in dialog boxes only).
Ctrl+Shift+F		Creates a new case search.
Ctrl+Shift+D		Creates a new document search.
Ctrl+Shift+C		Creates a new contact search.
Enter		Performs a search.
Right Arrow key, Enter		Expands the list for a selected item (if available).
Left Arrow key		Hides the list for a selected item (if available).
Ctrl+G and select Case or Ctrl+O and select Case		Opens the **Go to case** form and enables you to perform a quick search for cases.
Ctrl+G and select Document or Ctrl+O and select Document		Opens the **Go to document** form and enables you to perform a quick search for documents.
Ctrl+G and select Contact or Ctrl+O and		Opens the **Go to contact** form and enables

Shortcut keys		Description
Main ribbon	Detail ribbon	
	select Contact	you to perform a quick search for contacts.

Navigate between areas

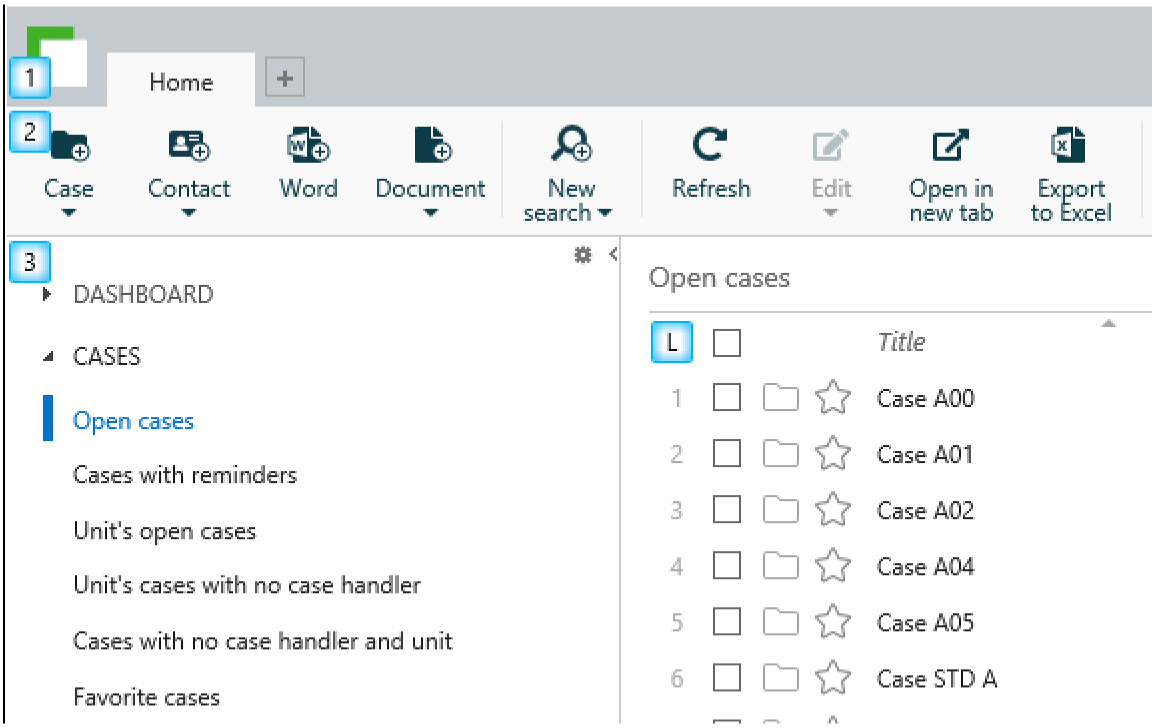
You can navigate between items in the different areas of the user interface.

1. Press **Alt+Q** to activate area selection for keyboard navigation.
   Numbers and letters are displayed in the user interface to indicate the area you can navigate to with the keyboard.

   > **Note:** To deactivate area selection for keyboard navigation, mouse click or press **Esc**.

2. Type a number or a letter of an area in which you want to navigate with the keyboard.

   Example:



Press **3** to navigate to the navigation pane on the **Home** tab.

A color mark indicates that the selected area is active for keyboard navigation.

You can also navigate between different areas using the following keyboard shortcuts:

Shortcut keys	Description
Tab	Moves forward between fields in the selected area.
Shift+Tab	Moves backward between fields in the selected area.
Ctrl+Right Arrow key	Selects the next area on the page. If you have not selected any area yet, the first area on the page will be selected.
Ctrl+Left Arrow key	Selects the previous area on the page. If you have not selected any area yet, the last area on the page will be selected.

Navigate in an area

Use the following keyboard shortcuts to navigate between the items in the selected area:

Shortcut keys	Description
Up/Down Arrow keys	Toggles between the vertically aligned items in the selected area.
Right/Left Arrow keys	Expands/hides a hierarchy.
Enter	Activates the selected button or item.

Navigate in lists

Use the following keyboard shortcuts to navigate in lists:

Shortcut keys	Description
Down Arrow key	Selects next list item.
Up Arrow key	Selects previous list item.
Page Down	Displays the next page of the list.
Page Up	Displays the previous page of the list.
Enter	Opens the selected list item in a new tab.
P	Displays/hides the preview pane for the selected list item.
Ctrl+A	Selects/deselects all list items on the current page.
Home	Selects the first list item on the current page.
End	Selects the last list item on the current page.
Ctrl+Down Arrow key	Highlights the next list item. Already selected list items remain selected.
Ctrl+Up Arrow key	Highlights the previous list item. Already selected list items remain selected.
Ctrl+Space	Selects highlighted list items.
Ctrl+Home	Goes to the first page.
Ctrl+End	Goes to the last page.
Shift+Down Arrow key	Selects the next list item. Already selected list items remain

Shortcut keys	Description
	selected.
Shift+Up Arrow key	Selects the previous list item. Already selected list items remain selected.

Tip: You can also navigate in the lists displayed in the preview pane or in the detail lists on a detail page.

Navigate in the dialog boxes

Use the following keyboard shortcuts to navigate in the dialog boxes:

Shortcut keys	Description
Alt+Q	Activates area selection for keyboard navigation.
Tab	Moves forward between fields or buttons in the selected area of a dialog box.
Shift+Tab	Moves backward between fields or buttons in the selected area of a dialog box.
Ctrl+Right Arrow key	Selects the next area on the page. If you have not selected any area yet, the first area in a dialog box will be selected.
Ctrl+Left Arrow key	Selects the previous area on the page. If you have not selected any area yet, the last area in a page will be secc-ted.
Ctrl+S	Saves changes and close the dialog box (this is the same as clicking Save or).
Esc	• When the focus is on the search form elements - close the dialog box. • When the focus is on a list - close the dialog box. • When the focus in on a list item - move focus to the

Shortcut keys	Description
	list.
Down/Up Arrow key (for fields with selectable items)	Opens a drop-down list for the current field.

In the **Add case/document/contact references** dialog boxes, you can also use the following keyboard shortcuts:

Shortcut keys	Description
Ctrl+Shift+Down Arrow key	Displays the **Advanced search** fields.
Ctrl+Shift+Up Arrow key	Hides the **Advanced search** fields.
Enter	When the focus is set on the search form elements - perform a search.
Enter	• When the focus is set on a list - highlight the first item in a list. • When the focus is set on a list item - add this item to another list.
Down/Up Arrow key (for lists)	• When the focus is set on a list - scroll down/up the list. • When the focus is set on a list item - move to the next/previous item in a list.

In search pages, forms and dialogs with fields that contain drop-down lists:

Shortcut keys	Description
Arrow key	Opens a drop-down list if the field contains a drop-downlist.
Space	Opens a drop-down list if the field contains a drop-downlist.
Enter	Start search based in the search criteria currently specified in the search page or dialog.

Shortcut keys	Description
	In order to prevent searching the entire database and thereby negatively impacting performance, pressing **Enter** in a search page with no defined criteria will not start the search.

How to set a date

You can set or edit a date on a case, document, or contact detail page and in the search request with a date criteria.

When you set or edit a date, you can:

- Type the exact date

  - Or -

- Select the date from the calendar

  - Or -

- Specify a time period in relation to the current moment, for example, + 2 weeks, - 4 hours, and click **Save** .

To specify the time period, use the following syntax that is aligned with the Danish and English languages:

Possible values	Meaning
+	Add a date in the future
-	Add a date in the past
Å Y	Year
Q	Quarter (3 months)
M	Month
U W	Week

Possible values	Meaning
D	Day
T H	Hour
MI	Minute
S	Second

Example:

`+4u` - You set a date of 4 weeks after the current day.

`-1y` - You set a date of 1 year before the current date.

- You can only enter a single value for each date field, for example, `+7w`. Do not use multiple values, for example, `+1m3w`.
- `Day` is the default time period. If you enter just a number without time value, WorkZone considers it as a day. Thus, `+6` equals `+6d`.

System messages

Your system administrator can create and display general system messages in WorkZone Client (your browser) and globally. The content of each system message is defined by the system administrator and can inform users of any important information, for example if the system will be offline for maintenance in the near future.

System messages can be displayed to all WorkZone users as well as only displayed to users that match the access codes defined in the system message parameters.

The system messages are prominently displayed in the upper right-hand corner of the browser whenever the browser is opened or loaded.

There are three types of system messages:

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

- **Warning:** The message is displayed in a orange message field.

Closing a system message

The system message is displayed continuously but you can close the message by clicking directly on the message. All system messages, including closed messages, are re-displayed when the client browser is re-loaded or opened again.

Some system messages can be defined by system administrators as being always displayed and these types of message cannot be closed.

System messages that cannot be closed are semi-transparent and can be clicked through, but not clicked on.

Cases

About cases

A case in WorkZone Client corresponds to a physical case or a case folder. The purpose of a case is to gather all information related to this case in one place.

- A case is unique and has a unique case number.
- A case can refer to the other cases as case references.
- Cases can have a hierarchy of a parent case with one or more of the child cases. For example, a case can have child cases if the cases contain information closely related and subordinated to the original case.

Closed and open cases

A case can either be in an open or closed state. This state will determine which actions a user can perform on the case. Newly created cases are always open.

Open cases

Open cases are active cases and can be edited by users with sufficient editing rights (Write access) to the case. New documents and parties can also be added to the case.

Finding open cases

Open cases are defined by not having a closed date and you can use the **Open cases** or the **Unit's open cases** standard lists to find open cases. You can also create your own searches as well as use distributed searches and customized lists created by other users to locate open cases.

Closing cases

You can close an open case according to the procedures for closing cases in your organization. See Close a case.

Closed cases

Closed cases are inactive and cannot be edited by any users. You can only edit the **Reminders**, **Case handler**, **Responsible unit**, **Read access**, and **Retention code** fields on a closed case. New documents and parties cannot be attached to a closed case.

When you close a case, a retention date is calculated based on the retention policy assigned to the case.

Finding closed cases

Closed cases are defined by having a closed date which is used to locate closed cases. Closed cases can be found by creating a case search query and using the **Closed date from** and **Closed date to** search criteria fields to refine and narrow your search.

Reopening a case

If you need to edit a closed case or add a new document or party to a closed case, you must reopen the case. See Re-open a closed case.

Case category

A case category is a major division of cases defined by a category. An organization configures case categories individually depending on its architecture, requirements, and needs.

When creating a new case, you must first define the case category by selecting the category from the **Case** drop-down list on the main ribbon. After a case has been created, you can change the case category for the case as well as for multiple cases.

Case categories are created and maintained in the WorkZone Configurator > **Case** > **Properties** page > **Case categories** tab.

There are two special case categories: the Desktop case and the Standard case.

Standard case

When manually creating a case, you must select the case category before creating the case, but when a case is created using OData or WorkZone Explorer, the Standard case category will be applied as a default case to the newly created case.

The Standard case is a WorkZone system category and can be edited but not deleted.

The case detail page of a Standard case will be rendered with the default case template.

Finding Standard cases

Standard cases are not considered to have a case category and the **Case category**field of the case is therefore empty. When searching for Standard cases, all cases where the case category field is empty are therefore found. You can create a specific search for Standard cases or you can create a general case search, add the**Case category**search criteria to the search and define the**@Empty** value in the search criteria.

Changing a Standard case category

A Standard case can be changed to any other case category, for example changing a Standard case to a Subject case.

Clearing a case category

The case category of a case can also be cleared. This changes the case to a Standard case and changes the case template used for the case to the default case template. You cannot clear the case category for multiple cases.

The Desktop case

Every user has a case called a desktop case. The desktop case contains documents that have been created by you and not immediately saved on a case. These documents are automatically saved on your desktop case. You can also save documents directly on your desktop case, use the Desktop case as a draft case for your documents, and then move finished documents to other cases as the work progresses.

Documents that are archived from the desktop case are not assigned a record number. Instead they keep the original record number (0) which was assigned when the document was created. If the archived document is assigned to another (non-desktop) case, the document will be updated with a new record number that corresponds to the new case.

Desktop case numbering

The case number of the desktop case has the following format: "`SJ-STD-<USERNAME>`". For example, for a user with the username "`LOF`", the case number of the desktop case will be "`SJ-STD-LOF`". The title of the desktop case is "Desktop - <USERNAME>". For example, "Desktop - LOF".

Desktop cases cannot be closed or deleted.

Case type

A case type is a more granular division of the cases by a predefined case type. Case types are specific to the organization and reflect how the organization sub-divides case meta data. An organization configures case types individually depending on its architecture, requirements, and needs.

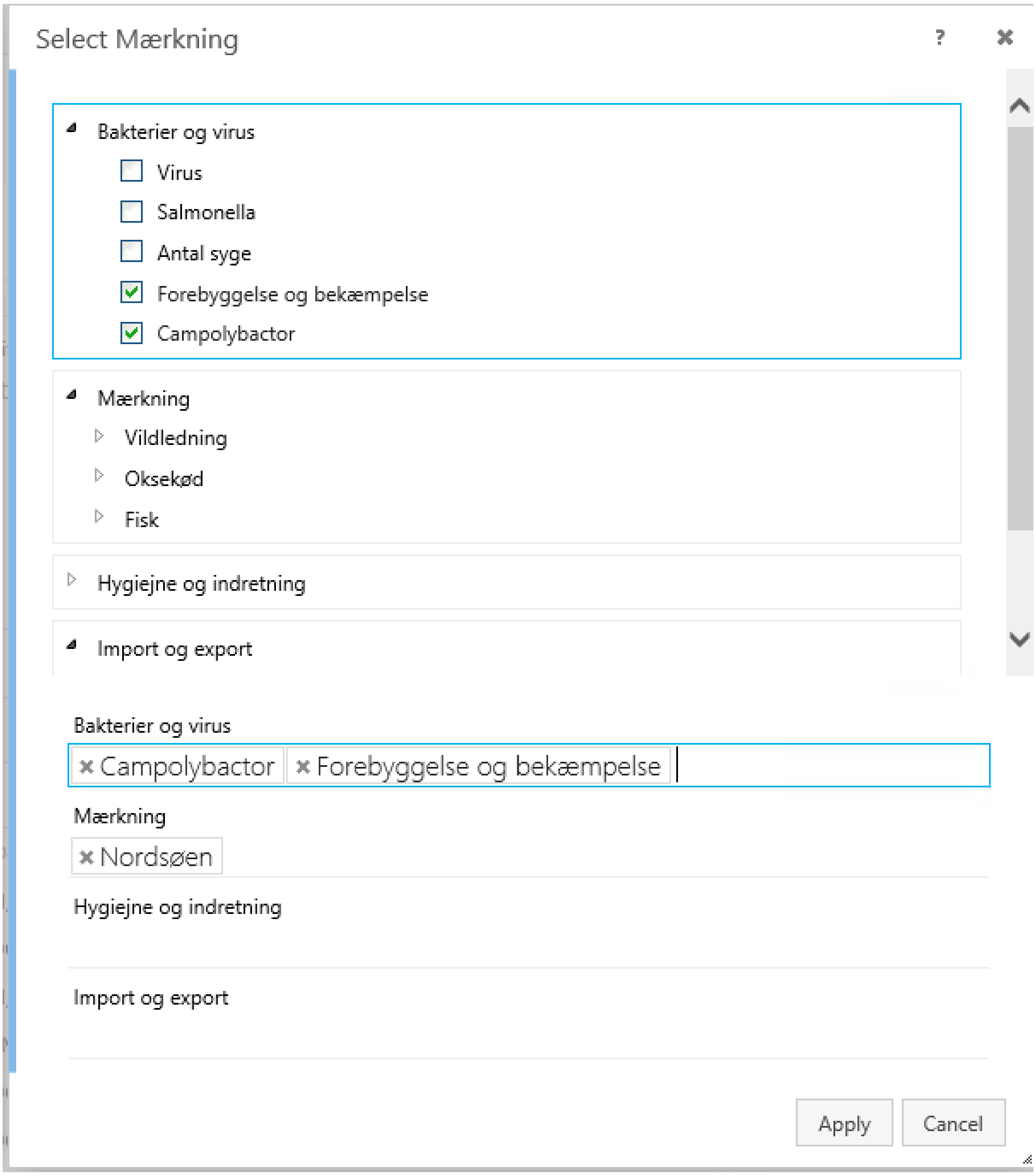
Case types are defined in the **Case type** field on the case detail page and can freely be changed on all open cases.

Case types are created and maintained in the WorkZone Configurator > **Case** > **Properties** page > **Case types** tab.

Facets

Facets represent case properties that are specific for an organization. Use facets as an alternative or complimentary way to classify your cases. In contrast to case groups, you can select multiple facets for a case. Facets are defined by an administrator and then made available on a case detail page. Click the icon on a facet to open a list of available options, select facets and click **Apply**.

Example:



Tip:

- You can recognize facets by this icon in the field - 
- You can use facets or case groups as a search criteria to find specific cases.

See Also

Case groups and child case groups

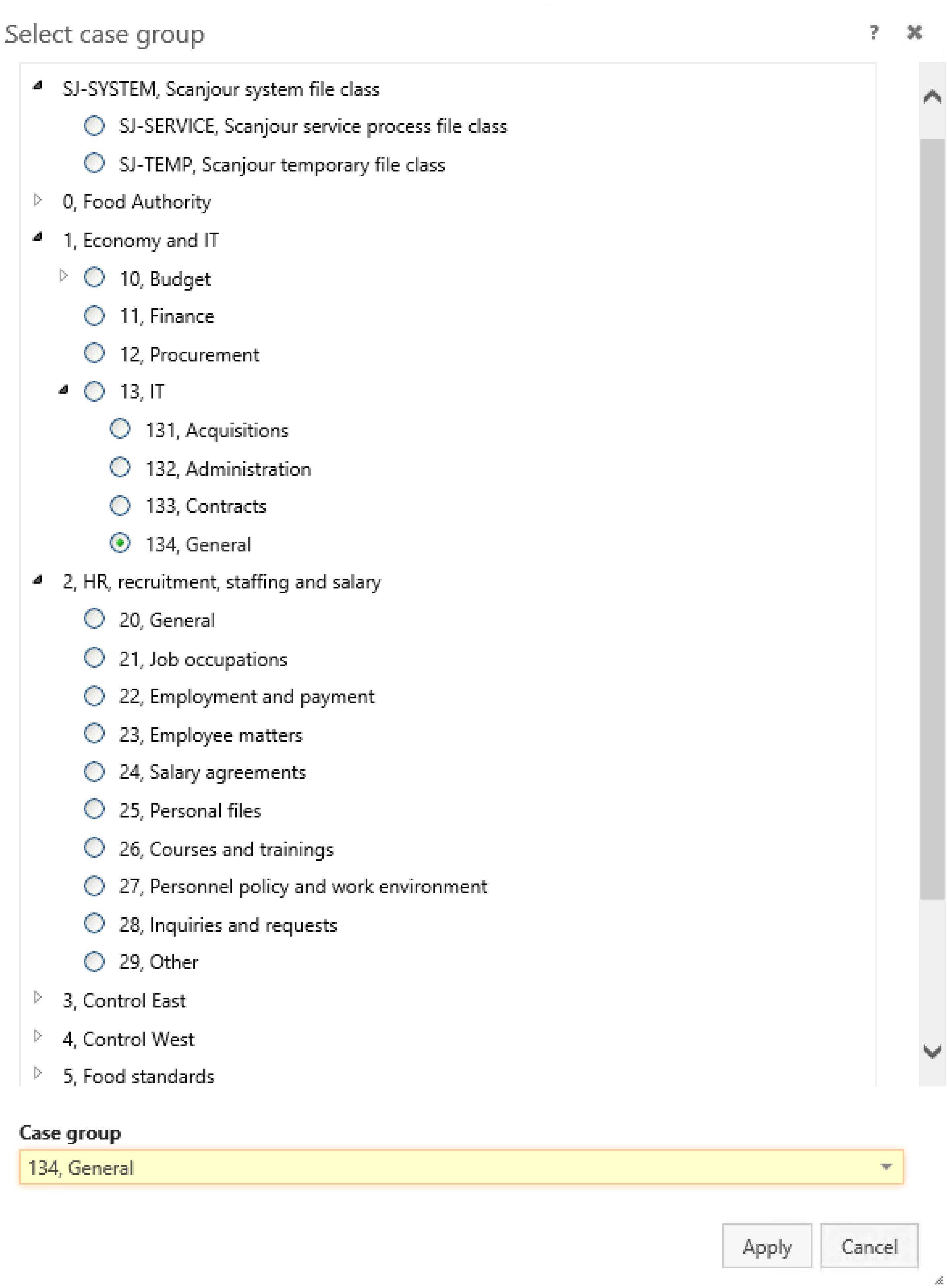
Case groups and child case groups

Case groups represent a classification scheme for cases and is a mandatory field. A case group can have sub-groups, which further categorizes the case within the main case group. Case groups are part of your organization's classification scheme and are defined by an administrator in the WorkZone Configurator > **Taxonomy** > **Classification scheme**.

When you create a new case, you must select a case group to which the new case belongs but you can change it later if you need to.

To select a case group, click the icon on the **Case group** field, select the group and click **Apply**.

Example:


Select case group
SJ-SYSTEM, Scanjour system file class
SJ-SERVICE, Scanjour service process file class
SJ-TEMP, Scanjour temporary file class
0, Food Authority
1, Economy and IT
10, Budget
11, Finance
12, Procurement
13, IT
131, Acquisitions
132, Administration
133, Contracts
134, General
2, HR, recruitment, staffing and salary
20, General
21, Job occupations
22, Employment and payment
23, Employee matters
24, Salary agreements
25, Personal files
26, Courses and trainings
27, Personnel policy and work environment
28, Inquiries and requests
29, Other
3, Control East
4, Control West
5, Food standards
Case group
134, General
Apply
Cancel

The SJ-TEMP case group

The SJ-TEMP case group is a special case group which has been retained in WorkZone for historical purposes.

In WorkZone 2019.0 and earlier, users could only change the case group for cases in the SJ-TEMP case group and SJ-TEMP was therefore used as an initial repository for cases that had not yet been assigned a final case group.

From WorkZone 2019.1 and onwards, users can change the case group of any case and the use of SJ-TEMP as the only way reassigning case groups is no longer relevant. SJ-TEMP is still used internally by WorkZone as a temporary case group assigned to cases where the final assignment of a case group by the system is not clearly defined. Users can then manually re-assign any cases in the SJ-TEMP case group to the correct case groups.

Case group default values

Case groups can have related default values that populate specific fields with the predefined values (for example, the main IT support user could be set as the default case handler for the IT case groups). Case group default values are also defined in your organization's classification scheme by an administrator in the WorkZone Configurator > **Taxonomy** tab.

If you create a new case and select a case group, the following fields will be populated with the default values specified in the selected case group.

- Case type
- Responsible unit
- Acting unit
- Case handler
- Assistant
- Read Access
- Write Access
- Default document classification
- Retention code

The default values are only suggestions and you can change the field values after the default values have been applied values if you have write access to the fields.

Applying a case group with default values

If you first define values in the case fields mentioned above and afterwards apply a case group containing default values, any existing field values will be overwritten by the case group default values, depending on the field and whether or not of default values in the case group.

The following table illustrates what happens to values defined in specific fields when selecting a case group after a field value has been defined.

	Case group default value is...	
Case detail field	**defined**	**not defined**
Case type	Default value.	Original field value.
Responsible unit	Default value.	Original field value. If the field is empty, the field will be updated with the unit of the user creating the case.
Acting unit	Default value.	Original field value.
Case Handler	Default value.	Original field value. If the field is empty, the field will be updated with the user creating the case.
Assistant	Default value.	Original field value.
Read Access	Default value.	• If you are using WorkZone Standard Edition: Original field value • If you are using WorkZone Corporate Edition: ALLEEMNER&[authority]
Write Access	Default value.	Original field value If the field is empty and... • If you are using WorkZone Standard Edition: Original field value • If you are using WorkZone Corporate

Case detail field	Case group default value is... defined	not defined
		Edition: The field is updated with the ALLEEMNER&[authority] access code.
Default document classification	Default value.	Original field value.
Retention code	Default value.	Original field value.

Default Value: The default value defined on Case Group is applied.

Original field value: The value defined by the user on the field in question is maintained.

Child case groups

Child case groups are optional sub-divisions of a case group and some case groups have child case groups to provide more accurate classification.

Child case groups are defined by an administrator in the WorkZone Configurator > **Taxonomy** tab and are known as **Subnumbers** and **Subnumber types** in the WorkZone Configurator.

Like case groups, you can change child case groups after you have created the case.

See Also

Change case group and child case group

Hidden entities

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

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

Finding hidden entities

Hidden cases, documents and/or contacts can be found by using the Hidden lists (Hidden cases, Hidden documents and Hidden contacts) in the WorkZone navigation pane.

> Prerequisite: You must have the LOSTANDFOUND access code to see and add the Hidden lists to your navigation pane.

> Note: If you need to edit hidden cases, documents or contacts (items are not assigned to you), you must have the * access code.

See Also

Hidden entities (WorkZone Client Administrators Guide)

Navigation pane and lists

Lists

About fields on the case detail page

The case detail page provides a detailed overview of a case. The page displays detailed case information as well as meta data fields that are used to classify and provide access and security details for the case. The case detail page can also be set up to display detail tabs at the bottom of the page.

The case detail page is opened by double-clicking a case in the case list or in a search result list.

Meta data fields

The following fields are displayed on the case detail page:

Field	Description
Title	The case title.
Case group	A classification of the cases and a mandatory field. A case group can have sub-groups, further categorizing the case within the main case group. The content of this field is defined by your organization. **See Also** Case groups and child case groups
Child case group	An optional classification of a case. The content of this field is defined by your organization. **See Also** Case groups and child case groups
Case handler	The name of the user who created the case is entered here by default. You can assign a different case handler.
Responsible unit	The organizational unit that is responsible for the case. The organizational unit of the current user is automatically inserted by default. You can change the unit by selecting a different unit from the list.
Case type	The content of this field is defined by your organization.
State	The available case states are defined by your organization.
Case text	A description of the case or comments on the progress of the case handling.

Field	Description
Created date	The creation date of the case is entered automatically. This field cannot be edited.
Planned closing date	The date on which the case is expected to be closed. You can define a planned closing dare for the case which lies before the date case is created inWorkZone. If the planned closing date is before the date the case is created, the field value will be displayed in a red font color.
Closed date	The date on which the case is closed.
Created by	The name of the user who created the case is entered automatically.
Previous case number	Enter the case number of the previous relevant case.
Keywords	You can enter keywords from the dictionary of your organization on cases, documents, and contacts.
Read access	Define who can see the case. The text of the access code is displayed by default, but a system administrator can edit your configuration and change the field parameter to display the actual access code instead.
Write access	Define who can edit the case. The text of the access code is displayed by default, but a system administrator can edit your configuration and change the field parameter to display the actual access code instead.

Field	Description
Acting unit	The organizational unit responsible for case execution.
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. **Note:** Documents created in WorkZone Client 2017 SP1 and earlier versions have no classification.
Retention code	Indicates which retention policy is assigned to the case. Retention policy defines the following rules: • time during which the case should be retained in the database; • access code which is required for permanent case deletion.
Retention date	Indicates until what date the case should be retained in the database after the case has been closed. The **Retention date** is calculated based on the retention policy assigned to the case by adding the value in the **Relative retention period** of the assigned retention policy to the date the case was closed. The **Relative retention period** is a field on

Field	Description
	the applied retention policy and is found in WorkZone Configurator > **Retention** > **Retention policy**.
Primary party	The primary party is the main contact associated with the case. This field is not displayed by default and must be added to the configuration by a system administrator. The primary party field can be made mandatory and default values can be set by the system administrator when adding the field to the case detail page. **See Also** Add or change the primary party

Note: If you have the CONFIGADM access code, you can configure the fields displayed on the case detail pages. See About detail page customization.

Manage cases

Create a new case

1. In the ribbon, click **Case** to open a new case detail page.
2. In the new case detail page, fill in the required fields.
3. In the ribbon, click **Save** to create the case. The case detail page of the new case will remain open in the browser.

Create a new case from a template

You can create case templates with different case types and properties.

> **Prerequisite:** To create cases from a template, you must have one or more case templates set up on the server.

1. In the ribbon, click **Case**.
    - If only the default case template exists on the server, a new case detail page will open based on a standard template.
    - If more than one case template is set up on the server, a list of available case templates will be displayed. Select a case template from the list. A new case detail page will open based on the selected template.
2. In the new case detail page, fill in the required fields.
3. In the ribbon, click **Save** to create the case based on the selected case template. The case detail page of the new case will remain open in the browser.

Create a new child case

You can create a new case and automatically associated it as a child case to another existing case (the parent case) or you can make an existing case a child case of another existing case.

Create a new child case.

1. Open the detail page of the case you want to create a new child case to.
2. From the detail tabs on the case detail page of the parent case, select the **Child cases** tab[1].
3. On the **Cases** detail tab:

   - Click **Cases** and then select a case template to create a new child base based on a case template
     - or -
   - Click **Cases** to create a new child case that is not based on a case template.
     In both situations, a new case detail page is opened.
4. In the new case detail page, fill in the required fields.
5. In the ribbon, click **Save** to create the case as a child case of the case in the case detail page. The case detail page of the new child case will remain open in the browser.

[1]If the **Cases** detail tab is not displayed in the detail ribbon, you can display it, see Manage tabs

Add an existing case as a child case

See Add or remove parent or child cases

Click **Refresh** to update the contents of the tab.

Edit a case

You can edit information on a case until the case is closed. If you need to edit a closed case, you must reopen the case.

1. Open the case that you want to edit.
2. Click the field that you want to edit.

3. Make your changes. See also About fields on the case detail page.
4. Click **Save**.

Tip: You can also edit some fields when the case is displayed in a list. See Edit item from a list.

Close a case

1. Open the case that you want to close.
2. In the ribbon, click **Close**.

Important:

- You cannot add new documents or parties to a closed case.
- You can only edit **Reminders**, **Case handler**, **Responsible unit**, **Read access**, and **Retention code** on a closed case. To edit other fields, you need to reopen this case first.
- When you close a case, the retention date is calculated. The **Retention date** is calculated based on the retention policy assigned to the case by adding the value in the **Relative retention period** of the assigned retention policy to the date the case was closed.

Reopen a closed case

1. Open the case that you want to reopen.
2. In the ribbon, click **Reopen** to reopen the case and clear the **Closed date** field.

Copy an existing case

You can copy an existing case and reuse its content for a new case. You can choose to copy selected references on the original case such as case parties, case references, case information, date, and case lists from custom case types. You cannot select which specific references you want to copy. If you select to copy case references, then all case references are copied.

1. Open the case that you want to copy.
2. In the Main ribbon, click **Copy** to open the **Copy case** form.
3. Select the references that you want to copy from the original case and, optionally, change the case group or child case group.
4. Click **Copy** to create a new case that contains content from the original case. The new case is displayed in a new tab. You can find a reference to the original case on the**Case reference** detail tab. The value in the **Role** field will be **Original**.
5. If needed, make changes to the new case and click **Save**.

> **Important:**
>
> - If a contact from an original case no longer exists in the database, this contact will not be copied to the new case.
> - If you copy a case that includes dates in the past, such as an end date that has passed, then these dates will not be copied to the date fields of the new case.
> - If you copy a closed case, the **Closed date** and the **Planned closing date** fields of the new case will be empty.

View the life cycle of a case

The life cycle shows the progress of a case since it was created. This means that you can see:

- When the **State** field has been updated.
- When the case handler was changed.
- When the case was closed.
- When the case was reopened.

1. Open the case for which you want to view the life cycle.
2. From the detail tabs, open the **Life cycle** tab.

Edit case state

The case state shows, for example, whether a case is new, pending, or archived.

1. Open the case for which you want to edit the case state.
2. Click the **State** field, and select a state from the list, for example **Pending**.
3. Click **Save**.

Send a link to a case in an e-mail message

You can send a link to a case in an e-mail.

Prerequisite:

- You must have WorkZone for Office installed.
- The recipient must have access to WorkZone Client to see the case.

1. Open the case you want to create a link for in an e-mail message.
2. In the ribbon , click **Share** > **In Mail** > **Link** to open a new e-mail message in Microsoft Outlook automatically containing a link to the case in WorkZone Client.
3. In the E-mail message, add a recipient and click **Send**.

Copy a case to the clipboard

You can copy the link to a case in WorkZone Client and, for example, paste it in a document.

1. Open the detail page of a case that you want to copy to your clipboard, or select it from a list.
2. In the ribbon, click **Share** > **Copy to clipboard**.
3. Paste the link, for example, in a document.

Open a case with Windows Explorer

You can open a case as a folder in Windows Explorer and see the content of a case. See User's Guide for WorkZone Explorer.

Prerequisite: The WorkZone Explorer must be configured and activated.

1. Open the case that you want to open with Windows Explorer, or select the case from a list.
2. In the Main ribbon, click **Explore** to open the selected case as a folder in Windows Explorer. If you are using a case list, you can also right-click on the case in the list and select **Explore**.

Due to the security model of the Google Chrome and Microsoft Edge Chromium browser, the Windows File Explorer is not opened automatically when you click the **Explore** button. Instead, you must open the Windows File Explorer manually and then press **CTRL+V** in the address bar to open the Explorer for the active case.
The link address of the active case is automatically copied to your clipboard when you click the **Explore** button.

If you are using the Microsoft Edge browser, you must be signed in to the WorkZone IdentityServer to enable integration to the Windows File Explorer. If you select the **Keep me signed in** check box during sign in, you will not be required to sign in again. The persistent cookie storage can however expire so you may be required to sign in later.

If WorkZone Explorer has been deactivated, the **Explore** button will not be displayed, regardless of which web browser is used. WorkZone Explorer can be activated and deactivated by a system administrator in **WorkZone Configurator** > **Global** > **Feature Settings** > **Client** > **Explore**.

Print case documents

You can print the case documents to a PDF file and save it on a case and on your local disk. The PDF file will include the selected documents and, optionally, meta data.

> Prerequisite: To create a PDF file, the WorkZone PDF Engine must be installed.

> Tip: If you need to print supplementary documents without their main documents, you can do it on the **All main documents and supplementary documents** detail tab or on the custom tab configured to display only supplementary documents.

1. Open the case detail page.
2. To print case documents, click **Print** in the ribbon and then select **Print** from the drop-down list,

   \- Or -

   On any document detail tab (for example, **Documents**), select at least one document and click **Print** on the detail ribbon[1].
3. On the **Print case** dialog box, select the documents that you want to include in a PDF file from the left-hand list. Expand **Advanced search** to find specific documents. Note that documents without an associated case cannot be included in a PDF file and they are not displayed.

4. Click to move the selected documents to the right-hand list. Only documents from the right-hand list will be included in the PDF file. Drag and drop documents to place them in the order that you want them to appear in the PDF file.

   Click the **Add archived** button to move archived main documents with their supplementary documents (even if they are not archived) to the right-hand list.

5. Optionally, click the **Advanced** tab and adjust settings for the PDF file:

   - **Template** – Select a template for a PDF file. The cover page includes the case, parties and document meta data.
     - **A case with parties and documents** – Includes meta data of the case, documents and parties, and selected documents.
     - **Public Access, printout of the case documents** - Includes meta data of the case, documents and parties, and selected documents.
     - **Report without a cover page** – Includes selected documents only.
   - **Title** – Specify a name for the new PDF file.

     Specify type, group, case handler, letter date, document state, and classification on this tab for the PDF file.

6. Select the **Include document contents** check box to add the actual contents of the documents in the report. If the **Include document contents** check box is cleared, the report will consist of a list of documents with no content.

7. Select the **Include document cover page** check box to insert a cover page for each document to separate the documents from each other in the report.

8. In the **Set print parameters for case documents** group, specify whether or not to include comments and notes to the Word, Excel, PowerPoint and PDF documents of the report as well as display, accept or reject any revisions made to Word or Excel documents. You can also specify whether or not to flatten any PDF forms included in the report.

9. Click **Print and save** to create a PDF file that will be saved on the case, or click **Print** to either open it directly or save it on your local disk.

[1]To create a custom document tab, see Save a search as a custom detail tab.

Delete a case

When you delete a case for the first time, the case is moved to the recycle bin (soft delete). You cannot see the case in regular lists, but it is not removed from the database and you can restore the case later if required.

WorkZone can be configured to automatically soft delete a case or document when the defined retention period for the case or document expires. The automatic deletion parameter is set for each individual retention policy in WorkZone Configurator > **Retention**> **Retention Policies**.

> **Important:**
>
> - You cannot delete a desktop case.
> - You cannot delete a case that has documents. Delete the case's documents first and then delete the case; hard delete the case's documents to hard delete the case permanently.
> - To delete some cases, a special update code is required. Please contact your administrator for more information.

Soft delete a case

> **Prerequisite:** To soft delete a case, you must have the SOFTDELETE access code.

When you soft delete a case, the case is moved to the recycle bin. At the same time the case will still exist in the WorkZone database. This enables you to restore the case, if required.

To delete a case, proceed with the following steps:

1. Open the detail page of the case you want to delete.
2. In the Main ribbon, click **Recycle**. If you are using a case list, you can also right-click on the case in the list and select **Recycle**.

3. In the **Delete case** dialog box, select a reason for deletion from the list and add your comment to the **Description** field, if needed.
4. Click **Delete**. The case is moved to the recycle bin.

Deleted cases have crossed-out case titles on the Case detail pages.

Delete a case permanently

> **Prerequisite:** To delete a case permanently (hard delete), you must be assigned the SOFTDELETE access code as well as the access code associated with the case's retention policy.

You can permanently delete cases from:

- **Recycle Bin - Cases** list;
- Detail page of the deleted case

1. Open detail page of the deleted case or select it in a list. Note that you can select multiple items in a list.
2. In the main ribbon, click **Delete** and then **Yes**. If you are using the **Recycle Bin - cases** list, you can also right-click on the case in the list and select **Delete**.

The cases are permanently deleted from WorkZone.

Automatically hard delete cases

WorkZone can be configured by a system administrator to automatically hard delete a case or document after a predefined purge period. The purge period is defined as number of days after the case or document has been initially soft deleted. Hard deleted items are deleted permanently.

The purge period can be defined for each individual retention policy in the **Purge period** field for the retention policy and is found in the settings for the retention policy in WorkZone Configurator > **Retention** > **Retention policies**.

Cases and documents will not be automatically hard deleted if the **Purge period** field has not been defined (that is, if the field is empty and contains no values) .

Cases and documents that are to be hard deleted will contain a date in the **Purge date** field in the respective recycle bin lists - **Recycle bin - Cases** for cases and **Recycle bin** for documents on the **Home** page as well as the **Recycle bin** tab in the Case details page. You can use the **Purge date** field to search for, filter, and sort cases or documents in the respective recycle bins.

How the Purge date field is determined

The value in the **Purge Date** field is determined by adding the value of the **Purge period** field for the assigned retention policy to the **Retention date** of the case or document.

For cases with no value in the **Retention date** field (for example SJ-TEMP cases or open cases that have been manually deleted), the **Purge date** is determined by adding the value of the **Relative retention period** field and the value of the **Purge period** field to the date the case was last updated - usually the date of deletion.

The **Purge date** will always be at least equal to the date the case or document was last updated (usually the date of deletion) plus the value of the **Purge period** field.

If the **Purge date** field is empty, the case or document will not be automatically hard deleted.

View deleted cases

You can view deleted cases in the **Recycle bin - Cases** list in the navigation pane under the **Cases** section.

Restore a deleted case

> **Prerequisite:** To restore a soft-deleted case, you must be assigned the SOFTDELETE access code.

1. Open a case that you want to restore, on its detail page
   - Or -
   Select deleted case(s) in the **Recycle Bin - Cases** list.
2. In the ribbon, click **Restore**. If you are using the **Recycle Bin - cases** list, you can also right-click on the case in the list and select **Restore**.

Edit information on a case

Add or remove case parties

You can add one or more contacts to a case as case parties.

Add a party to a case

1. On the case detail page, open the **Parties** tab from the detail tabs.
2. Click **Add** to display the **Add contact references** form.
3. In the **Add contact references** form, specify your search criteria in one or more of the following ways:
   - Enter a text in the **Free text** field.
   - Define the scope of your search under **Search in**.
   - Click **Advanced search** and enter additional search criteria.

   - If you enter multiple search criteria, an Or search will be performed using the OR operator by default.
   - Switching back from **Advanced search** to **Simple Search** will automatically delete any additional search criteria that you have inserted.
4. Click **Search**.

   The contact you have viewed most recently will appear at the top of the search result list.

5. Double-click the contacts you want to add.
6. Select a role in the **Role** field.
7. Click **Save**.

> **Tip:** You can configure which columns are displayed in the search result list. Right-click on a column to select the columns to display.

Remove a party from a case

1. On the case detail page, open the **Parties** tab from the detail tabs.
2. Select the check box next to the parties that you want to remove.
3. Click **Remove**.

Add parties to and remove parties from multiple cases

You can add parties to or remove parties from multiple cases at once.

1. In the **Navigation** pane > **Cases** panel on the **Home** tab, select a case list.
2. In the case list, select all cases you want to add parties to or remove parties from and click **Edit** > **Parties** to open the **Edit parties** form.
3. In the **Edit parties** form:
    - In the **Type** field, select a type to filter the contacts to be added or removed.[1]
    - In the **Party role** field, select a role to filter the contacts to be added or removed.[1]
    - In the **Party** field, select the name / ID of the contact to the added or removed.

4. In the **Edit** button

    - Select **Add** to add the contact to the cases selected in the list.
    - Select **Remove** to remove the contact to the cases selected in the list.

5. In the **Confirm** form, click **Yes** to confirm the changes and close the form.

[1] You do not need to filter the contacts by type or role, but filtering can help you select the contact to add or remove by reducing the list of contacts in the **Party** field.

Add or change the primary party

You can add a primary party during case creation by selecting a contact from the contact list. You can change the contact assigned as the primary party later if you need to.

> **Prerequisite:** A user who has the CONFIGADM access code must add the **Primary party** field to the case detail page.
> The user must configure the field by selecting by selecting **Advanced** properties in the **Primary party** field to display the **Set default party values** form and then select the relevant party role from the drop-down list in the **Party Role** field.
> The user can also select the contact types that can selected as the primary party by adding various contact types from the drop-down list in the **Type** field.
>
> **Party role** and, optionally, **Type** in the **Set default party values** form.

A system administrator can set the primary field to be mandatory and define any default field values when adding the field to the case detail page.

To add a primary party to a case

You can only add a primary party to a case during case creation and the **Primary party** field must be displayed in the case detail page and configured to accept user-based entries. See **Prerequisites** above.

During creation of a case you want to add a primary party to, in the case detail page, select a contact in the **Primary party** field and click  **Save** when you are finished creating the case to save your changes.

If you forget to add a primary party to the case, you can change the primary party later.

To change a primary party of a case

You change the primary party of an existing case but the **Primary party** field must be displayed in the case detail page and configured to accept user-based entries. See **Prerequisites** above.

1. Locate and open the case you want to change the primary party of.
2. On the case detail page, click **Change** > **Primary party** to open the **Edit Primary party** form[1].
3. In the **Edit Primary party** form > **Primary party** field, select the new primary party from the contact list.
4. Click **Save** and then **Yes** in the **Confirm** dialog to save your changes and close the form.

[1]The **Primary party** menu option is only accessible if the **Primary party** field is displayed in the case detail page.

Edit case party role

1. On the case detail page, open the **Parties** tab from the detail tabs.
2. Select one or more parties to edit the role for and click **Edit** to open the **Edit party role** form.
3. In the **Edit party role** form, select a different party role in the **Party role** field.
4. Click **Save**.

Add or remove case documents

A case document is a document saved on a particular case. You can save different types of documents on a case and remove them later.

Add a new case document

When you create a new document from the case detail page, this document automatically becomes a case document on the case.

1. Open the detail page of a case to which you want to add a new case document.
2. Create a new document.

   You can create several types of documents.

   For more information, see:

   - Create a new Word document
   - Create a new Excel document
   - Create a new PowerPoint document
   - Create document information
   - Import from file system

3. Click **Save**.

   Click **Refresh** if the document does not appear immediately.

Remove a case document from a case

1. On the case detail page, open the **Documents** tab from the detail tabs.
2. Select a case document that you want to remove from this case, and then click **Move**.

Add or remove parent or child cases

You can add an existing case to another as either a child case or as a parent case and in this fashion, create a hierarchy of inter-related cases.

Add a parent or a child case

1. Open the detail page of the case you want to add a parent or a child case to.
2. From the detail tabs, select the **Child cases** tab to add a child case or **Parent cases** tab to add a parent case[1].
3. On the detail tab, click **Add** to open the **Add child case references** form.
4. In the **Add child case references** form, locate the case you want to add by defining search criteria in one or more of the following ways:
    - Enter a text in the **Free text** field.
    - Define the scope of your search under **Search in**.
    - Click **Advanced search** and enter additional search criteria.

   Switching back from **Advanced search** to **Simple Search** will automatically delete any additional search criteria that you have inserted.
5. Click **Search** to display cases that fit you search criteria. If the wrong cases are displayed, try editing your search criteria.
6. In the left pane, select the cases you want to add and then click the right arrow to add them to the right pane. You can also double-click each individual case to add it the right pane. Finally you can select all the cases in the left
7. Click **Save** to add all cases in the right pane as either child cases or parent cases.

[1]If the **Child cases** or **Parent cases** detail tabs are not displayed in the detail ribbon, you can display them, see Manage tabs

If necessary, click **Refresh** to update the contents of the tab.

Remove a parent or a child case

1. Open the detail page of a case you want to remove a parent or a child case from.
2. From the detail tabs, select the **Child cases** tab to remove a child case or **Parent cases** tab to remove a parent case[1].

3. On the **Child cases** or **Parent cases** tab, depending on what you want to remove, select the cases you want to remove.
4. Click **Remove** to remove the selected cases.

If necessary, click **Refresh** to update the contents of the tab.

Add or remove case references

A case reference is a link to another case that may be relevant to the case handling of the current case. For example, case references could be cases that may affect making principle decisions.

Add a case reference

1. Open the detail page of a case to which you want to add a reference.
2. From the detail tabs, open the **Case references** tab.
3. Click **Add** to open the **Add case references** form.
4. In the Add case references form, specify your search criteria in one or more of the following ways:
    - Enter a text in the **Free text** field.
    - Define the scope of your search under **Search in**.
    - Click **Advanced search** and enter additional search criteria.

   Switching back from **Advanced search** to **Simple Search** will automatically delete any additional search criteria that you have inserted.
5. Click **Search**.
6. Double-click the cases that you want to add.
7. Click **Save.**

Remove a case reference

1. Open the detail page of a case from which you want to remove a case reference.
2. From the detail tabs, open the **Case references** tab.
3. Select the case references that you want to remove.
4. Click **Remove**.

Add or remove keywords

You can use keywords, for example for classification and retrieval of cases.

1. Open the detail page of a case to which you want to add or remove a keyword.
2. Do one of the following:
   - To add a keyword: enter a keyword in the **Keywords** field.

     -Or-
   - To remove a keyword: delete a keyword in the **Keywords** field.
3. Click **Save**.

Note:

- If your organization uses a dictionary, you can only select keywords from this dictionary. If you enter words that are not in the dictionary, you will get an error message when you try to save.
- If your organization does not use a dictionary, you can create your own keywords.

Add or remove document references

A document reference is a link to another document that may be relevant to the current case handling.

Add a document reference

1. Open the detail page of a case to which you want to add a document reference.
2. From the detail tabs, open the **Document references** tab.
3. Click **Add** to open the **Add document references** form.
4. In the **Add document references** form, specify your search criteria in one or more of the following ways:
    - Enter a text in the **Free text** field.
    - Define the scope of your search under **Search in**.
    - Click **Advanced search** and enter additional search criteria.

   Switching back from **Advanced search** to **Simple Search** will automatically delete any additional search criteria that you have inserted.
5. Click **Search**.

   The document you have viewed most recently will appear at the top of the search result list.
6. Double-click the documents that you want to add.
7. Click **Save**.

Remove a document reference

1. Open the detail page of a document from which you want to remove a document reference.
2. From the detail tabs, open the **Document references** tab.
3. Select the document references that you want to remove.
4. Click **Remove**.

Add, edit or remove information

The information you can add to a case is determined by your organization.

An item of information consists of two parts:

- An **Information type** field – the name or type of the information, for example **Error**.
- An **Information value** field, which can be used, for example, to register the specific type of error.

Add information

1. Open the detail page of a case to which you want to add information.
2. From the detail tabs, open the **Information** tab.
3. Click **Add** to display the **Add information** form.
4. In the **Add information** form, select the **Information type** and fill in the **Information value** field.
5. Click **Save**.

Edit information

1. Open the detail page of a case where you want to edit information.
2. From the detail tabs, open the **Information** tab.
3. Double-click the information item that you want to edit to display the **Edit information** form.
4. In the **Edit information** form, make your changes and click **Save**.

Remove information

1. Open the detail page of a case where you want to remove information.
2. From the detail tabs, open the **Information** tab.
3. Select the information items that you want to remove.

4. Click Remove.
5. Click **Yes** in the confirmation dialog box.

Add and remove information to multiple cases

You can add or remove information types and values to multiple cases at once by selecting the cases in the Navigation pane and clicking the **Edit** > **Information** to select which information type and value you want to add or remove.

See Edit multiple items in a list for more information.

Add, edit or remove dates

The dates you can add to a case are determined by your organization.

A date item consists of two parts:

- A **Date type** - the name or type of the date, for example, **Error is registered**.
- A **Date** field.

Add a date

1. Open the detail page of a case to which you want to add a date.
2. From the detail tabs, open the **Dates** tab.
3. Click **Add** to open the **Add date** form.
4. In the **Add date** form, select the **Date type** and fill in the **Date** field.
5. Click **Save**.

Edit date

1. Open the detail page of a case to which you want to edit a date.
2. From the detail tabs, open the **Dates** tab.

3. Double-click the date that you want to edit to display the **Edit date** form.
4. In the **Edit date** form, make your changes and click **Save**.

Remove date

1. Open the detail page of a case from which you want to remove a date.
2. From the detail tabs, open the **Dates** tab.
3. Select the dates that you want to remove.
4. Click **Remove** to open the **Confirm** dialog.
5. Click **Yes**.

Add and remove date types to multiple cases

You can add or remove date types and values to multiple cases at once by selecting the cases in the Navigation pane and clicking the **Edit** > **Date** to select which date type and value you want to add or remove.

See Edit multiple items in a list for more information.

Add, edit, or remove reminders

The reminders you can add to a case are determined by your organization.

Add reminder

1. Open the detail page of a case to which you want to add a reminder.
2. From the detail tabs, open the **Reminders** tab.
3. Click **Add** to open the **Add reminder** form.

4. In the **Add reminder** form, for the following fields:
   - **Date** - type or select the date using the calendar.
   - **Reminder for** - select a recipient of the reminder.
   - **Reminder type** - select a reminder type.
   - **Reminder closed** - select **P, Closed** to close the reminder.
     Closed reminders will not appear in your search results if you search for reminders.
   - **Reminder text** - enter the reminder text (optional).
5. Click **Save**.

Edit reminder

1. Open the detail page of a case to which you want to edit a reminder.
2. From the detail tabs, open the **Reminders** tab.
3. Double-click the reminder that you want to edit to display the **Edit reminder** form.
4. In the **Edit reminder** form, make your changes and click **Save**.

Remove reminder

1. Open the detail page of a case from which you want to remove a reminder.
2. From the detail tabs, open the **Reminders** tab.
3. Select the reminders that you want to remove.
4. Click **Remove** to open the **Confirm** dialog.
5. In the **Confirm** dialog, click **Yes**.

Assign or remove read access to a case

You can assign or remove read access to cases for employees and groups.

When you assign an access restriction on a case, the restriction applies to all the case documents by default. Only users who are members of one of the groups with read access will be able to access the case, document, or contact, as well as to its documents or contacts.

Inheritance of case access rights

There are important functional differences between inheriting access rights from the case and manually assigning the same access rights as the case to the document.

- **Inheriting case access rights:** If the document inherits access rights from the case, users must be assigned all the same access rights as the case as well as any specifically assigned access rights to the document in order to access the document.
- **Manually assigning identical case access rights to the document:** If the document is manually assigned the exact same access rights as the case in the **Read access** and **Write access** fields, users need only be assigned one of the access rights (case or document) to access the document.

For WorkZone Content Server, Standard edition

To assign read access to a case

1. On the Case detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. In the **Edit read access** form > **Search in** field, select the filter to apply to the access codes:
    - **All access codes:** All access codes are available.
    - **Term access codes:** Only Term access codes are available.
    - **Organizational access codes:** Only Organizational access codes are available.
3. In the **Access code** field, enter the name of the access code to locate the specific access code you want to assign to the case.
   Click the **Access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
4. Click the **Apply** button to assign the selected access codes to the case.

To remove an assigned read access code from a case

1. On the Case detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. In the **Edit read access** form, click the **X** next to the employee or group you want to remove read access from.
3. Click the **Apply** button to apply your changes to the case.

For WorkZone Content Server, Corporate edition

To assign read access to a case

1. On the Case detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. In the **Edit read access** form, click the **Create new access code** button to display the **Term access code** and **Organizational access code** mandatory fields.
3. In the **Term access code** field, enter the name of the Term access code to locate the specific access code you want to assign to the case.
   Click the **Term access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
4. In the **Organizational access code** field, enter the name of the access code to locate the specific access code you want to assign to the case.
   Click the **Organizational access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
5. Repeat steps 2 to 4 to create a new access code group to assign to the case if required.
6. Click the **Apply** button to assign the selected access codes to the case.

To remove an assigned read access code from a case

1. On the Case detail page, click the icon in the **Read access** field to open the **Edit read access** form.

2. In the **Edit read access** form > **Access code** field, click the **X** next to the value in the **Term access code** or **Organization access code** fields to remove the access code.
   You can also remove an entire access code group by clicking the **X** in the upper right-hand corner of the access code group.
3. Click the **Apply** button to apply your changes to the case.

See Access codes for more information

Assign or remove write access to a case

You can assign or remove write access to cases for employees and groups.

When you assign an access restriction on a case, the restriction applies to all the case documents by default. Only users who are members of one of the groups with write access will be able to edit and update information on the case, document, or contact, as well as to its documents or contacts.

> Important: You must always have write access to the cases, documents or contacts for which you define write access.

> Important: Always assign write access to yourself. If you do not, your changes to the write access cannot be saved.

> Tip: Display a list of all users registered with read or write access on the case by displaying the **Users with read access** and **Users with write access** detail tabs on the case detail page.

For WorkZone Content Server, Standard edition

To assign write access to a case

1. On the Case detail page, click the icon in the **Write access** field to open the **Edit write access** form.
2. In the **Edit write access** form > **Search in** field, select the filter to apply to the access codes:
    - **All access codes:** All access codes are available.
    - **Term access codes:** Only Term access codes are available.
    - **Organizational access codes:** Only Organizational access codes are available.
3. In the **Access code** field, enter the name of the access code to locate the specific access code you want to assign to the case.
   Click the **Access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
4. Click the **Apply** button to assign the selected access codes to the case.

To remove an assigned write access code from a case

1. On the Case detail page, click the icon in the **Write access** field to open the **Edit write access** form.
2. In the **Edit write access** form> **Access code** field, click the **X** next to the value to remove the access code.
3. Click the **Apply** button to apply your changes to the case.

For WorkZone Content Server, Corporate edition

To assign write access to a case

1. On the Case detail page, click the icon in the **write access** field to open the **Edit write access** form.
2. In the **Edit write access** form, click the **Create new access code** button to display the **Term access code** and **Organizational access code** mandatory fields.
3. In the **Term access code** field, enter the name of the Term access code to locate the specific access code you want to assign to the case.
   Click the **Term access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
4. In the **Organizational access code** field, enter the name of the access code to locate the specific access code you want to assign to the case.
   Click the **Organizational access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
5. Repeat steps 2 to 4 to create a new access code group to assign to the case if required.
6. Click the **Apply** button to assign the selected access codes to the case.

To remove an assigned write access code from a case

1. On the Case detail page, click the icon in the **Write access** field to open the **Edit write access** form.
2. In the **Edit write access** form > **Access code** field, click the **X** next to the value in the **Term access code** or **Organization access code** fields to remove the access code.
   You can also remove an entire access code group by clicking the **X** in the upper right-hand corner of the access code group.
3. Click the **Apply** button to apply your changes to the case.

See Access codes for more information

Create and manage custom document tabs

You can create custom tabs so that you can select specific documents on a case and view them in a separate list. For example, if you want to view only Word documents on a case, you can create a custom tab, and you will then always have a quick access to Word documents. Apart from custom tab, WorkZone Client also creates a saved search that is available in **My lists** on the **Navigation pane**.

Note:

- Custom tabs are only available for the document lists on the case detail pages.
- A custom tab that you create on a case will be available on cases that have the same case category. If you make changes to a custom tab on a case, you will see these changes on the other cases too.
- If you rename, edit, or remove a custom tab, related saved search in **My lists** will not be affected. This also works vice versa.
- To share a custom tab when you distribute a configuration, you must permit sharing of the related saved search lists. See how to Manage saved search lists

Create a custom tab

Please read how to create and configure a custom tab in the Save a search as a custom detail tab section.

Change a case category

If the new case category has been set up to display fewer or other fields than the old case category, these fields will no longer be displayed in the Case detail page and a user cannot enter new data in these fields. The data contained in the now-hidden fields will not be deleted and if the old case category is reinstated on the case, the fields will be displayed once more, with the original data.

To change a case category for a single case

1. Open the case detail page.
2. In the ribbon, click **Change** > **Category** and select a new case category.
3. In the **Confirm** dialog, click **Yes** to change the case category.

To change the case category of multiple cases

1. In the **Navigation** pane on the **Home** tab, click **Cases** and select the case list you want to open.
2. In the list area, select all the cases you want to change the case category for.
3. In the **Main** ribbon, click **Edit** > **Case Category** to open the **Edit case category** form[1].
4. In the **Edit case category** form., select the new case category and click **Save** to open the**Confirm** dialog.
5. In the **Confirm** dialog, click **Yes** to change the case category of the selected cases.

[1]If the **Case category** option is not available in the **Edit** menu, you can customize the ribbon and add the **Case category** to the **Edit** menu. For more information, see Ribbons

To clear a case category (change a case category to Standard)

Standard cases do not contain a value in the **Case category** field. When you clear a case category, the case will revert to a Standard case. You cannot clear the case category for multiple cases.

1. Open the case detail page.
2. In the ribbon, click **Change** > **Category** and select **Standard**.
3. In the **Confirm** dialog, click **Yes** to clear the case category and change the case to a Standard case.

> **Tip:** For a better overview of your cases and their categories, add the **Case category**

> column to the case list.
> For more information, see Add / Remove columns in a list.

Change case group and child case group

You can change the case group and child case group for an open case by using the **Change** button in the ribbon. Child case groups can only be changed if they have been defined and set up for the case group you are changing the case to.

You can also change the case group or child case group for multiple cases in case lists.

Case numbers

When you change the case group and/or child case group on a case, the case number will also be updated if the case group or child case group is included in the case number format. The old case number will longer be used for daily operations and cannot be reused. The old case number still exists in the database for analysis and logging purposes. Due to this update of the case number, changing the case groups is not recommended if the case numbering includes the case group and/or child case group.

If the case group is a part of the case number and you have changed the case group, thereby also changing the case number, you can still locate the case using the old case number by specifying which case number (actual or history) is to be used in a case search.

To search for a case using the old case number

1. In the ribbon, click **New search** and select **Case** to open the **Case search** page.
2. On the **Case search** page > **Case number** field, enter the old case number
3. In the upper right corner of the **Case number** field, click **[actual]** to toggle the search setting to **[history]** to search for the old case number.
4. Enter any other relevant search criteria for the case in the other fields.
5. In the ribbon, click **Search** or press **Enter** to start the search. The list of search results is displayed at the bottom of the page.

Case group default values

There are two scenarios relevant when changing a case group on a case:

- **During case creation:** The fields on the case detail page will be updated with the default values for the case group for all defined default values only. If a default value has not been defined for the case group, the value of the corresponding field on the case detail page will be retained instead.
- **On an existing case:** Default values from the case group will not be applied to the fields on the case detail page.

To change a case group

To change a case group:

1. Locate and open the case you want to change the case group and/or child case group to.
2. On the case detail page, click **Change** > **Case group** to open the **Edit case groups** form.
3. In the **Edit case groups** form > **Case group** field, select the new case group.
4. (if you also want to change the child group) In the **Edit case groups** form > **Child case group** field, select the new child case group.
5. Click **OK** and in the **Confirm** dialog, click **Yes** to save your changes and close the form.

To change a case group for multiple cases

1. In a case list - for example the list of search results when searching for cases or in the **Open cases** list, select the cases you want to change the case group for.
2. In the ribbon, click **Edit** > **Case group** to open the **Edit case groups** form.

   You can also right-click the selected cases and select **Edit** > **Case group** to open the **Edit case groups** form.
3. In the **Edit case groups** form > **Case group** field, select the new case group from the list.

4. In the **Edit case groups** form > **Child case group** field, select the new child case group from the list.
5. Click **Save** and then **Yes** to update the case group and /or child case group of the selected cases.

See Also

About fields on the case detail page

The Agenda Management module

WorkZone Client can integrate with the Ditmer Agenda Management module, enabling you to create an agenda item from WorkZone and attach it to a meeting agenda in the Agenda Management database. The new agenda item must be based on a WorkZone case and you can define agenda items, add meeting documents and save the agenda for later editing in the Agenda Management module.

> **Prerequisite:** The Ditmer Agenda Management module must be installed and configured correctly before you can use WorkZone to manage your agenda items.

In contrast to WorkZone Meetings, data stored in the Agenda Management module (agendas and their agenda items and attached documents) can be accessed either through WorkZone Client or through the Agenda Management module by Ditmer.

If you want to access the agenda items through the Agenda Management module, for example if you want to edit an agenda item, you must have a specific Agenda Management user name and password.

Installing and activating

The Agenda Management module is installed by default during the initial installation of WorkZone but is not activated by default. If you want to use the Agenda Management module, you must activate it as well as create specific Agenda Management users and correctly set up the module.

You can activate Agenda Management module for WorkZone in the WorkZone Configurator > **Global** > **Feature Setting** > **Client** > **Client Agenda Management module**.

When the Agenda Management module is activated, the **Case preparation** detail tab will be available in the Case detail page. When you add the detail tab to your Case detail page, you can start using the module.

Agenda Management tasks in WorkZone Client

All field values in the following tasks refer to items and concepts within the Agenda Management module and do not refer to WorkZone items or concepts. For example the committees, meetings, meeting agendas, and item types you select for the agenda item are not WorkZone contacts or meetings, but committees meetings, meeting agendas, and item types created and maintained in the Agenda Management module.

Create a new agenda item

1. In the main tab, open the case detail page you want to create a meeting agenda for.
2. On the **Case preparation** detail tab, click **Add** to open the **Case preparation** form.
3. In the **Add Agenda item** form:
    1. In the **Title** field: Enter the title of your agenda item.
    2. In the **Committee** field: Select a committee for the agenda item from the list. The committees in the list are populated from the Agenda Management module and are not WorkZone contact items.
    3. In the **Meeting** field: After selecting a committee in the **Committee** field above, select a committee meeting the agenda item is to be processed in.
    4. In the **Agenda** field: After selecting a meeting in the **Meeting** field above, select the agenda to apply to the agenda item.
    5. In the **Item type** field: After selecting an agenda in the **Agenda** field above, select the item type to apply to the agenda item.

6. In the **Enclosures** field: (Optional) Attach one or more documents to your agenda item.

   - **To add documents from the case:** Click the **Documents** field and start typing the name of the document to filter the list and select a case document from the case. You can also click **Advanced Search** to open the **Advanced search** form and search for the case documents you want to add to the agenda item. Select the documents you want to add to the agenda item, transfer them to the right pane and click **Select** to add the documents to the agenda item.
     You can only add documents from the case to an agenda item. You cannot add documents from other cases to the agenda item.
   - **To add documents from the file system:** Click **Browse** in the right corner of the **Documents** field to open a Browse window and select one or more documents from the file system to add to the agenda item.
     Documents selected from the file system are also uploaded to the case when the agenda item is created.

7. Select the **Public** check box to mark the agenda item as publicly accessible.

4. Click **Save** to create the agenda item in the Agenda Management module.

Edit an existing agenda item

You can edit the title of the agenda item as well as add or remove any documents attached to the agenda item.

1. In the main tab, open the case detail page that contains the agenda item you want to edit.
2. In the **Case preparation** detail tab, select the agenda item you want to edit.

3. Click **Edit** to open the **Edit Agenda item** form.
    1. In the **Title** field enter a new title.
    2. In the **Enclosure** field, remove an existing meeting document or add a new one.
4. Click **Save** to save your changes and exit the form.

Preview an existing meeting agenda item

1. In the main tab, open the case detail page that contains the agenda item you want to view.
2. In the **Case preparation** detail tab, select the agenda item you want to view.
3. Click **Preview** to open the preview pane.
4. Enter your Agenda Management user name and password and click **Log in** to access your Agenda Management account.

See Also

Display or hide list columns

Manage meetings

Documents

About documents and document types

Document number / record number

Document number

A document number is a sequential number, automatically generated from the database. The document number starts at 1 and is unique globally within WorkZone. When a new document is created, it is assigned a document number to identify the document in WorkZone. The document number cannot be changed during the lifetime of the document.

The document number is displayed on the document detail page as part of the detail page title and is prefixed with "D-", for example the document number "123" will be displayed as "D-123" in the document detail page title in addition to any other document information also displayed in the title.

The **Document number** column is also displayed by default in document lists, for example in the **Documents** detail tab on the Case detail page or any of the **Documents** lists on the Home page.

Document numbers can also be used as search criteria for document searches, enabling you to rapidly locate specific documents and filter search results by document number.

Record number

The record number is a sequential number, automatically generated from the database. The record number starts at 1 and is unique for each archived document within the case the documents are archived on.

When a document is created and during normal document and case management, no record number is assigned and the value of the record number is always 0. When a document is archived, the next available record number is assigned to the document to help uniquely identify the archived document within the case it has been archived on.

The **Record number** column can be displayed in the **Documents** detail tab on the Case detail page but is not displayed by default.

Deleting an archived document

If the archived document is deleted, a new document record of the type DEL will be assigned to the now vacant record number in order to fill the gap in the record number sequence and also serve as an indicator that the original document was deleted.

Copying an archived document

Archived documents can be copied to other cases. Copied archived documents are created as drafts in the case they are copied to by default, but you can select to register the documents as archived on the new case when you copy them.

Document types

WorkZone Client distinguishes between different types of documents.

- A document can be associated to a case as a **Main document**.
- A main document can have several **Supplementary documents**. Supplementary documents are documents that can clarify aspects of the main document and are part of the case handling.
- At the same time, many cases may refer to the same document. The relationship between a case and a document is called a **document reference**.

Main documents

A main document is a document that has one or more supplementary documents attached to it.

A document becomes a main document when the **Main Document** field is empty.

Supplementary documents

Supplementary documents contain information that is important for the progress of the case and illustrate various aspects of the main document.

A document can only be a supplementary document to a one other document (that is, its main document). The ID number and title of the main document is displayed in the **Main Document** field on the supplementary document's detail page.

Many other documents can refer to a document that serves as a supplementary document.

Create a supplementary document

When you create a Word, Excel or PowerPoint document, you indicate that the document is a supplementary document by selecting the ID number of the main document in the **Main Document** field on the **Document Registration** pane in the Microsoft Office application.

When you create a document by importing it or creating document information, you indicate that it is a supplementary document by specifying the ID number of the main document in the **Main Document** field on the document's detail page.

See also Create a new document and Move document.

Note: You can change an existing main document to a supplementary document and you can move a supplementary document from one main document to another.

Document references

The document references are related to a case documents, that can provide additional information for the case handling, but they are not a part of the actual case handling.

See also Add or remove document references.

Locating documents

Documents are often attached to cases, but can be attached to main (parent) cases or child cases, and documents can themselves contain supplementary documents, which can complicate locating a specific document. Additionally, large or complicated cases can potentially contain hundreds of documents and it can be difficult and time-consuming to accurately and quickly locate specific documents as you need them.

The following methods can be used to search for and locate documents in WorkZone:

- Open a document list in the Navigation pane and search for the document in a list by entering free text search criteria in the **Search in list** field.
- On the **Documents** detail tab on a case detail page, search for all documents attached to the active case by entering free text search criteria in the **Search in list** field.
- On the **Documents in hierarchy** detail tab on a case detail page, search for all documents attached to the active case and its child cases by entering free text search criteria in the **Search in list** field. The **Documents in hierarchy** tab is not displayed by default and must be manually added to the case detail page.
- Create a custom detail tab and apply the tab to the case detail page to filter documents attached to the case. The results may be case context sensitive, meaning you would only get documents that are attached to a case or a meeting. You can either use a saved custom search (see custom search below) or define your own filter directly for the custom tab.
- Use a standard documents search page to locate specific documents or all documents. The results are displayed in a document list which itself can be filtered using the **Search in list** field. You can also use the standard documents search page to search for all documents in a parent and child case hierarchy by using the Case (Simple) field as a search criteria.
- Create a custom search and adjust the search criteria to fit the exact specifications of the documents you want to locate. Saved custom searches can be added as custom detail tabs on detail pages or added to the Navigation pane as independent items or lists.
- Open a Quick Search and use the document number or title as search criteria and automatically open the document detail page for the document.

See Also

Search using text fields

Detail tabs on cases

Document search on child cases

Quick Search

Searches

Manage saved search lists

Navigation pane and lists

About fields on a document detail page

The document detail page provides a detailed overview of a document. The page displays detailed document information as well as meta data fields that are used to classify and provide access and security details for the document. The document detail page can also be set up to display detail tabs at the bottom of the page.

The document detail page is opened by double-clicking a document in the documents list or in a search result list.

The following fields are displayed in the document detail page:

Field	Description
Title	Enter a short title for the document.
Case	Here you see the number of the case to which the document belongs.
Main document	If the document is a supplementary document, it is associated with a main document. Shows the ID number of the main document.
Case handler	The name of the user who created the document is entered here by default. You can assign a different case handler.
Responsible unit	When saving a document, your responsible unit (responsible department) is automatically added. You can change it later.
Document type	The document type indicates whether the document is, for example, incoming, outgoing or internal.
Document	Shows the group to which the document belongs. For example, **Decision**, **Con-**

Field	Description
group	**firmation** or **Consultation**.
State	The available states are defined by your organization. **See Also** Edit document state.
Mail list	There are two mail lists: • Public mail list for today - All incoming letters with created date today, which are set on the public mail list. • Internal mail list for today - All incoming letters with created date today, which are set on the internal mail list. All users can view both the public and internal mail lists.
Letter date	Enter today's date or the date found on the incoming letter.
Reply date	Here you can type the date on which the document should be answered.
Text	You can enter a description of the document's contents in this field.
Keywords	You can edit keywords directly in the field. **See Also** Add or remove keywords.
Created by	The name of the person creating the document is entered by default.
Created date	The creation date of the document is entered by default. This field cannot be edited.
Version number	The document by default has version number 1. When versioning the document for the first time, the new version of the document is assigned version number 2.
Postal date	Displays the sent date for outgoing mail or the received date for incoming mail.
Read access	Defines who has permission to view the document. The read access codes of the document are a combination of the access codes from the case and the

Field	Description
	codes assigned to the document itself when it was created in WorkZone. The text of the access code is displayed by default, but a system administrator can edit your configuration and change the field parameter to display the actual access code instead. **See Also** Add or remove read access to a document.
Write access	Defines who has permission to edit the document. The write access codes of the document are a combination of the access codes from the case and the codes assigned to the document itself when it was created in WorkZone. The text of the access code is displayed by default, but a system administrator can edit your configuration and change the field parameter to display the actual access code instead. **See Also** Add or remove write access to a document.
Type	This field shows which program should be used to open the file (document).
Archive approved	Informs whether the Danish National Archives accepts the current document type. This field is available in read-only mode.
Classification	Classification orders and prioritizes data based on its sensitivity. By default, classification code is inherited from the related case, but you can change it in this field. Note that supplementary documents inherit classification code from their main documents. **Note:** Documents created in WorkZone Client 2017 SP1 and earlier versions have no classification code.
Retention code	Indicates which retention policy is assigned to the document. Retention policy defines the following rules: • time during which the document should be retained in the database; • access code which is required for permanent document deletion.

Field	Description
Retention date	Indicates until what date the document should be retained in the database when the case is closed. The field is updated with the **Retention date** field of the case when the case is closed.

Hidden entities

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

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

Finding hidden entities

Hidden cases, documents and/or contacts can be found by using the Hidden lists (Hidden cases, Hidden documents and Hidden contacts) in the WorkZone navigation pane.

Prerequisite: You must have the LOSTANDFOUND access code to see and add the Hidden lists to your navigation pane.

Note: If you need to edit hidden cases, documents or contacts (items are not assigned to you), you must have the * access code.

See Also

Hidden entities (WorkZone Client Administrators Guide)

Navigation pane and lists

Lists

Manage documents

Create a new document

You can create different document types in the ribbon.

- If you create a document from the case detail page, the new document is automatically saved on this case.
- If you create a document from the **Home** tab, for example, the document is automatically created on your desktop case, unless you choose another case.

Create a Word document

1. In the ribbon, click **Word** to open Microsoft Word with the **New** window displayed.
2. (Optional) If your organization uses templates, select a template.
3. Click **OK** to open a new Microsoft Word document.
4. Add content to your document.
5. Fill in the fields in the **Document Registration** pane.
6. Click **Save on Case**.

Create an Excel document

1. In the ribbon, click **Document** and select **Excel** to open Microsoft Excel with the **New** window displayed.
2. (Optional) If your organization uses templates, select a template.
3. Click **OK** to open a new Microsoft Excel worksheet.
4. Add content to your document.

5. Fill in the fields in the **Document Registration** pane.
6. Click **Save on Case**.

Create a PowerPoint document

1. In the ribbon, click **Document** and select **PowerPoint** to open Microsoft PowerPoint with the **New** window displayed.
2. (Optional) If your organization uses templates, select a template.
3. Click **OK** to open a new Microsoft PowerPoint presentation.
4. Add content to your document.
5. Fill in the fields in the **Document Registration** pane.
6. Click **Save on Case**.

Create a document (Word, Excel or Powerpoint) from Templafy

Important:

- For Microsoft Internet Explorer: Integration with Templafy using the https protocol is not supported.
- For Google Chrome and Microsoft Edge: Integration with Templafy using the http protocol is not supported.

If your organization uses Templafy to store and manage your Microsoft Office templates, you can create documents (Microsoft Word, Excel or Powerpoint) in WorkZone Client based on one of your organization's Templafy templates.

You must have your Templafy log-in credentials (User name and password) available and your organization's connection to Templafy must be set up correctly in **WorkZone Configurator** > **Global** > **Templafy settings** before you can create your documents.

1. In the ribbon, click **Document** > **Create from Templafy** to open the **Create document from Templafy** form.
2. In the **Create document from Templafy** form, select the template you want to base your new document on and fill out any fields required for the template. Depending on the template, templates might contain additional fields that must be specified before creating a document from them.
3. Click **Create** to download the template, apply the specified field values and open Microsoft Office.
4. In Microsoft Office, you can edit the document and then click **Save on case** to save the document on the active case.

Using the Safari browser

If you are using a Safari browser, 3rd party cookies must be enabled to use the Templafy integration in WorkZone Client.
3rd party cookies are enabled by clearing the **Prevent cross-site tracking** Privacy setting in the Safari browser settings. The **Prevent cross-site tracking** setting is fully implemented from Safari version 13.1 but present in Safari browsers from version 11.0.3 (3604.5.6).
For earlier versions of the Safari browser (before version 11.0.3(3604.5.6)), the **Prevent cross-site tracking** setting is not present.
While Templafy integration might work with other Safari versions, only the Safari browser, version 13.1 was used for testing Templafy integration.

Create a document from the case detail page

You can also create a document based on the active case in the case detail page.

1. In the Documents detail tab on a case detail page, click **Add** and then select the action you want:
   - **Word:** To create a Microsoft Office Word document in Microsoft Office.
   - **Excel:** To create a Microsoft Office Excel spreadsheet in Microsoft Office.
   - **Powerpoint:** To create a Microsoft Office Powerpoint document in Microsoft Office.

- **Import from file system:** To import an existing document into WorkZone from another location.
- **Import from WorkZone:** To import an existing document into WorkZone from another WorkZone database.
- **Information:** To create a WorkZone information entry on the case.
- **Create from Templafy:** To create a Microsoft Office document (Word, Excel, or Powerpoint) using templates managed by the 3rd party product, Templafy. This menu option is only displayed if your organization uses the Templafy 3rd party product and has configured the Templafy settings correctly in **WorkZone Configurator** > **Global** > **Templafy settings**.

2. In Microsoft Office, you can add your changes to the document and when you click **Save on case** in the WorkZone office add-in panel, the document will be uploaded to the WorkZone server and saved on the active case.

Create document information (new information)

You can create document information without an associated document (that is, a document detail page without, for example, an associated `.txt`, `.doc`, or `.xls` document).

1. In the ribbon, click **Document** > **New information** to open a new document in a new tab.
2. Fill in the required fields.
3. In the ribbon, click **Save** . Your newly created document is now displayed under **Documents** > **Today** in the navigation pane.

Import a document

You can add a document outside WorkZone Client to your case. For example, a scanned document.

Documents can only be imported into a case and will be imported to the active case in WorkZone. Note that you can only import documents into one active case at a time. If you need to import documents into multiple cases, you must import the documents once for each case.

You can only import documents to open cases. Documents cannot be added to closed cases. For more information, see Closed and open cases.

The active case

An active case is the case last selected by you. If multiple case detail pages are displayed, the page title of the active case is displayed clearly while the page title of inactive cases will be dimmed.

The active case will also be displayed when you select which documents in the source database you want to import into WorkZone, enabling you to ensure you are importing documents into the correct case before you perform the import.

No active case

If there is no active case selected to contain the imported documents, your desktop case will automatically be used as the active case. You can also select the desktop case manually if you want to be sure the desktop case is the active case.

> **Tip:** You can transfer the imported documents from the desktop case to another case later if you need.

1. In the ribbon, click **Document** > **Import from file system** to open the **Import document** tab.
2. In the **Select document** field, click the folder icon to open the **Choose File to Upload** form.
3. the **Choose File to Upload** form, browse to the document you want to import, select the document, and click **Open** to import the document.
4. A new document detail tab is opened to contain document meta data for the document you are importing.
   The title of the document is automatically transferred to the **Title** field but you can

change the title of the document as it is registered in WorkZone by entering a new title in the **Title** field.

5. In the new document detail tab, **Document type** field, select a document type.
6. Define the rest of the document meta data information in the fields in the tabs.
7. In the ribbon, click **Save** to save the imported document in WorkZone.

Edit a document

You can edit a document until the document is locked or archived.

- You can only edit documents of the type Word, Excel and PowerPoint.
- The documents must have the state **Personal draft** or **Draft**.

Microsoft Office Suite

If the Microsoft Office Suite is installed on the local machine, you can use Microsoft Office to edit your document.

If WorkZone for Office is also installed on the WorkZone Content Server, the special WorkZone office pane will also be available in the Office application.

Edit a document

1. Open the document detail page or select this document from a list.
2. In the ribbon, click **Open** or if you are using a document list, click the document icon to open document for editing. You can also right-click on the document in the list and select **Open**.
3. Make your changes. If needed, make changes in the **Document Registration** pane.
4. Click **Save on Case**.

WorkZone Explorer

If you are using the WorkZone Explorer, you can open a document for editing (and reading) by clicking the **Explore** button in the main ribbon for the case to open the WorkZone Explorer and then double-click the document.

Due to the security model of the Google Chrome and Microsoft Edge Chromium browser, the Windows File Explorer is not opened automatically when you click the **Explore** button. Instead, you must open the Windows File Explorer manually and then press **CTRL+V** in the address bar to open the Explorer for the active case.
The link address of the active case is automatically copied to your clipboard when you click the **Explore** button.

If you are using the Microsoft Edge browser, you must be signed in to the WorkZone IdentityServer to enable integration to the Windows File Explorer. If you select the **Keep me signed in** check box during sign in, you will not be required to sign in again. The persistent cookie storage can however expire so you may be required to sign in later.

If WorkZone Explorer has been deactivated, the **Explore** button will not be displayed, regardless of which web browser is used. WorkZone Explorer can be activated and deactivated by a system administrator in **WorkZone Configurator** > **Global** > **Feature Settings** > **Client** > **Explore**.

Microsoft Office Online Server

If the Microsoft Office Suite is not installed on the local machine and if your organization is using Microsoft Office Online Server to create, read and edit documents, you can edit a document directly in your internet browser through the preview pane, but you must first add the Office Online panel to the preview pane in order to have access to the Office Online options.

See Customize the preview pane

Edit 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.

A document can have the following states:

- **Personal draft - UP**. Can be viewed, edited and deleted by the creator only. To allow other employees view, edit and delete your personal draft document, you must release it (**Change** > **Release personal draft**). The document state can be changed to UÅ or UL. The document may use draft versioning.
- **Draft - UÅ**. Can be viewed, edited and deleted by anyone. The document state can be changed to UP or UL. The document may use draft versioning.
- **Locked document - UL**. The document itself cannot be edited by anyone, but the document metadata can be edited. The document may be deleted (see notes below). The document state can only be changed to ARK. The document is locked and therefore does not use draft versioning.
- **Archived - ARK**. The document is archived, assigned a record number in the database and the state cannot be changed. The document itself cannot be edited, but the document information can. The document can only be deleted by users with the SOFTDELETE access code. An archived document is bound to the original case and cannot be moved to other cases. However, documents archived from the desktop case may be moved to other cases.
  Archived documents can be copied to other cases. Copied archived documents are created as drafts in the case they are copied to by default, but you can select to register the documents as archived on the new case when you copy them.

Note:

- Scanned documents and incoming e-mails are by default registered with the state **Archived**.
- Locked documents can be deleted, unless they contain references to with other documents, cases, tasks, or contacts.
- When you archive a document, it should be associated with a case. If you archive a document on your desktop case or an sj-temp case, the document will have no record number, and you will be able to move it to another case.

Edit document state

1. Open the detail page of the document which state you want to edit or open a document list that displays the document you want to edit.
2. In the main ribbon, click **Change** or in the document list, right-click the document and select **Change**.
3. Select a new state or click **Lock**.

Considerations regarding changing a document state

- An Archived document (ARK) cannot be changed to any other state.
- A Locked document (UL) can only be archived (ARK).
- A Draft document (UÅ) or Personal draft (UP) document can be locked (UL), archived (ARK) as well as changed to and from Draft (UÅ) or Personal draft (UP).

Send a link to a document in an e-mail message

You can send a link to a document, send the document itself or send the document as a PDF file in an e-mail.

Prerequisite:

- WorkZone for Office must be installed. These options will not be displayed if WorkZone for Office is not installed on your local machine.
- When sending links, the e-mail recipient must have access to WorkZone Client to see the case the document is attached to.
- When sending documents as PDF files, you can only send documents that already have been generated as PDF files.

To send a document link in an e-mail

1. Open the document you want to create a link for in an e-mail message.
2. In the ribbon , click **Share**> **In Mail** > **Link** to open a new e-mail message in Microsoft Outlook automatically containing a link to the case in WorkZone Client.
   If you are using a document list, you can also right-click on the document in the list and select **Share**> **In Mail** > **Link**.
3. In the E-mail message, add a recipient and click **Send**.

To send a document as an attachment to an e-mail

1. Open the document you want to create a link for in an e-mail message.
2. In the ribbon , click **Share**> **In Mail** > **Attach as document** to open a new e-mail message in Microsoft Outlook with the document added as an attachment. If you are using a document list, you can also right-click on the document in the list and select **Share**> **In Mail** > **Attach as document**.
3. In the E-mail message, add a recipient and click **Send**.

To send a document as a PDF attachment to an e-mail

Note this option will not be accessible if the document in question does not exist in PDF format.

1. Open the document you want to create a link for in an e-mail message.
2. In the ribbon , click **Share**> **In Mail** > **Attach as PDF** to open a new e-mail message in Microsoft Outlook with the document in PDF format added as an attachment.
   If you are using a document list, you can also right-click on the document in the list and select **Share**> **In Mail** > **Attach as PDF**.
3. In the E-mail message, add a recipient and click **Send**.

View the life cycle of a document

Life cycle shows the actions that have been performed on the document since its creation. For example:

- Which **Case handler** has carried out the action.
- Which action has been performed with the document.
- When the **State** field has been updated.

View the life cycle of a document

1. Open the detail page of a document.
2. From the detail tabs, open the **Life cycle** tab.

Reply to a document

If WorkZone for Office is installed on your local machine, you can reply to a document either from a list or from the document detail page, and have case information automatically inserted to your reply document. If WorkZone for Office is not installed on the server , the **Reply** menu option will not be displayed.

1. Find the document to which you want to reply.
2. In the ribbon, click **Manage** > **Reply** to open a new Microsoft Word document with relevant information from your original document automatically inserted and displayed in the **Document Registration** pane:
    - The reply document type is set to **Outgoing**.
    - The **Title** of the original document is copied and prefixed with **Re:**.
    - Document parties with **Sender** role in the original document are used as **Recipients**.
    - A document reference to the original document is created.
3. Make your changes to the reply document.
4. Click **Save on Case**.

Copy a document

You can copy an existing document to a case. In that way you can reuse information and content from the original document.

The new document retains the original document's references to:

- Documents
- Supplementary documents
- Contacts
- Cases

It will also have a document reference to the original document added.

If the document you want to copy is archived (Document state = ARK), you can select to register the document as archived on the new case when you copy it. Copied archived documents are created as drafts in the case they are copied to by default.

You can also copy non-archived documents to other cases and in the process, archive the document on the cases.

Copy a single document

1. Open the document that you want to copy.
2. In the ribbon, click **Copy** to open the **Copy document** form. If you are using a document list, you can also right-click on the document in the list and select **Copy**.
3. In the **Copy document** form > **Copy to case** field, select the case you want to copy the document to.
4. In the **Copy document** form, select the **Archive documents on new case** checkbox to archive the document on the case it is copied to.
5. Click **Copy** to copy the document and open the detail page of the copied document where you can apply changes to the new document and save it.

> **Tip:** To edit the document contents, see also Edit document.

Copy multiple selected documents

You can select a series of documents from a list and copy them to a case.

1. Open a list, for example, the **Documents** list or a list of document search results.
2. In the list area, select the documents that you want to copy to a case.
3. In the Main ribbon, click **Copy** to open the **Copy documents** form. If you are using a document list, you can also right-click on the document in the list and select **Copy**.
4. In the **Copy document** form > **Copy to case** field, select the case you want to copy the documents to.
5. In the **Copy document** form, select the **Archive documents on new case** to archive the documents on the case they are copied to.
6. Click **Copy** to open the selected case with the copied documents added to the **Documents** detail tab.

Archive a document

When you archive a document, the following happens:

- The document is assigned a record number on the case it is connected to[1].
- The document state changes to **Archived**.
- The document can no longer be edited.
- To delete an archived document, you must be assigned the SOFTDELETE access code.

[1]Documents that are archived from the desktop case are not assigned a record number. Instead they keep the original record number (0) which was assigned when the document was created. If the archived document is assigned to another (non-desktop) case, the document will be updated with a new record number that corresponds to the new case.

You can archive a document either from the document detail page or from a document list.

Archive from the document detail page

1. Find the document you want to archive and open it.
2. In the ribbon, click **Archive** .

Archive from a document list

1. Open a document list with the document you want to archive.

> **Example**: On the Home tab, open the **Documents** list.

2. Select a document that you want to archive and click **Archive** on the detail ribbon or right-click the document in the list and select **Archive** .

Delete a document

When you delete a document for the first time, the document is moved to the recycle bin. You cannot see the document in regular lists, but it is not removed from the database and you can restore it if required.

WorkZone can be configured to automatically soft delete a case or document when the defined retention period for the case or document expires. The automatic deletion parameter is set for each individual retention policy in WorkZone Configurator > **Retention**> **Retention Policies**.

> Important:

- If you soft delete a main document, its supplementary documents are also soft deleted automatically.
- If you want to hard delete the main document, you must hard delete its supplementary documents first.
- You cannot delete a main document if its supplementary document requires specific access rights that are not assigned to you.
- You cannot delete a document if it has document or case references created by a user. References created automatically by WorkZone Client, for example, *Replies/Replied by*, do not restrict deletion.

Soft delete a document

Prerequisite:

- To delete a document that is archived and has a record number, you must have the SOFTDELETE access code. Note that everybody can delete an archived document if the document is saved on the desktop case or belongs to the SJ-TEMP case group.
- Everybody can delete a document that has the states **Personal draft**, **Draft** or **Locked document**.

When you soft delete a document, the document is moved to the recycle bin. At the same time the document will still exist in the WorkZone database. This enables you to restore the document if required.

To soft delete a document, proceed with the following steps:

1. Select the document you want to delete in a list or open it on the detail page.
2. In the ribbon, click **Recycle** to open the **Delete document** dialog. If you are using a document list, you can also right-click on the document in the list and select **Recycle**.

3. For a non-draft document, select a reason for deletion from the list and add your comment to the **Description** field, if needed. For a draft document, go to step 4.
4. Click **Delete**.

Deleted documents are dimmed in the document lists and have crossed-out title on the detail pages.

Hard delete a document

> **Prerequisite:** To delete a document permanently, you must be assigned the SOFTDELETE access code as well as the access code associated with the document's retention policy.

You can hard delete documents from:

- **Recycle bin** detail tabs on cases
- **Recycle bin** list in the navigation pane
- The detail page of the deleted document

1. Open detail page of the deleted document or select it in a list. Note that you can select multiple items in a list.
2. In the Main ribbon, click **Delete** and then **Yes**. If you are using a document list, you can also right-click on the document in the list, select **Delete**, and then **Yes**

The documents are permanently deleted from WorkZone including their supplementary documents.

Deleting an archived document

If an archived document is deleted, a new document record of the type DEL will be assigned to the now vacant record number in order to fill the gap in the record number sequence and also serve as an indicator that the original document was deleted.

Automatically hard delete documents

WorkZone can be configured by a system administrator to automatically hard delete a case or document after a predefined purge period. The purge period is defined as number of days after the case or document has been initially soft deleted. Hard deleted items are deleted permanently.

The purge period can be defined for each individual retention policy in the **Purge period** field for the retention policy and is found in the settings for the retention policy in WorkZone Configurator > **Retention** > **Retention policies**.

Cases and documents will not be automatically hard deleted if the **Purge period** field has not been defined (that is, if the field is empty and contains no values) .

Cases and documents that are to be hard deleted will contain a date in the **Purge date** field in the respective recycle bin lists - **Recycle bin - Cases** for cases and **Recycle bin** for documents on the **Home** page as well as the **Recycle bin** tab in the Case details page. You can use the **Purge date** field to search for, filter, and sort cases or documents in the respective recycle bins.

How the Purge date field is determined

The value in the **Purge Date** field is determined by adding the value of the **Purge period** field for the assigned retention policy to the **Retention date** of the case or document.

For cases with no value in the **Retention date** field (for example SJ-TEMP cases or open cases that have been manually deleted), the **Purge date** is determined by adding the value of the **Relative retention period** field and the value of the **Purge period** field to the date the case was last updated – usually the date of deletion.

The **Purge date** will always be at least equal to the date the case or document was last updated (usually the date of deletion) plus the value of the **Purge period** field.

If the **Purge date** field is empty, the case or document will not be automatically hard deleted.

Find / View deleted documents

You can find and view deleted documents in the following lists:

- In the search results if the documents meet the search criteria[1]:
- In a saved search list if the documents meet the search criteria[1].
- On the **Recycle bin** detail tab of the related case.
- In the **Recycle bin** list in the navigation pane under the **Documents** section.

Note: You can see all soft deleted documents on a case on its **Recycle bin** detail tab. In the **Recycle bin** list in the navigation pane, you can see only documents deleted by you.

[1] Add the **Deleted by** search criteria field to the **Document search** page and specify **@Filled in** to find deleted documents.

Restore a deleted document

You can only restore a soft deleted document from the recycle bin. Hard deleted documents cannot be restored.

Prerequisite: To restore a Terminated or Archived document, you must be assigned the SOFTDELETE access code.

1. Find and select the document(s) you want to restore.
2. In the ribbon, click **Restore.** If you are using a document list, you can also right-click on the document in the list and select **Restore.**

   There are three options for document restoring :

   - **Restore** - Use this option if you need to restore only the document to the current case.

     This option is disabled when original case of the document is deleted.
   - **Restore with case** - Use this option if case of the document is deleted and you want to restore both document and case.

- **Restore and move to another case** - Use this option if case of the document is deleted and you don't want to restore the case. Instead, you restore the document and move it to another existing case.

Importing documents from other databases

You can import a document from another WorkZone database (the source database) into your WorkZone installation (the target database), and create the imported document as a new document.

You can import any kind of document, ranging from archived documents in closed databases to live documents in active databases. Once a document has been imported into WorkZone, you can work with the document just like any other document.

You can only import documents to open cases. Documents cannot be added to closed cases. For more information, see Closed and open cases.

> Important: In order to import a document from another WorkZone database, both databases (the one imported from and the one importing to) must contain identical WorkZone configurations.

Imported documents are not connected to the original document in the source database. Any updates made to the source document in the source database will not affect the imported document in the target database in your WorkZone application. Likewise, any changes made to the imported document in the target database in your WorkZone application will only be applied to the imported document (now a local document) and not the source document in the source database.

When you import documents from other databases, you should:

1. Open the case you want to import the documents into. If you do not have an open (active) case, the your Desktop case will be used as the active case.
2. Search for the documents you want to import. You can use case number, case text filters or document text filters to narrow your search.
3. From the search results, select which documents you want to import

4. (Optional) In the documents selected for import, edit Case Handler and/or Responsible Unit for individual documents
5. Import the selected documents.

Importing documents into a case

Documents can only be imported into a case and will be imported to the active case in WorkZone. Note that you can only import documents into one active case at a time. If you need to import documents into multiple cases, you must import the documents once for each case.

The active case

An active case is the case last selected by you. If multiple case detail pages are displayed, the page title of the active case is displayed clearly while the page title of inactive cases will be dimmed.

The active case will also be displayed when you select which documents in the source database you want to import into WorkZone, enabling you to ensure you are importing documents into the correct case before you perform the import.

No active case

If there is no active case selected to contain the imported documents, your desktop case will automatically be used as the active case. You can also select the desktop case manually if you want to be sure the desktop case is the active case.

> **Tip:** You can transfer the imported documents from the desktop case to another case later if you need.

Importing from multiple WorkZone databases

You can import documents from multiple WorkZone databases by selecting documents to import from each database and then importing them into your active case.

The source database is selected in the **Select database** field of the **Import from WorkZone** form and you can locate the documents you want to import by searching by case number, document free text or case free text. Filter the result and select the documents for import by transferring the selected documents from the left pane of the **Import from WorkZone** form to the right pane.

Select another database to import from in the **Select database** field. The left pane of the **Import from WorkZone** form will be cleared but your documents selected for import in the right pane will remain, enabling you to import the documents into your active case.

Importing documents multiple times

You can import documents into WorkZone multiple times as each document will be assigned a unique document ID and a case can therefore contain multiple identical imported documents.

However, you cannot select multiple identical documents for import at the same time as the **Import from WorkZone** form cannot contain multiple references for identical documents.

If a document already has been selected for import (the document is located in the right pane of the **Import from WorkZone** form), an error message with the text "*This item is already referenced*" will be displayed if you select the same document again for import (moving the document from the left pane of the **Import from WorkZone** form to the right pane).

If you have select multiple identical documents for import, the error message will contain the text "*Some of the selected items are already referenced*".

To import the same document again, you must completely import the document and then import it once again.

Maximum number imported documents

You can only select 200 documents or less for import at a time. If you need to import more than 200 documents, you must split the documents to be imported into multiple imports.

Note that you can only import documents into one case at a time.

Inheriting case handler and responsible unit from imported documents

When importing a document from another database, you can choose how to define the case handler and the responsible unit for the imported documents.

Select the following options:

- **Current Case**: Use the case handler and responsible unit from the desktop case. The current active case, the case handler and the responsible unit from the active case are displayed in the **Select inheritance policy** form.
- **Current User:** Use the current user as the case handler and the current user's unit as the document unit. The current active case, the case handler and the responsible unit from the active case are displayed in the **Select inheritance policy** form.
- **Original Document:** Use the case handler and responsible unit from the source document. The current active case is displayed in the **Select inheritance policy** form. The **Case handler** and **Responsible unit** fields are dimmed to reflect that the fields are not updated with values from the documents. If you have selected a single document for import, **Case Handler** field will not be dimmed.

> Tip: The case handler and responsible unit of each document to be imported can also be manually changed before actually importing them. This enables you to import documents with a different case handler and/or responsible unit than the active case, current user or the original document.

Read access codes and importing documents

You can assign Read access codes to the imported documents when you select documents for import, re-use the Read access code from the imported documents (if any) or remove all Read access codes from the documents to be imported.

Access codes can be added or removed in the **Select Inheritance Policy** form by using the **Read access** field and the **Import without access codes** check box. You can also apply the Read access codes from the current case to all the documents selected for import by selecting the **Restricted by case** check box in the **Edit read access** form.

By default, the access codes of the documents to be imported will be displayed in the **Read access** field of the **Select Inheritance Policy** form.

To import documents without any access codes, select the **Import without access codes** check box. If you manually remove all access codes for the document in the **Read access** field, the documents will be imported with all access codes instead.

If you do not specify any Read access codes when importing the documents, the access codes of the documents to be imported will be used.

Supplementary documents

The **Import without access codes** check box is ignored when importing supplementary documents. Supplementary documents are always imported without any access codes and automatically restricted by case and restricted by (main) document.

Supplementary documents imported as main documents still respect the **Import without access codes** check box and are treated as main documents with regards to assigning access codes.

Only active access codes

When a document is imported, only active Read access codes are imported. Access codes that are inactive in the WorkZone application you are importing into are skipped.

Re-assign access codes to documents selected for import

You cannot edit access codes you have assigned to documents selected for import (documents on the right pane of the **Import from WorkZone** form). If you need to change these access codes, you must remove the affected documents from the import selection and select the documents once again, assigning the correct access code in the process.

Meta data for imported documents

When imported documents from other databases into WorkZone, all source document meta data will be transferred to WorkZone as defaults for the meta data fields with the following exceptions:

- **Case handler and Responsible unit:** You use the case handler and responsible unit from the original document (source document) or you can use the case handler and responsible unit from the active case you are importing the source documents into. You can also manually adjust the case handler and responsible unit of the documents to be imported in the right pane of the **Import from another database** form before importing them.
- **Access codes:** Any access codes specified on the document in the source database will not be imported. If you need to apply access codes to the document, you must do so manually for each imported document after the import.
- **Document Type:** If the document type of the document in the source database is not used in the target database, the DOK document type will be applied by default as the DOK document type is present in all WorkZone installations by default.

- **Document State:** All document states can be imported into WorkZone but there are some important restrictions if the document state is AFS. The AFS document state was used by the Captia Web Client and is no longer in use in newer versions of WorkZone.
    - If the document state of the document to be imported is AFS then:
        - For desktop cases and or cases assigned to the case group SJ-TEMP:
            - Documents with the AFS document state cannot be imported into desktop cases or cases assigned to the case group SJ-TEMP.
              If you try to import a document with the AFS document state into a desktop case or a case assigned to the case group SJ-TEMP, an error message will be displayed and the document import will stopped.
        - For non desktop cases or cases that are not assigned to the SJ-TEMP case group:
            - If the document state AFS exists in your current WorkZone application, the document will be imported with the AFS document state.
            - If the document state AFS does not exist in your current WorkZone application, the document will be imported with the document state Archived (ARK) instead.

Additional characteristics regarding source meta data import

Generally, all source document meta data values are imported, unless the source document meta data cannot be inserted in identical meta data fields in the WorkZone installation.

If document meta data from the imported document cannot be inserted in the WorkZone installation, the import will not fail but the meta data will not be imported.

Document references

Document references are references to other WorkZone items (Cases, Documents, Contacts, and/or Meetings). Document references in the meta data of the source document are not imported into your WorkZone installation.

Main and supplementary documents

You can import main and supplementary documents with the references defining their associations intact. Documents with supplementary documents (Main documents) are displayed with a small black triangle to the left of a main document in the left and right panes of the **Import from WorkZone** form. Click the triangle to expand and display its supplementary documents.

You must manually select which documents to import. If you select the main document, all supplementary documents will also be select by default. If you only want to import the main document, you must select the main document first and then clear all supplementary documents.

You can also import individual supplementary documents by clearing the main document selection and then selecting the individual supplementary document(s) you want to import.

> Tip: Expand the main document to display all supplementary document to double-check which documents have been selected for import.

Custom Properties

The source document meta data may contain custom properties, which are customized fields that contain meta data and are saved in the database like standard meta data field values.

Custom Properties can be added to your WorkZone installation to provide additional meta data relevant to your organization, customizing WorkZone to fit to your work flows and registration needs. Typically, a WorkZone administrator or developer defines and adds these custom properties to a WorkZone configuration.

Different custom properties

If the source document meta data contains values from custom properties your WorkZone installation does not contain, only document meta data from identical custom properties will be imported.

If your WorkZone installation contains custom properties that the source document meta data does not contain, only document meta data from identical custom properties will be imported.

Identical custom properties

If identical custom properties exist in the source document meta data and the WorkZone installation, all meta data values will be imported.

Note that in either scenario, the document import will not fail, but not all meta data values will be imported.

Document date and information fields

The source document meta data may contain document date and/or information fields, which are special fields a user can add to the document that contain additional document meta data information and are saved in the database like standard meta data field values.

Different Document dates and/or Information fields

If the source document meta data contains document date and information fields your WorkZone installation does not contain, only identical document date and/or information field values will be imported.

If your WorkZone installation contains document date and information fields the source document meta data does not contain, only meta data from identical document date and/or information field values will be imported.

Identical Document dates and/or Information fields

If identical document date and/or information fields exist in the source document meta data and the WorkZone installation, all document date and/or information field values will be imported.

Note: In either scenario, the document import will not fail, but not all meta data document date and/or information field values will be imported.

Tip: As with all default data in fields, you can change the values in the fields to suit your

> requirements.

Identifying imported documents

When a document is imported into WorkZone from another database, the **Originates from** field is updated to display a link to the source document in the source database.

The **Originates from** field will be empty if the document in question was not imported from another WorkZone database.

Clicking the link in the **Originates from** field will open the source document in your WorkZone application in the source database.

In documents lists

You can use the **Originates from** field to filter a documents list, identifying and locating all documents that have been imported into WorkZone from other WorkZone databases. You must first add the **Originates from** column to the documents list before you can filter the list.

On the document detail page

The link from the **Originates from** field is displayed on the document detail page, to the right of the **Title** field prefixed with ***Originates from***. If the document was not imported from another database, there will be no link and no prefix.

> Note: The contents of the **Originates from** field cannot be exported to a Microsoft Excel spreadsheet.

Importing documents to a case

If you want to import documents directly into a case, you must make sure the detail page of the case you want to import documents into is active.[1]

1. On the case detail page, make sure the values in the **Case handler** and **Responsible unit** fields are correct.
2. In the ribbon, click **Document** > **Import from WorkZone** to open the **Import from WorkZone** form.

3. In the **Import from another database** form > **Select Database** field, select the database you want to import documents from
    - In the **Case number** field, enter the case number for the case of the documents you want to import.
    - In the **Case free text filter** field, enter free text filter criteria for the case of the documents you want to import.
    - In the **Document free text filter** field, enter free text filter criteria of the documents you want to import from the source database.
4. Click **Search** to search the database and display a list of documents you can import.
5. In the left pane which lists the filtered search results, select the documents you want to import and click the **>** button to add them to the right pane. The right pane lists the documents to be imported and open the **Select inheritance policy** form.
   You can also double-click the document you want to select for import to open the **Select inheritance policy** form.

   > Tip: You can filter the column in the left pane to further reduce the number of displayed documents, making it easier to identify which documents to select for import.

6. Select how to assign the case handler and responsible unit: In the **Select inheritance policy** form, the case you are importing the selected documents into is displayed in the **Current case** field.
   You can select which case handler and responsible unit to apply to the imported document:
    - Select **Current case** to use the case handler and responsible unit from the current, active case.
    - Select **Current user** to use the current user as the case handler and the current user's unit as the document unit.
    - Select **Original document** to use the case handler and responsible unit from the source document.

7. Select how to import access codes: In the **Select inheritance policy** form:

   - Select the **Import without access codes** check box to remove the Read access code from all documents you are selecting for import. The documents will be imported without any Read access codes. When you select this check box, the **Read access** field will be dimmed.
   - In the **Read access** field, click the icon to open the **Edit read access** form and define the Read access code to be applied to all documents you are selecting for import.
     Select the **Restricted by case** check box to apply the read access codes assigned to the current case to the documents.
   - If the **Read access** field is empty and the **Import without access codes** check box is cleared, the Read access codes on the documents selected for import will be imported. If a Read access code on a document selected for import does not exist in the WorkZone application you are importing the document into, no Read access codes will be applied to the imported document.

8. Click **Save** to use apply the case handler and responsible unit to the documents to be imported and close the **Select inheritance policy** form.
9. In the right pane of the **Import from another database** form:

   1. In the **Case handler** column, change the case handler, if necessary. This enables you to import a document with a different case handler than the active case or the original document.
   2. In the **Responsible unit** column, change the responsible unit, if necessary. This enables you to import a document with a different responsible unit than the active case or the original document.

10. Select the documents you want to import and click **Import documents** to import the selected documents into the active case. If you have imported a single document, the document detail page is also opens.

[1]Use a case list to locate the case you want to import document into and double-click the case to open it in the ribbon, making the case detail page active. If you have multiple case detail pages open, select the case detail page you want to import documents into to make it active.

Tip: You can perform multiple documents searches and add or remove documents from the left pane, building up a search results list which you then can select documents to import from.

Importing documents to your desktop case

Close all active case detail pages. If a case detail page is active, the documents will be imported into the active case by default. You can also open your desktop case detail page, making it the active case.

Important: Documents with the AFS document state cannot be imported into desktop cases or cases assigned to the case group SJ-TEMP.

If you try to import a document with the AFS document state into a desktop case or a case assigned to the case group SJ-TEMP, an error message will be displayed and the document import will stopped.

Tip: Open the desktop case detail page to ensure that the desktop case is the active case.

1. In the ribbon, click **Document** > **Import from WorkZone** to open the **Import from WorkZone** form.
2. In the **Import from another database** form > **Select Database** field, select the database you want to import documents from
    - In the **Case number** field, enter the case number for the case of the documents you want to import.
    - In the **Case free text filter** field, enter free text filter criteria for the case of the documents you want to import.
    - In the **Document free text filter** field, enter free text filter criteria of the documents you want to import from the source database.

3. Click **Search** to search the database and display a list of documents you can import.
4. In the left pane which lists the filtered search results, select the documents you want to import and click the **>** button to add them to the right pane which lists the documents to be imported and open the **Select inheritance policy** form.
   You can also double-click the document you want to select for import to open the **Select inheritance policy** form.

   > **Tip:** You can filter the column in the left pane to further reduce the number of displayed documents, making it easier to identify which documents to select for import.

5. In the **Select inheritance policy** form > **Current case** field, make sure the case you are importing the selected documents into the desktop case.
   You can select which case handler and responsible unit to apply to the imported document:
   - Select **Current case** to use the case handler and responsible unit from the desktop case.
   - Select **Current user** to use the current user as the case handler and the current user's unit as the document unit.
   - Select **Original document** to use the case handler and responsible unit from the source document.
6. Click **Save** to use apply the case handler and responsible unit to the documents to be imported and close the **Select inheritance policy** form.
7. Select how to import access codes: In the **Select inheritance policy** form:
   1. Select the **Import without access codes** check box to remove the Read access code from all documents you are selecting for import. The documents will be imported without any Read access codes. When you select this check box, the **Read access** field will be dimmed.

2. In the **Read access** field, click the icon to open the **Edit read access** form and define the Read access code to be applied to all documents you are selecting for import.
   Select the**Restricted by case**check box to apply the Read access codes from the current case to the documents.
3. If the **Read access** field is empty and the **Import without access codes** check box is cleared, the Read access codes on the documents selected for import will be imported. If a Read access code on a document selected for import does not exist in the application you are importing the document into, no Read access codes will be applied to the imported document

8. In the right pane of the **Import from another database** form:

   1. In the **Case handler** column, change the case handler, if necessary. This enables you to import a document with a different case handler than the active case or the original document.

   2. In the **Responsible unit** column, change the responsible unit, if necessary. This enables you to import a document with a different responsible unit than the active case or the original document.

9. Select the documents you want to import and click **Import documents** to import the selected documents into your desktop case. If you have imported a single document, the document detail page opens.

Edit information on a document

Add or remove document parties

You can add one or more contacts, that is, parties, on a document. You do this on a document detail page in the **Parties** tab.

Add party to a document

1. Open the detail page of a document you want to edit.
2. From the detail tabs, open the **Parties** tab.
3. Click **Add**. The **Add contact references** dialog box opens.
4. Specify your search criteria in one or more of the following ways:
    - Enter value in the **Free text** field.
    - Define the scope of your search under **Search in**. You can choose case parties, favorite contacts, or recent contacts.
    - Click **Advanced search** and enter additional search criteria. Switching back from **Advanced search** to **Simple Search** will automatically delete any additional search criteria that you have inserted.
5. Click **Search**. The search results are displayed in the left column. The contact you have viewed most recently will appear at the top of the search result list.
6. Double-click the contacts you want to add. The selected contacts are displayed in the right column.
7. Select a role for the contact in the **Role** field.
8. Click **Save**.

> **Tip:** You can configure which columns are displayed in the search result list. Right-click on a column to select columns.

Remove party from a document

1. Open the detail page of a document you want to edit.
2. From the detail tabs, open the **Parties** tab.
3. Select the check box next to the party you want to remove.
4. Click **Remove**.

Add parties to and remove parties from multiple documents

You can add parties to or remove parties from multiple documents at once.

1. In the **Navigation** pane > **Documents** panel on the **Home** tab, select a document list to display documents.
2. In the document list, select all documents you want to add parties to or remove parties from and click **Edit** > **Parties** to open the **Edit parties** form.
3. In the **Edit parties** form:
   - In the **Type** field, select a type to filter the contacts to be added or removed.[1]
   - In the **Party role** field, select a role to filter the contacts to be added or removed.[1]
   - In the **Party** field, select the name / ID of the contact to be added or removed.
4. In the **Edit** button
   - Select **Add** to add the contact to the cases selected in the list.
   - Select **Remove** to remove the contact to the cases selected in the list.
5. In the **Confirm** form, click **Yes** to confirm the changes and close the dialog.

[1] You do not need to filter the contacts by type or role, but filtering can help you select the contact to add or remove by reducing the list of contacts in the **Party** field.

Edit document party role

1. On the document detail page, open the **Parties** tab from the detail tabs.
2. Select one or more party to edit role for, and click **Edit**. The **Edit party role** dialog box opens.
3. Select a different party role in the **Party role** field.
4. Click **Save**.

Add or remove keywords

Keywords can be used, for example, for classification and retrieval of documents.

1. Open the detail page of a document to which you want to add or remove a keyword.
2. Do one of the following:
    - To add a keyword: enter a keyword in the **Keywords** field.

      -Or-
    - To remove a keyword: delete a keyword in the **Keywords** field.
3. Click Save.

Note:

- If your organization uses a dictionary, you can only select keywords from this dictionary. If you enter words that are not in the dictionary, you get an error message when you try to save.
- If your organization does not use a dictionary, you can create your own keywords.

Add or remove document references

A document reference is a link to another document that may be relevant to the current case handling.

Add a document reference

1. Open the detail page of a document to which you want to add a reference.
2. From the detail tabs, open the **Document references** tab.
3. Click **Add**. The **Add document references** window opens.

4. Specify your search criteria in one or more of the following ways:
    - Enter value in the **Free text** field.
    - Define the scope of your search under **Search in**.
    - Click **Advanced search** and enter additional search criteria. If you enter multiple search criteria, by default an Or search will be performed.

    Switching back from **Advanced search** to **Simple Search** will automatically delete any additional search criteria that you have inserted.
5. Click **Search**. The search results are displayed in the left column. The document you have viewed most recently will appear at the top of the search result list.
6. Double-click the document or documents you want to add. The selected documents are displayed in the right column.
7. Click **Save**. The added document is now displayed on the **Document references** list.

Remove a document reference

1. Open the detail page of a document from which you want to remove a document reference.
2. From the detail tabs, open the **Document references** tab.
3. Select the check box next to the document reference you want to remove.
4. Click  **Remove**.

Add, edit or remove information

The information you can add to a document is determined by your organization.

An item of information consists of two parts:

- An **Information type** field - the information's name or type, for example, **Error**.
- An **Information** field, that can be used, for example, to register the specific type of error.

The input field can contain a list of fixed values or a field for free data entry.

Add information

1. Open the detail page of a document to which you want to add information.
2. From the detail tabs, open the **Information** tab.
3. Click **Add**. The **Add Information** dialog box is displayed.
4. Select the **Information type** and fill in the **Information** field.
5. Click **Save**.

Edit information

1. Open the detail page of a document to which you want to edit information.
2. From the detail tabs, open the **Information** tab.
3. Double-click the information item that you want to edit. The **Edit Information** dialog box is displayed.
4. Make your changes and click **Save**.

Remove information

1. Open the detail page of a document from which you want to remove information.
2. From the detail tabs, open the **Information** tab.
3. Select the information items that you want to remove.
4. Click . The **Confirm** dialog box is displayed.
5. Click **Yes**.

Add and remove information to multiple documents

You can add or remove information types and values to multiple documents at once by selecting the documents in the Navigation pane and clicking the **Edit** > **Information** to select which information type and value you want to add or remove.

For more information, see Edit multiple items in a list.

Add, edit or remove dates

The dates you can add to a document are determined by your organization.

A date item consists of two parts:

- A **Date type** - the date's name or type. For example, when an error has occurred.
- A **Date** field.

Add date

1. Open the detail page of a document to which you want to add a date.
2. From the detail tabs, open the **Dates** tab.
3. Click **Add**. The **Add date** dialog box is displayed.
4. Select the **Date type** and fill in the **Date** field.
5. Click **Save**.

Edit date

1. Open the detail page of a document to which you want to edit a date.
2. From the detail tabs, open the **Dates** tab.
3. Double-click the date that you want to edit. The **Edit date** dialog box is displayed.
4. Make your changes and click **Save**.

Remove date

1. Open the detail page of a document from which you want to remove a date.
2. From the detail tabs, open the **Dates** tab.
3. Select the dates that you want to remove.

4. Click . The **Confirm** dialog box is displayed.
5. Click **Yes**.

Add and remove date types to multiple documents

You can add or remove date types and values to multiple documents at once by selecting the documents in the Navigation pane and clicking the **Edit** > **Date** to select which date type and value you want to add or remove.

See Edit multiple items in a list for more information.

Add, edit or remove reminders

The reminders you can add to a document are determined by your organization.

A reminder item consists of the following parts:

- **Date** - the date when reminder will apply.
- **Reminder for** - the recipient of a reminder.
- **Reminder type** - the text to be displayed on the reminder.
- **Reminder closed** - you can close a reminder, for example, when you start working on a document which you have been reminded of.
- **Reminder text** - the text to be displayed on the reminder.

> Note: Closed reminders (that is, with a **P, Closed** state) will not appear in your search results if you search for reminders.

Add reminder

1. Open the detail page of a document to which you want to add a reminder.
2. From the detail tabs, open the **Reminders** tab.
3. Click **Add**. The **Add reminder** dialog box is displayed.

4. Fill in the fields:
    - **Date** - type or select the date using the calendar.
    - **Reminder for** - select a recipient of the reminder.
    - **Reminder type** - select a reminder's type.
    - **Reminder closed** - select **P, Closed** to close the reminder.
    - **Reminder text** - enter the reminder's text (optional).
5. Click **Save**.

Edit reminder

1. Open the detail page of a document to which you want to edit a reminder.
2. From the detail tabs, open the **Reminders** tab.
3. Double-click the reminder that you want to edit. The **Edit reminder** dialog box is displayed.
4. Make your changes and click **Save**.

Remove reminder

1. Open the detail page of a document from which you want to remove a reminder.
2. From the detail tabs, open the **Reminders** tab.
3. In the **Reminders** tab, select the reminders that you want to remove.
4. Click **Remove** to open the **Confirm** dialog.
5. In the **Confirm** dialog, click **Yes**.

Assign or remove read access to a document

You can assign or remove read access to documents for employees or groups.

By default, a document inherits the same read permissions as the case it belongs to. You can manually assign the same access codes as the case to the document and you can also assign additional access codes specifically for the document.

Inheritance of case access rights

There are important functional differences between inheriting access rights from the case and manually assigning the same access rights as the case to the document.

- **Inheriting case access rights:** If the document inherits access rights from the case, users must be assigned all the same access rights as the case as well as any specifically assigned access rights to the document in order to access the document.
- **Manually assigning identical case access rights to the document:** If the document is manually assigned the exact same access rights as the case in the **Read access** and **Write access** fields, users need only be assigned one of the access rights (case or document) to access the document.

Supplementary documents

A supplementary document inherits by default the same read permissions as its main document, if it has one but can be set up to inherit the case access codes. You can chose to use the same access codes as the case and the main document as well as assigning new access codes specifically for the supplementary document.

> **Note:** If there is no defined read access to a document, it can be read by anyone.

For the Standard edition of WorkZone Content Server

To assign read access to a document

1. On the Document detail page, click the icon in the **Read access** field to open the **Edit read access** form.

2. (Optional) In the **Edit read access** form:
   - Click **View access codes** to display the case read access codes for the document.
   - Clear the **Restricted by case** check box to remove the case read access codes from the document.[1]
   - (For supplementary documents) Clear the **Restricted by document** check box to remove the main document read access codes from the supplementary document.[2]
3. In the **Edit read access** form > **Search in** field, select the filter to apply to the access codes:
   - **All access codes:** All access codes are available.
   - **Term access codes:** Only Term access codes are available.
   - **Organizational access codes:** Only Organizational access codes are available
4. In the **Access code** field, enter the name of the access code to locate the specific access code you want to assign to the document.
   You can left-click in the **Access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the document.
5. Click the **Apply** button to assign the selected access codes to the document.

[1] Select the **Restricted by case** check box to apply case read access codes to the document. Any new access codes you assign to the document will be in addition to the access codes from the case. See **Inheritance of case access rights** above.

[2] Select the **Restricted by document** check box to apply the main document read access codes to the supplementary document. Any new access codes you assign to the supplementary document will be in addition to the access codes from the main document.

To remove an assigned read access code from a document

1. On the Document detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. In the **Edit read access** form, click the **X** next to the employee or group you want to remove read access from.

3. Click the **Apply** button to apply your changes to the document.

For the Corporate edition of WorkZone Content Server

To assign read access to a document

1. On the Document detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. (Optional) In the **Edit read access** form:
   - Click **View access codes** to display the default read access codes for the document.
   - Clear the **Restricted by case** check box to remove the case read access codes from the document.[1]
   - (For supplementary documents) Clear the **Restricted by document** check box to remove the main document read access codes from the supplementary document.[2]
3. In the **Edit read access** form, click the **Create new access code** button to display the **Term access code** and **Organizational access code** mandatory fields.
4. In the **Term access code** field, enter the name of the Term access code to locate the specific access code you want to assign to the case.
   Click the **Term access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
5. In the **Organizational access code** field, enter the name of the access code to locate the specific access code you want to assign to the case.
   Click the **Organizational access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
6. Repeat steps 2 to 4 to create a new access code group to assign to the document if required.
7. Click the **Apply** button to assign the selected access codes to the document.

[1] Select the **Restricted by case** check box to apply case read access codes to the document. Any new access codes you assign to the document will be in addition to the access codes from the case. See **Inheritance of case access rights** above.

[2] Select the **Restricted by document** check box to inherit the main document read access codes for the supplementary document. Any new access codes you assign to the supplementary document will be in addition to the access codes from the main document.

To remove an assigned read access code from a document

1. On the Document detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. In the **Edit read access** form > **Access code** field, click the **X** next to the value in the **Term access code** or **Organization access code** fields to remove the access code.
   You can also remove an entire access code group by clicking the **X** in the upper right-hand corner of the access code group.
3. Click the **Apply** button to apply your changes to the document.

See Access codes for more information.

Assign or remove write access to a document

You can add or remove write access to documents for employees or groups. Only those employees and groups to whom you give write access can edit the document.

Inheritance of case access rights

There are important functional differences between inheriting access rights from the case and manually assigning the same access rights as the case to the document.

- **Inheriting case access rights:** If the document inherits access rights from the case, users must be assigned all the same access rights as the case as well as any specifically assigned access rights to the document in order to access the document.
- **Manually assigning identical case access rights to the document:** If the document is manually assigned the exact same access rights as the case in the **Read access** and

Write access fields, users need only be assigned one of the access rights (case or document) to access the document.

Important: You must always have write access to the cases, documents or contacts for which you define write access.

Tip: Display a list of all users registered with read or write access on the document by displaying the **Users with read access** and **Users with write access** detail tabs on the document detail page.

Supplementary documents

A supplementary document inherits by default the same write permissions as its main document, if it has one but can be set up to inherit the case access codes. You can chose to use the same access codes as the case and the main document as well as assigning new access codes specifically for the supplementary document.

Note:

- If there is no defined write access to a document, it can be edited by anyone.
- You should always assign yourself write access to an item. If you do not, your changes to the write access cannot be saved.

For WorkZone Content Server, Standard edition

To assign write access to a document

1. On the Document detail page, click the icon in the **Write access** field to open the **Edit write access** form.

2. (Optional) In the **Edit write access** form:

    - Click **View access codes** to display the default write access codes for the document.
    - Clear the **Restricted by case** check box to remove the case write access codes from the document.[1]
    - (For supplementary documents) Clear the **Restricted by document** check box to remove the main document write access codes from the supplementary document.[2]

3. In the **Edit write access** form > **Search in** field, select the filter to apply to the access codes:

    - **All access codes:** All access codes are available.
    - **Term access codes:** Only Term access codes are available.
    - **Organizational access codes:** Only Organizational access codes are available

4. In the **Access code** field, enter the name of the access code to locate the specific access code you want to assign to the document.
   You can left-click in the **Access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the document.
5. Click the **Apply** button to assign the selected access codes to the document.

[1] Select the **Restricted by case** check box to apply case write access codes to the document. Any new access codes you assign to the document will be in addition to the access codes from the case. See **Inheritance of case access rights** above.

[2] Select the **Restricted by document** check box to apply the main document write access codes to the supplementary document. Any new access codes you assign to the supplementary document will be in addition to the access codes from the main document.

To remove an assigned write access code from a document

1. On the Document detail page, click the icon in the **Write access** field to open the **Edit write access** form.
2. In the **Edit write access** form, click the **X** next to the employee or group you want to remove write access from.

3. Click the **Apply** button to apply your changes to the document.

For WorkZone Content Server, Corporate edition

To assign write access to a document

1. On the Document detail page, click the icon in the **Write access** field to open the **Edit write access** form.
2. (Optional) In the **Edit write access** form:
   - Click **View access codes** to display the default write access codes for the document.
   - Clear the **Restricted by case** check box to remove the case write access codes from the document.[1]
   - (For supplementary documents) Clear the **Restricted by document** check box to remove the main document write access codes from the supplementary document.[2]
3. In the **Edit write access** form, click the **Create new access code** button to display the **Term access code** and **Organizational access code** mandatory fields.
4. In the **Term access code** field, enter the name of the Term access code to locate the specific access code you want to assign to the case.
   Click the Term access code field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
5. In the **Organizational access code** field, enter the name of the access code to locate the specific access code you want to assign to the case.
   Click the **Organizational access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the case.
6. Repeat steps 2 to 4 to create a new access code group to assign to the document if required.
7. Click the **Apply** button to assign the selected access codes to the document.

[1] Select the **Restricted by case** check box to apply case write access codes to the document. Any new access codes you assign to the document will be in addition to the access codes from the case. See **Inheritance of case access rights** above.

2 Select the **Restricted by document** check box to apply the main document write access codes to the supplementary document. Any new access codes you assign to the supplementary document will be in addition to the access codes from the main document.

To remove an assigned write access code from a document

1. On the Document detail page, click the icon in the **Write access** field to open the **Edit write access** form.
2. In the **Edit write access** form > **Access code** field, click the **X** next to the value in the **Term access code** or **Organization access code** fields to remove the access code.
   You can also remove an entire access code group by clicking the **X** in the upper right-hand corner of the access code group.
3. Click the **Apply** button to apply your changes to the document.

See Access codes for more information.

Document actions

This section describes the basic actions you can perform on the documents.

Open a document in corresponding program

You can open a document from the list or from the detail page in the program which was used to create this document.

1. Select the document you want to open either from a list or from the detail page.
2. Click **Open** . The document opens in the application which was used to create this document (for example, Microsoft Word, Excel, Outlook or PowerPoint).

Note:

- If you open a Microsoft Word, Excel or PowerPoint document and have installed the corresponding WorkZone for Office module, the documents are displayed with the **Document Registration** pane. You can edit their document meta data and save your changes.
- The documents are opened with the associated applications as in Microsoft Windows. If the file type is not associated with Microsoft Word, Excel, Outlook or PowerPoint, or they are not installed, you will be suggested either to download the document to your hard disk or to open the document with another application.

Share document

You can share a document in multiple ways.

Send document as a link

You can send a link to the detail page of a document in an e-mail.

Prerequisite: The recipient must have access to WorkZone Client to see the document.

1. Find the document to which you want to send a link, and either:
    - Open the document detail page.

      -Or-
    - Select it in a list, for example, **My Documents**, in the navigation pane.
2. Click **Share** > **Link** on the ribbon. A new e-mail will open in Microsoft Outlook.

   Two links are added:
    - A link to the detail page of the document in WorkZone Client
    - A direct link to download the document.
3. Add a recipient and click **Send**.

Note: For document information (document information without an associated document), a link to the detail page of the document in WorkZone Client is added.
For more information, see Create document information (new information).

Send document as attached file

Prerequisite: WorkZone for Office must be installed to enable this functionality.

1. Open the detail page of a document that you want to attach to an e-mail, or select the document from a list.
2. Click **Share** > **Attach document** on the ribbon. A new e-mail will open in Microsoft Outlook. The document is attached to the e-mail.

Send document as attached PDF

Prerequisite: A PDF version of the document must exist. See Create PDF version.

1. Open the detail page of a document with PDF version that you want to attach, or select the PDF document from a list.
2. Click **Share** > **Attach PDF** on the ribbon. A new e-mail will open in Microsoft Outlook. The PDF document is attached to the e-mail.

Copy a document to the clipboard

You can copy a link to a document in WorkZone and, for example, paste it in another document.

1. Open the detail page of a document that you want to copy to your clipboard, or select it from a list.

2. Click **Share** > **Copy to clipboard** on the ribbon.
3. Paste the link, for example, in a document.

Move document

You can change the relation between documents in various ways. That is, you can choose if a document should be a main document, or a supplementary document, and which case a main document belongs to.

Move main document to another case

You can move a main document from one case to another. Supplementary documents cannot be moved other cases.

If you want to move a supplementary document to another case, you can:

- **Convert to main and move:** Convert the supplementary document to a main document and then move the now-main document to other case.
- **Keep as supplementary and move:** Move the supplementary document to another main document on the other case.

> **Note:** If the document has supplementary documents, they will also be moved.

1. Open the detail page of a document that you want to move to another case, or select it on a list.
2. Click **Move** > **Move to case** on the ribbon.
3. The **Move document** window opens.
4. Enter part of the name of the case to which you want to move the document. For example, the title, case number or case handler.
5. Select a case from the list.
6. Select the **Archive document on new case** check box, if you want to archive the document.
7. Click **Move to case**. The document has now been moved to the selected case.

> **Tip:** You can also move several documents from a list to a new case. See Work with multiple list items.

Select a different main document

If your document is a supplementary document, you can select a different document as the main document.

1. Open the detail page of the supplementary document, or select it on a list.
2. Click **Move** > **Move to new main document** on the ribbon.
3. The **Change main document** dialog opens.
4. Select the document you want as new main document from the list.
5. Click **Save**.
6. On the document detail page, the new document is added to the **Main document** field.

Convert a supplementary document to a main document

You can convert a supplementary document to a main document on the same case as the main document the supplementary document was attached to.

1. Open the detail page of the supplementary document, or select it on a list.
2. Click **Move** > **Change to main document** on the ribbon.
3. The **Change main document** dialog opens.

   Select the document you want as main document from the list.

4. Click **Save**.

   On the document detail page, the document is added to the **Main document** field.

Convert a main document to a supplementary document

You can convert a main document into a supplementary document if the main document does not contain supplementary documents.

If the main document itself contains supplementary documents, it cannot be converted to a supplementary document.

To convert a main document with supplementary documents to a supplementary document, you must first remove all supplementary documents from the main document, either by selecting a new main document for the supplementary documents or by converted all the supplementary documents to main documents themselves. Once the main document no longer contains supplementary documents, it can be converted.

1. Open the detail page of the main document, or select it on a list.
2. Click **Move** > **Change to supplementary document** on the ribbon.
3. On the document detail page, the previous main document is removed from the **Main document** field.

Create PDF version

You can create PDF versions of documents on both open and closed cases. You can only attach a newly generated PDF document to an open case. Documents of any other type cannot be attached to closed cases.

1. Open the detail page of a document to which you want to create a PDF version.
2. Click **Create PDF**. The PDF version of the document is created.

You can also create a compiled PDF report consisting of multiple documents, for example creating a compiled document for public access.

1. On the **Home** page, open the detail page of the case that contains he documents you want to create a compiled PDF report of
2. In the **Documents** detail tab, select all the documents you want to include in the compiled PDF report.

3. In the detail ribbon, click **Report > A document list with parties and supplementary documents** to generate the PDF.
4. When the PDF report is generated, you can open it or save it locally.
    - If you open the report, you can review the report and, depending on the PDF viewer utilized to read PDF documents, save the report locally.
    - If you save the report locally, you can add the report as a document to the case if necessary.

> Tip: Some report requests can take some time to compile and generate.
>
> Click the **Reports status** button in the bottom panel of the browser page to open the **My reports today** list where you can monitor the progress of your submitted PDF report generation requests for the day.

See Also

My reports today list

View PDF version

1. Open the detail page of a document with PDF version.
2. Click **Preview**. The PDF version is displayed in the preview pane.

See Also

The Preview Pane

View lists of unsuccessful PDF conversions

For a variety of reasons, sometimes PDF versions of your documents cannot be created. You can view a list of the documents that could not be converted to PDF versions in the following document lists:

- **All unconverted:** The list displays all unconverted documents that have been edited by the current user. The list includes all documents with following PDF status: Review, Skipped, or Failed.
- **Unconverted:** The list displays all unconverted documents that have been edited by the current user. The list only includes documents with the Review PDF status.
- **All unconverted - total:** The list displays all unconverted documents, regardless of who edited the documents. The list includes all documents with the following the PDF status: Review, Skipped, or Failed.

You can also see a list of all reports you have submitted for PDF conversion for today in the **My reports today** navigation list. The list includes PDF reports where the PDF conversion has failed.

The lists of unsuccessful PDF conversions also provide information about the reasons of failure in the following fields:

- **PDF status**:
  - **Review**: The document could not be converted due to document issues that you or an administrator can fix. For example, the document is password protected or content exceeds the page bounds of the document.
  - **Skipped** : The document was skipped during the conversion because it is an unsupported file type, for example video and audio files that cannot be converted to PDF.
  - **Failed**: The document could not be converted due to other errors. The document may have failed to convert because the job timed out on the server or the file is corrupted.
    You can try to open the document in the corresponding application. If the document opens as expected but the PDF version still is not created, please contact a administrator for assistance.
- **Error description** – Provides a more detailed information about the failure reason.

See Also

Manage lists

PDF document editing

PDF documents can be annotated, redacted and edited using the **Advanced PDF** pane in the preview pane. The **PDF Viewer** pane, which is available and enabled for use by default, cannot be used to edit PDF documents.

> Note: AdvancedPDF editing is not supported by the Internet Explorer 11 browser.

Separate Advanced PDF licenses are required to annotate/redact and edit PDF documents. A free version of the Advanced PDF is however available and installed by default. The free version of Advanced PDF can only be used to read PDF documents and the default WorkZone PDF Viewer is still installed and enabled for all users.

> Note: Licensed versions of Advanced PDF must be enabled in WorkZone Configurator.

The Advanced PDF license

The Advanced PDF license consists of three tiers. The first tier is installed by default and is free of charge. The second tier includes annotation and redaction features while the third tier contains annotation, redaction and advanced PDF editing features.

Both the **Advanced PDF** and **PDF Viewer** panes are opened from the preview pane. By default the preview pane contains and displays the PDF Version, but the preview pane must be configured to also display the **Advanced PDF** pane.

Advanced PDF features

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

- Add advanced annotations such as highlights, notes, callouts, comments, apply text formatting such as striking out, underlining or marking text, adding text boxes and free hand drawings.
- Search for and mark terms for redaction.

- Preview text marked for redaction before applying the redactions as well as sending the redaction-marked document for review before redaction is applied.
- Rotate, move or delete pages.
- Extract existing pages.
- Add, remove or edit temporary bookmarks.
- Add a watermark to the document.

Editing locks the document

When a PDF document is edited, it will be locked in WorkZone Explorer to prevent users simultaneously editing the same document. When you stop editing , the lock will be removed, enabling others to access the document. The document lock will be reset after 15 minutes of document inactivity.

Only PDF documents

You can only edit, annotate or redact PDF documents. Non-PDF documents can only be previewed.

> **Tip:** When using the Advanced PDF editor to annotate, redact or edit PDF documents, you can enter full-screen mode by selecting **Menu** > **Full screen**.
>
> The full screen mode of the Advanced PDF editor expands the editor to cover the entire screen, blocking out all other windows. By comparison, the full screen mode of the Preview pane only expands the current tab to full screen mode within WorkZone Client.

PDF documents that cannot be annotated, redacted or edited

PDF documents that are locked for editing, archived , deleted, attached to closed cases, have been re-journalized, or which the current user does not have editing rights to, cannot be annotated, redacted or edited using Advanced PDF. These documents can be read unless read access is also prevented.

Additionally, previous versions of PDF documents (for example PDF documents opened from the **Versions** detail tab on the Document detail page) cannot be annotated, redacted or edited using Advanced PDF.

Annotating PDF documents

Prerequisite:

- A licensed version of Advanced PDF (either the Annotation and Redaction license or the Advanced Editing license) must be available to your organization.
- The Annotation Advanced PDF feature must be enabled in WorkZone Configurator.
- The Advanced PDF pane must be added to the preview pane.

You can use the **Advanced PDF** pane in the preview pane to annotate a PDF document, adding your comments, highlighting or emphasizing sections of text, adding shapes and lines, and generally inserting feedback and suggestions to the document.

Advanced PDF annotation enables you to perform the following actions on the document:

- Strikeout selected text.
- Underline selected text.
- Highlight selected text.
- Add, edit and manage comments to the document.
- Add blocks of free text to the document.
- Draw rectangles in the document text.
- Draw freehand diagrams to the document.
- Add shapes to the text for example rectangles, circles, clouds , lines, polylines and arrows
- Add URLs or direct links to pages in the document.
- Add signatures, stamps, images, file attachments and callouts to the document.

- Select colors for all annotation options.
- Erase annotations, shapes and text formatting.

Document review and multiple annotations

You can send the document to other users who can continue annotating the document and can review, edit or remove your annotations. A PDF document can contain multiple annotations and multiple users can annotate the same document, but not at the same time. When a PDF document is edited, it will be locked in WorkZone Explorer to prevent users simultaneously editing the same document. The document lock will be reset after 15 minutes of document inactivity.

An overview of all current annotations can be displayed in the **Comments** panel.

> **Note:** Your changes are automatically saved every 10 seconds while working on the document. If you want to save your changes immediately, click **Save**.

To annotate a PDF document

- Open the preview pane for the PDF document you want to annotate. The preview pane is typically opened from the **Documents** detail tab on the Case detail page or from document lists in WorkZone.
- In the preview pane, select the **Advanced PDF** pane. If the **Advanced PDF** pane is not available, the preview pane must be configured to display the **Advanced PDF** pane.

To annotate text in the document

1. In the **Advanced PDF** pane toolbar, click **Annotate** to display the annotate toolbar.
2. Select the annotation option (highlight, strikeout, underline, fre text, etc) and the color you want to apply.
3. Select text in the document to apply the annotation.

To add a URL or link to a page in the document

1. In the **Advanced PDF** pane toolbar, click **Select(Esc)** and select a section of text or an annotation in the document.
2. In the text tool menu, select **Link** and click **URL** to enter an internet URL or **Page** to enter a page reference
3. Click **Link** to create the link.

To add shapes to the document

1. In the **Advanced PDF** pane toolbar, click **Shapes** to display the shapes toolbar.
2. Select the shape and shape color you want to apply to the document.
3. Click and drag in the document to add the selected shape to the document.

To add a callout to the document

1. In the **Advanced PDF** pane toolbar, click **Insert** to display the Insert toolbar.
2. Click **Callout** and place the callout anchor in the document. You can select the color of the callout (red, black, blue or green) in the field to the right of the **Callout** button.
3. In the text box, enter the text of the callout. The text will be the same color as the callout box and arrow.

To add a signature to the document

1. In the **Advanced PDF** pane toolbar, click **Insert** to display the Insert toolbar.
2. Click **Signature** and click **Add New Signature** field to open the signature form.
   - Select **Draw** to draw or write your signature in freehand
   - Select **Type** to use the keyboard to enter your signature
   - Select **Upload** to upload an image of your signature
   - Click **Create** to create the signature.
3. Place the signature in the document page with your mouse.

To add a rubber stamp to the document

1. In the **Advanced PDF** pane toolbar, click **Insert** to display the Insert toolbar.
2. Click **Rubber Stamp** and in the **Approved** field, (the field has no name but displays the previously selected stamp), select the stamp you want to apply to the page.
    - Click **Standard** to select stamps that are part of the original installation.
    - Click **Custom** to select stamps you have created.

      You can create your own stamp by clicking **Create New Stamp** and then defining the components of the stamp.
3. Place the selected stamp in the page with your mouse.

To add an image to the document

1. Click **Stamp** and click on the page to open a file explorer.
2. In the file explorer, select the image you want to add to the page and click **Open**.
3. The image will be placed on top of the page, covering the backgrund content. You can re-size the image and drag it to a better location if necessary.

To add an attachment to the PDF document

1. Click **File Attachment** and click on the page to open a file explorer.
2. In the file explorer, select the file you want to add to the page and click **Open**.
3. The attached file will be represented by a paper clip. Readers can click the paper clip to download the file attachment.

Remove annotations in the document

You can remove annotations from a document in two ways:

Select and delete

- Click **Select(Esc)** to enable the selection tool, and in the comments panel, click

the comment menu and select delete.
or

- Click **Select(Esc)** to enable the selection tool, manually select annotation in the document with the hand cursor ( ) and then select **Delete** in the text tool menu.

Erase the annotation

1. In the **Advanced PDF** pane toolbar > **Edit** , click **Eraser** to change your mouse cursor to a crosshair cursor.
2. Drag the crosshair cursor over the annotation you want to remove. All types of annotations and redactions (searched for or manually set) can be removed this way.

Manage comments

You can get an overview of existing comments and annotations in the document in the comments panel.

- Click **Comments** in the **Advanced PDF** pane toolbar to open the comments panel.

In the comments panel, you can search for text in the existing comments, apply a filter to the list and sort the entire list of comments. You can add a reply to another user's comments, edit or delete comments and change the status of a comment.

Sorting comments

Comments in the list can be sorted by:

- The comment's position in the document.
- The time of the last change of the comment.
- The comment status (Approved, Rejected, Canceled, Completed, None, Marked, Unmarked).
- The comment author.
- The comment type.

Redacting PDF documents

Prerequisite:

- A licensed version of Advanced PDF (either the Annotation and Redaction license or the Advanced Editing license) must be available to your organization.
- The Redaction Advanced PDF feature must be enabled in WorkZone Configurator.
- The Advanced PDF pane must be added to the preview pane.

Redaction in this context is the removal of chunks of text from the original document prior to forwarding the document to other parties, for example removing sensitive, personal, private, or classified information not intended by policy or legislation to be distributed publicly. In the finished PDF document, redacted text is covered by black bars and cannot be reinserted into the document or made readable again.

Redacting text

When redacting, you are first finding and selecting text chunks for redaction, marking them for redaction but not actually redacting the text. You can manually mark sections of text for redaction or you can search for text which automatically marks the search results for redaction. Additionally, you can apply redaction search rules, which will search the text in the PDF document for a set of recurring patterns as defined in the search rule, for example a pattern that identifies the text as being an email address. All text that satisfies the applied search rule will be marked for redaction.

There are four default search rules: Email address, Web address, CPR number, and CVR number. Additional search rules can be created for your organization in WorkZone Configurator by a system administrator.

The PDF document is not at this stage irreversibly redacted. The redaction markings can be removed by you or others. Once you have found and marked all the text you want redacted, you either can apply final redaction to the document or exit Advanced PDF and return to the document later to continue your work.

Important: Once a document is redacted, the process is irreversible. You cannot restore the document and the selected text to its state prior to the redaction.
It is recommended to enable and use Document Versioning in WorkZone Configurator when redacting PDF documents.

Document review and multiple redactions

At any point prior to the final application of the redaction, you can send the document to other users who can continue redacting the document or review the text you have marked for redaction. A PDF document can contain multiple redactions and multiple users can redact the same document, but not at the same time. When a PDF document is edited, it will be locked in WorkZone Explorer to prevent users simultaneously editing the same document. The document lock will be reset after 15 minutes of document inactivity.

Users, including reviewers, can remove redaction marking of any text in the PDF document at any point prior to the final application of the redaction, but once the redaction process has been started, the redacted text cannot be restored.

An overview of all current redaction markings is be displayed at the bottom half of the **Redaction** panel, ordered by search results.

Note: Your changes are automatically saved every 5 seconds while working on the document. If you want to save your changes immediately, click **Save**.

Mark text for redaction in a PDF document

1. Open the preview pane for the PDF document you want to redact. The preview pane is typically opened from the **Documents** detail tab on the Case detail page or from document lists in WorkZone.
2. In the preview pane, select the **Advanced PDF** pane. If the **Advanced PDF** pane is not available, the preview pane must be configured to display the **Advanced PDF** pane.

3. To manually mark text for redaction:

    1. In the **Advanced PDF** pane toolbar, click **Select(Esc)** to enable the selection tool.
    2. In the PDF document, manually select the text you want to mark for redaction and then select **Mark for redaction** in the text tool bar.
    or

    1. In the **Advanced PDF** pane toolbar > **Edit** , click **Redact** to change your mouse cursor to a crosshair cursor.
    2. Select the text you want to mark for redaction.

4. To perform a search for text to redact

    1. In the **Advanced PDF** pane, click **Panel** to open the left panel and click **Redaction** to open the **Redaction** panel in the left panel.
    2. Searching for a specific text

        1. In the **Redaction** panel > **Search text** field, enter the exact text you want redacted. Note the redaction text search is not case-sensitive.
        2. Click **Search** to search for and mark the text in the document for redaction.

    3. Applying search rules to the text

        1. In the **Redaction** panel, in the search field below the **Search text** field, select the search rule you want to apply.
        2. Click **Search** to search for and automatically mark the text in the document for redaction.

    4. To get an overview of the located text, click **Search** to open the Search panel and display search results.

Remove redaction marking on a text

You can remove redaction markings in multiple ways:

Select and delete

- Click Select(Esc) to enable the selection tool, manually select text with the hand cursor ( ) and then select **Delete** in the text tool menu.

Erase the redaction marking

1. In the **Advanced PDF** pane toolbar > **Edit** , click **Eraser** to change your mouse cursor to a crosshair cursor.
2. Drag the crosshair cursor over the text you want to remove the redaction marking for. All types of annotations and redactions (searched for or manually set) can be removed this way.

Remove redaction by search result

1. In the **Advanced PDF** pane, click **Panel** to open the left panel and click **Redaction** to display a list of all different types of text marked for redaction under the search fields.
   If you have performed multiple searches, the results of each search are displayed as well as the search text.
2. Click to remove redaction marking from all text originating from that specific search.
   If you remove the MANUAL_REDACTIONS entry, all redaction marking performed manually will be removed.

Display text marked for redaction

Text that is marked for redaction is displayed with a red outline in the PDF document but you can also see a list of all text marked for redaction by search result or from manual selection.

1. In the **Advanced PDF** pane, click **Panel** to open the left panel and click **Redaction** to display a list of all different types of text marked for redaction under

the search fields.
If you have performed multiple searches, the results of each search are displayed as well as the search text.

2. Click ✖ to remove redaction marking from all text originating from that specific search.
   If you remove the MANUAL_REDACTIONS entry, all redaction marking performed manually will be removed.

You can also perform a normal search for the redacted text, but this search may not correspond to the redaction search as the normal search can be made case sensitive and/or limited to the whole word only.

Applying redaction to the document

When the PDF document is ready for redaction, you can open the document in the Advanced PDF pane and apply the redaction to the text marked for redaction.

> **Important:** Once a document is redacted, the process is irreversible. You cannot restore the document and the selected text to its state prior to the redaction.
> It is recommended to enable and use Draft Versioning in WorkZone Configurator when redacting PDF documents.

1. Open the preview pane for the PDF document you want to redact. The preview pane is typically opened from the **Documents** detail tab on the Case detail page or from document lists in WorkZone.
2. In the preview pane, select the **Advanced PDF** pane. If the **Advanced PDF** pane is not available, the preview pane must be configured to display the **Advanced PDF** pane.
3. In the **Advanced PDF** pane, click **Panel** to open the left panel and click **Redaction** to display the **Redaction** panel.
4. In the **Redaction** panel, click **Apply Redaction** to open the **Confirm** dialog.
5. In the **Confirm** dialog, click **Apply** to redact all text marked for redaction in the document.

6. Click **Save** to save your changes or wait 5 seconds after which document will be saved automatically.

Editing PDF documents

Prerequisite:

- A licensed version of Advanced PDF (Advanced Editing license) must be available to your organization.
- The Advanced Editing Advanced PDF feature must be enabled in WorkZone Configurator.
- The Advanced PDF pane must be added to the preview pane.

You can use the **Advanced PDF** pane in the preview pane to manage page layouts, bookmarks and watermarks in the document.

Advanced PDF editing enables you to perform the following actions on the document:

- Rotate, move or delete existing pages
- Extract existing pages
- Add, remove or edit temporary bookmarks
- Add a watermark

Pages

By default, a PDF document is created with the same page alignment and order as the original document, but you can use the Advanced PDF editor to change the page alignment for each page, changing the orientation from portrait to landscape or upside down. The order of the pages can also be changed by dragging a page to a new location. You can remove entire pages from the document and you can extract one or more pages from the PDF document. Extracted pages are downloaded as separate PDF documents, creating a new PDF document in the process. The new PDF document is not automatically added to WorkZone and must be added manually.

Bookmarks and Watermarks

Bookmarks are embedded and named links to specific pages in the PDF document, making reading and navigation of larger documents easier. Bookmarks are often created during PDF creation based on the table of contents of the original document, but you can use the Advanced PDF editor to insert new bookmarks to the document.

A page can only contain one bookmark. If you insert a new bookmark to a page that already contains a bookmark, the existing bookmark will be replaced with the new one.

> Important: Bookmarks created using the Advanced PDF editor are not saved in the PDF document and can only be used to navigate the document while editing the document.

Watermarks

Watermarks are text snippets that are placed on all pages of the document, usually to indicate the origin, purpose, or define any special conditions of the document, for example confidential document could be watermarked "for internal use". Watermark text is usually semi-transparent in order not to impede reading and large.

You can use the Advanced PDF editor to add your own watermark to PDF document and define the opacity, font size and color of the watermark text. The watermark text will be displayed diagonally in the document.

> Note: While you can add multiple watermarks, each watermark will be placed in the same diagonal location in the document and overlap each other. The resulting watermark may be nearly unreadable.
>
> Existing watermarks, including watermarks you have added using the Advanced PDF editor, cannot be edited or removed.

Document review and multiple annotations

You can send the document to other users who can continue editing the document and can also review, edit or remove your some of your changes. Some changes (for example watermarks) cannot be removed. Multiple users can edit the same document, but not at the same time. When a PDF document is edited, it will be locked in WorkZone Explorer to prevent users simultaneously editing the same document. The document lock will be reset after 15 minutes of document inactivity.

Note: Your changes are automatically saved every 10 seconds while working on the document. If you want to save your changes immediately, click **Save**.

Editing a PDF document

To manage pages in the PDF document

1. Open the preview pane for the PDF document you want to edit. The preview pane is typically opened from the **Documents** detail tab on the Case detail page or from document lists in WorkZone.
2. In the preview pane, select the **Advanced PDF** pane. If the **Advanced PDF** pane is not available, the preview pane must be configured to display the **Advanced PDF** pane.
3. In the **Advanced PDF** pane, click **Panel** to open the left panel and click **Thumbnails** to open the **Thumbnails** panel in the left panel.
4. In the **Thumbnails** panel:
   - Click **Counterclockwise** to rotate the page 90 degrees counter clockwise.
   - Click **Delete** to remove the page from the document.
   - Click **Clockwise** to rotate the page 90 degrees clockwise.
   - Drag a page to another location in the document to rearrange the page order.
   - Click **Extract** at the bottom of the panel to extract the current page. Extracted pages are downloaded as separate PDF documents.

Managing bookmarks in the document

Insert a new bookmark

Bookmarks created using the Advanced PDF editor are not saved in the PDF document and can only be used to navigate the document while editing the document.

1. Open the preview pane for the PDF document you want to insert new bookmarks in. The preview pane is typically opened from the **Documents** detail tab on the Case detail page or from document lists in WorkZone.
2. In the preview pane, select the **Advanced PDF** pane. If the **Advanced PDF** pane is not available, the preview pane must be configured to display the **Advanced PDF** pane.
3. In the **Advanced PDF** pane, click **Panel** to open the left panel and click **Bookmarks** to open the **Bookmarks** panel in the left panel.
4. In the PDF document, navigate to the page you want insert a bookmark to.
5. In the **Bookmarks** panel, click **New Bookmark** and in the **Name** field of the **New Bookmark** dialog, enter the name of the bookmark
6. Click **Save** to save your bookmark and close the **New Bookmark** dialog.

Edit an existing bookmark

1. Open the preview pane for the PDF document you want to edit bookmarks for. The preview pane is typically opened from the **Documents** detail tab on the Case detail page or from document lists in WorkZone.
2. In the preview pane, select the **Advanced PDF** pane. If the **Advanced PDF** pane is not available, the preview pane must be configured to display the **Advanced PDF** pane.
3. In the **Advanced PDF** pane, click **Panel** to open the left panel and click **Bookmarks** to open the **Bookmarks** panel in the left panel.
4. In the **Bookmarks** panel, select the bookmark you want to edit and click **Edit** to open the **Edit** dialog.
5. In the **Edit** dialog, enter a new bookmark name and click Save to update the bookmark.

Delete an existing bookmark

1. Open the preview pane for the PDF document you want to delete bookmarks for. The preview pane is typically opened from the **Documents** detail tab on the Case detail page or from document lists in WorkZone.
2. In the preview pane, select the **Advanced PDF** pane. If the **Advanced PDF** pane is not available, the preview pane must be configured to display the **Advanced PDF** pane.
3. In the **Advanced PDF** pane, click **Panel** to open the left panel and click **Bookmarks** to open the **Bookmarks** panel in the left panel.
4. In the **Bookmarks** panel, select the bookmark you want to delete and click **Delete**.

Managing watermarks in a document

While you can add multiple watermarks, each watermark will be placed in the same diagonal location in the document and overlap each other. The resulting watermark may be nearly unreadable.

Existing watermarks, including watermarks you have added using the Advanced PDF editor, cannot be edited or removed.

Add a watermark to the document

1. Open the preview pane for the PDF document you want to add a watermark for. The preview pane is typically opened from the **Documents** detail tab on the Case detail page or from document lists in WorkZone.
2. In the preview pane, select the **Advanced PDF** pane. If the **Advanced PDF** pane is not available, the preview pane must be configured to display the **Advanced PDF** pane.
3. In the **Advanced PDF** pane, click **Panel** to open the left panel and click **Watermark** to open the **Watermarks** panel in the left panel.

4. In the **Watermark** panel:

    1. In the **Watermark text** field, enter the watermark text.
    2. In the **Opacity** bar, drag the bar to increase or decrease the opacity of the watermark.
    3. In the **Font** size bar, drag the font to increase or decrease the fontsize of the watermark.
    4. In the **Watermark color** field, click and select the color of the watermark text. You can also define the RGB values of the watermark color.

5. Click **Add Watermark** to add the watermark to the document.

Draft versioning

About draft versioning

Draft versioning preserves different versions of documents in WorkZone and enables you to track changes and to restore previous versions of a document.

For example, a newly created document is saved as the first version of that document. If another user opens the document and saves changes, the changed document is saved as version 2. If you want to view the document before the changes made by the other user, you can download and open the first version, making changes to the document and saving it as version 3 of the document.

Draft versioning must be enabled globally for the entire organization before you can use the feature. Draft versioning is enabled or disabled in WorkZone Configurator > **Draft versioning** where an administrator can also define whether or not to limit the number of saved draft document versions and to enable draft versioning automatically to all documents.

> **Note:** Draft versioning only applies to draft documents - specifically documents with the state UÅ (Draft) or UP (Personal draft).

Enable or disable versioning

You can manually enable or disable versioning for a specific document on the document detail page.

- To enable versioning, click **Manage** > **Enable versioning** on the main ribbon.
- To disable versioning , click **Manage** > **Disable versioning** on the main ribbon.

Note: If the **Enable versioning** and **Disable versioning** options are inaccessible, draft versioning has been disabled globally or you might not have sufficient rights to access to the document.

Draft versioning can also be automatically enabled on all documents, existing and new and for all users by a system administrator in WorkZone Configurator > **Draft versioning** > **Apply versioning to drafts automatically** toggle button.

View draft versions

You can view all versions for a document on the **Versions** detail tab. See how to add a detail tab.

By default, the list of versions provides information about version numbers, document title, who and when updated the document.

Tip: You can filter versions by user(s) who updated the document or by time when versions were created. See Apply a filter.

Download and open a previous version

1. On the **Versions** detail tab, select a version that you want to open.
2. Click **Open** on the detail ribbon.

The document is downloaded and you can open it locally.

Preview a document version

You can preview any version of a document as a PDF file in the **Versions** detail tab.

1. On the **Versions** detail tab, select the version you want to open.
2. Click **Preview** on the detail ribbon.
3. The **Preview** pane opens in the right-hand corner of the WorkZone Client

Delete previous versions

Prerequisite: You must have the write access for the document which versions you want to delete.

You can permanently delete all previous versions if you no longer need them. The latest version will be kept.

1. On the **Versions** detail tab, select any previous version.
2. Click **Delete previous versions** on the detail ribbon.

The latest version is kept and obtains version number 1. All other versions (including the selected one) are permanently deleted.

Restore a version

> **Prerequisite:** You must have the write access to the document that you want to restore.

Restore a version of a document if you want it to become the current version.

1. On the **Versions** detail tab, select a version that you want to restore.
2. Click **Restore version** on the detail ribbon.

The copy of the selected version is created and it becomes the current version. The old version cannot be "restored" again as long as it is the current version of the document. You can restore another older version instead.

> **Note:** The restored document always inherits the title of the current document.

Lock a document for editing

You do not need to manually check documents out and in continuously to prevent others from editing your documents while you work on them. When you open a Microsoft Office document for editing or just for reading, the document will automatically be locked for editing to other WorkZone users.
When your editing is completed, the document lock will automatically be removed, allowing other WorkZone users to open and edit the document.

Locking a document

When you open an Office document (Word, Excel, Powerpoint and Visio documents) in Microsoft Office, the document will automatically be locked for editing by other WorkZone users and only you can edit the document.

Your user name will be displayed in the **Locked by** field in all document lists that display the document as well as the date and time the document lock expires in the **Lock expires** field.

Note: The **Locked by**, **Lock expires**, **Checked out by**, and **Checked out** fields are not displayed in the document list by default., You must edit the list and add these fields to display their values.

The document lock expiration time will be set to 10 minutes after the document has been opened but as long as the Microsoft Office program remains open, the expiration time of the document lock will continuously get extended by 10 minutes. When you close the Microsoft Office program, the document lock expiration time will be cleared.

If WorkZone does not register the closing of the Microsoft Office program (for example if the network connection is lost or the Microsoft Office program unexpectedly shuts down), the document lock expiration will not get extended and the document lock will expire naturally.

When you open an Office document (Word, Excel, Powerpoint and Visio documents) in Microsoft Office, the **Checked out** and **Checked out by** fields in the documents list are initially empty.

Saving changes to a document

When you save any changes made to your open Microsoft Office document, the **Checked out** field in all document lists will be updated with the date and time of the first time you saved your first changes and the **Checked out by** field will contain your WorkZone user name.

The **Locked by** and **Lock expires** fields in the list will still contain your WorkZone user name and the date and time the lock expires.

The **Checked out** date and time values are used to determine the existence of a new version of the Microsoft Office document. If draft versioning has been enabled in your WorkZone installation, the different document versions are displayed in the **Versions** detail ribbon tab on the document detail page.

Draft versioning is enabled by a system administrator in WorkZone Configurator > **Document** > **Draft versioning** > **Enable draft versioning**.

Note: The **Checked out** and **Checked out by** fields are not displayed in the document list by default. You must edit the list and add the fields to display their values.

Unlocking a document

When you close the Microsoft Office program, the document will be updated in the WorkZone database and the following fields in the documents list will be cleared:

- Checked out
- Checked out by
- Locked by
- Lock expires

A system administrator can also unlock a document in the database in case another user needs the document immediately.

Checking in a document without a document lock

In rare situations, an office document may be registered as being checked out, but the document will not be registered as having a document lock expiration date.

This can happen when documents are opened for editing during an upgrade from an earlier WorkZone version (before WorkZone 2018.1). These documents will be upgraded with a date in the **Checked out** field but no date in the **Lock expires** field.

You can manually check these documents in by clicking **Manage** > **Check in** in the ribbon on the document detail page.

Important: Locking a document for editing (document lock) is not the same as the document state Locked (UL).

- The Locked (UL) document state is manually set by a user and used to prevent anyone from editing the document, including the user who originally locked the document.

- Locking a document for editing is an automatic process that only allows the user who opened the document to edit and save the document.

Locking non-Office documents

If you are editing documents that are not Microsoft Office documents (for example plain text documents, that is documents with the.txt extension), the **Locked by**, **Lock expires**, **Checked out** and **Checked out by** fields will not be updated and other WorkZone users cannot see if a particular document has been opened. Also, users will not be informed when opening a document that is currently opened or being edited by another user.

If two or more WorkZone users save their changes on the same non-Office document, the last user to save will overwrite the changes of all other users.

Note: If you have enabled and are using the advanced PDF editor to edit PDF documents, the **Locked by** and **Lock expires** fields are updated when your changes are saved to the PDF document.
The **Checked out** and **Checked out by** fields are not updated by the advanced PDF editor, even after saving changes.

See Also

Edit document state

Draft versioning

Contacts

About contacts

In the following, the terms contact, name, and party are described.

About contacts

A contact is a designation for the names that are used in case handling. A contact can, for example, be a person, employee, municipality, institution, or organization.

A contact is identified in WorkZone Client by both a contact type and an ID.

Contact types could be **Persons** (**with CPR**), **Persons (without CPR)**, **Buildings**, **Companies (with CVR)**, **Companies (without CVR)**, or **Institutions**.

Contact IDs are unique for each contact and could be auto-generated or entered by the user as well as CPR or CVR numbers that are validated by WorkZone's CPR /CVR integration.

Sharing contacts

Once you have created contacts, you can access the contacts when assigning parties to cases and documents. Not all contacts may be accessible or displayed, depending on the Read access code defined on the contacts.

About contact types

Contacts are grouped by contact types in the Contact register and also define format of the contact ID. Some contact types have CPR or CVR numbers, which require special CPR or CVR numbering while other contact types can freely be assigned their own numbering.

When creating CPR or CVR contacts, you can use WorkZone's CPR or CVR integration which enables you to retrieve contact information based on a CPR or CVR query. The query is opened from the **ID** field when you enter the CPR or CVR number or by clicking the icon in the **ID** field.

Contact types are set up and maintained in the WorkZone Configurator by system administrator.

You can search your contacts by contact types and even create a special contact type-specific search.

About contact ID

The Contact ID is a general designation for different numbering schemes which all serve to uniquely identify the individual contact. WorkZone contains a number of pre-defined numbering schemes as well as integrations to Danish authorities to ensure retrieval of correct contact information (CPR/CVR integration).

The number scheme associated with the contact type is set up on the contact type in the WorkZone Configurator by a system administrator.

Examples of contact IDs could be **CPR number** and **CVR number**, auto-generated sequential numbers created by the system, or even numbers freely entered by the user.

About contact names

Each contact has one or more names that are entered on the contact detail page.

The fields **Name 1** and **Name 2** can be used for the first name and surname respectively.

About parties

Party is another word for a contact that is used in a particular context. A party can be, for example, a person who has contacted an organization with a complaint that requires case handling. The person and the organization are both parties in the case.

In the documents, the parties can be assigned roles, such as **Sender**, **Recipient**, or **Author**.

See Also

Access codes

Assign or remove read access to a contact

About fields on a contact detail page

The contact detail page provides a detailed overview of a contact. The page displays detailed contact information as well as meta data fields that are used to classify and provide access and security details for the contact. The contact detail page can also be set up to display detail tabs at the bottom of the page.

The contact detail page is opened by double-clicking a contact in the contacts list or in a search result list.

The following fields are displayed on the contact detail page:

Field	Description
ID	The **ID** field depends on your choice in the **Type** field. > **Example**: If you choose **Persons (with CPR)**, that is a social security number, in the **Type** field, you must enter a CPR number in the **ID** field.
Contact start date	Start date for the contact. When you create a contact, the current date will be given as the start date. You can change the date. > **Example**: You can set a forward date if the contact is not to be used until the forward date. In this case, the contact will appear as **Closed** until the forward date.
Contact end date	End date for the contact. You can close a contact by adding an end date and

Field	Description
	thus prevent the contact from being used in connection with, for example, new cases and documents. See also Close a contact.
Name 1 and Name 2	For names of persons, you can use the **Name 1** field for first and middle names and the **Name 2** field for the last name. Each field can contain 150 characters.
Address 1, 2, and 3	There are three fields for the address. Each field can contain 150 characters.
Postcode and country	Denmark is set as the default country in the **Country** field. If you do not change the country, the system assumes that the postcode you enter in the first field is a Danish postcode or postal district.
Phone	The phone number of the contact.
Mobile	The mobile phone number of the contact.
E-mail	The email address of the contact.
Web page	The web page of the contact.
Fax	The fax number of the contact.
Address type	The address you enter in the address fields is automatically made the **Main address** in the **Address type** field. You can change the content of the field for the main address, for example, to **Branch Address**.
Group	The available groups are defined by your organization.
Position	The job title of the contact.
Read access	Defines who has permission to view the contact.

Field	Description
	You can edit read access the same way as write access cases and documents is edited. See also Manage access rights
Write access	Defines who has permission to update the contact. You can edit write access the same way as write access cases and documents is edited. See also Manage access rights
State	The content of the field is defined by your organization. The options available in the field are defined in the WorkZone Configuration Management.
Created date	The creation date of the contact is entered by default. This field cannot be edited.
Created by	The name of the person creating the contact is entered by default.
Last updated	The update date of the contact is entered by default. This field cannot be edited.
Updated by	The name of the person updating the contact is entered by default.
Protection	This field is used prevent the contact's address from being displayed when sending SmartPost messages and when merging contact information into Microsoft Word documents using WorkZone for Office 2017 and later. Define a start date for address protection for the contact. When a contact's address is protected, only the contact's name will be displayed in Word documents and SmartPost messages.

Field	Description
	Note: In SmartPost messages, the cover page of the message will still contain the full name and address of the contact so the mailman can deliver the mail.
Address start date	Start date for the address. When you create an address, the current date will be given as the start date. You can change the date. For example, you may forward date if the address is not to be used until a later date. In this case, the address will appear as **Closed** until the start date arrives.
Address end date	End date for the address. You can close an address by adding an end date and thus prevent the address being used in connection with, for example, new cases and documents.
Keywords	You can edit keywords directly in the field. See also Add or remove keywords.

Hidden entities

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

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

Finding hidden entities

Hidden cases, documents and/or contacts can be found by using the Hidden lists (Hidden cases, Hidden documents and Hidden contacts) in the WorkZone navigation pane.

> **Prerequisite:** You must have the LOSTANDFOUND access code to see and add the Hidden lists to your navigation pane.

> **Note:** If you need to edit hidden cases, documents or contacts (items are not assigned to you), you must have the * access code.

See Also

Hidden entities (WorkZone Client Administrators Guide)

Navigation pane and lists

Lists

Manage contacts

In the following, the basic tasks associated with contacts are described. See also About contacts.

Create a new contact

If you are creating a company with CVR or Person with CPR, see **Create a contact by CPR (persons) or CVR (companies) number** below.

1. In the Main ribbon, click **Contact** and in the menu, select the contact type you want to create.
2. A new contact detail page is displayed on a new tab.

3. In the new contact detail page > **ID** field, if the ID has not been auto-generated, enter the unique number for the contact.
4. In the new contact detail page, define any other relevant contact information in the fields of the detail page.
   Read about the fields in Fields on the contact detail page.
5. In the Main ribbon, click **Save** .

Create/update contacts using CPR (persons) or CVR (companies)

Persons (with CPR) contacts

When creating Persons (with CPR) contacts, you can import core contact data from the Danish Central Office of Civil Registration if your organization has enabled and configured CPR Integration for Persons (with CPR) contacts.

Additionally, if your organization has enabled and configured CPR Batch to subscribe to changes from the Danish Central Office of Civil Registration, contact data for existing Persons (with CPR) contacts will automatically be updated with the changes. If your organization does not use CPR Batch, all updates to your contact data must be performed manually.

Companies (with CVR) contacts

When creating Companies (with CVR) contacts, you can import core contact data from the Danish Central Business Register if your organization has enabled and configured CVR Online for Companies (with CVR) contacts.

Additionally, if your organization has enabled and configured CVR Update to subscribe to changes from the Danish Central Business Register, contact data for existing Companies (with CVR) and Production unit contacts will automatically be updated with the changes. If your organization does not use CVR Update, all updates to your contact data must be performed manually.

Create a new contact or update an existing contact by CPR number

All residents of Denmark have personal CPR (Civil Personal Registration) numbers. You can use CPR numbers to download general contact information from the Central Office of Civil

Registration to WorkZone with the CPR Integration module, helping you to quickly create new contacts.

The CPR number must have this format: *ddmmyy-xxxx*.

Existing CPR contacts can also be automatically updated using the CPR Batch module which can be set up to run periodically by a system administrator. CPR Batch will only update CPR contacts that have been imported and also subscribe to CPR Batch.

Changed contact CPR number

If a contact's CPR number is updated, for example if the contact has registered a gender change, the contact's previous CPR number is stored in the **Previous name code** field to help users search for the contact using the previous CPR number as well as the new one. You can add the **Previous name code** field to contact searches, contact lists and the contact detail page.

If your organization subscribes to WorkZone CPR Batch, the contact's data is automatically updated, including any changed CPR numbers.

If your organization does not subscribe to CPR Batch, you must update the contact manually using CPR Online. When you update the contact manually, the current and new CPR number will be displayed in a separate form prior to importing.

> **Note:** The **Previous name code** field is not displayed by default and must be added manually to searches and lists. The **Previous name code** field is read-only and cannot be updated manually by WorkZone users.

> **Prerequisite:** CPR Online must be configured and set up correctly to import CPR contact data from the Central Office of Civil Registration and CPR Batch must be configured and set up correctly to subscribe to updates of CPR contact data.

1. In the ribbon, click **Contact** > **Persons (with CPR)**.
2. In the **ID** field, click **Import contact** to open the **Import contact by CPR number** form. You can also enter the CPR number in the ID field and then click **Import contact**.

3. In the **Import contact by CPR number** form, enter a CPR number in the **ID** field and click **Search**. If you have specified a valid CPR number in step 2 above, the **ID** field will be pre-filled with this CPR number.
4. Click **Search** to search for contact information from the Central Office of Civil Registration. The search results will also include any close relatives of the CPR number.

   The color of the record provides the following additional information:

   - Blue: The CPR number already exists as a contact
   - Black: A person related to the CPR number already exists as a contact.
   - Grey: The CPR number does not exist as a contact.
5. In the **Import contact by CPR number** form, select the contacts you want to add or update and
   - Click **Refresh selected** to update contact information for the selected contacts in the **Import contact by CPR number** form.
   - Click **Import selected** to import the selected contacts into WorkZone. Contact information will be updated for existing contacts according to the Danish Civil Registration System. New contacts will be created if they do not exist in WorkZone and meta data fields such as name and address will automatically be populated.

If your organization is using CPR Batch to update your CPR contact data, a subscription for updates will automatically be created when you import the contact into WorkZone.

Guardians and wards

Guardians with CPR numbers must be selected manually from the list of CPR contacts when importing the ward from CPR Online. Guardians without CPR numbers are not listed and will by default be automatically imported as a Person (without CPR) contact when the ward is imported.

> **Note:** The default contact type (known as Name types) of guardians without CPR numbers can be changed to better suit your organization's requirements. For more

information, see [Configure CPR Connection]

When a guardian is imported, a Guardian reference will also automatically be created between the contact and the guardian. If necessary, the reference is updated when the contact is updated.

If a new guardian without CPR number is assigned to the contact and the contact subscribes to CPR Batch updates, the next update will create the new guardian in WorkZone along with a new reference with the Guardian role. The old guardian contact will not be deleted from WorkZone but the reference between the old guardian and the contact will be removed.

> **Tip:** If you are using CPR Batch to update your CPR contacts, updates will be made automatically as new information is imported into WorkZone. If you need an overview of the changes made to your contacts, you can create and save a query in WorkZone QueryBuilder that displays all updated contacts within a specific time frame (for example within the last 2 weeks) and add it to your dashboard and navigation pane as a saved search list.
>
> **See Also**
>
> Creating lists from queries

Create a company contact by CVR or P-number

All companies in Denmark are required to have an identification number known as a CVR (Central Business Register) number. You can use CVR numbers to download general business contact information from the Central Business Register to WorkZone and quickly create new contacts or update the existing ones. A CVR number is an eight-character number with the following format: *xxxxxxxx*. A company can have multiple addresses, for example, a headquarters and several production addresses. Each address must also have a unique Production unit number (P-number). The P-number is a ten-character number with this format *xxxxxxxxxx*. P-units can have the same CVR number.

The Municipality code

The municipality field (called **Municipality code** in WorkZone Client) can be displayed in the

Address detail tab on the Contact detail page, the **Parties** detail tab on the Case detail page and added to Contact searches using the **Show all fields** button. The **Municipality code** field can also be added in contact reference selectors.

> Tip: You can search for a company either by using the CVR number, P-number and/or company name. P-number searches are faster than CVR number searches. Searches by company name are slowest as they are the broadest searches.

1. In the ribbon, click **Contact** > **Companies (with CVR)**.
2. In the Contact detail tab > **ID** field, click the **Import contact** icon to open the **Import Company** form.
3. In the **Import Company** form > **ID** field, enter a valid CVR or P-number to search for a company by CVR or P number.
4. (Optional) In the **Import Company** form > **Name** field, enter a name in the **Name** field. You do not need to use search by company name if you have the CVR or P-number. You must enter the company name exactly as it is registered in the Central Business Register. Note that the registered company may deviate from the popular or known company name. The search is case-sensitive and will not return "fuzzy" hit results.
5. Select the **Import only CVR Companies** check box to exclude P-numbers from the search results, displaying only CVR numbers. If you have entered a valid P-number in the ID field above, the P-number will be displayed regardless of the **Import only CVR Companies** check box.
6. Click **Search** to retrieve company data from the CVR register. The search results include the searched company and its units.

   The color of the record provides the following additional information:

   - Dark Blue: The CVR number already exists as a contact
   - Dark Grey: The CVR number does not exist as a contact.
   - Light Blue: The P-number already exists as a contact.
   - Light Grey: The P-number does not exist as a contact.

7. Select companies and units that you want to add as contacts and click **Import selected**. Once you click the button, new contacts are created and saved in WorkZone. Meta data fields such as name and address are automatically populated. If you select existing contacts, information about them will be updated according to the Danish Civil Registration System.

Creating a contact person without a CPR number or a company without a CVR number

Non-Danish contact persons or companies must be created as a **Person (without CPR)** or a **Companies (without CVR number)**.

Edit a contact

You can change information on an existing contact. For example, you can add and remove addresses or edit case references.

Contacts can be edited from the contact detail page or from a contacts list.

From the contact detail page

1. Open the detail page of a contact you want to edit.
2. Click the meta data field that you want to edit, and make your changes.

   -Or-

   Open a relevant detail tab (for example **Case references**), and make your changes.
3. In the Main ribbon, click **Save** .

From a contacts lists

1. In the **Home** tab, in the navigation pane, select a contacts list.
2. In the list area, select the contact you want to edit. You can select and edit multiple contacts.
3. Right-click on the contact in the list and select **Edit** and the information you want to edit.
4. Define the new values in the dialog and click **Edit.**

Edit contact state

1. Open the detail page of a contact for which you want to edit the state.
2. In the **State** field, select a state from the list.
3. Click **Save** to save the contact. The life cycle of the contact is updated with the new state.

View the life cycle of a contact

The life cycle shows the progress of a contact since its creation, that is:

- When the **State** field was changed.
- To what value the **State** field was changed.
- Who has made the change (column **Performed by**).
- When the contact was created, closed, or reopened (column **Action**).

To view the life cycle of a contact, follow these steps.

1. Open the detail page of a contact whose life cycle you want to see.
2. From the detail tabs, open the **Life cycle** tab.

   To add or remove more columns, see add more columns.

Close a contact

Usually you close a contact if the contact is an organization that has ceased to exist.

A closed contact will still be preserved as a party where it is added as a party.

1. Open the detail page of a contact you want to close.
2. Insert a date in the **Contact end date** field.
3. Click **Save** . The contact will be closed as of this date.

Copy a contact to the clipboard

You can copy a link to a contact in WorkZone and, for example, paste it in a document.

1. Open the detail page of a contact that you want to copy to your clipboard, or select it from a list.
2. In the Main ribbon, click **Share** > **Copy to clipboard**. If you are using a contacts list, you can also right-click on the contact in the list and select **Share** > **Copy to clipboard**.
3. Paste the link, for example, in a document.

Delete a contact

Prerequisite:

- The contact must not have references to cases, documents, or to other contacts. Remove any references to these elements before deleting the contact.
- You cannot delete contacts of the types **Employee** and **Unit**.

You can get an overview of a contact's references by using the **Case references**, **Documents**, **References to deleted documents** and **References to deleted cases** detail tabs on the contact detail page.

To delete a contact, proceed with the following steps:

1. Open the detail page of the contact you want to delete.
2. In the ribbon, click **Delete**and then **Yes** in the Confirm dialog.

Important: Contacts are permanently deleted immediately and cannot be restored.

Edit information on a contact

Add or remove contact references

You can add one or more contact references on a contact.

Add a contact reference

1. Open the detail page of a contact for which you want to create a contact reference.
2. From the detail tabs, open the **Contact references** tab.
3. Click **Add** . The **Add contact references** dialog box opens.
4. Specify your search criteria in one or more ways:
    - Enter value in the **Free text** field.
    - Define the scope of your search under **Search in**.
    - Click **Advanced search** and enter additional search criteria.

        - If you enter multiple search criteria in the **Country** field, you can select the postcodes belonging to these countries. If you add multiple postcodes in the **Postcode** field, an Or search will be performed.
        - Switching back from **Advanced search** to **Simple Search** will automatically delete any additional search criteria that you have inserted.

5. Click **Search**. The search results are displayed in the left column.
6. Double-click the contacts you want to add. The selected contacts are displayed in the right column. You can select a different role for the contact in the list **Role**, for example **Chairman** or **Committee**.

7. Click **Save**. The added contacts will now be displayed on the list **Contact references**.

Remove a contact reference

1. Open the detail page of a contact you want to edit.
2. From the detail tabs, open the **Contact references** tab.
3. Click the check box for the contact reference you want to remove.
4. Click **Remove**.

Add contact references to and remove contact references from multiple contacts

You can add contact references to or remove contact references from multiple contacts at once.

1. In the **Navigation** pane > **Contacts** panel on the **Home** tab, select a contacts list.
2. In the contacts list, select all contacts you want to add contact references to or remove contact references from and click **Edit** > **Contact reference** to open the **Edit contact references** form.
3. In the **Edit contact references** form:
   - In the **Type** field, select a type to filter the contacts to be added or removed.[1]
   - In the **Party role** field, select a role to filter the contacts to be added or removed.[1]
   - In the **Party** field, select the name or ID of the contact to be added or removed.
4. In the **Edit** button:
   - Select **Add** to add the contact reference to the contacts selected in the list.

- Select **Remove** to remove the contact reference to the contact selected in the list.

5. In the **Confirm** form, click **Yes** to confirm the changes and close the form.

[1] You do not need to filter the contacts by type or role, but filtering can help you select the contact to add or remove by reducing the list of contacts in the Party field.

Add or remove a party relation

You can add one or more of the relations to a party, that is, contacts related to that party. Then you can view all party relations and their roles from any party list.

> Prerequisite: Before you add a contact as a party relation, you must add this contact as a contact reference.

Add a party relation

1. On the detail page of a contact for which you want to add a relation, open the **Contact references** detail tab.
2. Select the party for which you want to add a relation.
3. Click **Add related parties**. The **Add party relation** dialog box opens. The contact references of this party are displayed.
4. Search for the related party you want to add in one of the following ways:
   - Define the scope of your search under **Party role**.
   - Specify the party ID in the **ID** field.
5. Click **Search**. The search results are displayed in the left column.
6. Double-click the contacts you want to add as relations to this party. The selected contacts are displayed in the right column. You can select a different party role for the added relation in the **Role** field.

7. Click **Save**. The added contacts will now be displayed on the **Contact references** list for the party selected in step 2.
8. Repeat steps **3-7** until you have added all related parties.

Remove a party relation

You remove a party relation in the same way as you remove any other contact reference.

1. On the detail page of a contact from which you want to remove a party relation, open the **Contact references** detail tab.
2. Select one or more of the party relations you want to remove.
3. Click **Remove** to open the confirmation dialog.
4. In the confirmation dialog, click **OK**.

Edit contact party role

1. On the contact detail page, open the **Contact references** tab from the detail tabs.
2. Select one or more parties for which you want to edit the role, and click **Edit > Role** . The **Edit role** dialog box opens.
3. Select a different party role in the **Party role** field.
4. Click **Save**.

Add or remove case references

You can add one or more case references.

Add a case reference to contact

1. Open the detail page of a contact to which you want to add the case reference.
2. From the detail tabs, open the **Case references** tab.
3. Click **Add** to open the **Add case references** form.
4. In the **Add case references** form, specify your search criteria in one or more ways:
    - Enter a value in the **Free text** field.
    - Define the scope of your search under **Search in**.
    - Click **Advanced search** and enter additional search criteria.

    Switching back from **Advanced search** to **Simple Search** will automatically delete any additional search criteria that you have inserted.
5. Click **Search**.
6. Double-click on the cases you want to add. The selected cases are displayed in the right column. You can select a different role for the contact in the list **Role**, for example **Case party** or **Consultation party**.
7. Click **Save**.

Remove a case reference from contact

1. Open the detail page of a contact from which you want to remove case references.
2. From the detail tabs, open the **Case references** tab.
3. Click the check box next to the case references you want to remove.
4. Click **Remove** .

Add, edit or remove delegates for a contact

Prerequisite: WorkZone Process must be installed in order to work with delegates.

You can select other users or organizational units to be your delegates and act on process tasks on your behalf. You add, edit, and remove your delegates from the **Delegates** tab on your user profile page. You can also see the list of contacts who selected you to be their delegate on the **Delegate for** tab.

Tip: The **Delegates** and **Delegate for** tabs are not displayed by default and must be added manually. See Manage tabs

Delegates can have two type of roles: **NORMAL** or **ADMIN**. The **NORMAL** role allows a delegate to work with process tasks on behalf of the user who assigned a delegate. The **ADMIN** role allows a delegate to work with process tasks and to select other users to be delegates for the initial contact. Basically, you are assigning another user the rights to manage your delegates.

Example:

If User 1 is a delegate for User 2 with the NORMAL role, User 1 can work with process tasks on behalf of User 2. If User 2 is a delegate for User 3 with the ADMIN role, the User 2 can work with process tasks on behalf of User 3 and also select User 4 and User 5 to be delegates for User 3 and act on behalf of User 3.

Delegating tasks to other users

You can freely select one or more delegates to act on process tasks on your behalf but you must be assigned the ADMIN role to select delegates for other users, for example if you want to select a delegate for a colleague who is on leave. Additionally, if you are assigned the ADMIN role for a unit, you can manage delegates of that unit.

Using organizational units

If you want to select organizational units as delegates on behalf of other users or units, you must be assigned the AFDADM access code. For example, you can select an employee to act on process tasks on behalf of an entire organizational unit.

Add a contact as delegate

1. Open the detail page of a contact for which you want to add a delegate. You must be assigned the ADMIN role code to add delegates for other users.

   -Or-

   If you add a delegate for yourself, click your user name in the bottom right corner of WorkZone Client to open your contact detail page.
2. From the detail tabs, open the **Delegates** tab.
3. Click **Add** . The **Add delegates** dialog box opens.
4. Search for the party you want to add as a delegate in one of the following ways:
   - Enter value in the **Free text** field.
   - Define the scope of your search under **type**.
   - Specify the party ID in the **ID** field.
5. Click **Search**. The search results are displayed in the left column.
6. Double-click the contacts you want to add. The selected contacts are displayed in the right column.
7. Select a role for the delegate.
8. Click **Save**.

Edit role for a delegate

1. On the contact detail page, open the **Delegates** detail tab. The list of delegates is displayed.
2. Select one or more delegates for which you want to edit the role, and click **Edit > Delegate** . The **Edit delegate role** dialog box opens.

3. Select a different role in the **Role** field.
4. Click **Save**.

Remove a delegate

1. On the contact detail page, open the **Delegates** detail tab. The list of delegates for this contact is displayed.
2. Select one or more delegates that you want to remove.
3. Click **Remove**. The confirmation dialog box is displayed.
4. Click **OK**.

View who a contact is a delegate for

On a contact detail page, you can also view who this contact is a delegate for.

- On the contact detail page, open the **Delegate for** detail tab. The list of contacts for which this contact is a delegate is displayed.

Add or remove keywords

Keywords can be used, for example, for classification and retrieval of contacts.

1. Open the detail page of a contact.
2. Do one of the following:
    - To add a keyword: enter a keyword in the **Keywords** field.

      -Or-
    - To remove a keyword: delete a keyword in the **Keywords** field.
3. Click **Save** .

Note:

- If your organization uses a dictionary, you can only select keywords from this dictionary. If you enter words that are not in the dictionary, you get an error message when you try to save.
- If your organization does not use a dictionary, you can create your own keywords.

Add, edit or remove address

You can add, edit, or remove addresses for an active (that is, not closed) contact.

Add an address

1. Open a contact detail page to add an address.
2. From the detail tabs, open the **Addresses** tab.
3. Click **Add** . The **Add address** dialog box is displayed.
4. Enter the address.
5. Click **Save**.

Set the default address for a contact

If you have more than one address for a contact, you can set the default address for this contact.

Select an address and click **Set as default address** to make it the default address for this contact.

Edit an address

1. Open a contact detail page to edit an address.
2. From the detail tabs, click the **Addresses** tab.
3. Double-click the address that you want to edit. The **Edit address** dialog box is displayed.
4. Make your changes, and click **Save**.

Remove an address

- You cannot delete the main address of a contact.
- You cannot delete an address if it is used by another reference.

1. Open a contact detail page to remove an address.
2. From the detail tabs, click the **Addresses** tab.
3. Select the address that you want to remove.
4. Click **Remove** . The **Confirm** dialog box is displayed.
5. Click **Yes**.

Add, edit, or remove information

The information you can add to a contact is determined by your organization.

An information item consists of two parts:

- An **Information type** - the name or type of information, for example **Error**.
- An **Information** field that can be used, for example, to register the specific type of error.

The **Information** field may contain a list of predefined values or a field for free entry of text.

Add information

1. Open a contact detail page to add information.
2. From the detail tabs, click the **Information** tab.
3. Click **Add** . The **Add information** dialog box is displayed.
4. Select the **Information type** and fill in the **Information** field.
5. Click **Save**.

Edit information

1. Open a contact detail page to edit information.
2. From the detail tabs, click the **Information** tab.
3. Double-click the information item that you want to edit. The **Edit information** dialog box is displayed.
4. Make your changes and click **Save**.

Remove information

1. Open a contact detail page to remove information.
2. From the detail tabs, click the **Information** tab.
3. Select the information items that you want to remove.
4. Click **Remove** . The **Confirm** dialog box is displayed.
5. Click **Yes**.

Add and remove information to multiple contacts

You can add or remove information types and values to multiple contacts at once by selecting the contacts in the Navigation pane and clicking the **Edit** > **Information** to select which information type and value you want to add or remove.

See Edit multiple items in a list for more information.

Add, edit or remove dates

The dates you can add to a contact are determined by your organization.

A date item consists of two parts:

- A **Date type** - the name or type of the date, for example when an error has occurred.
- A **Date** field.

Add date

1. Open the detail page of a contact to which you want to add a date.
2. From the detail tabs, open the **Dates** tab.
3. Click ⊕ **Add** . The **Add date** dialog box is displayed.
4. Select the **Date type** and fill in the **Date** field.
5. Click **Save**.

Edit date

1. Open the detail page of a contact on which you want to edit a date.
2. From the detail tabs, open the **Dates** tab.
3. Double-click the date that you want to edit. The **Edit date** dialog box is displayed.
4. Make your changes and click **Save**.

Remove date

1. Open the detail page of a contact from which you want to remove a date.
2. From the detail tabs, open the **Dates** tab.
3. Select the dates that you want to remove.
4. Click **Remove** to open the **Confirm** dialog.
5. In the **Confirm** dialog, click **Yes**.

Add and remove date types to multiple contacts

You can add or remove date types and values to multiple contacts at once by selecting the contacts in the Navigation pane and clicking the **Edit** > **Date** to select which date type and value you want to add or remove.

See Edit multiple items in a list for more information.

Assign or remove read access to a contact

You can assign or remove read access codes to a contact for employees and groups. Multiple access codes can be assigned to the contact if necessary.

Default contact access codes

Default read access codes for contacts can be defined for each contact type in WorkZone Configurator > **Contact** > **Contact types**. During contact creation in WorkZone Client, the **Read access** field in the contact detail page will initially be populated with the defined default read access codes.

The default access codes can be changed during contact creation or later if the user is assigned sufficient permissions. Any read or write access codes specifically defined in the configuration of the contact type detail page will be applied instead of the default contact access codes.

Note: Clearing the access code fields during contact creation will result in the default access code defined in WorkZone Configurator being applied to the contact again when the contact is saved. After the contact has been created, the access code fields can be cleared and the contact can be saved without the default access code values being applied.

For WorkZone Content Server, Standard edition

To assign read access to a contact

1. On the Contact detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. In the **Edit read access** form > **Search in** field, select the filter to apply to the access codes:
   - **All access codes:** All access codes are available.
   - **Term access codes:** Only Term access codes are available.
   - **Organizational access codes:** Only Organizational access codes are available.
3. In the **Access code** field, enter the name of the access code to locate the specific access code you want to assign to the contact.
   Click the **Access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the contact.
4. Click the **Apply** button to assign the selected access codes to the contact.

To remove an assigned read access code from a contact

1. On the Contact detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. In the **Edit read access** form, click the **X** next to the employee or group you want to remove read access from.
3. Click the **Apply** button to apply your changes to the contact.

For WorkZone Content Server, Corporate edition

To assign read access to a contact

1. On the Contact detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. In the **Edit read access** form, click the **Create new access code** button to display the **Term access code** and **Organizational access code** mandatory fields.
3. In the **Term access code** field, enter the name of the Term access code to locate the specific access code you want to assign to the contact.
   Click the **Term access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the contact.
4. In the **Organizational access code** field, enter the name of the access code to locate the specific access code you want to assign to the contact.
   Click the **Organizational access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the contact.
5. Repeat steps 2 to 4 to create a new access code group to assign to the contact if required.
6. Click the **Apply** button to assign the selected access codes to the contact.

To remove an assigned read access code from a contact

1. On the Contact detail page, click the icon in the **Read access** field to open the **Edit read access** form.
2. In the **Edit read access** form > **Access code** field, click the **X** next to the value in the **Term access code** or **Organization access code** fields to remove the access code.
   You can also remove an entire access code group by clicking the **X** in the upper right-hand corner of the access code group.
3. Click the **Apply** button to apply your changes to the contact.

Assign or remove write access to a contact

You can assign or remove write access codes to a contact for employees and groups. Multiple access codes can be assigned to the contact if necessary.

Default contact write access codes

Default write access codes for contacts can be defined for each contact type in WorkZone Configurator > **Contact** > **Contact types**. During contact creation in WorkZone Client, the **Write access** field in the contact detail page will initially be populated with the defined default access codes.

The default access write codes can be changed during contact creation or later if the user is assigned sufficient permissions. Any read or write access codes specifically defined in the configuration of the contact type detail page will be applied instead of the default contact access codes.

> Important: You must always have write access to the cases, documents or contacts for which you define write access.

> Note: Clearing the access code fields during contact creation will result in the default access code defined in WorkZone Configurator being applied to the contact again when the contact is saved. After the contact has been created, the access code fields can be cleared and the contact can be saved without the default access code values being applied.

For WorkZone Content Server, Standard edition

To assign write access to a contact

1. On the Contact detail page, click the icon in the **Write access** field to open the **Edit write access** form.

2. In the **Edit write access** form > **Search in** field, select the filter to apply to the access codes:
   - **All access codes:** All access codes are available.
   - **Term access codes:** Only Term access codes are available.
   - **Organizational access codes:** Only Organizational access codes are available.
3. In the **Access code** field, enter the name of the access code to locate the specific access code you want to assign to the contact.
   Click the **Access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the contact.
4. Click the **Apply** button to assign the selected access codes to the contact.

To remove an assigned write access code from a contact

1. On the Contact detail page, click the icon in the **Write access** field to open the **Edit write access** form.
2. In the **Edit write access** form, click the **X** next to the employee or group you want to remove read access from.
3. Click the **Apply** button to apply your changes to the contact.

For WorkZone Content Server, Corporate edition

To assign write access to a contact

1. On the Contact detail page, click the icon in the **Write access** field to open the **Edit write access** form.
2. In the **Edit write access** form, click the **Create new write code** button to display the **Term access code** and **Organizational access code** mandatory fields.
3. In the **Term access code** field, enter the name of the Term access code to locate the specific access code you want to assign to the contact.
   Click the **Term access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the contact.

4. In the **Organizational access code** field, enter the name of the access code to locate the specific access code you want to assign to the contact.
   Click the **Organizational access code** field to open a complete list of the available access codes. In the list, select the code you want to assign to the contact.
5. Repeat steps 2 to 4 to create a new access code group to assign to the contact if required.
6. Click the **Apply** button to assign the selected access codes to the contact.

To remove an assigned read access code from a contact

1. On the Contact detail page, click the icon in the **Write access** field to open the **Edit write access** form.
2. In the **Edit write access** form > **Access code** field, click the **X** next to the value in the **Term access code** or **Organization access code** fields to remove the access code.
   You can also remove an entire access code group by clicking the **X** in the upper right-hand corner of the access code group.
3. Click the **Apply** button to apply your changes to the contact.

See Access codes for more information

Lists

List actions

This section describes the basic tasks associated with the lists. See also Save and reuse search lists.

Open a list in a new tab

1. On the **Home** tab, select the list you want to open in a new tab.
2. In the Main ribbon, click **Open in new tab** or click the mouse-scroll button.

Note: You can pin a list to the browser the same way a detail page can be pinned. See Pinning detail pages for more information.

Open a detail page of an item from a list

If you open more than one item from a list, the detail page of each item (for example a case, document, or contact) will open in a new tab. This makes navigation easier and gives you a quick overview of each opened item.

1. Open a list that contains the item whose detail page you want to open.
2. Double-click the item. Its detail page will open in a new tab.

Add / Remove columns in a list

Lists display the most commonly used data in the columns but you can adjust which data is displayed in the list columns by adding or removing extra columns to the list.

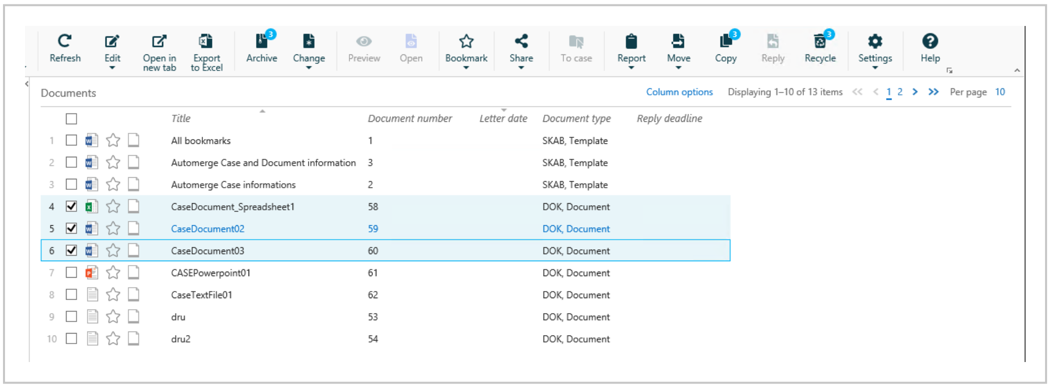
To add / remove columns to a list

1. Open a list and right-click in the columns of the list to open a drop-down list of all available columns[1].
2. In the drop-down list, select the column you want to display in the list. A column that is not selected will not be displayed from the list.

[1]You can select **More...** open the **Select columns** form. The **Select columns** form enables you to fine-tune the list columns as well as define the individual column width in pixels and reset the list columns, clearing all list column customizations.

Work with multiple list items

When you work with lists, you can apply some of the ribbon actions to multiple selected items in a list. See About ribbon buttons.



1. From a list, select the items that you want to work with. The counter on the ribbon buttons displays the number of selected items you can apply the function of each button to.
2. Click a ribbon button or right-click on a list item and select an option from the list menu to apply this function to the selected items.

Note: You can view and edit up to 50 list items as a time. If you have the **MULTIEDIT** access code, you can view and update up to 500 list items at a time.

Edit one or more items from a list

You can edit meta data on an list item, foe example changing the case handler of a case directly on the **Open cases** list in the navigation pane.

Edit a single item in a list

1. In a list, select the item that you want to edit.
2. In the main ribbon, click **Edit** or right-click the list item and select **Edit**
3. Make your changes by entering or selecting a new value.
4. Click **Save**.

Edit multiple items in a list

When you work with lists of cases or documents, you can edit some of their meta data directly from a list.

- For multiple selected cases you can edit case handler, case category, responsible unit, acting unit, state, case type, planned closing date, closed date, read access, retention code, and default document classification. You can also edit case information and date types.
- For multiple selected documents you can edit document type, document group, acting unit, case handler, responsible unit, reply date, read access, retention code, and classification. You can also edit document information and date types.
- For multiple selected contacts, you can only edit contact information and date types.
- You can edit the reference type from lists that display document references and case references.

Tip: When you select multiple cases or documents and edit them from a list, your selection remains after you have completed editing and you can continue editing the same items without having to re-select them.

Note: You can only apply one new value to multiple items. If you need to apply multiple new values to multiple items, for example if you need to change the **Planned close** as well as the **Closed** fields for multiple cases, you must first update the **Planned close** fields and then update the **Closed** date for all the selected cases.

To edit multiple items in a list

1. Open a list that contains multiple items you want to edit.
2. Select the items you want to edit and in the main ribbon, click **Edit** or right-click the list item and select **Edit**.
3. Select the field you want to update from the drop-down list to open the **Edit** form. The selected field will be displayed in the **Edit** form title.
4. In the **Edit** form, enter the new value for the selected field and click **Save**.

To enable mass editing of custom fields that are not displayed

If the cases, documents or contacts selected for mass editing contain hidden custom fields (custom fields that have been created but not added to the respective detail pages), you can enable these fields for mass editing.

1. Open a list that contains multiple items you want to edit.
2. Select the items you want to edit and in the main ribbon, click **Edit** > **Enable properties to edit** to open the **Configure ribbon** form. You can also right-click the list item and select **Edit** > **Enable properties to edit**. Finally, you can click **Configure ribbon** in the main ribbon to open the **Configure ribbon** form.
3. In the **Configure ribbon** form > **Edit** menu, select the dimmed custom fields you want to enable for mass editing, displaying the selected fields in the **Edit** menu. You can also clear fields to hide them from the **Edit** menu.
4. Click **Save** to save your changes to your personal configuration.

To add or remove **Information** types for multiple items in a list

1. Open a list that contains multiple items you want to edit.
2. Select the items you want to edit and in the main ribbon, click **Edit** or right-click the list item and select **Edit**.
3. In the drop down list, select **Information** to open the **Edit Information** form.
4. In the **Edit Information** form:
    1. In the **Information Type** field, select the information type field you want to edit.
    2. In the **Information Value** field, enter the value for the selected information type field.
5. In the **Edit** field:
    - Select **Add** to add the selected information type and value to the **Information** tab in the item's detail tab.
    - Select **Remove** to remove the selected information type field and value from the **Information** tab in the item's detail tab. Only the field type and value that correspond exactly to the information type and value you entered in the **Edit Information** form will be removed from the selected items.
6. In the **Confirm** dialog, click **Yes** to confirm your choice (Add or Remove).

To add or remove **Date** types for multiple items in a list

1. Open a list that contains multiple items you want to edit.
2. Select the items you want to edit and in the main ribbon, click **Edit** or right-click the list item and select **Edit**.
3. In the drop down list, select **Date** to open the **Edit Date** form.

4. In the **Edit Date** form:
    1. In the **Date Type** field, select the date type field you want to edit.
    2. In the **Date Value** field, enter the date for the selected date type field. You can click the **Open Calendar** icon in the Date field to open a calendar to help you select a valid date.
5. Click **Edit** and...
    - Select **Add** to add the selected date type and value to the **Dates** tab in the item's detail tab.
    - Select **Remove** to remove the selected information type field and value from the **Dates** tab in the item's detail tab. Only the date type and date that correspond exactly to the date type and date you entered in the **Edit Date** form will be removed from the selected items.
6. In the **Confirm** dialog, click **Yes** to confirm your choice (Add or Remove).

To add or remove contact references or parties for multiple items in a list

1. Open a list that contains multiple items you want to edit.
2. Select the items you want to edit and in the main ribbon, click **Edit** or right-click the list item and select **Edit**.
3. In the drop-down list, select:
    - **Contact references** (for Contacts).
    - **Parties** (for Cases or Documents).
4. The **Edit Parties** or **Edit contact references** form is displayed depending on whether you are editing cases and documents or contacts.
5. In the **Edit parties** or **Edit contact references** form:
    - In the **Type** field, select a type to filter the contacts to be added or removed.[1]
    - In the **Party role** field, select a role to filter the contacts to be added or removed.[1]

- In the **Party** field, select the name or ID of the contact to be added or removed.

6. In the **Edit** field:
   - Select **Add** to add the party or contact reference to the contacts selected in the list.
   - Select **Remove** to remove the party or contact reference from the contacts selected in the list.
7. In the **Confirm** dialog, click **Yes** to confirm your choice (Add or Remove).

[1] You do not need to filter the contacts by type or role, but filtering can help you select the contact to add or remove by reducing the list of contacts in the **Party** field.

View a list item in the preview pane

You can view additional information on a list item in a preview pane, for example you can view a document from the **Documents** list on the case detail page in the preview pane.

> Important: PDF documents can be displayed in the preview pane from the detail page only.

1. Open a list, for example **Documents**.
2. Select a document.
3. In the main ribbon, click **Preview** or right-click the list item and select **Preview** to display the lists of parties and supplementary documents in the preview pane.

View supplementary documents

You can expand a main document to view its supplementary documents in the document list. To do this, click the small black triangle on the left-hand side of the desired document. You can see the following information about each supplementary document:

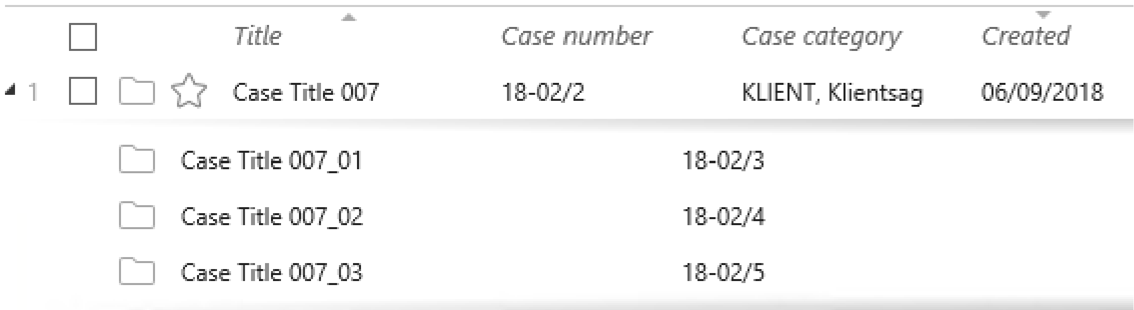
- File type shown by the icon
- Document number
- Document name

To view all information about a specific supplementary document, double-click its name. The document detail page will appear in a new tab.

View child cases

You can expand a parent case to view its child cases in the case list. To do this, click the small black triangle on the left-hand side of the desired case. You can see the following information about each child case:

- Case name
- Case number



To view all information about a specific child case, double-click its name. The case detail page opens in a new tab.

Child cases of a child case are not displayed in this list.

Export a list to Excel

You can export any list from WorkZone Client to Excel and have all information about the items of this list automatically inserted into an Excel document in the same order and with the same column names as in WorkZone Client.

Note:

- You can edit the exported Excel document (for example to create a report) in the same way as you would edit any other Excel spreadsheet. However, the changes you make in the Excel spreadsheet will NOT be saved in WorkZone Client.
- You can get the latest version of an exported list and its items in WorkZone Client at any time by exporting this list anew.

Export a list to Excel

The first time you export a list from WorkZone to Microsoft Excel, you must set up your Excel connection.

To set up the Excel connection, you must define the privacy level for your current spreadsheet as well as for the actual connection used to integrate Excel with WorkZone.

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

Once you have set up your connection, you only need to define the privacy level for the current spreadsheet the next time you export WorkZone data to Excel.

1. Select a list that you want to export to Excel.
2. In the Main ribbon, click **Export to Excel** to open a new Excel spreadsheet containing the information from the selected list items , exported in the same order and with the same column names as in WorkZone Client.
3. In the top bar of the Microsoft Excel spreadsheet, click **Enable Editing** and then **Activate content** to enable the excel spreadsheet to be updated with data from WorkZone.

4. In the **Privacy level** form, define the level of privacy of your data for the current spreadsheet to start data transfer from WorkZone to the spreadsheet.
5. You can work in the Excel spreadsheet and save it locally.

> Tip: In Microsoft Excel, click **Data** > **Queries and Connections** to open the **Queries and Connections** panel to see the progress of the data transfer from WorkZone in the WorkZone OData connection.

Update an exported list from Excel

You can refresh an exported list in Excel and 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 **Update all** in the **Queries and Connections** group.
3. If you have edited any column labels, your changes will be overwritten with the column labels from WorkZone.

> Tip: You can protect your changes to column labels by editing column labels in the query used to extract WorkZone data and in this way prevent WorkZone form updating your column labels when updating the data in the spreadsheet.

Filter a list

You can filter any list to, for example, view a subset of its content or find a specific item. You can apply a filter to one or more columns of a list. When a list column is filtered, the column heading is displayed with a yellow overlay.

Save filter

The applied filter will automatically be reset when you open a new list. You can save your list filter in the your current configuration by selecting the **Save filter** check box when you create the filter. All saved list filters will be removed if you reset your configuration which also restores the default configuration. If you do not want to reset the entire configuration, you can reset a list filter by removing all filter criteria and saving the filter.

The applied list filters are saved in your private configuration and cannot be distributed as part of a WorkZone configuration.

Apply a filter

1. Open a list you want to apply a filter for.
2. Point at the name of the column you want to filter. The column filter icon is displayed.
3. Click the column filter icon to open the filter dialog.
4. In the filter dialog, click the empty field to open a drop-down list and a filter criteria. If you know the name of the criteria, You can enter the name to automatically search the drop-down list. To add more filter criteria, click the field again and repeat.
   Depending on the column type, you can select filter criteria as date ranges, free texts, or standard values such as `@Me`, `@My unit`, `@Empty`, or `@Filled in`.
5. If you want to save the filter in your configuration, select the **Save filter** check box.
6. Click **Apply** to apply the filter and close the filter dialog.

Remove a filter

You can reset any list filter, removing all list filters from the list. If you have several lists columns, each with its own filter, all filters will be removed.

If you want to remove a list filter from one column but keep list filters applied to other list columns, you must edit the list filter you want to reset and remove all filter criteria from that list filter only.

1. Open a list you want to remove a filter from.
2. Click on the column filter icon to open the filter dialog.

3. In the filter dialog, click **Reset All Filters** to remove all list filters from the list and close the filter dialog.

Change a filter

If you want to remove only some of the values from your list filter you must:

1. Open a list you want to change the list filter for.
2. Click the column filter icon to open the filter dialog
3. In the filter dialog, click the **X** in front of the values you want to remove.
4. If you want to save the filter in your configuration, select the **Save filter** check box.
5. Click **Apply** to your save your changes and close the filter dialog.

Filtering a list by Read access codes

When filtering a list by Read access codes, all existing read access codes for cases, contacts or documents respectively are displayed as a text string in the drop-down list for both WorkZone Standard and WorkZone Corporate Editions.

The Read access code text string is ordered alphabetically and filtered from left to right and filter terms are also applied from left to right. For example if a user filters the read access code drop-down list with "aaa bbb ccc", the access code "aaa ccc bbb" will not be displayed. If the filter applied is "aaa ccc" instead, the access code "aaa ccc bbb" will be displayed.

You can also gain an overview of the users registered with read or write access on a case or document by displaying the **Users with read access** and **Users with write access** detail tabs respectively in the corresponding case detail page and document detail page.

See Also

The Detail tabs

Corporate access codes

Creating lists from queries

You can create your own saved search list based on a saved query and add it to your dashboard and navigation pane.

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

Creating a query in WorkZone Query Builder

> Important: While using WorkZone QueryBuilder does not require any special access rights, you must have a technical understanding of the database structure in WorkZone as well as a working knowledge of the names and relationships of the underlying WorkZone database tables and fields.
>
> Using WorkZone QueryBuilder is usually a task for system administrators, database technicians or very experienced super-users.

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

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

Sharing saved lists

You can also share your saved list with other users, enabling them to access the list and add it to their customized navigation panes or include the list in their personalized dashboards

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

System administrators

Other users can share their lists with you, granting you access to the list, for example a system administrator can share a list based on a query saved from WorkZone QueryBuilder with you and other users. Sharing lists this way enables system administrators to distribute specific lists to relevant users, ensuring all users have the same list as a base to work from and base their decisions on.

See Also

Manage lists

Configure the dashboard

Share a saved search list

Favorites

About favorites

You can mark cases, documents, meetings and contacts as your favorites and have them displayed on a list. You can quickly add items to your favorites and remove them later. A list of your favorite items gives you easy access to your favorite cases, document, or contacts from the navigation pane.

> **Tip:** For information about how to add **Favorite cases**, **Favorite documents** and **Favorite contacts** to the navigation pane, see [Manage lists](#).

On the detail pages and in lists, a star icon indicates if an item is already added to your favorites.

Icon	Description
	The item is already added to your favorites.
	The item is not added to your favorites.

- In lists: Double-click the icon to toggle between adding and removing the list item from the **Favorites** list.
- In detail pages: Click the icon to toggle between adding and removing the list item from the **Favorites** list.

Add an item to favorites

You can add one or more cases, documents, or contacts to your favorites, either from a list or from a detail page.

Add one or more items to favorites from a list

1. Open a list that contains the case, document, or contact you want to add to the **Favorites** list.
2. Select the items you want to add to favorites.
3. In the ribbon, click **Bookmark** > **Add to favorites** or right-click the item and select **Bookmark** > **Add to favorites**.

or

In the list, double-click the **Favorite** icon to add the list item (case, document or contact) to the favorites list. Double-clicking the **Favorite** icon will also remove any existing selections of the list items and select the list item line.

Add an item to favorites from a detail page

1. Open the detail page of a case, document, or contact that you want to add to the Favorites list.
2. In the ribbon, click **Bookmark** > **Add to favorites** or right-click the item and select **Bookmark** > **Add to favorites**.

or

In the item detail page, click the **Favorite** icon to add the item (case, document or contact) to the **Favorites** list.

Remove an item from favorites

You can remove one or more cases, documents, or contacts from your favorites. You do that either from a list or from a detail page.

Remove one or more items from favorites from a list

1. Open a list that contains the case, document, or contact you want to remove from the Favorites list.
2. Select items you want to remove from favorites.
3. In the ribbon, click **Bookmark** > **Remove from favorites** or right-click the item and select **Bookmark** > **Remove from favorites**.

or

In the list, double-click the **Favorite** icon to remove the list item (case, document or contact) from the Favorites list. Double-clicking the **Favorite** icon will also remove any existing selections of the list items and select the list item line.

Remove an item from favorites from a detail page

1. Open the detail page of a case, document, or contact that you want to remove from the Favorites list.
2. In the ribbon, click **Bookmark** > **Remove from favorites** or right-click the item and select **Bookmark** > **Remove from favorites**.

or

In the item detail page, click the **Favorite** icon to remove list item (case, document or contact) from the **Favorites** list.

Followed items

About followed items

You can mark cases, documents and contacts as your followed items and have them displayed on the **Followed cases**, **Followed documents**, and **Followed contacts** lists. Such lists give you easy access to your followed cases, documents, or contacts from the navigation pane.

When you follow a case, document or contact, you are informed about changes applied to it by other users. For example when other users change one or more meta data fields or add or remove references on a followed item, it will appear on your list of **Changed cases**, **Changed documents**, or **Changed contacts**.

For information about how to add a list to the navigation pane, see Manage lists.

> **Tip:** Add the **Is followed** column to your lists to see the special icon for items you follow. See Display or hide columns on lists.

Follow an item

You can follow one or more cases, documents, or contacts. You can start following an item either from a list or from a detail page.

Follow an item from a list

1. Open a list that contains the case, document, or contact that you want to follow.
2. Select the item that you want to follow.
3. In the ribbon, click **Bookmark** > **Follow** or right-click the item and select **Bookmark** > **Follow**.

Follow an item from a detail page

1. Open the detail page of a case, document, or contact that you want to follow.
2. In the ribbon, click **Bookmark** > **Follow** or right-click the item and select **Bookmark** > **Follow**.

Remove an item from your followed items

You can stop following an item (remove an item from your followed items) from a list or from a detail page.

Unfollow an item from a list

1. Open a list that contains the case, document, or contact that you no longer want to follow.
2. Select the item that you want to remove from followed.
3. In the ribbon, click **Bookmark** > **Unfollow** or right-click the item and select **Bookmark** > **Unfollow**.

Unfollow an item from a detail page

1. Open the detail page of a case, document, or contact that you no longer want to follow.
2. In the ribbon, click **bookmark** > **Unfollow** or right-click the item and select **bookmark** > **Unfollow**.

Reading lists

About reading lists

Reading list cases, **Reading list documents**, or **Reading list contacts** are a useful tool to collect cases, documents, and contacts in order to view them later. Items appear in your reading lists when:

- You add a case, document, or contact to a reading list yourself by marking the case, document, or contact as unread.
- Somebody assigns you as a case handler to a case or document and you have not opened (read) the case or document yet.

A case, document, or contact from a reading list appears in bold in all the lists where it is included. When you view or open the item, it will be automatically removed from the reading list.

> Tip: For information about how to add the **Reading list cases**, **Reading list documents**, or **Reading list contacts** to the navigation pane, see Manage lists.

Add an item to a reading list

You can manually add one or more cases, documents, or contacts to the **Reading list cases**, **Reading list documents**, or **Reading list contacts**.

1. Open a list that contains the cases, documents, or contacts that you want to add to the reading list.
2. Select an item or several items from the list.
3. In the ribbon, click ☆ **Bookmark** > **Mark as unread** or right-click the item and select ☆ **Bookmark** > **Mark as unread**.

Remove an item from a reading list

You can manually remove one or more cases, documents, or contacts from your reading lists.

1. Open a list that contains the case, document, or contact that you want to remove from the reading list.
2. Select a desired item or several items from the list.

3. In the ribbon, click **Bookmark** > **Mark as read** or right-click the item and select **Bookmark** > **Mark as read**.

Access rights

About access rights

By using the access rights in WorkZone Client, you can define who can view and edit cases, documents, contacts, meetings and actor sequences.

- **Read access** – allows you to view a case, document, contact, meeting, or actor sequence. WorkZone items that you do not have read access to, will not be displayed for you in lists, fields or drop-down lists in WorkZone.
- **Write access** – allows you to edit a case, document, contact, meeting, or actor sequence.

You can assign read and write access to a case, document, or contact for selected users or groups of users. A group of users can consist of one or more employees and is configured in Microsoft Active Directory.

- When you restrict read or write access on a case, your restriction applies to all case documents of this case by default. This means that, if you have restricted read access on a case, only users who have read access to this case will have access to the case and all documents on this case.
- When you restrict read or write access on a document, your restriction applies to all supplementary documents of this case by default.
- When you restrict read or write access on a contact, your restriction applies to this contact only.

About read access

By default, everyone has read access to the newly created cases, documents, and contacts.

You can restrict the read access to an item by changing the read permissions to, for example, a case.

- You must always have read access to the cases, documents, and contacts for which you define read access.

- Only you can read and edit your documents in the **Personal draft** state. You must release your personal draft documents (**Change** > **Release personal draft**) to allow other employees access them. See Edit document state.

About write access

By default, all users have write access to newly created cases, documents, and contacts. You can restrict the write access to a case, document or contact by changing the write permissions.

> Important: You must always have write access to the cases, documents or contacts for which you define write access.

Inheritance of access rights

By restricting read access to a case, document, or contact, you restrict who can see the document, contact, or case and its child cases or case documents. By restricting write access to a case, document, or contact, you restrict who can update the document, contact, or case and its child cases or case documents.

By default, all subordinate items of a case or a document, such as child cases, case documents or supplementary documents, inherit the read access of this case or document. Contacts do not have access right inheritance as there is no hierarchical structure for contacts to base inheritance on.

> Tip:
>
> Cases inherit read and write access from their case group if your organization uses this functionality.
>
> Add the **Effective read access** column and the **Effective write access** column to your document lists to get an overview of the current read access.

The effective read access of effective write access can be expressed as follows:

[The case access]

& [The main document/document access]

& [The child item access]

For example, the effective read access on the document detail page [ ] & [ ] & [ ]:

[the document's own read access] & [the main document's read access] & [the case's read access]

By default, all supporting documents inherit the read access of the case, unless it is specifically changed for some of the documents.

Example of inheritance

- A case document is covered by the read permissions that are defined for the case AND the case document.
- A child item can be covered by the read permissions that are defined for the case AND the main document AND the child item itself.

A document created on a case, where read access is given to the group "PERS", but where no specific read permissions are defined for the document itself, has the effective read access:

[ ] & [ ] & [PERS]

You can restrict the read access to the document itself. For example, you can define that the employees BB and AA will have read access to the document only if they are also members of the group "PERS". You do this by adding the following to the read access of the document:

[BB|AA] & [ ] & [PERS]

If the inheritance of the read access of the case is removed from the document, the effective read access will be [BB|AA].

Remove access rights inheritance

You can remove inheritance, for example, from the case to the document or from a main document to a supplementary document.

Click the  icon in the **Read access** or **Write access** fields to open the **Edit read access** or **Edit Write access** forms

In the **Edit read access** or **Edit Write access** forms, you can remove the access codes assigned by default to the document by clearing the **Restricted by case** check box for documents and the **Restricted by document** check box for supplementary documents.

Lock access rights inheritance

WorkZone can be set up to prevent users from removing inheritance of access codes. When access right inheritance is locked, users will not be able to change inherited read and/or write access rights on documents.

A system administrator can lock access rights inheritance by enabling the **Enforce Access Code Inheritance** feature setting, found in **WorkZone Configurator** > **Global** > **Feature settings** > **Content Server**.

When the **Enforce Access Code Inheritance** feature setting is enabled, the inherited access rights are still displayed, but users will not be able to clear the **Restricted by case** and **Restricted by document** check boxes in the **Edit read access** and **Edit Write access** forms.

Overview of access rights

You can see which access codes you have been assigned on your user profile page.

You can also display a list of all users registered with read or write access a case or a document by displaying the **Users with read access** and **Users with write access** detail tabs on the respective case detail page or document detail page.

See also

The Detail tabs

Your user profile

Access codes

Prerequisite: Security and organizational access codes must be set up and maintained in **Active Directory** by your system administrator.

Security access codes

Security access code provides a permission for specific action to the related *security group*. Security groups can be used for Role-based or Group-based rights, depending on how users are defined in your WorkZone installation, for example an *Approver* security group would be a role-based group for users with the security requirements associated with approving something while a *Test* group could be used for all testers regardless of their role.

Security groups are created and maintained in **Active Directory** by your system administrator.

Each organization has its own structure of **security groups**. Some employees must be granted the extended rights to work with particular types of information. For example:
`**Managers** must have extended access to the customers' information; **System administrators** must have extended access to the database and network information;**Accountants** must have extended access to the financial information.`

In this example, managers, administrators, and accountants represent different security groups. To give more power to the security groups in their areas, a system administrator assigns relative access codes to each of them in **Active Directory**. For example, `MNGR` is assigned to all managers, `SYSADM` is assigned to all system administrators and `ACCNT` is assigned to all employees who work as accountants.

Each user can have multiple security access codes.

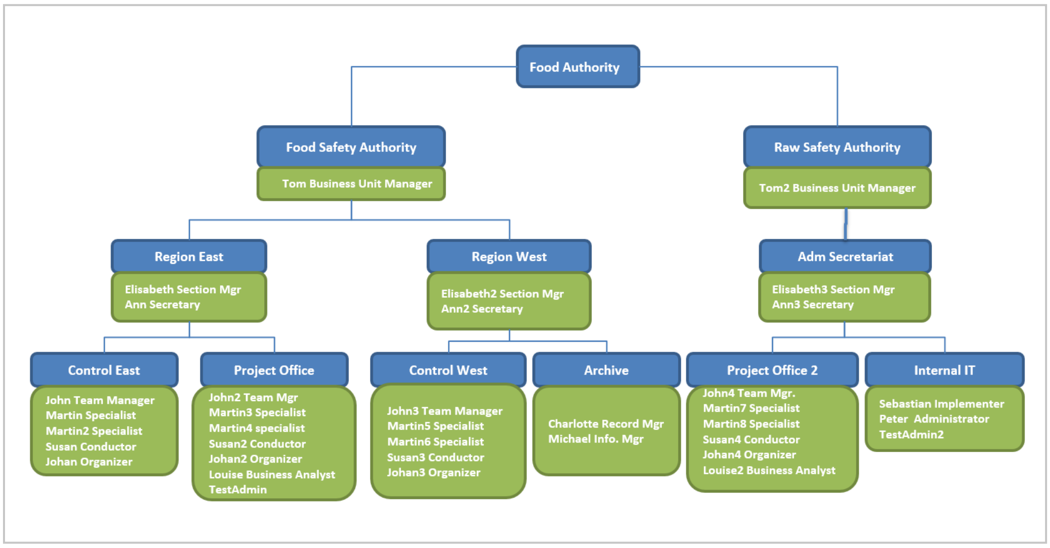
Example

TestAdmin1 has the following security access codes: `DATAADM, USERADM, CONFIGADM.`
TestAdmin2 has the following security access codes: `DATAADM, USERADM.`
`DATAADM` allows a user to configure custom fields and properties.
`USERADM` allows a user to configure case number format and organizational dictionary.
`CONFIGADM` allows a user to configure Outlook settings.
This means that administrators have rights to configure WorkZone installation, but TestAdmin2 is not allowed to configure Outlook settings.

Organizational access codes

Organizational access code is an access code that provides read or write permission for a particular *organizational unit* or *individual user*.

Each organization has its own structure of **organizational units**. For example, it can be the following tree-type hierarchy:



This organization has:

- 12 organizational units - each blue record stands for a separate organizational unit.
- 4 levels of organizational units where **Food Authority** represents the first level.

Organizational units and Organization access codes are created and maintained in **Active Directory** by your system administrator.

If access rights are not defined for a particular organizational unit, the unit will inherit access rights from the next higher-level organizational unit.

Example:

If a case has the **Raw Safety Authority** read access code and **Internal IT** write access code, this means that everybody from Raw Safety Authority, Adm Secretariat, Project Office 2 and Internal IT can view the case. However, only Sebastian Implementer, Peter Administrator and TestAdmin2 from Internal IT can edit it.

Important: If you change the organizational access code for a case, document, or contact, you must grant access to yourself.

Corporate access codes

The WorkZone Corporate edition enables you to create groups of access codes (Corporate access codes). A **Corporate access code** is a combination of security access codes and organizational access codes.

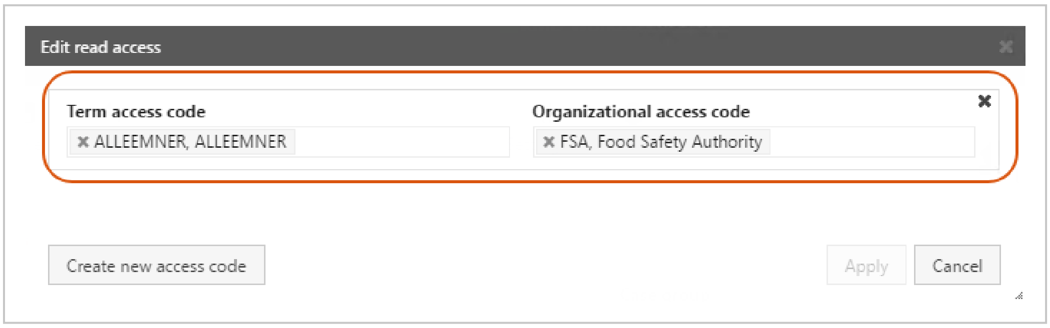
```
(Security access code) & (Organizational access code)
```

Corporate access codes help you fine tune access rights for each case, document, contact, meeting or actor sequence and are only available for the WorkZone Corporate edition.

Apply the access code groups in the **Read access** and **Write access** fields for cases, documents, contacts, meetings or actor sequences in the same fashion as access codes are applied for the WorkZone Standard edition.

Default corporate access code

A newly created case, document, or contact will always contain a default corporate access code which enables read or write access to the case, document or contact.



Tip: Security access code is often called **Term access code** in the WorkZone Client user-interface.

- Default security access code is always ALLEEMNER. ALLEEMNER includes all contacts in the organization.
- Default organizational access code is the second level organizational unit of the employee who has created this case, document or contact. The first level of organizational unit is always the whole organization. On the picture in the Organizational access codes section, **Food Authority** is the organizational unit of the first level; **Food Safety Authority** and **Raw Safety Authority** are the organizational units of the second level.

Important: If you change the corporate access code for a case, document, or contact, remember to grant access to yourself.

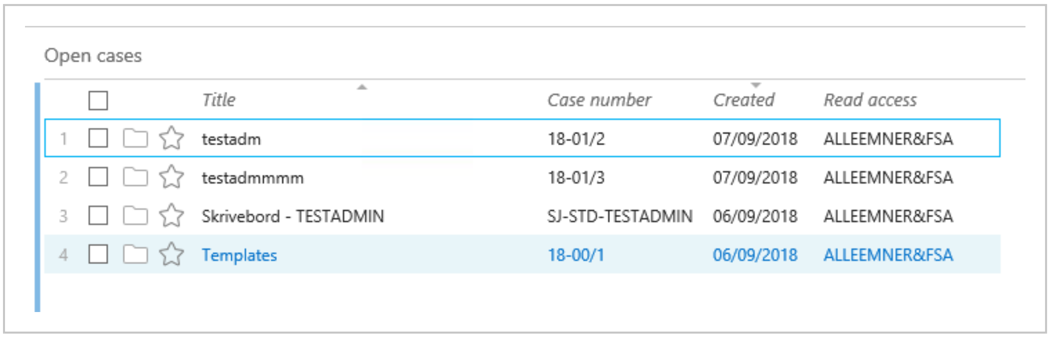
Corporate access string

Corporate access strings are a concise way to represent combinations of different access codes assigned to a given case, document, or contact.

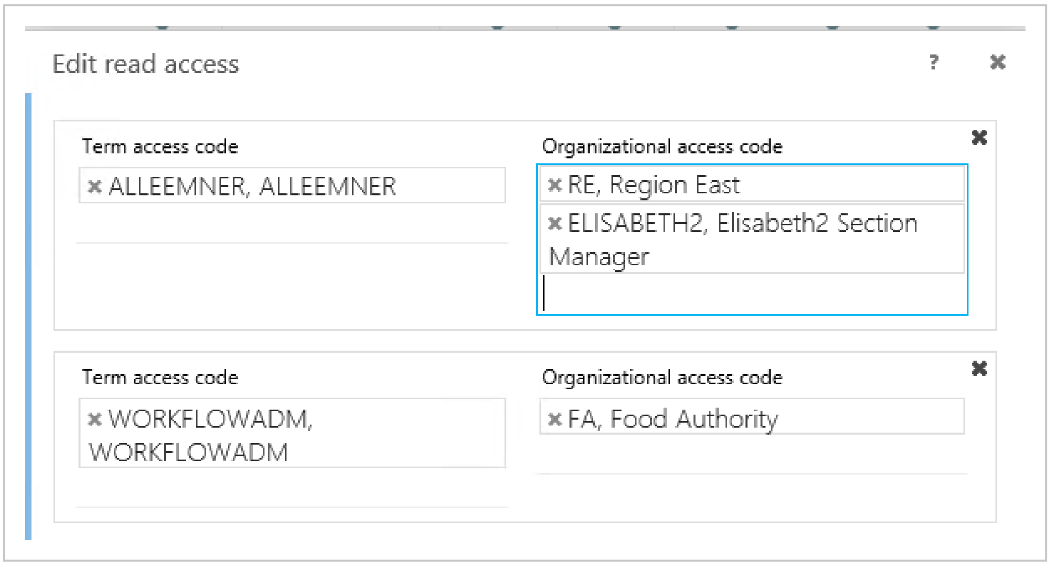
Corporate access strings include:

- **Access codes**: The access codes applied in the **Read access** and **Write access** fields.
- **Logical operators**: Characters that represent the logical bindings between the access codes and the Corporate access codes. The following logical operators are used:
  - &: Used to represent the AND function
  - |: Used to represent the OR function.

You can find corporate access strings in the **Read access** or **Write access** columns in lists, for example the **Open Cases** list.



The string from the example represents the following structure of access rights:



In other words, two groups of people can view the **Region East** case:

1. Any person (`ALLEEMNER`) from the Region East (`RE`) organizational unit and section manager (`Elizabeth2`) who works at a different organizational unit.
2. Any person in the company (`FA`) who has the `WORKFLOWADM` security access code.

The corporate access string for the example above would look like this: (ALLEEMNER&(ELISABETH2|RE))|(WORKFLOWADM&FA) in the **Open Cases** list.

> **Tip:** The image in Organizational access codes displays the full organizational structure of the sample company.

Manage access rights

Assign or remove read access

You can assign or remove read access to cases, documents, and contacts for individual users and groups of users.

If you remove all users and groups, you remove the restriction on read access. This means that all users will have read access to this item.

For more information, see:

Assign or remove read access to a case

Assign or remove read access to a document

Assign or remove read access to a contact

Assign or remove write access

You can assign or remove write access to cases or documents for users and groups. Contact cannot be assigned write access codes.

Important:

- You must always assign write access to yourself. Otherwise, your changes to the write access will not be saved.
- Only you can read and edit your documents in the **Personal draft** state. You must release your personal draft documents (**Change** > **Release personal draft**) to allow other users access them. See Edit document state.

If you remove all employees and groups, you remove the restriction on write access. This means that all employees have write access.

For more information, see:

Assign or remove write access to a case

Assign or remove write access to a document

Assign or remove write access to a contact

Searches

Perform a search

About searches

You can perform searches for cases, documents, contacts or meetings on the relevant search pages and can create and save your own customized searches to help you quickly locate specific cases, documents, contacts or meetings in WorkZone.

Saved searches can be distributed to and run by other users. You can edit search criteria when you run the search to narrow and focus the results. This helps you find what you are searching for and reduces the number of irrelevant search hits.

Create a new search

You can create a general search, searching for all cases, documents, contracts, or meetings or you can create a type-specific search, searching for a specific case or contact type.

Both types of searches are created by setting the desired search criteria of the search. You can run the search immediately to view the results or you can save the search in WorkZone and then run it.

All search criteria can be changed and the search can be saved, edited and saved again (updating the original search). The search can also be saved under a new name (effectively creating a new search).

Type-specific searches

You can create searches where the case category (for case searches) or contact type (for contact searches) is predefined and cannot be changed. This enables you to create searches for a specific case category or contact type, for example creating a search for all municipalities registered in WorkZone. When you create a search with a predefined case category or contact type, all search criteria can be edited apart from the case category or contact type.

Default values

The values you define in the search page fields when creating the search become default search criteria when the search is run. You can define new and change existing default search criteria when you edit and save your search.

The default values of your search cannot be changed or overwritten by other users, even if you share your search. If another user has sufficient access rights to edit searches, your shared search can be used a base for a new search and saved as a new search by that user.

Custom types

If your organization has defined and deployed custom types, you can also use the custom type fields as search criteria. Click **Show all fields** in the main ribbon to display any custom types. Custom types are displayed by name and by the custom type field used to connect to the case, document or contact.

To define search criteria in the custom type fields, click **Select** to open a form containing the custom type fields and enter search criteria.

To create a new search

1. In the ribbon, click **New search** and select **Case**, **Document**, **Contact**, or **Meeting** from the drop-down list. If your organization has defined and distributed custom types for you, the **More** menu option will be accessible and you can click **More** to create custom searches based on custom types.
2. A search page for the relevant item will open in a new tab.

Select a case or contact type so that your search is limited to this type of cases or documents. Click **Case** to expand the search to all cases types, click **Case** and click **Document** to expand the search to all document types.

3. Enter the desired search criteria in the fields.

> **Note:** If you enter multiple search criteria in fields that can contain multiple values, for example **Document type**, an OR search will be performed.

4. In the ribbon, click **Search** or press **Enter** to start the search. The list of search results is displayed at the bottom of the page.

To create a new type-specific search

1. In the ribbon, click **New search** > **Case** and select a case category to create a case type specific search or click **New search** > **Contact** and select a contact type to create a contact type specific search.
2. A search page for the case category or contact type will open in a new tab.
3. Enter the desired search criteria in the fields.

> **Note:** If you enter multiple search criteria in fields that can contain multiple values, for example **Document type**, an OR search will be performed.

4. In the ribbon, click **Search** or press **Enter** to start the search. The list of search results is displayed at the bottom of the page.

See also

Save and reuse search.

Configure a search page

You can configure a case, document, contact, or meeting search page for your own use. That is, you can add, remove, re-size, or reorder the displayed fields on the search page according to your needs. This action does not require any administrative rights.

If you are configuring a type-specific contact search page or case search page, the **Type** field (for contacts) and the **Case category** field (for cases) will not be displayed as the contact type or case category will already have been specified when creating the type-specific search.

> **Note:** You can pin a search page to the browser the same way a detail page can be pinned. See Pinning detail pages for more information.

To configure a search page

The procedure below describes how you configure a case search page to search among all cases. If you want to configure a document search page, a contact search page, or a meeting search page instead, make your changes on the document search page, the contact search page, or the meeting search page, respectively.

1. Click **New search** > **Case** to display a new case search page.
2. Point your mouse to the top right corner of the **Case search** field and click **Configure page**. The **Available fields** pane opens to the right and the semitransparent divider displays the existing fields.
3. Make your changes to the fields:
    - Drag and drop the fields to reorder them.
    - Double-click existing fields to remove them from the search page, or drag and drop them to the **Available fields** pane.
    - Double-click the fields in the **Available fields** pane to add them to the search page, or drag and drop them to the search page.
    - Resize the fields by dragging their right corner.
4. Click **Apply** to save your changes. The search page reloads.

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

To configure a type-specific search page

The procedure below describes how you configure a case search page to search among all cases. If you want to configure a contact search page instead, make your changes on the contact search page.

1. Click **New search** > **Case** and select a case category to display a new case search page.
2. Point your mouse to the top right corner of the **Case search** field and click **Configure page**. The **Available fields** pane opens to the right and the semitransparent divider displays the existing fields. If the field you are looking for is not displayed, it may be a hidden custom field. Contact your system administrator who can determine this.
3. Make your changes to the fields:
   - Drag and drop the fields to reorder them.
   - Double-click existing fields to remove them from the search page, or drag and drop them to the **Available fields** pane.
   - Double-click the fields in the **Available fields** pane to add them to the search page, or drag and drop them to the search page.
   - Resize the fields by dragging their right corner.
4. Click **Apply** to save your changes. The search page reloads.

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

Show all available fields

You can choose to display all available fields on a search page. By default, the **Case category** field and the (Contact) **Type** field are not displayed on the search page for general searches.

For type-specific searches, the **Case category** field and (Contact) **Type** fields are not displayed and cannot be displayed on the search page.

- In the ribbon of the search page, click **Show all fields**. The search page is reloaded with all available fields displayed (including custom fields and custom types and their fields). If the field you are looking for is not displayed, it may be a hidden custom field. Contact your system administrator who can determine this.

This can be useful, for example, if you have removed some of the fields or if you use another user's configuration.

Search using text fields

Text fields distinguish between uppercase and lowercase letters.

> **Example**: If you search for *petersen*, you will not find *Petersen*.

In text fields, you can use search operators.

Text fields can be found on the search pages for:

- Cases: **Case no.**, **Title**, **Text**, **Keywords**, and **Previous case number**.
- Documents: **Document no.**, **Title**, **Text**, **Keywords**, and **Information**.
- Contacts: **Name 1**, **Name 2**, **Address 1**, **Address 2**, **Address 3**, **Telephone no.**, **E-mail**, **WEB**, **Fax no.**, **Position**, **Information**, **Keywords**, and **ID**.

Customize the Search results tab

You can customize the **Search results** tab by adding or removing columns (fields) and rearranging the columns to better display the information you want displayed from your search.

To customize the **Search results** tab

1. Create a new search
2. In the **Search results** tab in the bottom of the page:

3. To add or remove columns (fields) to the results list: Right-click a row heading and select the column you want to add. Clear the selection to remove a column.
4. To rearrange columns: Use the mouse to drag the column heading to a new location. The column heading will indicate where you can drag the column to.

Customizing Contact-specific search results

When you perform a search by specific contact type, for example only for employees or buildings, you can customize the search results tab for the contact type you based your search on. In this fashion, you can configure the **Search results** tab for each contact type you want to search for and only display the search results you need for each contact type.

Your changes to the search results tab will also be used if you save and run the search again.

Case search with multiple information or date criteria

When you search for cases, you can specify multiple information values or multiple dates in the **Information** or **Dates** fields respectively. You can specify different information types and enter several information values to search for. Similarly, you can specify criteria for a date type, a date from, and a date to that you want to search for.

For example, to search for cases with multiple information criteria:

1. Open a case search page.
2. Click **Select information** in the **Information** field. The **Select information** dialog box opens.
3. Select an information type in the **Information type** field, and (or instead of it) enter one or more values in the **Information value** field.
4. Optionally, click **Advanced options** under the **Information type** field to set additional criteria:
    - **Exists** - Search only for cases with a specified information type and/or value.
    - **Doesn't exist** - Select this option when only the **Information type** field is filled in and the **Information value** field is empty. You will search only for

cases without selected **Information type** and for cases with empty **Information value** field.

- **Empty** - Select this option only when the **Information value** field is empty. You will search only for cases with no information value.

5. Click **Add**.
6. The options you have specified in the steps 3-4 are displayed in the **Information** field.
7. Optionally, click **Advanced options** under the **Information** field to set which search operator to use:
    - **And** - The default value. When selected, the search will perform for all specified options.
    - **Or** - Select to search for values of the same type only.
8. Click **Apply**. The **Select Information** dialog box closes and the selected information criteria are displayed in the **Information** field of the case search page.

> Tip: On search fields that can contain multiple values, for example **Facets** and **Keywords**, the search operator Or is used by default. To change to And, click [or]. It will then change to [and].

Use cross-register search

Use cross-register search when you have search requirements both to cases and documents. For example, you want to find emails that must be replied by tomorrow and that belong to cases assigned to you. To create such a list of documents, you must define search criterias both for documents (Document type = Incoming, Reply deadline to = 20/07/2018) and for cases (Case handler = @Me).

Cross-register search makes it possible to search for:

- Cases based on specific document criterias
- Documents based on specific case criteria

Search for cases

1. On the main ribbon, click **New search > Cases**.
2. Fill in the search criteria for cases and Click **Documents** .
3. On the **Define documents filter** dialog box, fill in the search criteria for documents. To include criteria to the search, click **Add**. To exclude criteria from the search, expand options next to the **Add** button and click **Exclude**.
4. Click **Apply**.
5. In the ribbon, click **Search** or press **Enter** to start the search. The list of search results is displayed at the bottom of the page.

Search for documents

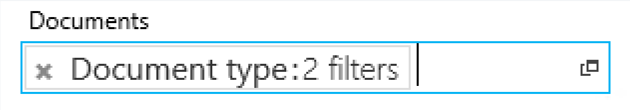
1. On the main ribbon, click **New search > Documents**.
2. Click in the **Case** field, fill in the search criteria for cases, click **Add** and then **Apply**.

   - Or -

   If you know which cases you need specifically, click the **Case (simple)** field and select the desired case(s) from the list. Above the field, toggle the **[case]** search behavior to **[hierarchy]** to include any child-cases of the case you select in the **Case (simple)** field.
3. Fill in other search criteria for documents, if necessary.
4. In the ribbon, click **Search** or press **Enter** to start the search. The list of search results is displayed at the bottom of the page.

> **Tip:** You can see all applied criteria in the **Case** or **Documents** field in the bottom of the dialog box. If you have multiple criteria that do not fit to the field, you will see the

icon. Click this icon to view the full list of criteria.



Click **Clear** to reset existing search criteria and to clear all fields.

Search in the case group hierarchy

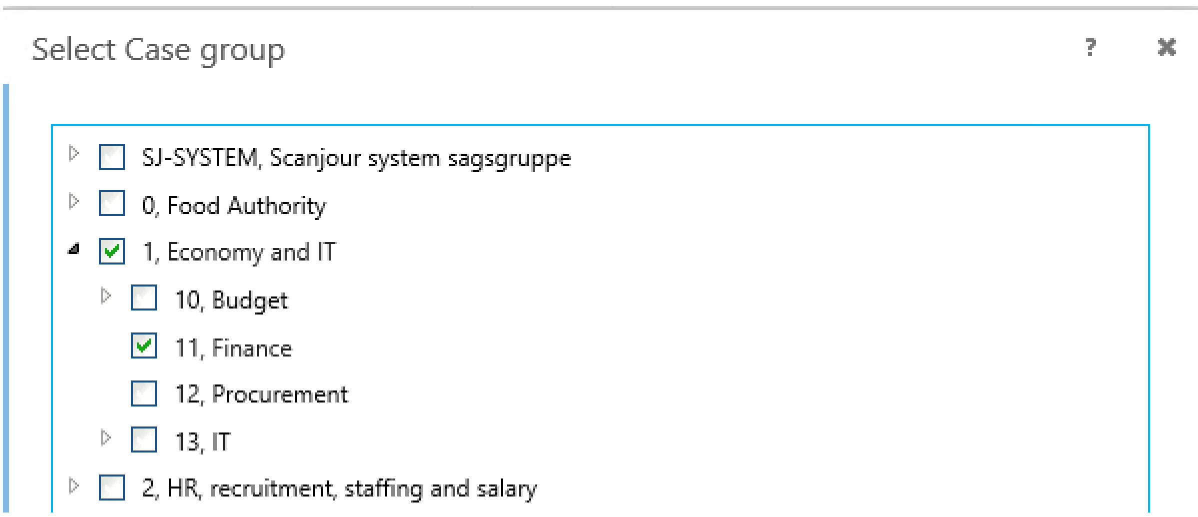
If you search for cases in a case group, you can include or exclude its child case groups in the search by toggling the **[hierarchy]** and **[case group]** tags over the **Case group** field.

Tip: Click the **Select Case group** button in the **Case group** field to open the **Select Case group** form and select at least one case group to display the **[hierarchy]** and **[case group]** tags.

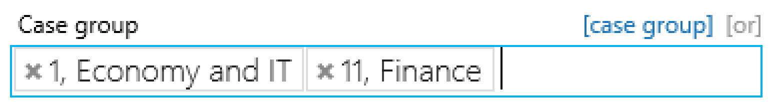
- Select the **[hierarchy]**tag to include child case groups in your search.
- Select the **[case group]** tag to exclude child case groups in your search. This narrows your search to only those case groups selected in the **Select Case group** form.

Example:

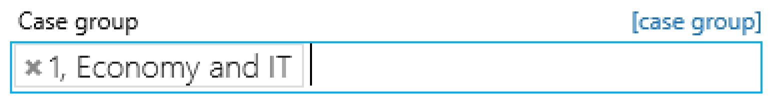
You have selected and applied case groups 1 and 11.



Click the **[case group]** tag to only search for cases in case groups 1 and 11:



Click the **[hierarchy]** tag to search for cases in the case groups 1, 10, 11, 12, 13 and their child case groups. You do not need to select the **11. Finance** case group as long as the **1. Economy and IT** Case group is selected in the **Select Case group** form.



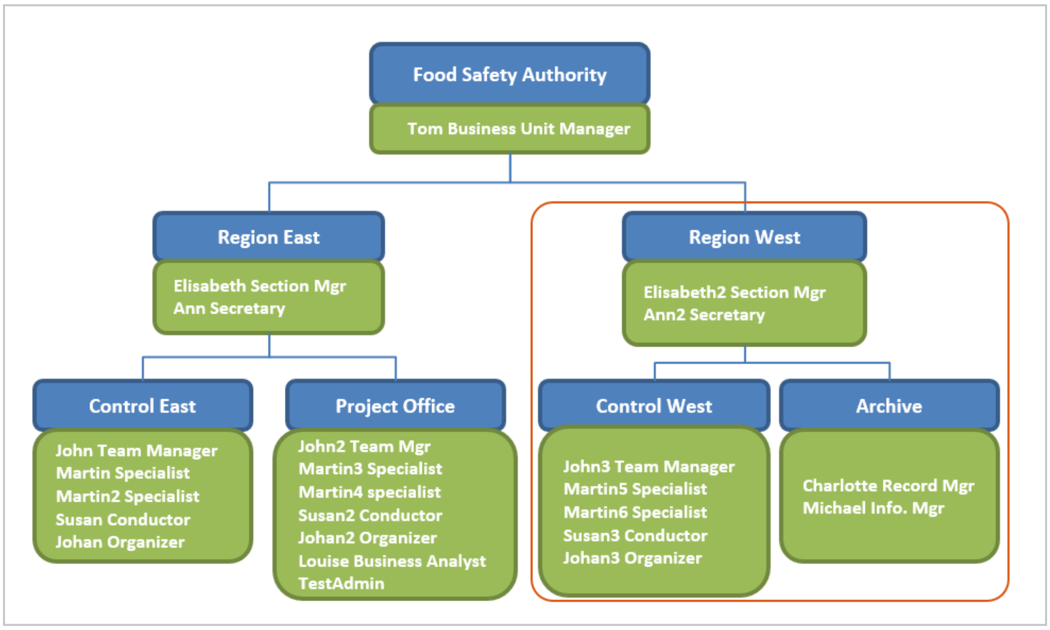
You can toggle between searching in a case group and searching in the case group hierarchy by toggling between the **[case group]** and **[hierarchy]** tags

Search in the responsible unit hierarchy

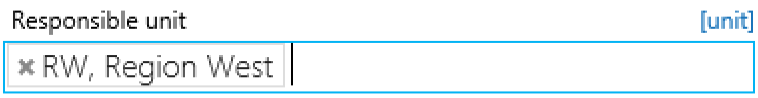
If you search for cases or documents by a responsible unit, you can include or exclude its child responsible units in the search. To include, ensure that you have **[hierarchy]** selected. To exclude, ensure that you have **[unit]** selected.

Example:

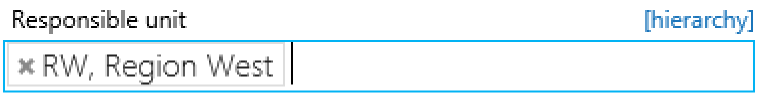
An organization has the following structure:



Click the **unit** tag to only search for cases in the *Region West* unit:



Click the **hierarchy** tag to search for cases in the *Region West*, *Control West* and *Archive* units:



Search using the Read Access field

When specifying read access codes in the **Read access code** field for case, document and contact searches, all existing read access codes for cases, contacts or documents respectively are displayed as a text string in the drop-down list for both WorkZone Standard and WorkZone Corporate Editions.

The Read access code text string is ordered alphabetically and filtered from left to right and filter terms are also applied from left to right. For example if a user filters the read access code drop-down list with "aaa bbb ccc", the access code "aaa ccc bbb" will not be displayed. If the filter applied is "aaa ccc" instead, the access code "aaa ccc bbb" will be displayed.

See Also

Corporate access codes

Search using free text fields

Free text search fields do not distinguish between uppercase and lowercase letters. The operators can be written in uppercase, lowercase, or a combination of the two.

> **Example**: If you search for *petersen*, you will also find *Petersen*.

Search operators can be applied in free text fields and you can enter one or more words in the search field.

- If you enter a single search word, all elements which contain the search word will be displayed on the search results tab.

- If you enter three search words or less, the search expression will be interpreted as containing an AND operator between the each search word. The automatically applied AND operators will not be displayed in the free text search field.
- If you enter any search operators (AND, OR, NOT, etc) to the search words (for example if you enter “Frank OR Lloyd OR Wright” in the free text search field), the free text search expression will not be interpreted as containing an AND operator between each search word and the search expression will be applied as it is entered in the field.
- If you enter four or more search words in the free text search field and do not used any search operators, all the individual search words will be joined into one single exact search expression. For example if you enter *Significance of sun spots for climate variability* in the free text search field, the document named *Significance of sun spots for climate variability* will be displayed in the search results tab, but the document named *Significance of sun spots fo climate variability* will not be displayed.

Example 2:

For a contact registered with the following name field values Name 1: *Allan Bob* Name 2: *Bacon*, using the search texts *Allan*, *Bob*, *Allan Bob*, *Allan Bacon*, or *Bob Bacon* in the free text search field will display the contact named *Allan Bob Bacon* in the search results.

If you enter *Allan OR Bacon*, all contacts that contain the name *Allan* or *Bacon* will be displayed in the search results tab.

> **Tip:** If you do not know the exact wording, you can search for individual words combined with search operators.

Free text searches look up in all indexed text, for example titles of cases or documents, case text, and the content of documents.

Fields for free text search can be found on the search pages.

> **Note:** When searching for a new document that you have just created, your search can fail if this document has not been indexed yet. In this case, either try again later, or use a

structured search using the text fields that are updated immediately.

Normal vs. extended searches

When creating a free text search, you can toggle between normal and extended searches as a search parameter to the **Free text** field.

- **Normal searches** will exclude any leading asterisk wildcard characters (*) from the search term and is the default setting.
  For example the search term **Case** will be treated as *Case**.
- **Extended searches** will include any leading asterisk wildcard characters (*) to the search term.
  For example the search term **Case** will be applied directly to the search as **Case**.

If you select the **extended search** parameter, the search can produce a large number of results, consume noticeable system resources and take significantly longer to display the search results as all WorkZone elements in the search are traversed for all full and partial occurrences of the search term.

See Also

Search operators

Search using free text fields

Use stop words

Stop words are common words used so often that they are unsuitable as search values, for example *of, is, after, or*.

For free text searches in WorkZone Client, these words are disregarded. For example, when searching for *approval of*, the word *of* is ignored, and the search is therefore only performed for *approval*.

If you want to use stop words in free text searches, these words must be removed from the list of stop words. You can remove and/or add the desired/undesired stop words in WorkZone Configuration Management in Basic Data > The Stopwords module.

See Also

Document search on child cases

Document search on child cases

You can find all documents on a parent case and its child cases in a search query by searching down the hierarchy of child cases for all documents. You must select a parent case and then define how the search query is to perform the search, either searching for the document only by case or searching downwards through the case hierarchy. Documents on the parent case are also listed in the search results.

> Tip: You can also add the **Documents in hierarchy** detail tab to the case detail page to display a list of all documents attached to an active case and its child cases.

The Case (simple) field

The **Case (simple)** field on the **Document Search** page field is used to specify the parent case and define the search behavior (how the search query is to perform the search).

You can toggle between two search behaviors:

- Select **[case]** to search for the case only. The field can contain multiple cases.
- Select **[hierarchy]** to search downwards through the case hierarchy. The field can only contain one case.

The direction of the case hierarchy search is always downwards through the parent-child case hierarchy. If you base your select on a child case, the search query will not "search upwards" from the child case to the parent case.

Like all searches, you can save your search and run it later and distribute it (share the search) with other WorkZone users.

To create a search for all documents on a case and its child cases:

1. In the ribbon, click **New search** > **Document** to open the **Document search** page.
2. In the ribbon of the **Document search** page, click the **Show all fields**button to display the **Case (simple)** field in the page.
3. Click the **Case (simple)** field and select the parent case. All cases are displayed in the list, including child cases. Make sure that you have based your search in the correct parent case.
4. Click **[case]** to the right of the **Case (simple)** text to toggle between **case** and **hierarchy** search. Make sure **[hierarchy]** is displayed.
5. Fill in any other relevant fields. If you enter multiple search criteria in fields that can contain multiple values, for example Document type, an OR search will be performed.
6. In the ribbon, click **Search**. The list of search results is displayed at the bottom of the page.

See Also

Manage tabs

Search operators

You can use search operators when performing a search. A search operator is a sign or a word that expands your search options. You should write the search operators with your search criteria.

> **Tip:** For Date and DateTime fields, you can enter values such as +1d or -1w to adjust the date fields by the number of years, quarters, months, weeks, days, hours, minutes or even seconds. See Shortcut keys for more information.

> **Note:** Searches work differently in text fields and in free text fields.

Search using text fields

Not all search operators can be used across all search pages and fields. See how you can use the search operators below.

<table>
<tr><th>Operator</th><th>Name</th><th>Description</th></tr>
<tr><td>*</td><td>Wildcard</td><td>Replaces one or more characters.

Example

Search in the field Title on the search page for cases.
If you write:
Sun* - you will find cases where the field Title begins with sun, for example sun vehicle.
sun - you will find cases where the field Title contains sun, for example a sunder, evening sun, and sun vehicle.
*sun - you will find cases where the field Title ends with sun, for example evening sun.</td></tr>
<tr><td>^</td><td>Hat (Circumflex)</td><td>Removes the distinction between uppercase and lowercase letters.

Example

If you write ^*sun* in the field Title, you will find cases where the field Title contains the word sun, regardless of whether it is in uppercase or lowercase letters, for example Chocolate SUNdays Ltd.</td></tr>
<tr><td>|</td><td>Or</td><td>Searches for individual elements where one or more of the entered words appear.

Example

By writing market|currency in the free text search field, you will find all documents where at least one of the words market or currency occurs.</td></tr>
</table>

Operator	Name	Description
&	And	Searches for individual elements where all the entered words appear. To search for the character `&`, not as an operator, but, for example, as part of the name of a contact, you must insert a backslash before the character, that is, `\&`. Example To find *Liebestraum, Immergut & Co*, you should search by typing *Liebestraum, Immergut \& Co*.

Search using free text fields

Not all operators can be used on all search pages and fields. See how you can use the search operators below.

Operator	Name	Description
*	Wildcard	Replaces one or more characters. Example If you search for cases and enter: • *Sun** - you will find cases that contain words that begin with sun, for example **sun** vehicle. • **sun** - you will find cases that contain the word sun, for example a **sun**der, evening **sun**, and **sun** vehicle. • **sun* - you will find cases that contain words that end with sun, for example evening **sun**. • [normal search] Toggle this search para-

Operator	Name	Description
		meter to the **Free text** search field to exclude leading asterisk wildcard characters (*) from the search term. This is the default setting. • [extended search] Toggle this search parameter to the **Free text** search field to include leading asterisk wildcard characters (*) to the search term. Using searches, for example **sun* and **sun** is not recommended for free text searches as all WorkZone elements are traversed for all full and partial occurrences of the search term. This type of search can produce a large number of results, consume noticeable system resources and take significantly longer to display the search results.
?	Question mark	Replaces exactly one character. Example If you write *Pe?ersen* and click **Contacts** in the menu, you will find all contacts with the name Pe**t**ersen or Pe**d**ersen, but not Pe**tt**ersen.
|, OR	Or	Searches for individual elements where one or more of the entered words appear. For free text searches for documents, the search is performed in the meta data fields and in the document itself. Example By writing *market|currency* in the free text search field, you will find all documents where at least one of the words *market* or *currency* occurs.

Operator	Name	Description
&, AND	And	Searches for individual elements where all the entered words appear. Example To find all documents where all the words *market* AND *currency* occur (for example, the words can be found in the meta data fields of the document or as indexed free text), you need to enter *market* AND *currency* in the free text search field on the document detail page. To search for the character & not as an operator, but, for example, as part of the name of a contact, you must insert a backslash before the character, that is, \&. Example To find Liebestraum, Immergut & Co, you should search by typing *Liebestraum, Immergut \& Co*.
~, NOT	Not	Searches for items where the words you enter after the operator do not occur. Example Find all documents where none of the words after NOT occur. If you write *interest NOT deposits*, you will find all the documents in which the word *interest* but not *deposits* is found. You should always search for an item that contains "*<word_to_find> NOT <word_to_find_not>*". Searching for *NOT deposits* will produce no result.

Manage saved search lists

You can save and reuse the search lists you create, sharing the searches with others and using the saved searches as a base for other searches, customized tab pages or options within lists.

Save a search as a list

When you save a search, you automatically become the owner of the search.

A search owner can share the search with other users, update the search and reassign the search to another user. When you reassign a search to another user, you are handing over ownership of the search and the user the search is assigned to becomes the new owner.

Users who are not owners of a search can use the search in lists and use the shared search as a base to create their own searches from.

Create a saved search list

1. Open a search page as described in Create your search steps 1-2.
2. Fill in the relevant search fields and click **Search**.

   To update your search results, change the search criteria and click **Search**.
3. In the ribbon, click **Save** to open the **Save Search** form.
4. Enter a name and possibly a description of the search list.
5. Click **Save**. You can now find your saved search list in the navigation pane under **My lists**.

> **Tip:** For information about how to add a list to the navigation pane, see Manage lists.

Edit a saved search list

A saved search can be change to reflect your organization's evolving requirements.

You can:

- Edit your own saved search, changing the search criteria.
- Rename a saved search, effectively creating a new search with the same or changed search criteria.
- Create a new search based on your own saved search with the same or changed search criteria.
- Create a new search based in a shared search owned by another user.

Edit a saved search

If you are the owner of a search, you can edit the search, changing search criteria and then update the search or save the search as a new search.

If you are not the owner of a shared search, you cannot overwrite (and thereby update) the shared search, even if the search is shared with you. You can however save the edited search as a new saved search, with you as the owner. You can then share the new saved search.

> **Tip:** If you are editing a shared search you do not own, make sure the name of your new search is not identical to the shared search you are basing your new search on.
>
> The name of the search can be changed when you click the **Save** button.

All elements using the search will be updated when the changes to the search are saved.

> **Tip:** If the **Owner** column is not displayed in the list, you can add the **Owner** column to be able to see who owns the shared search. See Add / Remove columns in a list.

To edit a saved or shared search you own

1. Click **My Lists** found in the **Other** panel on the Navigation pane on the **Home** tab to open a list of your saved searches.
2. In the **My Lists** area, select the search you want to edit.

3. In the ribbon, click **Edit** or right-click the search and select **Edit**to open the search in a new tab with the same title as the selected search.
4. In the new tab, edit the search criteria.
5. In the ribbon, click **Save** to open the **Save Search** form. You can rename your search if necessary.
6. In the **Save Search** form:
    1. In the **Name** field, enter a new name for your search if necessary.
    2. In the **Description** field, enter a description for your search.
    3. Select the **Overwrite** check box to overwrite your original search if you have kept the original name of the search. If you do not select the **Overwrite** check box, existing searches will not be overwritten, for example if you have renamed your search with a name of a search that already exists and you do not select the **Overwrite** check box, the changes will not be saved.
    The **Overwrite** button will not be displayed if you are editing a shared search owned by another user.
7. Click **Save**.

Delete a saved search list

You can delete a saved search list if it has become obsolete or is no longer used.

> **Note:** You can only delete searches you own.

When you delete a saved search, all elements that are based on the saved search, such as customized detail tabs, will be removed as well. If the search you want to delete is included in one or more distributed configurations, an overview of the configurations that contain the search is displayed. You must confirm the removal of the search to updated the configurations.

> **Tip:** If the **Owner** column is not displayed, you can add the **Owner** column to the list to be able to see who owns the shared search. See Add / Remove columns in a list.

To delete a saved search

1. Click **My Lists** found in the **Other** panel on the Navigation pane on the **Home** tab to open a list of your saved searches.
2. In the **My Lists** area, select the search you want to delete.
3. In the ribbon, click **Delete** or right-click the search and select **Delete**.
4. In the **Confirm** dialog, click **Yes** to delete the selected search.

To delete a shared search

1. Click **Shared Lists** found in the **Other** panel on the Navigation pane on the **Home** tab to open a list of searches you have shared.
2. In the **Shared Lists** area, select the search you want to delete.
3. In the ribbon, click **Delete** or right-click the search and select **Delete**.
4. In the **Confirm** dialog, click **Yes** to delete the selected search.
5. If the shared search is used by other users in WorkZone, the Confirm dialog is displayed and you must click **Yes** to confirm the deletion of the search.

Create a new search based on a saved search

You can create a new search based on the search criteria of an existing, saved search or shared search. In this way, several base searches can be created and used as search templates for more specialized searches. Searches created from other searches will not be updated if the original search is edited.

> **Tip:** If the **Owner** column is not displayed, you can add the **Owner** column to the list to

> be able to see who owns the shared search. See Add / Remove columns in a list.

To create a new search based on a saved search you own

1. Click **My Lists** found in the **Other** panel on the Navigation pane on the **Home** tab to open a list of your saved searches.
2. In the **My Lists** area, select the search you want to base your new search on.
3. In the ribbon , click **Edit** to open the search in a new tab with the same title as the selected search.
4. In the new tab, edit the search criteria.
5. When you are finished, click **Save** to open the **Save Search** form.
6. In the **Save Search** form
    1. In the **Name** field, enter a new name for your search.
    2. In the **Description** field, enter a description for your search
    3. Clear the **Overwrite** check box.
7. Click **Save** to create your new search.

To create a new search based on a shared search you do not own

1. Click **Shared Lists** found in the **Other** panel on the Navigation pane on the **Home** tab to open a list of searches shared with you.
2. In the **Shared Lists** area, select the search you want to use as a base.
3. In the ribbon, click **Edit** or in the list, right-click the search and select **Edit** to open the search in a new tab with the same title as the selected search.
4. In the new tab, edit the search criteria.
5. In the ribbon, click **Save** to open the **Save Search** form. You can rename your search if necessary.

6. In the **Save Search** form:
    1. In the **Name** field, enter a new name for your search. Make sure the name of your new search is not identical to the shared search you are basing your new search on.
    2. In the **Description** field, enter a description for your search.
7. Click **Save** to create your new search.

Share a saved search list

When you have saved a search, you can share your search with your entire organization or with the selected users, including groups of users. Shared searches can be used by other users as searches for lists or as a base for creating their own searches.

> Important: Remember to include yourself to the list of users you are sharing your search with.

> **Note:** You can only share one search at a time.

To share a saved search list

1. Click **My Lists** found in the **Other** panel on the Navigation pane on the **Home** tab to open a list of your saved searches.
2. In the **My Lists** area, select the search you want to share.
3. In the ribbon, click **Share** or right-click the search and select **Share** to open the **Share search** form.
4. In the **Access code** field, enter the access code of the users, groups of users, or organization that you want to share your search with.
Remember to share the search with yourself as well.
5. Click **Apply** to close the **Share search** form and update the search.

View shared search users

If you want to see who you are sharing a search with, you can use the **Share search** form.

To display users the search is shared with

1. Click **My Lists** found in the **Other** panel on the Navigation pane on the **Home** tab to open a list of your saved searches.
2. In the **My Lists** area, select the shared search you want to display users you have shared the search with.
3. In the ribbon, click **Share** or right-click the search and select **Share**to open the **Share search** form. The users you have shared the search with are displayed in the **Access code** field.
4. Click **Cancel** to close the **Share search** form without updating the search.

Reassign a shared search

If you have shared one of your searches, you can reassign it to one of the users you have shared the search with. You cannot reassign searches you own but have not shared.

When you reassign a search to another user, you are handing over ownership of the search. The user the search is assigned to becomes the new owner.

You can also reassign a shared search that you do not own if the owner (WorkZone user) has been rendered inactive, for example if the owner no longer is a part of your organization. This is to enable editing of shared searches that are widely used and the original owner no longer is a part of the organization.

You can assign the shared search to yourself, using [@me] as the shared user.

> **Tip:** If the **Owner** column is not displayed, you can add the **Owner** column to the list to be able to see who owns the shared search. See Add / Remove columns in a list.

To reassign a shared search

1. Click **Shared Lists** found in the **Other** panel on the Navigation pane on the **Home** tab to open a list of searches shared with you.
2. In the **Shared Lists** area, select the shared search you want to reassign to another user.
3. In the ribbon, click **Assign to** or right-click the search and select **Assign to** to open the **Assign search to** form.
4. In the **Assign search to** form, click the **Owner** field and select a new owner for the shared search.
5. Click **Save** to reassign the shared search and close the **Assign search to** form.

Save a search as a custom detail tab

You can create a new detail tab on a case, document, or contact to display more specific list of documents or parties. For example, in addition to having a standard tab with all parties, you can have a specific tab that only displays parties of the *Municipalities* type.

Note: Filter documents is only available on cases.

Create a custom tab

To create own custom tab, you must define search criteria for the filter, run the filter and save its results as a tab.

To create a custom tab

1. In the detail tabs area of a detail page, click **Select tabs to view** to open the **Tabs selector** form.
2. In the **Tabs selector** form, click **Add new tab** and select the filter type to apply to your custom tab.

> **Note:** The **Filter parties** option is called **Filter contact references** on the contact detail page.

3. Select an existing saved search list from the **Available saved search filters** drop-down list

   - Or -

   Create a search directly in the tab, add filter criteria and then save the search. You can only select saved searches that you own. Shared searches can be reassigned to another user, making the new user the owner. See above for details.
4. Click **Check filter** to view results of the defined filter.
5. Click **Save** and specify the name of the new custom tab and, optionally, its description.

Configure a custom tab

You can rename a custom tab, edit a custom filter, and remove a custom tab. You can only rename standard tabs.

To configure a custom tab

1. In the detail tabs area of a detail page, click + **Select tabs to view** to open the **Tabs selector** form.
2. In the **Tabs selector** form, locate the custom tab you want to configure and click **Edit tab**.

   Hint: Only custom tabs contain the **Edit tab** icon. Standard tabs contain the **Edit** icon.
3. Select **Rename**, **Edit filter**, or **Remove** depending on what you want to do.

Subscriptions

You can subscribe to your saved or shared search list and receive e-mail notifications about new items in this list.

You can view and manage your subscriptions in **Subscriptions** under the OTHER section in the navigation pane.

> Tip: You can also add the list to the dashboard as a widget.

Subscribe to your saved search list

When you subscribe to a saved search, the recurrence of the updates is based on the subscription creation date and time.

> **Example**: If you created a subscription on June 7th , 2019, 08:50:21 then the **Daily** recurrence option will send updates on June 8th, 2019, 08:50:21, June 9th, 2019, 08:50:21, June 10th, 2019, 08:50:21 and so on.

1. Click **My Lists** found in the **Other** panel on the **Navigation** pane on the **Home** tab to open a list of your saved searches.
2. In the list, select the search that you want to subscribe to.
3. In the ribbon, click **Subscribe** to open the **Add subscription** form.
4. In the **Add subscription** form, fill in the required fields:
    - **Recurrence** - Specify how often you want to get updates about the list by email:
        - Daily
        - Once per 4 hours
        - Weekly

- **Items in email** – Define the maximum number of list items that you will get in the emails.
- **New items only** – Select the check box if you want to get notifications only about new items in the subscribed list. Clear the check box to receive new and old items.

5. Click **Save**.

Edit your subscriptions

In the navigation pane, click the **Subscriptions** list. All of your subscriptions and their details are displayed. Select the subscription(s) you want to edit and proceed with the following steps:

1. Click **Edit**.
2. Apply required changes:
   - **Next occurrence** – You can set the date and time when you want to receive the next email with updates.
   - **Recurrence** – Specify how often you want to get updates about the list by email.
   - **Items in email** – Define the maximum number of list items that you will get in the emails.
   - **New items only** – Select the check box if you want to get notifications only about new items in the subscribed list. Clear the check box to receive new and old items.
3. Click **Save**.

Unsubscribe from your saved search list

You can unsubscribe from a saved search list at any time:

1. In the navigation pane, click the **Subscriptions** list. All of your subscriptions and their details are displayed.

2. Select one or more subscriptions from which you want to unsubscribe and click **Unsubscribe** in the ribbon to open the **Confirm** dialog box.
3. Click **Yes** to unsubscribe from a saved search list.

See Also

Save a search as a list

Share a saved search list

Quick Search

Quick searches enable you to rapidly search for cases, documents or contact persons based on a single piece of input, for example a contact person's name or a document number. The located case, document or contact is then opened in a new detail page.

You can perform quick searches instead of creating searches and defining search criteria and filters, saving time and jumping directly to the case, document or contact you are searching for.

Starting quick searches

Quick searches can be started by clicking the **Open** button in the tabs and selecting which item type you want to search for: Case, Document or Contact. You can also use a shortcut key combination to start the quick search by pressing **Ctrl+G** and then selecting which item type you want to search for.

> Tip: The **Ctrl+G** shortcut key is a global shortcut key so you can start a quick search from where ever you are in the WorkZone.

Valid search criteria

You use the following input as search criteria for quick searches:

- Cases: Case number, Case title
- Documents: Document number, Document title
- Contacts: Contact name 1, Contact name 2, Contact ID

MRU and Database

When using a quick search, the MRU (Most Recently Used) list is searched first and then the entire database. The MRU list in the quick search form can be scrolled and you can select the item from the list if necessary.

Note: You cannot use the **Open** button to locate or open documents with the AFS state.
The AFS document state was used by the WorkZone Captia Web Client and is no longer in use in newer versions of WorkZone.

How to perform a quick search

To perform a quick search for a case

1. In the ribbon, click **Open** button > **Case** (or press **Ctrl+G** and select **Case**) to open the **Go to case** form. The **Go to case** form opens with a list of the most recently used cases already accessible.
2. In the empty field in the top of the list, filter the list by entering the case number or case title you want to find.
3. When you have found the case you are searching for, select it and click the **OK** button to go directly to the case.

To perform a quick search for a document

1. In the ribbon, click **Open** button > **Document** (or press **Ctrl+G** and select **Document**) to open the **Go to document** form. The **Go to document** form opens with a list of the most recently used cases already accessible.

2. In the empty field in the top of the list, filter the list be entering the document number or document title you want to find.
3. When you have found the document you are searching for, select it and click the **OK** button to go directly to the document.

To perform a quick search for a contact

1. In the ribbon, click  **Open** button > **Contact** (or press **Ctrl+G** and select **Contact**) to open the **Go to contact** form. The **Go to contact** form opens with a list of the most recently used cases already accessible.
2. In the empty field in the top of the list, filter the list by entering the contact name or contact ID you want to find.
3. When you have found the contact you are searching for, select it and click the **OK** button to go directly to the contact.

See Also

Searches

About Notes

You can create notes on cases, documents, or contacts in order to record case management progress and to share the notes with your colleagues. Other users can create their own notes and edit, lock or delete your notes on the same cases, documents, or contacts if they are assigned sufficient rights to do so.

You can quickly view, create, edit, lock, and delete notes on the selected case, document, or contact. Notes can be exported to Microsoft Excel for more work or printed to a PDF file and either sent to a physical printer or saved back on the original case, document, or contract.

Notes are protected by the access codes defined on a case, document, or contact on which the note has been created. If you do not have write access to a case, document, or contact, you will not be able to create, edit, delete or lock the attached notes.

Note: You cannot add notes to the contacts that have the Unit type.

The note text

Notes can only contain 2,000 characters, including hidden formatting codes and the Note text field will indicate how many characters the field currently can contain.

The note text can also be lightly formatted, for example a text selection can bolded, italicized, underlined, struck through, made into a bulleted or numbered list as well as stripped of formatting. The note text can contain the Rich Text Format (RTF), which enables you to copy the text from other RTF-sources into the note text, for example from e-mail messages.

Note types

All notes must be assigned a Note type. Note types are created and maintained by your organization in the WorkZone Configurator and can be used to categorize notes that are created based on work procedures and accepted norms particular to your organization.

The Notes detail tab

All notes on a case, document, or contact are displayed in the **Notes** detail tab on the case, document, or contact detail page. The **Notes** tab enables you to gain an overview of all the notes on a case, document, or contact as well as sort the notes and filter them to locate the note or notes you want to find.

> Tip: If the **Notes** tab is not displayed, you can manually add it to the case, document, or contact detail tabs, see Manage tabs.

On the **Notes** tab you can:

- Create a new note
- Edit an existing note
- Lock one or multiple notes
- Delete one or multiple notes
- Export selected notes to Microsoft Excel
- Open a preview of a note
- Print one or multiple notes as a PDF file. You can save the PDF file back on the case, contact or document or you can open the PDF file, save it elsewhere and/or send it to a physical printer.

Sort the notes by a different column

By default, all displayed notes are sorted by the **Created date** but you can sort the notes by clicking the column header of the column you want the notes sorted by. Also, click the column header to toggle between ascending and descending sort order.

Filtering the contents

You can filter the contents of the **Notes** detail tab by applying a filter to each of the column headings. Only one filter can be applied to a column heading, but each column heading can contain a filter, so you can create multiple filters for the entire **Notes** tab.

> Tip: Column headers with an applied filter are highlighted in yellow.

Refresh the tab

The **Notes** tab is not automatically refreshed when other users create new or edit existing notes while you are working on the notes in the **Notes** tabs.

Click **Refresh** to manually refresh the **Notes** tab.

Manage notes

You can do the following to mange your note in the **Notes** detail tab.

Prerequisite: All notes inherit access rights defined for the case, document, or contact the notes are attached to.
If you do not have write access to a case, document, or contact, you will not be able to create, edit, delete or lock the attached notes.

Create a new note

1. Open the detail page for the case, contact, or document you want to create a note on. You can only create notes on case, documents or contacts you have write access to.
2. In the **Notes** detail tab, click **Add** to open the **Add note** form.
3. In the **Add note** form > **Note text** field, enter the note text.
   You can format your note text as well as remove the formatting from a text selection.
   The **Note text** field can only contain 2,000 characters, including hidden formatting codes.
4. In the **Add note** form > **Note Type** field, select the type of note from the drop-down list.
5. Click **Save** to save your changes and exit the form.

Edit an existing note

You can only edit one note at a time and locked notes cannot be edited. You can only edit notes on case, documents or contacts you have write access to.

1. Open the detail page for the case, contact, or document you want to edit a note on.
2. In the **Notes** detail tab, select the note you want to edit and click **Edit** to open the **Edit note** form. You can also right-click the note you want to edit and select **Edit**.
3. In the **Edit note** form > **Note text** field, enter the new note text.
   You can format your note text as well as remove the formatting from a text selection.
   The **Note text** field can only contain 2,000 characters, including hidden formatting codes.
4. In the **Edit note** form > **Note Type** field, select the type of note from the drop-down list.
5. Click **Save** to save your changes and exit the form.

Lock selected notes

You can lock your own or a colleague's notes. When the note is locked, it cannot be edited or deleted or unlocked.

You can only lock notes on case, documents or contacts you have write access to.

1. Open the detail page for the case, contact, or document you want to lock notes for.
2. In the **Notes** detail tab, select the notes you want to lock and click **Lock** to lock the selection. You can also right-click the note you want to lock and select **Lock**.
3. In the **Confirm** dialog, click **Yes** to lock the note.

Delete selected notes

You can delete your own or a colleague's notes. You can only delete notes on case, documents or contacts you have write access to. Locked notes cannot be deleted.

Unlike deleting cases or documents, deleted notes cannot be restored.

1. Open the detail page for the case, contact, or document you want to edit a note on.
2. In the **Notes** detail tab, select the notes you want to delete and click **Delete**.

   You can also right-click the note you want to delete select **Delete**.
3. In the **Confirm** dialog, click **Yes** to delete the note.

Export notes to Microsoft Excel

You must have Microsoft Office installed in order to open the exported notes in Microsoft Excel.

Note that the entire contents of the note text will be exported, including the hidden formatting codes, which will be visible in the spreadsheet.

1. Open the detail page for the case, contact, or document you want to export to Microsoft Excel.
2. In the **Notes** tab, select the notes you want to print and click **Export to Excel**.

   You can also right-click the note you want to export and select **Export to Excel**.
3. Select whether to save the spreadsheet or to open the Microsoft Excel.
4. In the top bar of the Microsoft Excel spreadsheet, click **Enable Editing** and then **Activate content** to enable the excel spreadsheet to be updated with data from WorkZone.
5. In the **Privacy level** form, define the level of privacy of your data for the current spreadsheet to start data transfer from WorkZone to the spreadsheet.
6. You can work in the Excel spreadsheet and save it locally.

Preview a note text

You can open a preview pane and read the note text for a note but you can only preview one note at a time. When the preview pane is open, you can select another note to preview in the Notes tab. You can only preview notes on case, documents or contacts you have read access to.

1. Open the detail page for the case, contact, or document contain the note you want to view
2. In the **Notes** detail tab, select the note you want to preview and click **Preview** to open the preview pane in the right hand side of the window. You can also right-click the note you want to export and select **Preview**.
3. You can select a new note in the **Notes** tab to display the note text in the preview pane.
4. Click **Close** to close the preview pane.

Print one or multiple notes

You can convert a selection of notes to a single PDF file and save it back on a case. You can also save the PDF file on your local disk or open the file in a PDF viewer to read. From the PDF viewer program, you can send the file to the printer directly.

> Prerequisite: To create a PDF file, the WorkZone PDF Engine must be enabled.

1. Open the detail page for the case, contact, or document you want to print notes.
2. In the **Notes** detail tab, select the notes you want to print and click **Print notes** to open the **Print notes** form. You can also right-click the notes you want to print and select **Print notes**.

3. In the left pane of the **Print notes** form, select the notes that you want to include in a PDF file. For more specific search, select a note type from the drop-down list or expand **Advanced** search to apply your criteria.
4. Click to move the selected notes to the right pane. Only notes from the right-hand list will be included in the PDF file. Drag and drop notes to place them in the order that you want them to appear in the PDF file.
5. Click the **Advanced** tab and adjust settings for the PDF file if necessary:
    1. In the **Template** field, select a template for a PDF file. The case with notes template includes meta data of the case and selected notes.
    2. In the rest of the fields: Edit title, document type, document group, case handler, letter date, document state, and classification for the PDF file if necessary.
6. Determine what to do with the PDF file:
    - Click **Print and save** to create a PDF file that will be saved on the case, document, or contact.
    - Click **Print** open the PDF file directly in a PDF viewer. You can print the PDF directly from the PDF viewer.
    - Click **Print and Save** to save the PDF file on your local disk.

About WorkZone Chat

WorkZone Chat is an internal communication tool which enables WorkZone users to collaborate and communicate about specific cases or documents as well as add additional or remove existing cases and/or documents. WorkZone Chat can also be used to communicate more informally with other WorkZone users without being associated to a case or document.

WorkZone Chat can only be used to communicate with other WorkZone and can only be used internally through WorkZone. WorkZone Chat cannot be used to communicate with other parties or contacts externally. If you need to communicate with an external contact or party, you must use another 3rd party chat program.

> **Note:** WorkZone Chat is disabled by default and must be enabled by a system administrator in **WorkZone Configurator** > **Global** > **Feature settings** > **Client** > **Chat**.

Removing participants and leaving a chat

Chat participants can leave chats or be removed from a chat. In both situations, the participant is no longer a part of the chat and will not receive notifications when the chat is updated (for example when new chat messages are posted). All existing messages from the participants who have left are still displayed in the chat. The participants who have left or been removed can still be added to the chat again.

Chat notifications

Users receive notifications when they are added to a new chat or when a new message is received in a chat they participate in. Users can mute a chat, which will hide all notifications to the user from the muted chat. Other chat participants that have not muted the chat will still receive notifications about new messages.

Opening a chat

A chat window can be opened from the bottom of the browser page or from any case or document that the chat contains references to. If the chat is opened from the bottom of the browser page, all chats for the user are displayed, and if a chat is opened from a referenced case or document, only that specific chat is displayed.

Case and document references in chats

Chats can contain case and/or document links which the chat participants can access for reference during the chat conversation.

You can add case and/or document references when you create chats or you can create an independent chat without any case or document references.

If you need to change the references at a later date, you can add additional or remove existing case and/or document references directly on the chat at any time, for example if information that can affect one or more cases surfaces in a chat, users can add relevant case and/or document references directly to the chat or remove irrelevant ones.

> Note: You can add document and case references to a chat irrespective of each other. Selecting to base a chat on a case does not prevent you from adding a document from another case as a document reference to the same chat.

Case and document access

Cases and documents submitted as references to chats still respect all read- or write-based access codes assigned to the original cases and documents. This means that you can only view chat references to cases or documents that you have read access to and you can only add or remove chat references to cases or documents that you have read access to.

Chats are only displayed in the **Chats** detail tab on the case detail page or document detail page if you have at least read access to the respective case and/or document.

You can still be a participant in a chat but not have access to the referenced cases or documents. In this situation, the cases and documents you do not have read access to, are not displayed in the References page of the chat message area nor in the chat data. Additionally, you will not be able to access the chat from the Chat detail tab for the cases or documents you do not have read access to. You can still access the chat from the chat window opened from the bottom of the browser page.

Creating Chats

Chats can be created from the bottom of the browser page or directly from a case or document. If a chat is created from a case or document, a reference to the case or document is already created. You can then add participants and start chatting. If the chat is created from the bottom of the browser page, you must manually add any relevant references as well as add participants.

References and participants can be added and removed at any time during the chat, and chat details, such as title and description, can be changed by any chat participant at any time. Likewise, the chat can be registered to be retained by any user.

Editing chats

Chat data (chat title and description, case and/or document references, and the list of chat participants as well as the chat retention state) can be edited by any chat participant either from the chat window or from the **Chats** detail tab.

Chat participants can only view chat references to cases or documents they have read access to and can only add/remove chat references to cases or documents they have read access to.

Deleting chats

New chats are by default created as unretained chats and will therefore automatically be deleted after a predefined retention period if there is no activity on the chat. Any activity (for example posting new messages) on a chat will reset the retention period.

Chats can be manually deleted by any chat participant and will also be deleted automatically after the retention period for chats has expired. Any activity (for example sending new messages) on a chat will reset the retention period for that chat.

The retention period for chats is defined in the **Retention period for chats** field found in WorkZone Configurator > **Global** > **Chat settings** tab.

Chat retention states can be toggled from unretained to retained, which will prevent the chat from being manually or automatically deleted. Likewise, chat retention states can be toggled from retained to unretained, which will enable the chat to be manually or automatically deleted. Toggling the retention state qualifies as updating the chat and will therefore reset the retention period of the chat.

The WorkZone Chat Window

The WorkZone Chat window contains the overview of respective chat as well as the chat messages and chat settings. The contents of the chat window will depend on where it is opened from: a case, document, or from an internet browser.

Opening the chat window

The chat window can be opened from the bottom of the browser page by clicking **WorkZone Chat** at the bottom of the browser window or from the **Chats** detail tab on the case detail page or document detail page.

From the bottom of the browser page

If you open the chat window from the bottom of the browser page, all chats you participate in will be displayed in your chat window. If you open the chat window from a case or document detail page, only the selected chat will be displayed in the chat window.

From the Chats detail tab

You can open a chat window from a **Chats** detail tab in three ways:

- Double-click the chat in the list in the **Chats** detail tab
- Select the chat in the list in the **Chats** detail tab and click **Preview**
- Right-click the chat in the list in the **Chats** detail tab and select **Preview**

> Tip: Drag the Chat window to other locations in the browser window if the window blocks your access to important elements or fields. The location will be reset when you close the window and a new chat window will be placed in the lower part browser window again.

If the chat window is open, the window will display the selected chat in the **Chats** detail tab.

Chat window elements

The chat window is split into two areas: a chats overview (the right pane) and chat message area (the left pane).

Chats overview (right pane)

The chats overview is always displayed and lists the current chats associated with user, case, or document, depending on from where and how the chat window is opened.

- Chat windows opened from the **Chats** detail tab on the case detail page will display the selected chat and are labeled **Selected chat**.
- Chat windows opened from the **Chats** detail tab on the document detail page will display the selected chat only and are labeled **Selected chat**.
- Chat windows opened from the  **Chat** icon in the bottom of the browser window will display all your chats only and are labeled **Recent chats**.

Chat status in the overview

You can see the general status of the chats in the chats overview pane. Chats that contain unread messages are displayed in bold in the chats overview and the status of the chat participants is indicated to the left of the chat title:

Icon	Description
	White dot The chat contains no participants
	Grey dot All participants in the chat are offline
	Green dot All participant in the chat are online
	Multicolored dot The chat contains a mix of online and offline participants

Note: If you close the chats overview, the chat message area will also be closed.

In the chats overview, you can:

- Create a new chat
- Delete an existing chat
- Edit an existing chat
- Change the chat session type
- Refresh the chat window
- Toggle the chat retention status
- Toggle the chat notification settings for you only.
- Open the chat message area for a selected chat

Chat message area (left pane)

The chat message area displays the actual chat messages of the chat. The chat message area can be closed independently of the chats overview area.

In the chat message area, you can:

- Read newly received chat messages.
- Create and send new chat messages to all participants.
- Add new WorkZone users as participants to the chat.
- Remove existing participants from the chat, including yourself.
- Manually refresh the participants list.
- Add new case and/or document references to the chat.
- Remove existing case and/or document references from the chat.
- Manually refresh the list of case and /or document references.

The chat message area contains three tabs:

- **Conversation:** Displays chat messages. You can post and read chat messages in this tab as well as add case references, document references, and participants to the chat.

- **Participants:** Displays chat participants. You can manage the chat participants in this tab, add new or remove existing participants to the chat.
- **References:** Displays any case or document references. You can manage case or document references in this tab, add new or remove existing references from the chat.

Create a new chat

New chats are by default created as unretained chats and will therefore automatically be deleted after a predefined retention period if there is no activity on the chat. Any activity (for example posting new messages) on a chat will reset the retention period.

WorkZone users that are currently online are displayed with a green dot to the right of the user name while WorkZone users that are currently offline are displayed with a gray dot. You can still send offline WorkZone users chat messages.

1. Click **WorkZone Chat** at the bottom of the browser window to open the chat window.
2. In the **Recent chats** (right) pane of the chat window, click **Add** to open the **Start a new chat** form
3. In the following fields of the **Start new chat** form:
    - **Participants** field: Select one or more participants to the chat. You can add or remove participants later if necessary.
    - **Title** field: Enter a title for the chat.
    - **Description** field: Enter a description of the chat.
    - **Cases** field: Select a case reference to the chat. If the drop-down list contains too many options, enter the case number, case title or case handler to filter the drop-down list.
      This step is optional and you can select multiple case references to associate with the chat.
    - **Documents** field: Select a document reference to the chat. If the drop-down list contains too many options, enter the document number or document title to filter the drop-down list.
      This step is optional and you can select multiple document references to

associate with the chat. You can have document references to other cases than the cases referenced on the chat.

4. Click **Save** to create the new chat and close the **Start new chat** form.
   Select the chat in the chat window to start sending messages to the recipients.

Create a new chat based on a user

You can create a chat based on a WorkZone user's detail page and add case and/or document references to the chat. You can only add chat references to cases or documents that you have read access to.

New chats are by default created as unretained chats and will therefore automatically be deleted after a predefined retention period if there is no activity on the chat. Any activity (for example posting new messages) on a chat will reset the retention period.

WorkZone users that are currently online are displayed with a green dot to the right of the user name while WorkZone users that are currently offline are displayed with a gray dot. You can still send offline WorkZone users chat messages.

1. In the ribbon on the contact detail page for the user you want to start chatting with, click  **New chat** open the **Start new chat** form.
2. In the following fields of the **Start new chat** form:
   - **Participants** field: The current WorkZone user is already added but you can select more participants if necessary. You can add or remove participants later if necessary
   - **Title** field: Enter a title for the chat. The default title is the username and user ID.
   - **Description** field: Enter a description of the chat.
   - **Cases** field: Select a case reference to the chat. If the drop-down list contains too many options, enter the case number, case title, or case handler to filter the drop-down list.
     This step is optional and you can select multiple case references to associate with the chat.

- **Documents** field: Select a document reference to the chat. If the drop-down list contains too many options, you can enter the document number or document title to filter the drop-down list.
  This step is optional and you can select multiple document references to associate with the chat. The document references do not need to be documents on the selected case references.

3. Click **Save** to create the new chat and open the chat window.

Create a new chat based on a case

You can create a chat based on a case from the chat window or directly from the case. You can only add chat references to cases or documents you have read access to.

New chats are by default created as unretained chats and will therefore automatically be deleted after a predefined retention period if there is no activity on the chat. Any activity (for example posting new messages) in a chat will reset the retention period.

WorkZone users that are currently online are displayed with a green dot to the right of the user name while WorkZone users that are currently offline are displayed with a gray dot. You can still send offline WorkZone users chat messages.

From the chat window

To create a new chat from the chat window, see Create a new chat.

From a case

1. In the ribbon on the case detail page, click **New chat** or on the **Chats** detail
   1
   tab, click **Add** to open the **Start new chat** form.

2. In the following fields of the **Start new chat** form:
   - **Participants** field: Select one or more participants to the chat, You can add or remove participants later if necessary
   - **Title** field: Enter a title for the chat. The default title is case number, case name, case handler, and date and time of the chat.
   - **Description** field: Enter a description of the chat.
   - **Cases** field: A reference to the active case is already registered and you can select multiple case references to associate with the chat.
   - **Documents** field: Select a document reference to the chat. If the drop-down list contains too many options, enter the document number or document title to filter the drop-down list.
     This step is optional and you can select multiple document references to associate with the chat. The document references do not need to be documents on the selected case references.
3. Click **Save** to create the new chat and open the chat window.

[1] You can also press **CTRL+SHIFT+N** on the **Chats** detail tab to create a new chat based on the case.

Create a new chat based on a document

You can create a chat based on a document from the chat window or directly from the document. You can only add chat references to cases or documents you have read access to.

New chats are by default created as unretained chats and will therefore automatically be deleted after a predefined retention period if there is no activity on the chat. Any activity (for example posting new messages) in a chat will reset the retention period.

WorkZone users that are currently online are displayed with a green dot to the right of the user name while WorkZone users that are currently offline are displayed with a gray dot. You can still send offline WorkZone users chat messages.

From the chat window

To create a new chat from the chat window, see Create a new chat.

From a document

1. In the ribbon on the document detail page click **New chat**, or on the **Chats**[1] detail tab, click **Add** to open the **Start new chat** form.
2. In the following fields of the **Start new chat** form:
   - **Participants** field: Select one or more participants to the chat. You can add or remove participants later if necessary.
   - **Title** field: Enter a title for the chat. The default title is document number, document title, and the date and time of the chat.
   - **Description** field: Enter a description of the chat.
   - **Cases** field: Select a case reference to the chat. If the drop-down list contains too many options, you can enter the case number, case title or case handler to filter the drop-down list.
     This step is optional and you can select multiple case references to associate with the chat.
   - **Documents** field: A reference to the active document is already registered and you can select multiple document references to associate with the chat.
     The document references do not need to be documents on the selected case references.
     If the drop-down list contains too many options, you can enter the document number or document title to filter the drop-down list.
3. Click **Save** to create the new chat and open the chat window.

[1] You can also press **CTRL+SHIFT+N** on the **Chats** detail tab to create a new chat based on the document.

Open a chat

Chats are opened from the chat window and you can open the chat window either from the bottom of the browser page window or from the **Chats** detail tab on a case detail page or a document detail page.

From the bottom of the browser page

Click **WorkZone Chat** at the bottom of the browser window to open the chat window.

In the **Recent chats** pane of the chat window, click the chat you want to open and the chat message area opens.

> Note: A red counter may be displayed on the WorkZone Chat icon. The red counter displays the number of chats you are a participant of that contain unread messages.

From the Chats detail tab

In the **Chats** detail tab on the case detail page or document detail page, select the chat you want to open and click **Preview** to open the chat window. The chat message area is opened automatically.

You can also right-click a chat in the **Chats** detail tab and select **Preview** or double-click the chat in the **Chat** detail tab to open the chat window.

The **Chats** detail tab may display the two detail tab counters:

- The standard tab counter: Displays the number of individual chats (rows) in the **Chats** detail tab in a blue bubble.
- The unread items counter: Displays the number of chats containing at least one unread message in a red bubble.

See Also

The WorkZone Chat Window

Delete a chat

Chats are deleted from the chat window or directly from a case or document and you can delete any chat you are a participant of.

When a chat is deleted, all chat messages are also deleted from the database. A log of the deletion will be created in the Use Log for future reference.

Retained chats cannot be deleted by any user but can be converted to normal chats, which can then be deleted.

Note: You cannot delete individual messages in the chat.

From the bottom of the browser page

1. Click **WorkZone Chat** at the bottom of the browser window to open the chat window.
2. In the **Recent chats** pane of the chat window, select the chat you want to delete and click **Delete**. You can also right-click the chat and select **Delete**.
3. In the **Confirm** dialog, click **Yes** to delete the chat.

From the Chats detail tab

1. In the **Chats** detail tab on the case detail page or document detail page, select the chat you want to delete and click **Delete** to open the **Confirm** dialog.[1]
2. In the **Confirm** dialog, click **Yes** to delete the selected chat.

[1] You can also right-click a chat in the **Chats** detail tab and select **Delete** or double-click the chat in the **Chats** detail tab to open the chat window and then select and delete the chat.

Edit chat data

Each chat is defined by its chat data which consists of the chat title and description, case and/or document references and the list of chat participants. You can edit chat data on any chat you participate in.

You can only view chat references to cases or documents you have read access to, and you can only add/remove chat references to cases or documents you have read access to.

Chat data is edited from the chat window and you can open the chat window from the bottom of the browser page window or from the **Chats** detail tab on the case detail page or the document detail page.

> **Note:** The chat retention state (retained or unretained) must be changed from the chat window and not from the **Edit chat** form.

From the bottom of the browser page

1. Click **WorkZone Chat** at the bottom of the browser window to open the chat window.
2. In the **Recent chats** pane of the chat window, select the chat you want to edit and click **Edit** to open the **Edit chat** form. You can also right-click the chat and select **Edit** to open the **Edit chat** form.
3. In the **Edit chat** form, you can edit the following fields:
   - **Title** field: Enter a new title for the chat.
   - **Description** field: Enter a new description of the chat.
   - **Participants** field: Add additional participants or remove existing participants from the chat.
   - **Cases** field: Select a new case reference to the chat. If the drop-down list contains too many options, enter the case number, case title, or case handler to filter the drop-down list.
     This step is optional and you can select multiple case references to associate with the chat.
   - **Documents** field: Select a new document reference to the chat. If the drop-down list contains too many options, you can enter the document number or document title to filter the drop-down list.
     This step is optional and you can select multiple document references to

associate with the chat. You can have document references to other cases than the cases referenced on the chat.

4. Click **Save** to save your changes and close the **Edit chat** form.

From the Chats detail tab on the case detail tab

1. On the **Chats** detail tab on the case detail page, select the chat you want to edit and click **Edit** to open the **Edit chat** form.[1]
2. In the following fields of the **Edit chat** form:
   - **Title** field: Enter a new title for the chat.
   - **Description** field: Enter a new description of the chat.
   - **Participants** field: Add additional participants to or remove existing participants from the chat.
   - **Cases** field: A reference to the active case is already registered and you can select multiple case references to associate with the chat.
   - **Documents** field: Select a new document reference to the chat. If the drop-down list contains too many options, enter the document number or document title to filter the drop-down list.
     This step is optional and you can select multiple document references to associate with the chat. The document references do not need to be documents on the selected case references.
3. Click **Save** to save your changes and close the **Edit chat** form.

[1] You can also right-click the chat and select **Edit** or double-click the chat in the **Chats** detail tab to open the chat window and then select and edit the chat.

From the Chats detail tab on the document detail page

1. On the **Chats** detail tab on the document detail page, select the chat you want to edit and click **Edit** to open the **Edit chat** form.[1]

2. In the following fields of the **Edit chat** form:

    - **Title** field: Enter a new title for the chat.
    - **Description** field: Enter a new description of the chat.
    - **Participants** field: Add additional participants to or remove existing participants from the chat.
    - **Cases** field: Select a new case reference to the chat. If the drop-down list contains too many options, enter the case number, case title or case handler to filter the drop-down list.
      This step is optional and you can select multiple case references to associate with the chat.
    - **Documents** field: A reference to the active document is already registered and you can select multiple document references to associate with the chat.
      The document references do not need to be documents on the selected case references.
      If the drop-down list contains too many options, enter the document number or document title to filter the drop-down list.

3. Click **Save** to save your changes and close the **Edit chat** form.

[1] You can also right-click the chat and select **Edit** or double-click the chat in the **Chats** detail tab to open the chat window and then select and edit the chat.

Adjust chat participants

You can both add and remove participants in any chat you are a participant of. You can also remove a participant who has posted messages in the chat (the messages from removed participants are not deleted) but you cannot remove the user who created the chat.

WorkZone users that are currently online are displayed with a green dot to the right of the user name while WorkZone users that are currently offline are displayed with a gray dot. You can still send offline WorkZone users chat messages.

From the bottom of the browser page

1. Click **WorkZone Chat** at the bottom of the browser window to open the chat window.
2. In the **Recent chats** pane of the chat window, select the chat you want to add or remove participants to and click **Edit** to open the **Edit chat** form.
3. In the **Participants** field on the **Edit chat** form, add additional participants to or remove existing participants from the chat.
4. Click **Save** to save your changes and close the **Edit chat** form.

You can also manage chat participants in the chat message area (left pane) of the chat window by clicking **Participants** and either

- select one or more participants and click **Remove** to remove the selected participants or
- click **Add** to open the **Add people** form and add new users to the chat

From the Chat detail tab

1. On the **Chat** detail tab on the case detail page or document detail page, select the chat you want to edit and click **Edit** to open the **Edit chat** form.[1]
2. In the **Participants** field on the **Edit chat** form, add additional participants to or remove existing participants from the chat.
3. Click **Save** to save your changes and close the **Edit chat** form.

[1] You can also right-click the chat and select **Edit** or double-click the chat in the **Chat** detail tab to open the chat window and then select and edit the chat.

> **Tip:** Enter @ in the message field in the chat message area of the Chat window and select **Add people** to add a new WorkZone user as a participant to the chat.

Add a reference to a chat

Chats can be created without references to cases or documents but you can add references to cases and documents later if you need. A chat can contain references to multiple cases and/or documents at the same time and the cases or documents do not have to be connected to each other to be referenced in the chat.

You can only add chat references to cases or documents you have read access to.

From the bottom of the browser page

1. Click **WorkZone Chat** at the bottom of the browser window to open the chat window.
2. In the **Recent chats** pane of the chat window, select the chat you want to add a case or document reference to and click **Edit** to open the **Edit chat** form.
3. **Adding cases:**
   In the **Cases** field in the **Edit chat** form, select a new or another case reference. If the drop-down list contains too many options, enter the case number, case title or case handler to filter the drop-down list. You can select multiple case references to associate with the chat.
4. **Adding documents:**
   In the **Documents** field in the **Edit chat** form, select a new or another document reference. If the drop-down list contains too many options, you can enter the document number or document title to filter the drop-down list.
   You can select multiple document references to associate with the chat. The document references do not need to be documents on the selected case references. You can have document references to other cases than the cases referenced on the chat.
5. Click **Save** to save your changes and close the **Edit chat** form.

You can also add case or document references in the chat message area (left pane) of the chat window by clicking **References** > **Cases** tab or **References** > **Documents** tab and then click **Add** to add new case or document references.

From the Chats detail tab

1. On the **Chats** detail tab on the case detail page or document detail page, select the chat you want to edit and click **Edit** to open the **Edit chat** form.[1]
2. **Adding cases:**
   In the **Cases** field in the **Edit chat** form, select a new or another case reference. If the drop-down list contains too many options, you can enter the case number, case title, or case handler to filter the drop-down list. You can select multiple case references to associate with the chat.
3. **Adding documents:**
   In the **Documents** field in the **Edit chat** form, select a new or another document reference. If the drop-down list contains too many options, you can enter the document number or document title to filter the drop-down list.
   You can select multiple document references to associate with the chat. The document references do not need to be documents on the selected case references. You can have document references to other cases than the cases referenced on the chat.
4. Click **Save** to save your changes and close the **Edit chat** form.

[1] You can also right-click a chat in the **Chats** detail tab and select **Edit** as well as double-click the chat in the **Chats** detail tab to open the chat window and then select **Edit**.

> Tip: Enter @ in the message field in the chat message area of the Chat window and select **Link a Case** or **Link a Document** to add a case or document reference.

Remove a reference from a chat

Case or document references are not mandatory for chat and you can therefore remove all case and/or document references from a chat without being warned.

You can only view chat references to cases or documents you have read access to.

From the bottom of the browser page

1. Click **WorkZone Chat** at the bottom of the browser window to open the chat window.
2. In the **Recent chats** pane of the chat window, select the chat you want to remove a case or document reference from and click **Edit** to open the **Edit chat** form.
3. **Removing cases:**
   In the **Cases** field in the **Edit chat** form, click the **x** to the right of the case name to remove the case from the chat.
4. **Removing documents:**
   In the **Documents** field in the **Edit chat** form, click the **x** to the right of the document name to remove the document from the chat.
5. Click **Save** to save your changes and close the **Edit chat** form.

You can also remove case or document references in the chat message area (left pane) of the chat window by clicking **References** > **Cases** tab or **References** > **Documents** tab and then click **Remove** to remove new case or document references.

From the Chats detail tab

1. On the **Chats** detail tab on the case detail page or document detail page, select the chat you want to remove a case or document reference from and click **Edit** to open the **Edit chat** form.[1]
2. **Removing cases:**
   In the **Cases** field in the **Edit chat** form, click the **x** to the right of the case name to remove the case from the chat.
3. **Removing documents:**
   In the **Documents** field in the **Edit chat** form, click the **x** to the right of the document name to remove the document from the chat.
4. Click **Save** to save your changes and close the **Edit chat** form.

[1] You can also right-click a chat in the **Chats** detail tab and select **Edit** as well as double-click the chat in the **Chats** detail tab to open the chat window and then select **Edit**.

Activate and/or remove chat retention

New chats are by default created as unretained chats and will therefore automatically be deleted after a predefined retention period if there is no activity on the chat. Any activity (for example posting new messages) on a chat will reset the retention period.

You can toggle the chat retention state from unretained to retained, which will prevent the chat from being manually or automatically deleted. You can likewise toggle the chat retention state from retained to an unretained, which will enable the chat to be manually or automatically deleted.

Toggling the retention state qualifies as updating the chat and will therefore reset the retention period of the chat.

From the bottom of the browser page

1. Click **WorkZone Chat** at the bottom of the browser window to open the chat window.
2. In the **Recent chats** pane of the chat window, select the chat session you want to change the retention state for and
   - click **Retain** to retain the chat
   - click **Remove retention** to remove retention from the chat.

You can also right-click the chat session in the chat window and select **Retain** or **Remove retention**.

From the Chat detail tab

On the **Chat** detail tab on the case detail page, select the chat session you want to change the retention state for and

- click **Retain** to retain the chat or
- click **Remove retention** to remove retention from the chat

You can also right-click a chat session in the **Chat** detail tab and select **Retain** or **Remove retention** as well as double-click the chat session in the **Chats** detail tab to open the chat window and change the chat retention settings there.

Toggle chat notifications

When you receive a new chat message or when you are added to a new chat, a notification will be displayed in the WorkZone Client window.

If you are a participant of many chats, you may receive a large amount of notifications as each participant contributes to the conversation, which may be disruptive of your daily work. You can toggle the chat notification settings for each chat and hide chat notifications you do not want. This means you will not be informed of any new messages or developments on the chats you have hidden notifications from. If you change your mind, you can always change the chat notification settings back again to start receiving notifications again.

You can only change chat notification settings on chats you are a participant of, so you will always be notified when you are added to a chat.

All new chats will by default display chat notifications to all chat participants. Each chat participant must afterwards change their own chat notification settings in order to hide chat notifications.

> **Note:** You can only define the notification settings for each individual chat and not for all chats.

Toggling the chat notification settings qualifies as updating the chat and will therefore reset the retention period of the chat.

From the bottom of the browser page

1. Click **WorkZone Chat** at the bottom of the browser window to open the chat window.
2. In the **Recent chats** pane of the chat window, select the chat session you want to change the notification settings for and

- click Mute to hide chat notifications for the chat
- click Unmute to display chat notifications for the chat

You can also right-click the chat session in the chat window and select **Mute** or **Unmute**.

From the Chat detail tab

On the **Chat** detail tab on the case detail page, select the chat session you want to change the notification settings for and

- click **Mute** to hide chat notifications for the chat
- click **Unmute** to display chat notifications for the chat

You can also right-click a chat session in the **Chat** detail tab and select **Mute** or **Unmute** as well as double-click the chat session in the **Chats** detail tab to open the chat window and change the chat notification settings there.

Refresh the chat

In some situations, you may need to refresh the chat window in order to immediately display the newest updates to the chat, for example if another chat participant adds or removes a participant, deletes a chat, or associates the chat with an additional case or document.

You can only view chat references to cases or documents you have read access to.

From the bottom of the browser page

- Click **WorkZone Chat** at the bottom of the browser window to open the chat window and click **Refresh**.

- or -

- Refresh the chat, case and/or document references in the chat message area (left pane) of the chat window by clicking **References** > **Cases** tab, **References** > **Documents** tab, or **Participants** respectively and then clicking **Refresh**.

From the Chats detail tab

- Double-click the chat displayed in the **Chats** detail tab on the case detail page or the document detail page to open the chat window and in the **Recent chats** pane of the chat window, click **Refresh**.
- Right-click a chat in the **Chats** detail tab and select **Refresh** as well as double-click the chat in the **Chats** detail tab to open the chat window and then select **Refresh**.
- Press **CRTL+SHIFT+R** to refresh the chat list in the **Chats** detail tab.

Export a list of chats to an Excel spreadsheet

A list of all chats on a case or document can be created by exporting the contents of the **Chats** detail tab to a Microsoft Excel spreadsheet. The chat messages are not exported, only the columns in the **Chats** detail tab.

You can only export the chat to a Microsoft Excel spreadsheet from the **Chats** detail tab on the case detail page or the document detail page.

1. On the **Chats** detail tab on the case detail page, select the chat you want to export and click **Export to Excel** to open a dialog box at the bottom of the screen.

2. In the dialog, you can either open Microsoft Excel and transfer the list of chats to the spreadsheet where you can edit the values, or save the list locally as a Microsoft Excel spreadsheet.

Note: If you have opened Microsoft Excel to read or edit the chat, remember to save the spreadsheet before you close Microsoft Excel.

Processes

Work with processes

About WorkZone Process

WorkZone Process applies an overall phase-based process model and makes it possible to automate processes, thus supporting business process automation. The phase-based process model includes deadline and duration controls. This gives you a better overview of the current state in the case management flow. For more information about processes, see the User Guide for WorkZone Process, for example About WorkZone Process and Use the Processes overview.

From WorkZone Client, you can start a process from a case or a document detail page. Note that all processes are based on a case even if you start it from a document detail page.

> **Prerequisite:** Before you start a process, you need to select a case that is not part of a running process yet, or you need to create a new case. See Create a new case

Processes differ by the sequence of actions to be completed by involved actors. For example, actors can contribute to a process one by one or work on this process simultaneously.

Read more about available options.

- **Submission** is a process based on a sequential flow where one or more actors approve a document in a certain order.
- **Hearing** is a process based on a parallel flow. This means that selected actors should not respond in a particular order - they can work in parallel.
- The purpose of a **distribution** process is to assign ownership of a case to a responsible contact and, perhaps, find contributors. Once the responsible contact has accepted ownership of the case, the contributors, if they accept their role as contributors, can start working on the case.

Find more information on this topic in the Basic Package and Extended Package sections of the WorkZone Process User Guide.

The Process Overview

The Processes overview displays processes created by you and you can select other views to display processes with different characteristics, for example processes created by other users, your unit's processes or all active processes.

You can also select and expand a process in the Process Overview to view additional process information.

For more information, see About the Process Overview

The Processes detail tab

The **Processes** case detail tab displays all active processes on the case and enables you to gain an overview of the process as well as start a process directly from the tab. The **Processes** tab also enables you to preview a selected process in greater detail, close a selected process, display grouped process steps for combined processes (parallel and sequential steps), and refresh the list to update any changes made to the processes by others.

By default the following information is displayed:

- The Process type and Title.
- Case handler, Responsible unit, and Process owner.
- The date the process was created and the date the process is due.
- The status of the process.

> **Tip:** Right-click the column headers to add additional process information fields such as the date the process is planned to be closed, the date the process was actually closed, the case type, the state of the process and the Instance ID. The Instance ID is only used for troubleshooting potential errors.

Start a process from a case

1. Open a case detail page to start a process.
2. In the ribbon or in the **Processes** case detail tab, click **Process** and select a sequence of involved actors among the available options to open the **Start Submission** form.
3. In the **Start Submission** form, click **Deadline** and specify date and time to set the process deadline.
4. In the **Description** field, enter an optional process description.
5. Select documents for this process.
6. Assign actors to this process. You can do this in two ways:
   - Add actors from the **Select parties** list.

   -And / Or-

   - Select an actor sequence from the drop-down list of available sequences.[1]
7. Click **Start**.

[1]To use this option, you must create an actor sequence. Find a detailed instruction on how to create an actor sequence, see Create a new actor sequence

Start a process from a document

1. Open a document detail page to start a process.
2. In the ribbon, click **Process** and select a sequence of involved actors among the available options to open the **Start Submission** form.
3. Click **Deadline** and specify date and time to set the process deadline.
4. In the **Description** field, enter an optional process description.
5. If you start a process from a document detail page, this document is then automatically added to the process. You can add more documents for the process in the **Documents** section.

6. Assign actors to the process. You can do this in two ways:

   - Add actors from the **Select parties** list one by one.

   -And / Or-

   - Select an actor sequence from the drop-down list of available sequences.[1]

7. Click **Start**.

[1]To use this option, you must create an actor sequence. Find a detailed instruction on how to create an actor sequence, see Create a new actor sequence

Order and reorder tasks

When a process is started, the order of user tasks is assigned automatically but you can reorder your tasks and the tasks of users that you are a delegate for according to the order that you want the tasks to be processed. You can reorder open and pending tasks. You can reorder tasks in WorkZone Client on the **My Open tasks** and **My pending tasks** lists on the **Home** tab and on the **Tasks** tab on your own contact detail page. You can also order tasks in WorkZone Mobile.

Change the order of your own tasks

On the **Home** tab, click **My open tasks** or **My pending tasks** in the navigation pane to open the list. You may have to add the lists to the navigation pane first. See List actions.

–Or–

Click your name in the lower right corner to open your contact page, and click the **User task** tab. You may have to add the tab first. See Manage tabs.

Drag and drop the tasks according to the order you want to work with them.

Change the order of tasks delegated to you

Open the contact detail page of the user you are a delegate for.

Click the **User task** tab. You may have to add the tab first. See Manage tabs.

Drag and drop the tasks according to the order you want the user you are a delegate for to process the tasks.

See also Work with Delegates.

Templates for advanced submissions

About templates for advanced submissions

A template for advanced submissions consists of a series of process steps that indicate actions which one or more WorkZone users must complete in order to complete the advanced submission the template is applied to.

Applying a templates to a advanced submissions adds a larger degree of flexibility in defining and completing the actions required of the submission.

Process steps

The template's process steps can be defined as either sequential or parallel steps.

Sequential steps must be completed in strict order, one after the other, while parallel process steps can be completed independently of all other process steps, including sequential process steps.

The order of the sequential process steps is determined by the placement of each step in the **Process steps** detail tab of the template detail page. Process steps can be re-ordered by dragging them to a higher or lower position in the list in the **Process steps** detail tab.

> **Prerequisite:** You must be assigned the STEPSUBMISSION access code to create, edit or delete templates for advanced submissions.

Read/Write access

You can restrict other users access to a template by defining access codes for Read and Write access to the template and its steps. Users not assigned the same Read access codes as the template will not be able to open and view the template and its steps in the **Templates for advanced submissions** detail tab.

Similarly, users not assigned the same Write access codes as the template will not be able to make changes to the template and its steps.

Starting the process

If you want another user to be able to start an advanced submission process, you must assign the user Read access to the template. Users that do not have Read access will not be able to start the process.

Updating and deleting templates for advanced submissions

There is no inheritance between the template and any processes the template has been applied to. When you update or delete a template, only the template itself is updated or deleted. Any processes the template is assigned to are unaffected by the update or deletion and will continue to contain the original values of the template from before the update or deletion.

Relative deadlines

Each template and process step can contain a relative deadline, defined as a number of days, hours and minutes.

When a template is assigned to a process, the relative deadline values are applied to the current date and time to determine each individual process step deadlines as well as the entire process deadline.

> **Example**: If a template contains three steps, each with a defined relative deadline of 1 day, 1 hour, 0 minutes and you apply the template to a process on 11:00:00, March 13th , 2021, then all three steps will have the same deadline (12:00:00, March 14th, 2021), regardless of whether the steps are to be executed sequentially or in parallel.

You must therefore make sure to define all relative deadlines in the template to be logical, consistent and achievable.

Create a template for advanced submissions and process steps

You can create a template and the attached process steps or you can create the template first and then edit the template and add steps later.

To create a template for advanced submissions and process steps

1. Open your user profile page.
2. If the **Templates for advanced submissions** detail tab is not displayed, edit the detail tab of your user detail page to display the tab.
3. In the **Templates for advanced submissions** detail tab, click **Add** to open the **New template** tab.
4. In the **New template** tab:
   - In the **Name** field, enter the name of the template. The name must be 64 characters or less.
   - In the **Relative process deadline** group, define the relative deadline for the template, measured as the number of days, hours and minutes since the process the template has been applied to, was started. If you do not enter any deadline values, the process deadline will not have any deadline.
   - In the **Description** field, enter an optional template description.
   - In the **Read** access field, select the WorkZone users who may read/open the template information.
   - In the **Write** access field, select the WorkZone users who may update the template.
5. In the ribbon, click **Save** to save your changes and display the **Process steps** detail tab. If you do not want to add process steps now, you can close the template detail page.
6. In the **Process steps** detail tab, click **Add** to open the **Add process step** form.

7. In the **Add process step** form:
    - In the **Name** field, enter the name of the process step. The name must be 64 characters or less.
    - In the **Description** field, enter an optional process step description.
    - In the **Actor sequence**, select an actor sequence to apply to the process step.
    - In the **Relative step deadline** group, define the relative deadline of the process step, measured as the number of days, hours and minutes since the step was started. If you do not enter any deadline values, the step will not have any deadline.
8. Click **Save** to save your changes and close the form.
9. Repeat steps 6 and 7 for each process step you want to add to the template.

The placement of the steps define their sequential order but you can re-define the sequential order by dragging a step to a higher or lower position in the list. Re-arrange all existing steps to adjust the step to the desired order.

> Tip: Click **Refresh** in the ribbon or your user profile page or in the **Templates for advanced submissions** detail tab to refresh the page and display any new changes.

View a template's steps or a process step's actors.

You can view a list of the process steps defined for a template in the **Preview** pane. You can also view a list of the actors in the actor sequence applied to a process step.

To display a list of the template's steps

1. Open your user profile page.
   If the **Templates for advanced submissions** detail tab is not displayed, edit the detail tab of your user detail page to display the tab.

2. In the **Templates for advanced submissions** detail tab, click **Preview** to open **Preview** pane. You can also right-click the template and select **Preview**.
3. Click **Close** to close the **Preview** pane.

The preview pane will display a list of the steps in the order they have been defined.

To display a list of actors in a process step

1. Open your user profile page.
If the **Templates for advanced submissions** detail tab is not displayed, edit the detail tab of your user detail page to display the tab.
2. In the **Templates for advanced submissions** detail tab, double-click the template you want to edit to open the template detail page. The template detail page is displayed with the template name and prefixed with the template's unique identification number.
3. In the **Process steps** detail tab, select the process step you want to display a list of actors for and click **Preview** to open **Preview** pane. You can also right-click the step and select **Preview**.
4. Click **Close** to close the **Preview** pane.

Edit a template or step

You can edit an existing template, changing the field values as well as adding, removing or editing the process steps of the template.

To edit a template for advanced submissions

1. Open your user profile page.
If the **Templates for advanced submissions** detail tab is not displayed, edit the

detail tab of your user detail page to display the tab.

2. In the **Templates for advanced submissions** detail tab, double-click the template you want to edit to open the template detail page. The template detail page is displayed with the template name and prefixed with the template's unique identification number.
3. Update the values in the required fields and click **Save** to save your changes.

If you want to add process steps to the template:

1. In the **Process steps** detail tab of the template detail page, click **Add** to open the **Add process step** form.
2. In the **Add process step** form:
    - In the **Name** field, enter the name of the process step. The name must be 64 characters or less.
    - In the **Description** field, enter an optional process step description.
    - In the **Actor sequence**, select an actor sequence to apply to the process step.
    - In the **Relative step deadline** group, define the relative deadline of the process step, measured as the number of days, hours and minutes from when the step was started. If you do not enter any deadline values, the step will not have any deadline.
3. Click **Save** to save your changes and close the form.
4. Repeat steps 6 and 7 for each process step you want to add to the template.

The placement of the steps define their sequential order but you can re-define the sequential order by dragging a step to a higher or lower position in the list. Re-arrange all existing steps to adjust the step to the desired order.

To edit a process step of a template

1. Open your user profile page.
   If the **Templates for advanced submissions** detail tab is not displayed, edit the

detail tab of your user detail page to display the tab.

2. In the **Templates for advanced submissions** detail tab, double-click the template you want to edit to open the detail page. The detail page is displayed with the template name and prefixed with the template's unique identification number.
3. In the **Process steps** detail tab, select the process step you want to edit and click **Edit** to open the **Edit process step** form. You can also double-click the step or right-click the step and select **Edit**.
4. In the **Edit process step** form, update the values in the required fields and click **Save** to save your changes.

Delete a template or a process step

You can delete a template and in the same action, delete all process steps defined for the template. You can also open the template detail page and delete a process step only.

To delete a template

1. Open your user profile page.
   If the **Templates for advanced submissions** detail tab is not displayed, edit the detail tab of your user detail page to display the tab.
2. In the **Templates for advanced submissions** detail tab, select the template you want to delete and click **Remove** to open the **Confirm** dialog. You can also right-click the template and select **Remove**.
3. Click **Yes** to delete the selected template and refresh the page.

To delete a process step

1. Open your user profile page.
   If the **Templates for advanced submissions** detail tab is not displayed, edit the

detail tab of your user detail page to display the tab.

2. In the **Templates for advanced submissions** detail tab, double-click the template that contains the step you want to delete to open the template detail page. The template detail page is displayed with the template name and prefixed with the template's unique identification number.
3. In the template detail page > **Process steps** detail tab, select the steps you want to delete and click **Delete** to open the **Confirm** dialog. You can also right-click the step and select **Delete**.
4. Click **Yes** to delete the selected steps and refresh the page.

See Also

Start an advanced submission

Open your user profile page

Manage tabs

Work with actor sequences

Work with actor sequences

You can involve specific contacts in a process. To do this, create an actor sequence and assign it to a process. Later on, you can use this actor sequence for other processes.

From WorkZone Client, you can create, edit, and view actor sequences for your processes.

Create a new actor sequence

1. On your user profile page > **Actor sequences** detail tab, click **Add** to open the **New sequence** tab.
2. In the **New sequence** tab, fill in the required fields.
3. In the ribbon, click **Save** to save your changes.

Tip: By default, only you will have access to the actor sequences you created. You can change read access in the **Read access** field to include other users.

View existing actor sequences

You can view all of your actor sequences in a list

1. On your user profile page, click the **Actor sequences** detail tab to display all your actor sequences.
2. In the **Actor sequences** tab:
   - Select a sequence and in the ribbon click **Preview** to view the details in a preview pane.
   - Double-click a sequence to open the sequence in a new tab where you can read and edit the sequence.

Remove an actor sequence

You can remove one or more actor sequences.

If the actor sequence is assigned to a process step template, the process step will no longer contain actor sequences. When selecting a process step without a defined actor sequence on the templates, users can select another sequence or manually add actors to the process.

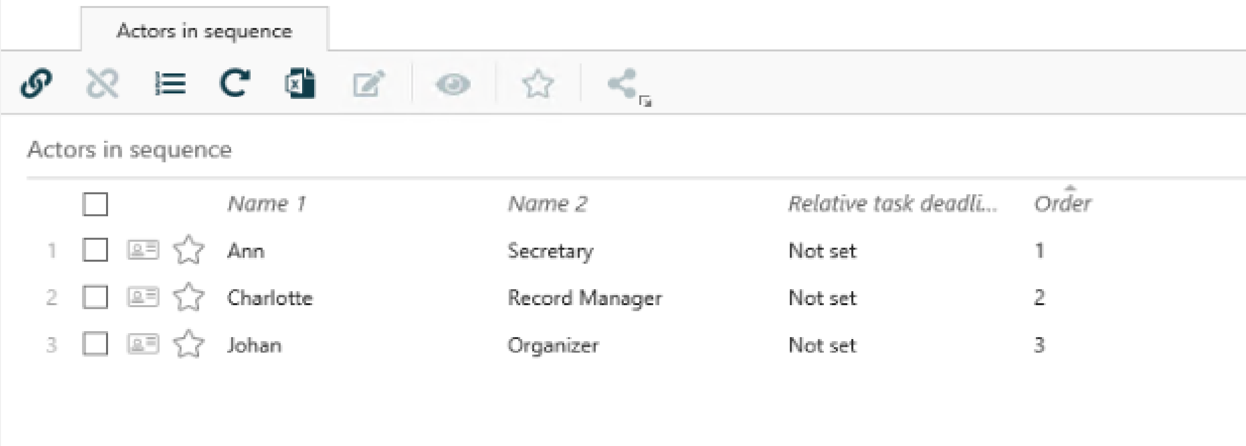
1. On your user profile page, click the **Actor sequences** detail tab to display all your actor sequences.
2. On the **Actor sequences** detail tab, select one or more actor sequences and click **Remove**.

   You can also right-click the selected sequences and select **Delete**.
3. In the **Confirm** dialog, click **Yes** to remove the selected sequences.[1]

[1]If the actor sequence is assigned to one or more process steps, you must additionally confirm the removal of the sequences.

Open the actors in a sequence tab

You can manage actors on the **Actors in sequence** detail tab. In the **Actor sequences** tab, double-click an actor sequence to open the **Actors in sequence** detail tab.



Add parties to an actor sequence

1. In the **Actors in sequence** detail tab, click **Add** to open **Add parties to an actor sequence** form.
2. Search for the party you want to add to a sequence as an actor:
   - Enter a text to search for in the **Free text** field.
   - Define the scope of your search under **Type**.
   - Specify the party ID in the **ID** field.
   - Specify a name in the **Name 1** or **Name 2** field.
3. Click **Search**. The search results are displayed in the left-hand list.
4. To add a party from the left-hand list as an actor:
   - Double-click the party that you want to add.

   -Or-

   - Select the check boxes of the parties and click ›.

   The selected parties are displayed in the right-hand list.

5. Optionally, enter a relative task deadline for each actor. Actors must react to the assigned task before the deadlines.
6. Click **Save**.

Tip: Once you are assigned to a process as a party, a new task is created for you. You can get quick access to all your tasks by adding the lists **My open tasks** and **My pending tasks** to the navigation pane as widgets.
For information about how to add the lists to the navigation pane, see Manage lists.

Edit relative task deadline for an actor

1. On the **Actors in sequence** detail tab, select one or more actors to edit the relative task deadline for.
2. Click **Edit** > **Relative task deadline** to open the **Edit relative task deadline** form.
3. Define the relative task deadline for the selected actor or actors. To do this, enter number of days, hours, and minutes, respectively.
4. Click **Save**.

Reorder actors in a sequence

1. On the **Actors in sequence** detail tab, drag the actors to the desired position in a sequence.
2. Click **Save**.

Remove actors from a sequence

1. On the **Actors in sequence** detail tab, select one or more of the actors that you want to remove.
2. Click **Remove** and then click **Yes**.

See Also

Your user profile

Case activities

About case activities

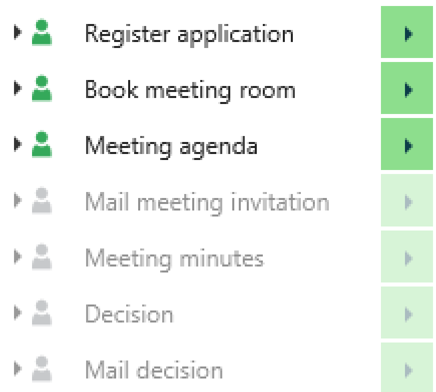
General overview

Sometimes complex workflows are required in order to adhere to legal, organizational, or practical procedures for case management. The Case activities feature assists you in conducting and registering these complex workflows on a case. The steps in such a workflow are called (case) activities and are organized in a Case activity list. A Case activities list is therefore a list of required or optional activities that can be performed for the case and multiple case activities can be assigned to a case.

Some activities must be executed in a specific order, while others can be executed freely, depending on the rules for the specific activity. Additionally, some activities are executed automatically and some activities can be conducted multiple times.

The activity lists are accessed through the **Activities** case detail tab, where you can start and delete activity lists. You must execute activities in the activities preview pane which is opened by double-clicking the activity list you want to work with.

This picture presents an activity list with seven activities:



Activity lists are created based on common case workflows in an organization. Users with administrative rights create the activity lists and make them available for use throughout the organization.

An activity list may consist of activities that are dependent of each other and thus must be carried out in a specific order. An activity list may also consist of activities that are unordered and independent of each other, for example, a check list with items that need to be followed up on, in no particular order.

Activity history

A list of all actions performed on an activity can also be displayed, allowing users to filter the list to gain an overview of past actions on the activity.

Deadlines

When you start a new case activity, you can set a deadline that defines by what date all activities must be completed. WorkZone Client defines three types of deadlines and each of them has its own color. This helps you see how much time is left to finish an activity:

- Green - the deadline is due in more than 24 hours, or a deadline is not set.
- Yellow - the deadline is due in less than 24 hours.
- Red - the deadline is overdue.

Icons in the activities preview pane

Execute activities and see the status of all activities in the activities preview pane. To view an activity description and comments, click **Expand** next to an activity.

Activity actions

The actions you can perform for each activity in the activities preview pane are displayed in the far right column of the pane.

Icon	Description
	The activity can be executed. Click the icon to execute the activity. Non-recurring activities are displayed as Done when completed. Recurring activities are displayed as open activities until they are completed the first time. After that, the icon changes to and the status is displayed as **Executed**.

Icon	Description
	The activity can be executed later when certain activities have been executed.
	The activity is a recurring activity and can be executed multiple times. The activity has already been executed at least once. Click the icon to execute the activity again.
	The activity has been completed and cannot be executed or completed again.
	Each activity on the case activities list contains a light-blue counter which displays the total number of comments registered on the activity. If no comments have been saved, the counter is not displayed.
	Click the check box to execute the activity without opening the **Confirmation** dialog. The check box is displayed to the left of the activity icon ( )
	Click the check box to execute the recurring activity again without opening the **Confirmation** dialog. The check box is displayed to the left of the activity icon ( )
	The activity has been completed and cannot be executed or completed again. The check box is displayed to the left of the activity icon ( )

Activity status

The status of each activity in the activities preview pane is displayed in the far left column of the pane.

Icon	Status	Description
	Open	The activity can be executed.
	Pending	The activity can be executed later after other activities have been executed.

Icon	Status	Description
	Executed and closed	The activity has been executed and closed.
	Executed	The recurring activity has been executed and can be executed again if required.
	Excluded	The activity has been excluded from the activity list and cannot be executed.
	Closed	If an activity list has been deleted, the **Closed** status is assigned to all non-executed activities.
	Required	The activity must be executed before the activity list can be completed.

See Also

Detail tabs on cases

Work with case activities

Start case activities

To start case activities, click **Activities** on the **Activities** tab on the case detail tab and select an activity list. You can start multiple activity lists on a case.

If the **Activities** tab is not displayed in the case detail tab, the tab must be displayed either manually or by applying a WorkZone configuration where the tab is displayed.

> Note: If an existing activity list is modified by a user with administrative rights, the new version will be used when you start the activity list. Previous versions of the activity list that are still active will continue to run.

See Also

Manage tabs

View the activity list

The activities preview pane displays all the activities in a selected case activity as well as a history of all actions performed on the activity.

To open the activities preview pane:

In the case detail tab > **Activities** tab

Select the activity list you want to start and click **Preview**, or click **Activities** and select the activity, to open the activities preview pane. You can also double-click the activity in the **Activities** tab open the activities preview pane.

The activities preview pane opens with the activities listed and the **Activities** view enabled.

Each activity in the activity list is displayed with the following information:

- **Activities** - Names of activities.
- **Role** - Roles of parties that are responsible for executing activity.
- **Executed** - The date when the activity was last executed. Recurring activities are marked as executed when completed at least once.
- **By** - The user who last executed the activity.
- **Status buttons** - Displays activity statuses and enables you to complete an activity.

Additionally, each activity on the case activity list contains a light-blue counter which displays the total number of comments registered on the activity.

The activities preview pane will remain open and must be manually closed. This enables you to select other activities in the **Activities** tab and display their actions and activities in the preview pane.

View activity list history

The activities preview pane can also display all actions performed on the activity.

The activity history displays the activity name, the action performed, WorkZone user who performed the action, when the action was registered and any comments the user added when performing the action.

Display the activity history list

To display the activity history list, select the **History** view in the activities preview pane. The **Activities** view will collapse and the activity history list will be displayed.

Filtering the activity history list

The activity history list displays all actions and can therefore contain many actions. You can filter the history list columns in the same fashion as the activity list (See Follow your activities below)

Execute an activity

You can register your work as completed by executing the related activity. Click to execute the activity or to re-execute a recurrent activity.

1. In the case detail page > **Activities** tab, select the activity list you want to work with, and click **Preview** to display it list in the activities preview pane.
2. In the activities preview pane, click or next to the desired activity to open an activity form. The content of the form varies depending on the type of activity. For example, if the activity is a Check activity, a **Confirmation** form is displayed but if the activity requires you to start a process, a **Start process** form is displayed.
3. If a **Confirmation** form is displayed, you can read the activity description and add a comment, if required.

   If a **Start [process name]** form is displayed, you must fill the required information for the process that is to be started.

> **Tip:** You can also complete an open activity by selecting the empty check box (☐) for that activity in the activities preview pane. This will complete the activity without opening the **Confirmation** form.
> Recurring activities can be executed multiple times by selecting the recurring check box (▣)for the activity. This will execute the recurring activity again without opening the

> **Confirmation** form.

Refresh the Activities tab

The **Activities** tab does not automatically refresh. If you want to see if any new activity lists have been added to or existing lists have been removed from the case, you must manually refresh the **Activities** tab by clicking **Refresh**.

Update a case activity list

While working on a case activity list, you should update the activities preview pane regularly to ensure that the pane reflects any changes to activities made by others while you were working.

Click **Update** to manually update the pane. Any updates to activities in the list will be reflected in the pane.

Delete a case activity list

If you want to remove the activity list, you can delete the activity list from the **Activities** tab.

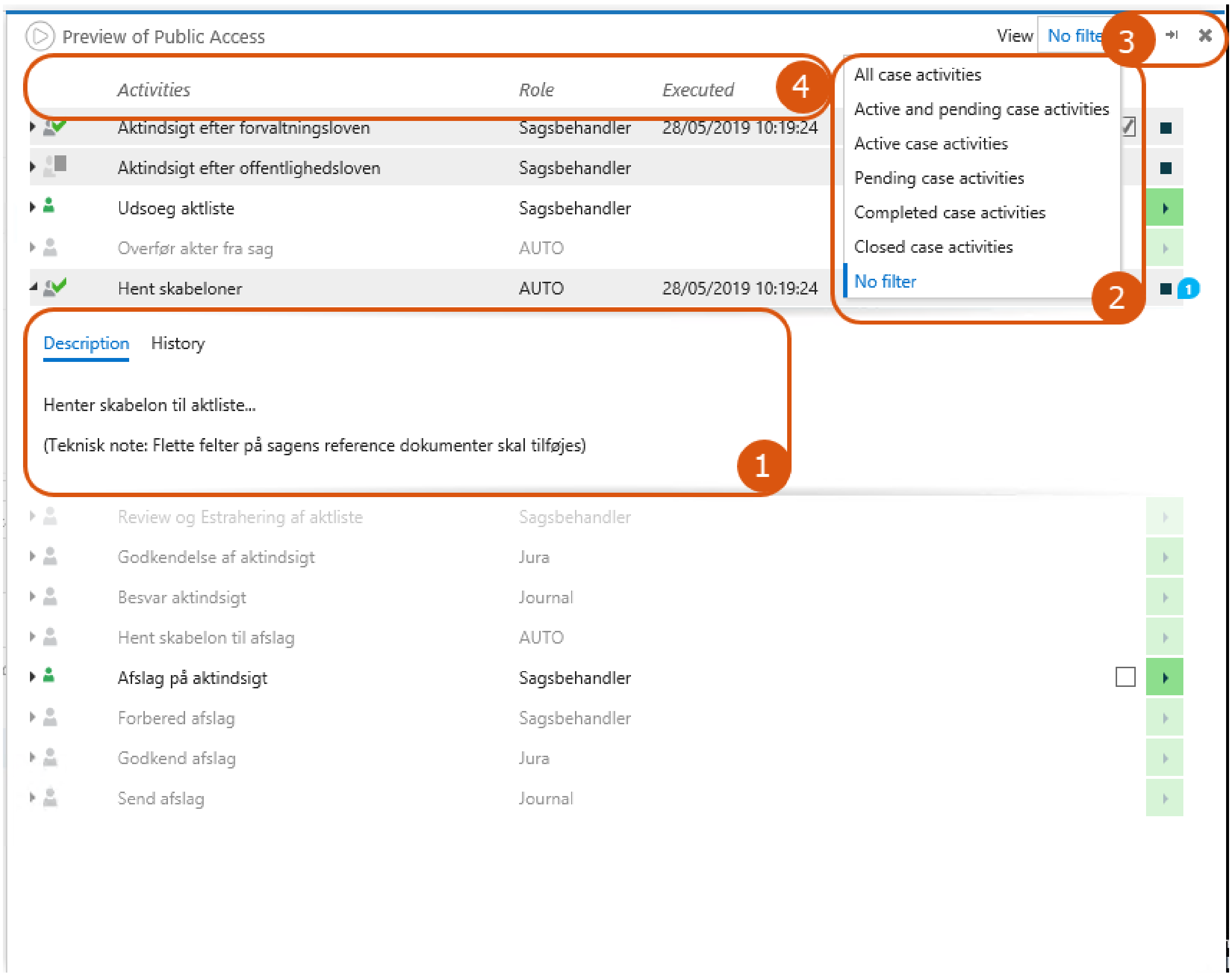
To delete the existing activity list, in the case detail tab > **Activities** tab, select the activity you want to delete and click **Delete**.

You can only delete one activity list at a time.

> **Note:** You cannot delete the activity list if all activities have been completed.

Follow your activities

The main purpose of the case activity functionality is to make the following of complex workflows as simple as possible. WorkZone Client provides different tips that inform you visually of how the process progresses.



(1) Activity description and history

Click **Expand** next to a desired activity to view its description and history.

- **Description**: Displays activity instructions or descriptions, written by the administrator who created the activity list.
- **History** Displays information about who has executed the activity and all comments entered on the activity as well as error messages if the activity could not be executed.

(2) Filter the activity list

You can filter the activities by the activity status:

Filter	Description
All case activities	Displays all case activities. This filter does not display activities handled by the system (for example AUTO tasks) unless the activity failed during automatic execution. Automatically

Filter	Description
	executed activities that fail are displayed with an error so they can be executed manually if necessary
Active and pending case activities	Displays the results of the **All case activities** filter above, but only for activities with the **Open and Pending** status.
Active case activities	Displays the results of the **All case activities** filter above, but only for activities with the **Open** status.
Pending case activities	Displays the results of the **All case activities** filter above, but only for activities with the **Pending** status.
Completed case activities	Displays the results of the **All case activities** filter above, but only for activities with the **Executed** or **Done** status.
Closed case activities	Displays the results of the **All case activities** filter above, but only for activities with the **Closed** status.
No filter	Displays all case activities, including activities handled by the system (for example AUTO tasks).

To filter activities, expand the **View** list, and select a desired filter.

> **Tip:** Reset the filter if you cannot find an activity. Filters are not reset automatically when you restart WorkZone Client. This is done for the convenience of users to view the expected group of activities.

(3) Adjust the activity list

You can do the following to adjust the activities preview pane and the activity list:

- Click **Collapse** to minimize the activities preview pane and display status buttons only. When you collapse the pane, you free up space on your case detail tab.

- Click **Expand** to display the collapsed activities preview pane when you need to consult the activity list.
- Click **Pin** to pin the activities preview pane to the right side of the window. When the activities preview pane is pinned, the pane will be displayed when you open a case with case activities. If there are multiple case activity lists on the case, the first activity list will be displayed in the activities preview pane.

> **Tip:** Drag the left margin of the pane to adjust the size of the activities preview pane.

(4) Filter the activities preview pane

Filter the activities preview pane by activity, role, the date the activity was executed, and/or the user who executed the activity. You can also save your filter and use it in all your the activities preview panes.

If you save your activity list filter, the filter will be saved in your personal configuration and will be applied to all activity lists you open. You can reset all your activity list filters at once by clicking the **Reset all filter** button or you can remove the filter conditions for each filter in order to reset the individual filter.

Activity list filters accumulate across columns, meaning you can define a filter for the **Role** column and then for the **Activities** column and both filters will be applied to the activity list.

- To filter the list by activity, click the **Filter** icon in the **Activities** column, enter the activity as it is displayed in the list and click **Apply**. You must enter the exact activity name or the filter will not display anything. Select the **Save filter** check box to save and apply your filter to all your activity lists.
- To filter the list by the specific activity role(s), click **Filter** in the **Role** column, select one or more roles from the list in the **Role** field, and click **Apply**.
- To filter the list by specific executed dates, click **Filter** in the **Executed** column, select the to and from executed dates, and click **Apply**.
- To filter the list by the user who executed the activity, click **Filter** in the **Executed** column, select the user or users, and click **Apply**.

WorkZone meetings

Manage meetings

About WorkZone meetings

WorkZone meetings are special appointments and meetings created from Microsoft Outlook. When you create a meeting in your Outlook calendar, you can either create a standard Outlook meeting or a WorkZone meeting.

- If you create a WorkZone meeting, the meeting will also be created in WorkZone. The meeting will be synchronized between WorkZone and Microsoft Outlook when updates are made to the meeting from either application.
- If you create a standard Microsoft Outlook meeting, the meeting will not be created in WorkZone. The meeting will only exist in your Outlook calendar and will not be synchronized with WorkZone.

Note: You cannot create a WorkZone meeting from within WorkZone. You must create the meeting from Microsoft Outlook.

You can view and organize WorkZone meetings in WorkZone or Outlook, adding, editing or removing agenda items as well as adding or removing documents to the agenda items and re-ordering the agenda items in the meeting. You can only edit the meeting parameters in Microsoft Outlook. For more information regarding WorkZone meetings in Outlook, see the **WorkZone Meeting** chapter in the online help for **WorkZone for Office**.

WorkZone meetings are saved on the WorkZone Meeting server with all the meeting details such as the attendees, subject, time, date, and location as well as related agenda items and documents.

Update meeting data

You cannot edit the meeting meta data from WorkZone and must update the meeting from your Outlook calendar.

Meeting cases

WorkZone meetings are WorkZone cases. When a meeting is created, a special WorkZone case is also created to contain the meeting, its agenda and any documents added to the agenda. WorkZone meeting cases are considered a special variant of WorkZone cases and are saved on the SJ-TEMP system case. WorkZone meeting cases are appended with a unique case number in order to identify each meeting.

You can perform many of the same actions on WorkZone meetings as you can on regular cases, for example specifying the default document classification for documents created on the case. You can change the Case group of a meeting case but you cannot change the Primary party (if one has been defined) or the Case category.

Opening WorkZone meeting cases

WorkZone meeting cases can be opened from the case lists (for example the **Open cases** lists) or from the meeting by clicking the **Go to Case** button in the Main ribbon.

Agenda items

A meeting can have an agenda which can consist of one or more agenda items. You can create the meeting agenda and add agenda items when creating the meeting in Microsoft Outlook. If you need to add, remove, edit, or re-order agenda items to the meeting agenda, you can do so in Microsoft Outlook or WorkZone.

In WorkZone, you can open the WorkZone meeting from the WorkZone meeting case by clicking the **Go to Meeting** button in the main ribbon. The WorkZone meeting can also be opened using special meeting lists. Once the meeting is opened in WorkZone, you can edit the meeting agenda. All changes to agenda items made in WorkZone will be synchronized to the Outlook meeting.

You can also edit the agenda in your Outlook calendar and all changes will then be synchronized to the meeting in WorkZone.

If you add documents to the agenda items on the meeting, the documents will also be registered and displayed on the meeting case for ease of reference.

Deleting WorkZone meetings

You can delete WorkZone meetings from your Outlook calendar like any other Outlook meeting, but the meeting will not automatically be deleted in WorkZone.

You can manually delete the canceled meeting from WorkZone but if the WorkZone meeting contains documents, you must either delete the documents or remove the references to the documents before deleting the meeting in WorkZone.

> **Note:** If you delete the meeting in WorkZone meeting, the removal of the meeting will not be synchronized to your Outlook calendar.

View existing meetings as a list

On the **Home** tab under **Cases**, you can view the following predefined meeting lists:

- **Meetings organized by me**
- **Meetings**

The **Meetings** list is automatically filtered to only display active meetings (the **Meeting state** field equals Active) while the **Meetings organized by me** displays all meeting states but can manually be filtered to display selected meeting states.

See also List actions.

Search for a meeting

You can search for a meeting in the same way as you search for a case.

- Click **New search** > **Meeting** on the ribbon. A **Meeting search** page opens in a new tab.

See also Perform a search.

Open a meeting detail page

On the meeting detail page you can view the meta data of the meeting. You can also add, edit, or remove meeting agenda items and the documents saved on them.

> **Note:** You cannot add parties to or remove them from a meeting or edit meta data. You can edit agenda items and the documents that are saved on a meeting.

Printing meetings

You can print a meeting report of the meeting agenda, participants and meeting documents, either printing the meeting report directly from the PDF output or saving the meeting report back on the case the meeting is attached to.

The standard report Meeting report is used as a template for the report and is populated with the meeting meta data, meeting participants, document and agenda.

You must define document-specific data when printing the meeting report in order to ensure correct document meta data when saving the report back on the meeting case.

To print a meeting

1. On the **Home** page, use the **Meetings** or **Meetings organized by me** list to display a list of meetings.
2. In the right pane, double-click the meeting you want to print to open the Meeting detail tab.
3. In the Meeting detail tab, click the **Print** button top open the **Print meeting report** dialog
4. In the **Print meeting report** dialog:
    1. In the **Template** field, select the template to be used to print the meeting report. The default template is **A meeting with agenda list**.
    2. In the **Title** field, enter a title of the meeting report. The default title is the Meeting title, appended with "report".

3. In the **Document Type** field, select the document type the meeting report is to be registered as. The default is **DOK, Document**.
4. In the **Document** group, select the document group of the meeting report.
5. In the **Case handler** field, select the case handler of the meeting. The default case handler is the user who is currently printing the meeting report.
6. In the **Letter date** field, enter the letter date of the meeting report. The default date is the day the meeting is printed.
7. In the **State** field, select the document state of the meeting report. The default value is **UL, locked document**.
8. In the **Classification** field, select the document classification of the meeting report. The default is **CONFIDNT, Condifential**.

5. Click **Print and save** to print the meeting report and save it as an attached document on the parent case.
   or
   Click **Print** to open the meeting report as a PDF file and print the meeting report without saving the document on the case.
   or
   Click **Cancel** to close the **Print meeting report** dialog without saving the values and without printing the report.

Meeting agenda items

A meeting can have an agenda which can consist of one or more agenda items. You can create the meeting agenda and add agenda items when creating the meeting in Microsoft Outlook. If you need to add, remove, edit, or re-order agenda items to the meeting agenda, you can do so in Microsoft Outlook or WorkZone.

You can also add documents to or remove documents from each agenda item by editing the agenda item in WorkZone and preview the agenda item in the Preview pane.

Any changes to the meeting agenda items are synchronized to the meeting in Microsoft Outlook, including attaching or removing document to agenda items.

Manage agenda items on a meeting

Add a new agenda item

1. On the meeting detail page, open the **Agenda items** tab from the detail tabs.
2. Click **Add** to open the **Add agenda item** form.
3. In the **Add agenda item** form:
    1. **Title** field: Enter the title of your agenda item.
    2. **Description** field: (Optional) Enter a description of the agenda item.
    3. **Documents** field: (Optional) Attach one or more documents to your agenda item:
        - Click the **Documents** field or start typing to select a document from WorkZone.
          -Or-
        - Click **Browse** in the right corner of the **Documents** field to select a document from the file system.
4. Repeat step **3** to add more documents.
5. Click **Save** to save your changes and close the form.

Edit an agenda item

1. On the meeting detail page, open the **Agenda items** tab from the detail tabs.
2. In the **Agenda items** tab, select the agenda item you want to edit and click **Edit** or double-click the agenda item that you want to edit to open the **Edit agenda item**.

3. In the **Edit agenda item** form:
    1. **Title** field: Enter the title of your agenda item.
    2. **Description** field: (Optional) Enter a description of the agenda item.
    3. **Documents** field: (Optional) Attach or remove one or more documents to your agenda item:
       To add a document:

- Click the **Documents** field or start typing to select a document from WorkZone.
  -Or-
- Click **Browse** in the right corner of the **Documents** field to select a document from the file system.
  To remove a document:
- In the **Documents** field, locate the document you want to remove and click [**x**].

4. Click **Save** to save your changes and close the form.

Reorder agenda items

1. On the meeting detail page, open the **Agenda items** tab from the detail tabs.
2. On the **Agenda items** tab, drag-and-drop the meeting agenda items to the desired position.
3. Click **Save** to save your changes and close the form.

View an agenda item

1. On the meeting detail page, open the **Agenda items** tab from the detail tabs.
2. Select the agenda item that you want to view.
3. Click **Preview** to open the **Preview** pane.

Tip:

- To edit the meeting from the preview pane, click the name of the meeting. The **Edit agenda item** dialog box opens.
- To view the list of attachments, click **Attachments** on the preview pane. The list of attachments is displayed in a new tab.

Remove an agenda item

1. On the meeting detail page, open the **Agenda items** tab from the detail tabs.
2. In the Agenda items tab, select the item or items you want to remove.
3. Click  **Remove** and then click **Yes**.

About fields on the meeting detail page

You can see the following fields on a meeting detail page:

Note: These fields cannot be edited in WorkZone Client. They can only be edited by an organizer or attendees in Outlook.

Field	Description
Subject	The subject of the meeting specified during the meeting creation.
Organizer	The name of the user who created the meet-ing.
Location	The location of the meeting specified during the meeting creation.
Description	The description of the meeting or comments

Field	Description
	on the meeting specified during the meeting creation.
Start date	The start date of the meeting specified during the meeting creation.
End date	The end date of the meeting specified during the meeting creation.
Created by	The name of the user who created the meeting.
Created date	The creation date of the meeting.
State	The current meeting status (Active or Canceled) The State field is updated automatically from Outlook (if you are using the Microsoft Office Web add-in for WorkZone) or manually from WorkZone (if you are using the VSTO-based Microsoft Office add-in for WorkZone). The **State** field is called **Meeting state** in the two Meeting lists: **Meetings** and **Meetings organized by me** and in meeting searches.

Reports

About reports

Use the reports to view and print information about cases or documents.

WorkZone offers you different predefined reports. Each report is generated based on a template. The templates are stored in the **Templates for reports** case as docx files.

> **Note:** To edit templates, you must have the `CONFIGADM` access code.

Generate a report

You can generate reports from the main ribbon or from the menu or ribbon in a case or document list.

Classification scheme report

To generate the classification scheme report, in the ribbon, click **Report** > **General** > **Classification scheme**.

Case and document list reports

To generate a case list, or document list report

A case list report or document list report includes all items selected in the list.

1. Open a case or document list
2. Select the items from the list you want to include in the report
3. In the ribbon, click **Report** and (for cases) select **A case list with parties and documents** or (for documents) select **A document list with parties and supplementary documents**.

   You can also right-click in the list, select **Report** and (for cases) select **A case list with parties and documents** or (for documents) select **A document list with parties and supplementary documents**.

To generate a filtered case list, or document list report

A filtered case list or document list report is a report that includes all items displayed in a filtered list. Selections of items are ignored.

1. Open a case or document list
2. Select the items from the list you want to include in the report
3. In the ribbon, click **Report** and (for cases) select **A filtered case list with parties and documents** or (for documents) select **A filtered document list with parties and supplementary documents**.

   You can also right-click in the list, select **Report** and (for cases) select **A filtered case list with parties and documents** or (for documents) select **A filtered document list with parties and supplementary documents**.

The report is generated and saved on your local disk as it is configured in your browser.

Available reports

In WorkZone Client, you can generate the following reports in English and Danish:

Name	Content
Classification scheme	Case groups in the classification scheme existing.
A case list with parties and documents	Case metadata, case parties, and document meta data of the selected cases. Only selected documents are included in the report.
A filtered case list with parties and documents	Case metadata, case parties, and document meta data of the listed cases that satisfy any applied list filters. This report cannot be executed on case reference lists.
A document list with parties and supplementary documents	Document data, document parties, and supplementary documents of the selected main document. Only selected documents are included in the report.
A filtered document list with parties and supplementary documents	Document data, document parties, and supplementary documents of the listed documents that satisfy any applied list filters. This report cannot be executed on document reference lists.

WorkZone Client configuration

About WorkZone Client configuration

What is a WorkZone configuration

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

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

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

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

What a configuration contains

When you customize WorkZone Client according to your needs, you create a personal configuration of WorkZone Client. Examples of customizations are when you add, remove, reorder, or resize the following elements:

- Dashboard items
- Widgets
- Lists (columns, order of columns, sorting)
- Tabs
- Panes and panels
- Fields and drop-down lists
- Case, document and contact detail pages
- Ribbons

> **Tip:** For more information about how to configure these elements, see User interface.

If you do not change anything of the above, your personal will be empty of changes configuration. In this case, you either use the Organizational , Unit or User configuration that an administrator has made available to you, your unit or the entire organization.

Configuration types and priorities

There are five types of WorkZone Client configurations (from the highest to lowest priority):

1. **Private:** A configuration that contains your filter settings and stored field values, much like a hidden layer of default field values. Private configurations cannot be opened or edited by any user but can be overwritten by another user's Private configuration when importing configurations.
2. **Personal:** A configuration where you have applied your personal customizations to the elements listed above (Dashboard items, Widgets, Lists, Tabs, etc). You can import another user's exported Personal configuration and either overwrite your own or merge the configuration changes into your own.
   An administrator can apply changes to the configuration.
3. **User:** A configuration that an administrator has customized and distributed to you. The User configuration is identical to the Personal configuration but also includes changes to fields in the detail tab pages.
   An administrator can apply changes to the configuration.

4. **Unit:** A configuration that an administrator has customized and distributed to your unit.
   An administrator can apply changes to the configuration.
5. **Organizational:** A configuration that an administrator has distributed to the whole organization.
   An administrator can apply changes to the configuration.

How configurations merge

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

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

  In this example, the **Open cases** list will display 20 rows. If the user resets the personal configuration, the settings with 5 rows are applied. If the administrator resets or clears the configuration for the user, the settings with 10 rows are applied.
- The Saved search list is only visible for the user who creates it. The search lists cannot be distributed or imported together with a configuration created by someone else.

What administrator and users can do

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

- If you are not assigned the CONFIGADM access code, you can:
  - Export your own Personal and Private configurations
  - Import your own and other user's Personal and Private configurations
  - Edit your own Personal configuration.
    - Filtered tabs and the default dashboard cannot be removed (meaning deleted from the configuration). You can chose not to display a filtered tab or the default dashboard, but you cannot remove them.
  - Reset your Personal configuration
  - View all changes to all configurations available to you.
- If you are assigned the CONFIGADM access code, you can:
  - Reset your own configuration or Reset another user's or unit's configuration.
  - Edit and save a User, Unit, or Organizational configuration
  - Save a configuration and make it available to another user, unit, or the entire organization
  - Export a configuration to a file and import a configuration from a file
  - View all changes to all configurations available to the current user.

Note: The actions described above are in the WorkZone Client Administrator's Guide which is available in English only.

Actions on configuration

Edit your Personal configuration

Every time you change any of these elements, you are customizing and saving your Personal configuration. You do not need to enter any special editing mode nor do you need save or update your Personal configuration to enable your changes.

- Dashboard items
- Widgets

- Lists (columns, order of columns, sorting)
- Tabs
- Panes and panels
- Fields and drop-down lists
- Case, document and contact detail pages
- Ribbons

You can reset your Personal configuration, removing all your changes and restoring the standard configuration for use.

Your filter settings and stored default values are saved as well, but not in your Personal configuration.

Reset your Personal configuration

You can reset your Personal configuration. If there are no changes to your Personal configuration, the organizational configuration will be applied.

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

Export your Personal and/or Private configuration

You can export your Personal and your Private configuration to a file, either to create a backup of your current configuration or send the export file to other WorkZone users so they can import and use the settings you have defined for your configuration.

1. In the ribbon, click **Settings** > **Import /Export** > **Export to file** to open the **Export user configuration to file** form
2. In the **Export user configuration to file** form:
    - Select the **Export all configurations** check box to export both your Personal and your Private configurations
    - Click the **Export selected configurations** field and then select either your Personal or your Private configuration
3. Click **Export** and define where the JSON export file is to be placed.

Import a Personal and/or Private configuration

You can import your own Personal or Private configuration or another user's exported Personal or Private configuration. When importing, you can decide whether to overwrite your existing configuration settings with the settings in the imported configuration or merge the differences between the configurations into your current configuration.

> Tip: Export your current Personal and Private configuration before importing a configuration as a backup in case the imported configuration contains settings you do not want. It is easier to re-import a backup than to manually change multiple settings in your configuration back.

1. In the ribbon, click **Settings** > **Import /Export** > **Import from file** to open the **Import user configuration to file** form
2. In the **Import user configuration to file** form > **Select file** field, navigate to and select the JSON export file you want to import.
3. Define how to treat the imported configuration settings:
    - Select **Merge with existing configurations** to merge the imported configuration settings with your current configuration.
    - Select **Drop existing configurations** to overwrite your current configuration settings with the settings of the imported configuration.
4. Click **Import** to import the selected configuration.

View all changes to configurations available to you

You can open an overview of all the changes to the configurations that have been applied and are available to you. The overview lists the changes to the configurations by type and also by configuration type (User, Unit and Organizational).

1. In the ribbon, click **Settings** > **View configuration** to open the **Effective configuration** form

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

See Also

About WorkZone Client configuration

Configure list selectors

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

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

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

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

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

The following search fields can be added to list selectors:

Cases	Documents	Contacts
• State • Case category • Case group • For Documents • Responsible Unit	• State • Letter date from/to • Reply deadline from/to	• Email • Phone • Mobile

Rearranging the displayed search fields in the list selector

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

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

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

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

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

To add a new search field to the list selector

1. From the distribution mode, open a Case, Document or Contact detail page.
   If the detail tab containing the list selector you want to customize is not displayed, click **Select tabs to view** and add the tab.
2. Select the detail tab containing the list selector you want to customize and click **Add** to open the **Add...references** form.

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

3. In the **Add...references** form, click **Configure page** to open the **Add...references** form in customizable mode.
4. In the **Add...references** form in customization mode, double-click or drag a new search field from the **Available fields** pane and place it in the left pane.
5. Click the **Apply** button to save the current customizations and close the **Add...references** form in customization mode.
   or
6. Click the **Cancel** button to close the**Add...references** form in customization mode without saving the current customizations.

To remove a search field from the list selector

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

To re-arrange the search fields in the list selector

1. From the distribution mode, open a Case, Document or Contact detail page.
   If the detail tab containing the list selector you want to customize is not displayed, click **Select tabs to view** and add the tab.
2. Select the detail page containing the list selector you want to customize and click **Add** to open the **Add...references** form.
   The **Add...references** form title contains the title of the tab the list selector is opened from.
3. In the **Add...references** form, click **Configure page** to open the **Add...references** form in customizable mode.
4. In the left pane of the **Add...references** form in customization model, select and drag a search field to a new location.
5. Click the **Apply** button to save the current customizations and close the **Add...references** form in customization mode.
   or
6. Click the **Cancel** button to close the**Add...references** form in customization mode without saving the current customizations.

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

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

Your user profile

Your user profile contains a user profile page in WorkZone Client with a large amount of information and settings you can update and edit.

Note that access rights and user privileges are set up and defined in the Microsoft Active Directory by a system administrator for WorkZone users. Most if not all WorkZone users will not have sufficient rights to change these settings but you can edit your own information on your user profile page.

The user profile page

Your user profile page contains information and settings about you similar to the information registered on the contact detail page for other WorkZone contacts. In fact, you as a WorkZone user are registered in WorkZone as a contact of the type Employee.

You can update your own contact information and define user profile settings on your user profile page as well as view additional information such as which access codes are assigned to you, your delegates or if you are assigned to be a delegate for another user.

Open your user profile page

In the WorkZone Client, double-click your User ID and user name in the lower right corner of the web page to open your personal settings page. Your user name will displayed in the tab title and the page resembles a contact detail page.

Special detail tabs on your user profile page

In addition to the detail tabs for the contact detail page, your user profile page contains several special detail tabs that are only displayed on this page.

Name	Description
Actor sequences	View a list of your actor sequences. You can add new sequences as well as remove or edit existing sequences on this tab. The tab is not displayed by default and must be added to the detail page, either manually or as part

Name	Description
	of a WorkZone configuration.
Delegates	View a list of you delegates, meaning WorkZone users you have assigned as your delegate. You can add new delegates as well as remove or edit existing delegates on this tab. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Delegate for	View a list of WorkZone users you are a delegate for, meaning users who have assigned you as a delegate for them. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration.
Templates for advanced submissions	View a list of templates for advanced submissions. You can add new templates for advanced submissions as well as remove or edit existing templates on this tab. You can also add, remove or edit process steps to the templates on this tab. The tab is not displayed by default and must be added to the detail page, either manually or as part of a WorkZone configuration. **Prerequisite:** You must be assigned the STEPSUBMISSION access code to create, edit or delete templates for advanced submissions.
My access codes	You can view all access codes that are assigned to you. The tab is not displayed by default and must be

Name	Description
	added to the detail page, either manually or as part of a WorkZone configuration.
Various custom contact types	Custom contact types are collections of customized fields created by system administrators in WorkZone Configurator and made available to users in WorkZone. Custom contact types contain custom type fields, which can contain contact data, much like custom fields. Custom contact types are displayed by their name and the custom type field to be used to connect the custom type to the contact. Custom types can be manually added to the contact detail tabs by users or can be distributed as part of a configuration.

See Also

Start an advanced submission

Manage tabs

Detail tabs on contacts

Work with actor sequences

Add, edit or remove delegates for a contact

About access rights

Templates for advanced submissions

Your personal settings

Your user profile contains a series of personal settings which you can update and edit in the **Personal settings** pane.

The following WorkZone Process notification settings can be updated in the **Personal settings** pane:

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

Note: Before you decide which notifications to enable, consider the fact that the number of emails that are generated as notifications can easily get very high.

Your personal settings will override your organization's global WorkZone Process notification settings and your unit's WorkZone Process notification settings.

Global WorkZone Process notification settings

The global settings are defined in by a system administrator in **WorkZone Configurator** > **Process** > **Process settings** > **Notifications**.

Unit WorkZone Process notification settings

Your unit can also contain WorkZone Process notification settings, defined on the Unit detail page. Your unit is considered a separate contact with its own WorkZone Process notification settings and in many cases, own email account. You can therefore receive notifications to your email account based on your personal settings as well as receive notifications to your unit's email account based on the unit's notification settings.

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

Tip: Click the + **Open** button in browser tab page area and select your unit to open the Unit detail page or create a contact search for the unit you want to edit and open the unit detail page from the search results.

Prerequisite: You must be assigned the AFDADM access code to edit unit settings.

See Also

Define your personal settings

Define your personal settings

1. Open your current user details page
2. In the main ribbon of your current user details page, click **Personalize** to open the **Personal settings** pane.
3. In the **Personal settings** pane, select the setting you want to enable or disable.
4. Click **Save** to save your settings.

   Additional tasks:

   - Click Refresh to reload the **Personal settings** pane.
   - Click **Close** to close the **Personal settings** pane.

See Also

Open your user profile page

Change your display language

You can change the display language in WorkZone Client, switching all user interface texts from one official WorkZone language to another. If your configuration contains customizations such as custom fields or custom types, the field labels that correspond to the new language will be displayed.

The contents of the fields in WorkZone (the actual data or metadata in WorkZone) will not be changed.

Language change requires reload of the client

Remember to save your changes to any open cases, documents or contacts as WorkZone Client will reload when the display language is changed.

When WorkZone Client reloads, you will be warned that all unsaved data will be lost and you can cancel the change of language.

User profile based

The display language is linked to your user profile. If you log on to WorkZone as a different user with a different user profile, the new user profile's selected display language will be used.

Change the display language for your user profile

1. In the lower right corner of WorkZone Client, click the language field[1] and select a new display language.
2. The **Change language** warning is displayed.
    - If you have unsaved work, click **No**, save your work and then change the display language again.
    - If you don't have any unsaved work or if you don't mind any unsaved work being lost, click **Yes** to reload WorkZone Client with the new display language.

[1] The language field displays the current display language (ENG for English, DAN for Danish or DEU for German)

See Also

User interface

Terms and conditions

Intellectual property rights

Disclaimer