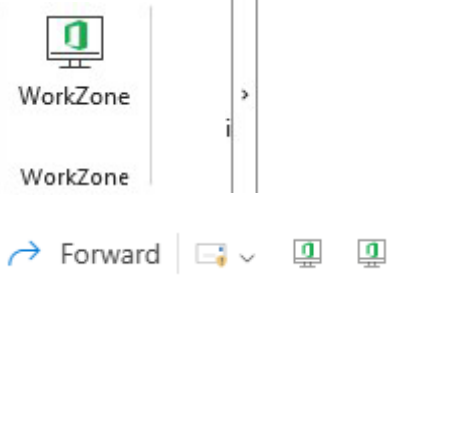

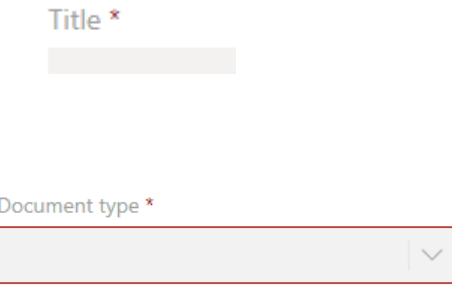

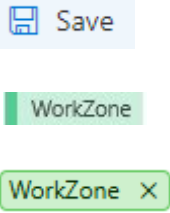
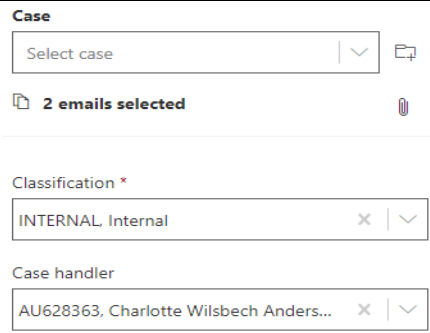


Filing an email with Workzone 365/MAC, academic staff

This guide describes how to file an email under an existing case (created by the Workzone team, either automatically or by request).

Instruction	Explanation	Navigation
<p>File email</p>	<p>Open the email that needs filing. If you use the reading pane, it is sufficient to mark the email in question.</p> <p>Click on the Workzone icon (if the email is not open in full screen, the icon will appear when clicking the arrow in the right).</p> <p>Please note that in the 'new Outlook', the icon is very small.</p>	
<p>Select a case</p>	<p>Select the case you would like to file the email to. The most recent cases you have used in Workzone are listed if you click on the drop-down menu.</p> <p>You can also search for a case by typing in the title or case number.</p>	
<p>Title and information</p>	<p>The remaining fields are largely completed based on the selected case and email.</p> <p>You can change the title, which corresponds to the subject of the email, to something that better reflects the content.</p> <p>The field 'Document type' is mandatory and is not always completed automatically. You cannot save until this field has been completed.</p>	
<p>Parties and attachments</p>	<p>If the parties are duplicated, you will need to pick one in order to save. Select the parties tab, select one for each option and close.</p> <p>If the email has attachments, there is a corresponding tab. You can deselect any attached files that should not be filed.</p>	

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<p>Save</p>	<p>Click 'Save'.</p> <p>The email has now been filed to the case and is marked with a green colour box, both in the email and your inbox. It sometimes takes a little while for this green box to appear.</p> <p>When filing from a shared folder (e.g. a shared mailbox), there will be no green box. This does not mean that the email has not been filed. If you want, you can add this yourself.</p>	
<p>Filing multiple emails to the same case</p>	<p>If using the reading pane, you can file multiple emails at the same time. Mark the emails you would like to file.</p> <p>Click on the Workzone icon. Select a case. Click 'Save'.</p> <p>As there are multiple emails, the registration tab only includes 'Classification' and 'Case handler' fields.</p>	
<p>Accessing filed material</p>	<p>If you are a Mac user, you can view your documents by opening a new email in Outlook and click on the green Workzone "icon" and search for them.</p> <p>If you are a PC user, this guide can help you to find your cases and documents in Explorer: https://medarbejdere.au.dk/fileadmin/www.medarbejdere.au.dk/hr/ESDH/VEJL_Workzone_lists_as_shortcuts_in_File_Explorer.pdf</p>	