



This guide demonstrates how to properly file one or more emails from Outlook to a case (created by the Workzone team, either automatically or following a request made by completing the appropriate form). The guide also shows you how to access materials you have previously filed.

Phase	Instructions	Navigation
Filing an email	Click on the email you want to file.  Click 'Save Item' on the 'Home' tab (or, if you are in an email, on the 'Message' tab).	Save Item ~
Select case	A drop-down menu will appear with the 10 last cases you have used. If you are a new user in Workzone, this list will be empty.  If the case does not occur in the drop-down menu, press 'Search Case'. Enter the case number provided by the Workzone team.  Press 'Search'.  Highlight the case and press 'OK'.	2022-0469892, DPU LSAU 2023, AU628363  Refresh  Search Case  Create New Case
Edit title and attachments	A box will appear showing the information that the system has drawn from the email.  At the top in bold text is the title, corresponding to the emails subject line. This can be edited by placing the cursor in the text field.  Any attachments are listed below the email. By default, they are all selected, but any attachments that you do not wish to file can be removed.	Select documents to be saved  Title  VS: Introduktion til journal  Step-by-step vejledning til jou  Forskningsprojekter - Hvad sk
Information about senders and recipients	The Danish National Archives require us to register information about the senders and recipients of emails. You should therefore always tick all parties to the case under 'Sender and recipient information'.	<ul> <li>Sender and recipient information -</li> <li>Name</li> <li>Simon Rolls,</li> </ul>

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## Filing emails, academic staff, DPU

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Save	Press 'Save'.	All Unread
	The email has now been filed and a yellow	□ 0 From ▲
	folder icon will be shown in Outlook.	(V) Charlotte Wilsbech Andersen
		G Chanotte Wissech Andersen
Filing multiple	It is possible to file multiple mails to a case	KMD WorkZone for Office
emails at the	at the same time.	
same time	Follow the first two steps above, holding	You have selected 2 items to be saved on the case '2022-0375379, DPU Testsag til undervisning 2022-2023,
	down the 'Ctrl' key to select more than one	AU628363'. Registration information cannot be modified for the items you are about to save.
	email. After selecting the case, a dialogue	Assessment to continue?
	box will open asking if you want to continue.  After confirming, all selected emails will be	
	filed. Please note that, when filing multiple	Ja Nej
	emails at the same time, you will not be	
	given the option of editing titles and attachments.	EQ.
	accacinnencs.	
Filing a calendar	Meetings in your Outlook calendar can also	
invite	be filed, for instance when containing attached documents.	□ - Case (workzone.uni.au.dk)
		18-08-2023 12:22:42 2022-0375379, DPU Testsa
	Select the meeting in your calendar (without	
	opening the meeting) and file it following the same procedure as for emails.	
	the same procedure as for emails.	
Accessing filed	Click on your inbox.	
materials		
	In the left column, there is a folder called	•
	'Cases & Documents'. This folder functions as a 'window' into Workzone.	Cases
	as a williagow lifto vyolkzolie.	🗅  Sag   Titel
	You can:	2022-0375379 DPU Testsag til undervisning 2022-2023
	See open cases	2022-0469900 DPU diverse ledelsesinformationer udsendt af Ins
	See any cases you may have	
	registered as favourites (see below)	
	<ul> <li>Open individual documents filed to the case – including emails that</li> </ul>	
	have been deleted in Outlook	
	Once a case has been closed, it will no	
	longer appear in the list of 'Open cases'. If	
	you need to access a case that has been	
	closed, please contact the Workzone team	
	for support.	

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## Filing emails, academic staff, DPU

Favourites: registering a case as a favourite can be a good idea if you need to regularly access and, for instance, file documents to someone else's case. The Workzone team can help you register a case as a favourite (workzonesupport@edu.au.dk).	
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