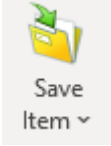

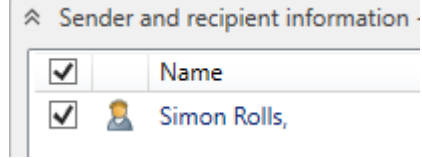

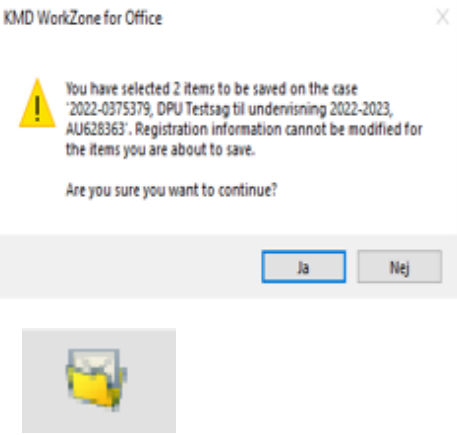

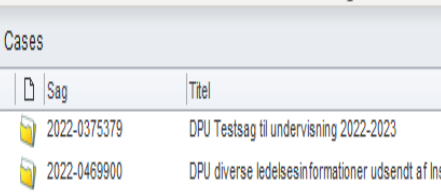


Filing emails, academic staff, DPU

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	<p>Click on the email you want to file.</p> <p>Click 'Save Item' on the 'Home' tab (or, if you are in an email, on the 'Message' tab).</p>	
Select case	<p>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.</p> <p>If the case does not occur in the drop-down menu, press 'Search Case'. Enter the case number provided by the Workzone team.</p> <p>Press 'Search'.</p> <p>Highlight the case and press 'OK'.</p>	
Edit title and attachments	<p>A box will appear showing the information that the system has drawn from the email.</p> <p>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.</p> <p>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.</p>	
Information about senders and recipients	<p>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'.</p>	

Filing emails, academic staff, DPU

<p>Save</p>	<p>Press 'Save'.</p> <p>The email has now been filed and a yellow folder icon will be shown in Outlook.</p>	
<p>Filing multiple emails at the same time</p>	<p>It is possible to file multiple mails to a case at the same time.</p> <p>Follow the first two steps above, holding down the 'Ctrl' key to select more than one email. After selecting the case, a dialogue box will open asking if you want to continue. After confirming, all selected emails will be filed. Please note that, when filing multiple emails at the same time, you will not be given the option of editing titles and attachments.</p>	
<p>Filing a calendar invite</p>	<p>Meetings in your Outlook calendar can also be filed, for instance when containing attached documents.</p> <p>Select the meeting in your calendar (without opening the meeting) and file it following the same procedure as for emails.</p>	
<p>Accessing filed materials</p>	<p>Click on your inbox.</p> <p>In the left column, there is a folder called 'Cases & Documents'. This folder functions as a 'window' into Workzone.</p> <p>You can:</p> <ul style="list-style-type: none"> • See open cases • See any cases you may have registered as favourites (see below) • Open individual documents filed to the case – including emails that have been deleted in Outlook <p>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.</p>	

Filing emails, academic staff, DPU

	<p>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).</p>	
--	---	--