Guide for WorkZone Filing e-mails from Outlook



This is a guide for filing e-mails from Outlook into an existing case in WorkZone. Both sent and received e-mails can be filed.

Phase	Instructions	Navigation
Save e-mail – step one	Open the e-mail you want to file.	
	Press Save Item in the tool bar.	Save Notes Assig
	Select the case you want to file the	1tem • Policy 2020-0055476, LAMU
	email to in the Drop down menu.	2018-232-000012, Arb
	If the case is not visible in the Drop	SJ-STD-AU615342, Ski 2019-622-002083, Kni
	down menu press Refresh . If the case	SJ-STD-AU91821, Skri
	does not occur in the drop down menu	2017-621-007606, An 2020-0044599, Collab
	press Search Case	2019-0023729, MBG Y
	Enter the Case Number or Search for	2019-622-002377, Lini 2019-0036299, Adgan
	the title of the case.	Befresh
		Q Search Case
		Create New Case
Save email – step two	Tick the documents that you want to	Iner Cutrick tem (ventume.un.du.dl)
	file (Marked in green)	Series How To case Statistic Advectorial - Adv15342, Adv15342 Sector Advocuments to be transf To advocument To advocument To advocument Type Classification Later Date Document Type Classification Later Date
	Tick "Mark all as main documents" if e-	Image: Section of the sectio
	mail and attachments must be saved as	Set at main document
	separate documents in WorkZone.	A Soledr and recipient information - 1 Soledr and recipient information - 1 Soler Assoler for the solet Assoler solebunds
	Tick the email recipients / senders that	Additense
	are parties on the case.	V Related Scionemin - 0 V Related Scionemin - 0 V Related Science Server Carect
	Press Save .	
	Tip:	
	It is possible to edit "title", "document	Save Outlook them (workponeuniauud) - Ser the hot care Ser The hot care Ser The hot Care Set of Schemberd - AUSISTRAL MUSISTRAL Set of Schemberd - But and Set of Schemberd - But and
	type" and "classification type" before	W The Document Group Document Group Document Group Document Group Document Group Document Group Low Low <thlow< th=""> Low <thlow< th=""></thlow<></thlow<>
	saving. Click the document line and use	DMED, finted image Li iconing N. Internal NOT, Notat BRIART Interna
	the drop down menus. The title can be	PRCHST, Hetorik RADDEF, Report definition
	changed manually and a new date can	
	be selected when pressing the calendar	
	icon.	
	It is also possible to change the	
	information afterwards in Workzone.	
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