Guide to Workzone



Attach Workzone documents in an email via Workzone365

This guide describes how you attach Workzone documents to an email in Outlook via Workzone365. You can attach documents to your email in two ways:

- Copy the documents to your clipboard in Workzone Client and paste them into a new email in Outlook
- Search for and attach documents in the Workzone365-pane

Copy the documents to your clipboard in Workzone Client and paste them into a new email in Outlook

Instruction	Explanation	Navigation
Choose documents	Mark the documents that you wish to share.	1 ☑ 💭 ☆ 🗋 🔔 0 2 ☑ 💭 ☆ 🗋 遵 0
Copy documents	Click on the button Share and choose Copy to clipboard .	In mail Copy to clipboard Open in new window
Create an email	Create a new email in Outlook. Click on the button Workzone365 in the email and choose Attach from clipboard .	WorkZone View Templates Attach from clipboard Search documents
Choose format of the shared files	A new pane opens in the right side of the email and the copied documents appear. At the bottom of the pane you can choose the format of the documents (Links, Documents or PDF). Click on the format you prefer and the documents will be attached in the format you have chosen.	 Links (2) Documents (2) PDF documents (2) Attach ~

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Create an email	Create a new email in Outlook. Click on the button Workzone365 in the email and choose Search documents .	WorkZone WorkZone Attach from clipboard Search documents
Type search criteria	On the right site a new pane opens which enables you to search the fields: Free text, Search in Document number, Case handler, Title and Case number. Type the search criteria and click Search .	Free text Search in Vælg search in Document number Case handler Vælg case handler Title Case number
Choose	A list of documents which live up to the search	🔿 🗋 🖻 Summary
documents	criteria will appear. Mark the documents that you wish to attach.	 ✓ □ □ □ −4627171, Undervisning ✓ □ □ −4627172, 29/10/2020
Choose format of	At the bottom of the pane you can choose the	C Links (2)
the shared files	format of the documents (Links, Documents or PDF).	Documents (2) PDF documents (2)
	Click on the format you prefer and the documents will be attached in the format you have chosen.	🔋 Attach 🗠