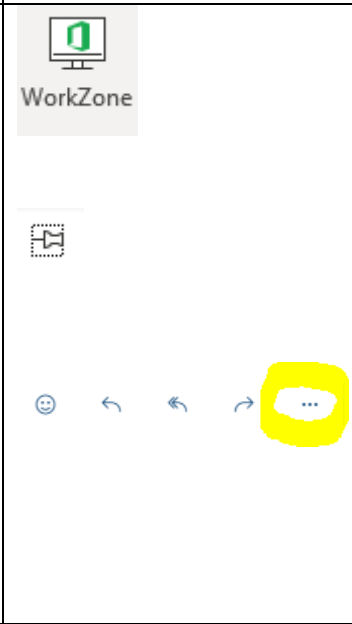



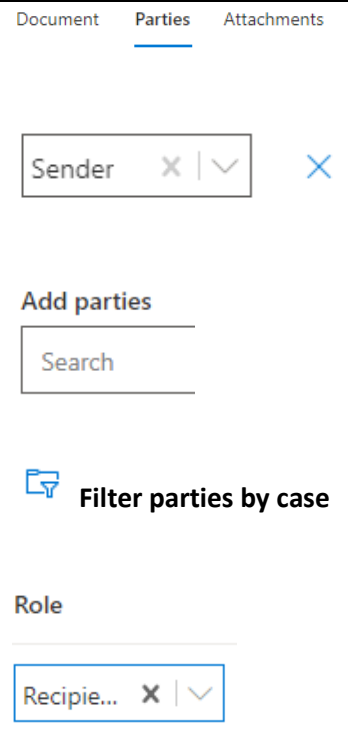
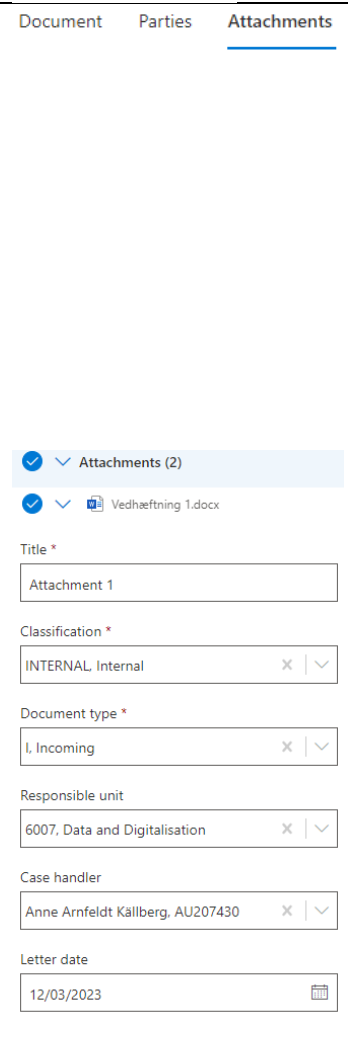
Filing an email with Workzone 365

This guide describes how to file an email under an existing case using Workzone 365. The guide applies to both Mac and Windows computers.

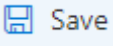

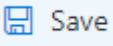
If you need to file the same mail under multiple cases, please see the information at the bottom on this guide.

Instruction	Explanation	Navigation
<p>Open WZ365</p>	<p>Open an email that you have received or sent in Outlook.</p> <p>Open the Workzone 365 registration window.</p> <p>Click on the pin icon if you would like to pin the registration window when you switch between emails.</p> <p>Note: If you are using New Outlook, you can open Workzone365 by clicking an email. In the upper right corner of the email, you will find three dots you can click and thereafter select Workzone in the drop-down menu which appears.</p>	
<p>Select a case</p>	<p>Select the case you would like to file the email.</p> <p>When you click on the Case field, you will see the cases you've opened most recently in Workzone.</p> <p>You can also search for a case by typing in the title or case number.</p>	
<p>Add the relevant information</p>	<p>Please provide the following information as a minimum:</p> <ul style="list-style-type: none"> • Title: Change the title of the email if necessary • Classification: Select the relevant classification. If the case already has a standard classification, this will be selected. 	

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<p>Handle parties</p>	<p>Click the tab Parties where sender and recipient are pre-registered.</p> <p>If you wish to delete the pre-registered parties, you can do this by clicking the cross next to the relevant party.</p> <p>If you wish to add other parties, you can find and add these parties through the field Add parties.</p> <p>Click the button Filter parties by case to exclusively see parties which are already connected to the case.</p> <p>You can select the role of each party once the relevant parties are added.</p>	
<p>Save attached files (if any)</p>	<p>If the email has files attached to it, you can click on the Attachments tab.</p> <p>Select/deselect the attachments you want to save.</p> <p>Please note: Even if you deselect the attached files they will still appear as a part of the main document (the email). It is thus not possible at the moment to avoid saving the attachments together with the email.</p> <p>Click on the arrow beside the attachment if you wish to change its information e.g. Title, Classification, Document type etc.</p>	

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	<p>Select Save as main documents if you want to save the attachments as main documents rather than as attachments to an email.</p>	
<p>Save</p>	<p>When you select Save, the email will be filed.</p> <p>The filed email automatically gets a green colour code so that you can maintain an overview of which emails you have filed.</p>	  <p>10-03-2023</p>
<p>File an email under multiple cases</p>	<p>Open the email you have already filed.</p> <p>Open the Workzone 365 registration window.</p> <p>Click on the Case field and find the next case you want to file the mail under.</p> <p>Provide the required information (title, document type and classification).</p> <p>Select/deselect any attachments.</p> <p>Click Save to save the email to the case.</p>	
<p>Case overview</p>	<p>Select Only cases this email is saved on.</p> <p>Then click on the Case field to see which cases the email is filed under.</p>	<p>Case</p> <p><input checked="" type="radio"/> Only cases this email is saved on</p> <p>Case</p> <p>Select case v</p>