

Documents in WorkZone


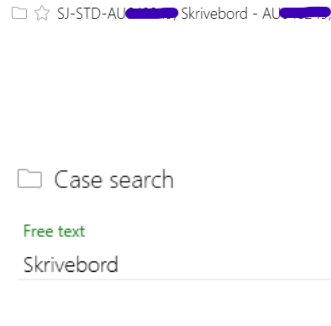
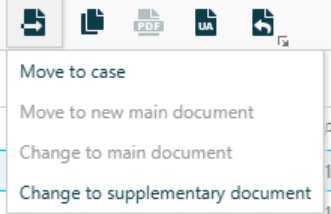
This guide explains how you remove or delete documents from your desktopcase. These types of documents appear in the list: "SD dok. på skrivebordsag". The list is marked with a red counter if there are any documents on your desktopcase.

All users have a desktopcase, which functions as a safety net in case a technical error occurs or if you accidentally create or upload a document to Workzone without attaching it to a case.

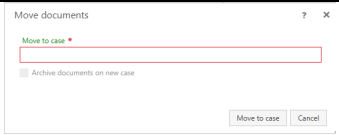

The desktopcase cannot be closed.

Documents should not be stored on desktopcases, instead, they should be journalized on the case to which they relate. According to The Danish National Archives, documents must not be saved on desktop-cases. For more information, see these instructions from AU:

https://medarbejdere.au.dk/fileadmin/www.medarbejdere.au.dk/hr/ESDH/Revideret_journalinstruks_v.4.0_-_godkendt.pdf

Instruction	Explanation	Navigation
SD dok. på skrivebordssag	Open Workzone Open the list: SD dok. på skrivebordssag. Tip 1: If you have removed the list, you can find it again under "GEMTE LISTER OG ABONNEMENTER" → "Shared lists". Tip 2: On the Default dashboard, the list appears as a counter. If the number is greater than 0, it will be shown in red, indicating that you have documents that need to be corrected.	
Find desktopcase	Find your desktopcase in the list "Open cases" Alternatively, select "New search" → "Case". Enter "Skrivebord" in the "Free text" field and click "Search". Open the case.	
Draft documents – move to another case	If the document needs to be moved to another case, follow these steps: <ol style="list-style-type: none"> 1. Select the document you want to move 2. Click the "Move" icon and choose "Move to case" from the drop-down menu 	

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	<ol style="list-style-type: none"> 3. Search for the case you want to move the document to 4. Click “Move to case” 5. The document has now been moved from the case <p>Tip: If you need to move multiple documents to the same case, you can select them and move them at the same time.</p>	
<p>Draft documents - delete</p>	<p>If the document needs to be deleted, follow these steps:</p> <ol style="list-style-type: none"> 1. Select the document you want to delete 2. Click the “Recycle” icon 3. Click “Yes” to confirm that the document and all attachments are moved to the recycle bin 4. The document has now been deleted from the case 	
<p>Archived documents</p>	<p>If the documents have been archived – meaning they have a padlock icon and a record number – you must contact HR Data og Digitalisering, as you cannot move or delete them yourself. You need to create a support ticket via Workzone - AU Serviceportal. We can then help you move the documents to the relevant case or delete them if they are not relevant.</p> <p>Please remember to provide a reason for the deletion so it can be recorded as part of the deletion process or provide the case number of the case to which the document should be moved.</p>	