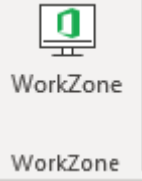






Creating documents with Workzone 365

This guide describes how to create a Word, Excel or PowerPoint document with Workzone 365 (WZ365) and file it under a case.

Please note that this guide describes the minimal steps required and that local guidelines may also apply, for example in relation to naming documents.

Instruction	Explanation	Navigation
<p>Open WZ365</p>	<p>Open Word, Excel or PowerPoint and create a new document.</p> <p>Click on the WZ365 button.</p>	
<p>Select a case</p>	<p>Select the case you want to save the document under.</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>You can also create a new case by clicking the case icon to the right of the search field.</p>	<p>Case</p> <input data-bbox="1093 779 1409 815" type="text" value="Select case"/> 
<p>Fill document title</p>	<p>Give the document an informative title that includes:</p> <ul style="list-style-type: none"> • A description of the content • A relevant date or time period <p>For example, "Agenda coordination meeting 01-10-2022"</p> <p>This only applies if the syntax for cases has been upheld (what, when, who).</p>	<p>Title *</p> <input data-bbox="1093 1220 1409 1256" type="text"/>
<p>Select document type</p>	<p>Select the relevant document type for the document.</p> <p>N, Internal – used for internal documents, I, Incoming – used for incoming post such as letter or emails U, Outgoing – used for outgoing post such as letters or emails</p>	<p>Document type *</p> <input data-bbox="1093 1585 1409 1621" type="text" value="Select document type"/>
<p>Select a standard document classification</p>	<p>Select the relevant document Classification.</p>	<p>Classification *</p> <input data-bbox="1093 1908 1409 1944" type="text" value="INTERNAL, Internal"/>

Creating documents with Workzone 365

	<p>As a general rule, documents have the same classification as the case. But they can have a different classification if necessary.</p> <p>Workzone uses the same classification categories as AU, which can be found here: https://medarbejdere.au.dk/informationssikkerhed/klaskifikation-af-data/</p>	
Adjust the status	<p>As a general rule, the document has the status "UÅ, Draft" and can thus be displayed, edited, and deleted by anyone who has access to the document.</p> <p>"UP, Personal draft" Can only be displayed, edited and deleted by the person who created the document.</p> <p>"UL, Locked document" The document itself cannot be edited by anyone, but everyone can edit document information.</p> <p>"ARK, Archived" The document itself cannot be edited by anyone, but everyone can edit document information. Documents can only be archived once they are final.</p>	<p>State *</p> <div style="border: 1px solid black; padding: 2px;">UÅ, Draft</div>
Save the document	<p>Click on the Save icon.</p> <p>A green information message will appear at the top of the registration window when the changes have been saved.</p>	<div style="border: 1px solid #ccc; padding: 5px; background-color: #e6f2ff; width: fit-content; margin-bottom: 10px;">  Save </div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #e6ffe6; width: fit-content;">  The changes are successfully </div>
Word	<p>Once the document is saved, the WZ365 registration panel will close.</p> <p>You can now edit the saved document.</p>	
Excel or PowerPoint	<p>A yellow information box appears.</p> <p>Click on Open document to edit the saved document.</p>	<div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4;"> <p> Action required. Click 'Open Document' to edit it in WorkZone, or close the document</p> <div style="text-align: right; margin-top: 5px;"> Open document </div> </div>