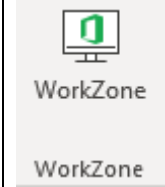



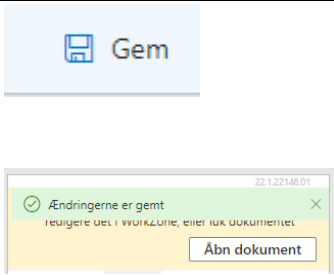
Creating documents with Workzone 365

This guide describes how to create a Word, Excel or PowerPoint document with Workzone 365 and file it under a case. The procedure is the same for the three programs.

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

Step	Explanation	Navigation
Open WZ365	<p>Open Word, Excel or PowerPoint and create a new document.</p> <p>Open the Workzone 365 registration window.</p>	
Select a case	<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>Sag *</p> <p>Vælg sag <input type="text"/></p>
Provide a title	<p>Give the document an informative title that includes:</p> <p>A description of the content A relevant date or time period</p> <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>Titel *</p> <p><input type="text"/></p>
Select document type	<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>Dokumenttype *</p> <p>Vælg dokumenttype <input type="text"/></p>
Select a standard document classification	<p>Select the relevant document classification.</p> <p>As a general rule, documents have the same classification as the case. But they can have a different classification if necessary.</p>	<p>Klassifikation *</p> <p>Vælg klassifikation <input type="text"/></p>

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	<p>Workzone uses the same classification categories as AU, which can be found here: https://medarbejdere.au.dk/informationssikkerhed/klassifikation-af-data/)</p>	
Adjust the status	<p>As a general rule, the document has the status Draft – UÅ and can thus be displayed, edited, and deleted by anyone who has access to the document.</p> <p>Personal draft – UP. Can only be displayed, edited and deleted by the person who created the document.</p> <p>Locked document – UL. The document itself cannot be edited by anyone, but everyone can edit document information.</p> <p>Archived – ARK. The document itself cannot be edited by anyone, but everyone can edit document information. Documents can only be archived once they are final.</p>	
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>	
Open document to edit	<p>Click on Open document to edit the saved document.</p>	