

## WHAT DO WE NEED TO SAVE?

### The Public Administration Act

*§ 15. Documents received or submitted by an administrative authority as part of an administrative procedure related to its activities must be saved to the extent that the document is of importance for a case or the procedure as such. This also applies to internal documents in their final form.*

### Examples of what **MUST** be saved:

- Applications, grants and rejections. (Remember to send the applications, grants and rejections to the group secretary and the project finance administrator at submission).
- Agreements, contracts, declarations and notes in their final form.
- Decisions (no matter whether they are included in notes, minutes, emails, telephone notes or whether they are individual documents).
- Inquiries from and responses to external parties.

### Examples of what **NOT** to save:

- Email correspondence of informal character, such as agreement on scheduled appointment time, meeting room etc.
- External inquiries in the form of advertisements, general requests etc.
- Uninvited job applications and responses.
- Publications.
- Analyses and drawings related to research and communication.
- Scientific data saved in SAS, Access databases etc.

The lists are not exhaustive!

## The short guide to saving in WorkZone: Use Outlook!

### CALL US FOR HELP

#### Foulum

Anna Dorthe Østergaard	8715 8034
Birgit S. Langvad	2331 0430
Jytte Christensen	8715 8015
Karina R. Christensen	4071 1132

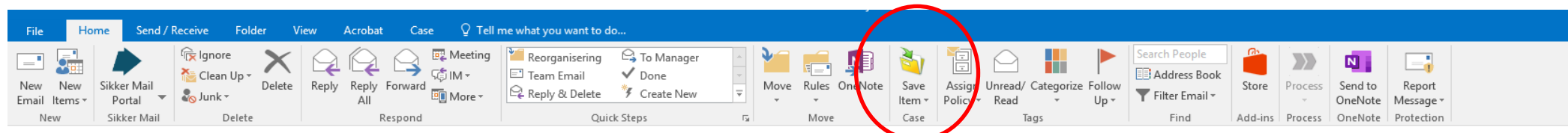
#### Flakkebjerg

Bende Astrup	8715 8265
Charlotte Hamann Knudsen	8715 8191
Kirsten Jensen	8715 8184

#### DCA

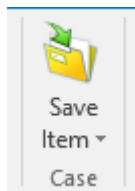
Ulla Sonne Bertelsen (myndighedssager) 9350 8568

Updated 20.11.2019 by MST



## SAVE THE OUTLOOK ITEM ON AN EXISTING CASE

1. Select the email you would like to save.
2. On the tab **Home**, click **Save item**.
3. Do one of the following:
  - A. Select a case from the list of the latest cases in which you would like to save your Outlook item (Click Update if necessary). The dialogue box **Save item on case** will appear, see below.
  - B. Select **Search case** in the list. The dialogue box **Select case** will appear.
    - i. Type in or select search criteria. See Searching.
    - ii. Click **Search**. The list of search results will appear in the bottom window.
    - iii. Select a case and click **OK**. The dialogue box **Save item on case** will appear, see below.
  - C. **Create a new case**: Call one of the persons listed on the front page.

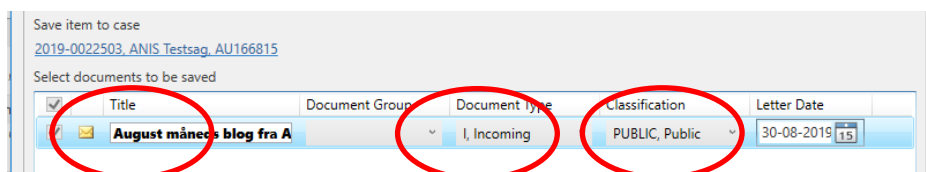


## SAVE SEVERAL OUTLOOK ITEMS

Before this function works, your case must be classified in WorkZone. If you need help, don't hesitate to ask your secretary. All new cases will be classified when creating them.

1. Select at least two emails that you would like to save.
2. On the tab **Home**, click **Save item**.
3. Do one of the following:
  - A. Select a case from the list of your latest cases.
  - B. Click **Search case** – search for a case and click **OK**.
  - C. Click **Create new case**: Call one of the persons listed on the front page.
4. The dialogue **Save several Outlook items** will appear.
  - A. Fill in the dialogue the best you can.
  - B. Be aware of the warning saying that you are not able to edit. Click yes.

## SAVE THE ITEM ON THE CASE



1. Select an expressive title (delete for instance vs:)
2. Select type of document (your evaluation)
3. Select classification (your evaluation, see for instance here: <https://medarbejdere.au.dk/informationssikkerhed/klassifikation-af-data/>)
4. If you only need to save the attached file, mark "Save all as main documents" and after that unmark which documents you don't want to save.

## SAVE THE EMAIL WHILE SENDING IT

1. Create an email.
2. On the tab **Message**, click **Select case**. A list will appear.
3. From the list you select the case on which you want to save the email. Then click **send** as you normally do.



### MORE GUIDELINES CAN BE FOUND AT

<https://medarbejdere.au.dk/administration/hr/hr-systemer/esdh/vejledninger/>