

WorkZone: Quick Guide AGRO

Responsibility

The following describes the general principles for when you need to save relevant documents in WorkZone. You are responsible for saving relevant material, and the head of department is responsible for ensuring that its employees save in WorkZone.

What is a case?

You may compare a case to a physical folder in which you keep all documents, emails, memos, etc. you have to save to perform a task/project. One case number must be created for each task/project.

When should a case be created?

You are responsible for having a case number in Workzone created as well as saving material on the case number.

At AGRO, the department secretaries will create new case numbers in Workzone. So please contact her/him in order to find out whether there already is a case number in Workzone, or a new case number needs to be created.

If you are in doubt, ask yourself the following:

1. Have you decided to enter into an external collaboration with government agencies, businesses, interest groups, or similar?
2. Are you performing public sector consultancy?
3. Are you preparing a research application, or about to enter into a formal agreement?
4. Will you, or have you advised or acted as an expert witness?
5. Have you entered into a contractual relationship, e.g. in connection with procurement, lending equipment, or analysis work?
6. Do you need to apply for a license or an approval from government agencies?

If you can answer 'yes' to one of above questions, a case number must be created in Workzone.

What needs to be stored on the case in WorkZone?

All incoming and outgoing correspondence/emails as well as finished, internal documents such as agendas and minutes from meetings, research applications, signed contracts, and formal agreements as well as significant documents, or critical internal correspondence in this connection.

If you receive or provide information orally which is of crucial importance to the case, you have an obligation to record this, and you should therefore write a memo/mail and save it in WorkZone (e.g. by sending an email to yourself and saving it on the case). Consider getting comments on the memo/mail from the person you spoke to, so you both agree on the content.

If you are working with **public sector consultancy and tasks covered by the Danish Environmental Information Act**, you must also save all project-related internal correspondence, etc., e.g. internal comments on a project description, but not correspondence about the time of the meetings, catering, etc.

If you are in doubt as to whether you need to save in Workzone, ask yourself:

1. Is this information relevant to the case?
2. Will colleagues or I need this information later?
3. Will this information be important if anyone requests "right of access to documents"?

If you can answer 'yes' to one of above questions, you need to save Workzone.

How often should I save in Workzone?

AU has made a precautionary decision that AU employees may not **keep sensitive and confidential personal data** for a longer period unless it is relevant to the case in question, meaning maximum 30 days.

In general, emails should be saved as soon as possible after receipt/sending. This means that you should on a regular basis save in Workzone from your inbox and save emails when you send them. If you have a long email thread on the same topic with the same recipient, you only need to save the last e-mail received/sent. NB! Think about the attached files in each email in the correspondence thread and decide whether they should all be saved.

Keep in mind that external parties in case of "*right of access to documents*" may get access to reading our emails, so think carefully about your wording in emails. Private messages should be sent in separate mails so they cannot be linked to cases in Workzone.

Who can see my cases in WorkZone?

When a case number is created in WorkZone, it is generally open to everyone at AU. If necessary, the person who creates the case numbers in Workzone may restrict insight.

Please be aware that you are only allowed to access case numbers, which are relevant for you in a work-related context. All activities in WorkZone are logged. If you read cases, which are not relevant to your work, this will be considered as a breach of your responsibilities and may result in a disciplinary action.

More information

In Danish only: Link to Guidelines for research collaborations with external parties at ST:
http://scitech.medarbejdere.au.dk/fileadmin/ingen_mappe_valgt/Retningslinjer_for_forskningssam_arbejder_med_eksterne_parter_ved_ST_Aarhus_Universitet_ver.1.0_final.pdf

In Danish only: Link to ST's Click Guides:
<http://scitech.medarbejdere.au.dk/medarbejderservice-paa-st/faelles-journaliseringspraksis-paa-st/>

In Danish only: Link to HR IT's guidelines and descriptions of filing practice at departments and in connection with projects:
<https://medarbejdere.au.dk/administration/hr/hr-systemer/esdh/vejledninger/>

Link to AU's staff pages on data security:
<https://medarbejdere.au.dk/en/informationsecurity/tips/>