

Processes in Workzone

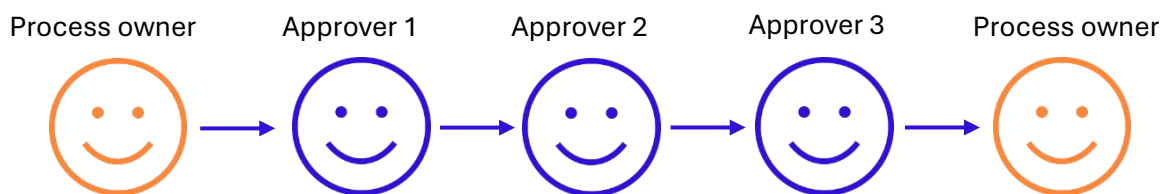
Workzone Process makes it possible to send documents for approval and hearing, and to have the process documented on a case. Please note the following limitations of the Workzone Process tool:

- To open the documents, you receive in SmartTask (emails from Workzone Process), you must have access to the case from which the process was initiated.
- For Mac users: Mac users must respond to processes in the Workzone web client, as Workzone for Office is not yet available for Mac.

There are four types of processes in Workzone: submission (basis and extended), hearing and distribution. A process can be initiated from Workzone web client and from Office applications when a document is linked to a case.

Submission:

A submission is used when one or more actors must approve a document in a specific order.



When all approvers have approved, or one has rejected, the case handler is notified.

In a basis submission, the approvers have the following response options:

- **Approve** – If you approve a submission and there are multiple approvers, the task is forwarded to the next approver for approval.
- **Reject** – If you reject a submission, the task is returned to the process owner (typically the case handler). The process owner will usually revise the document and restart the submission process with the new version of the document.
- **Skip** – If you feel you have nothing to contribute, you can skip the submission. The task is sent to the next approver (if any). If there are no more approvers, the submission is considered approved.
- **Forward** – You can forward a submission task to someone else if they should handle the task instead of you. The rest of the approval process remains unchanged.

In an extended submission, approvers have two additional response options:

- **Conditional** – With a conditional approval, you can request a change to the document from a previous approver. You can select any approver who has been involved in the approval

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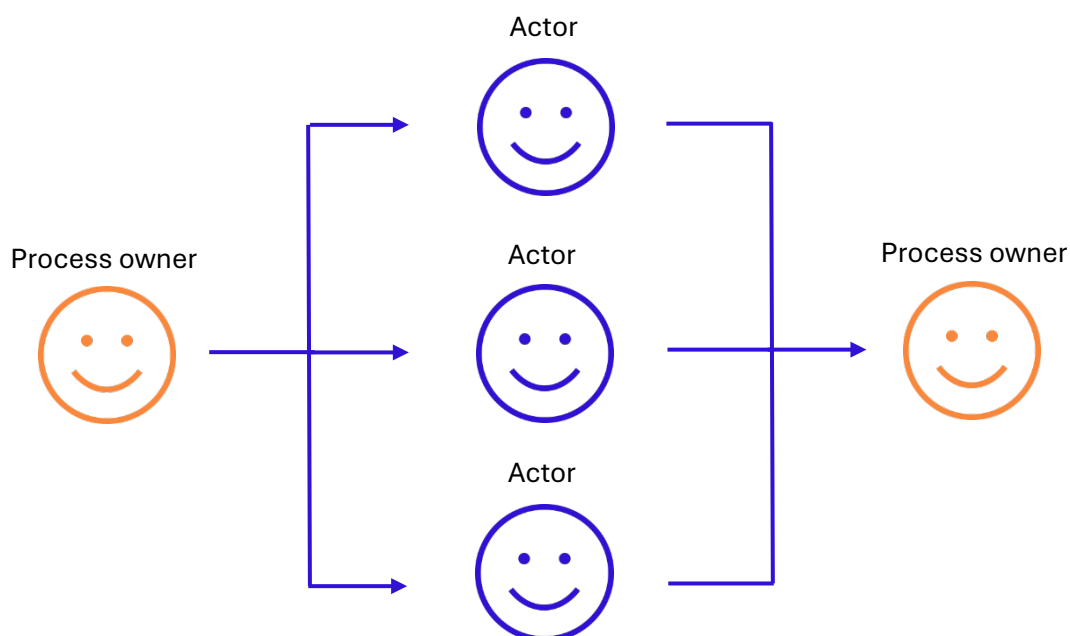
process before you.

Once the change has been made, the approval sequence resumes with the next approver in the chain. You will not see the revision.

- **Reject To** – Works in the same way as the Conditional response option. However, in this case, you will see the revision before the approval sequence resumes.

Hearing:

Hearing is a process based on a parallel workflow. The process can be stopped either when everyone has responded, when a specified number has responded, or when a deadline has passed.



In a hearing, actors have the following response options:

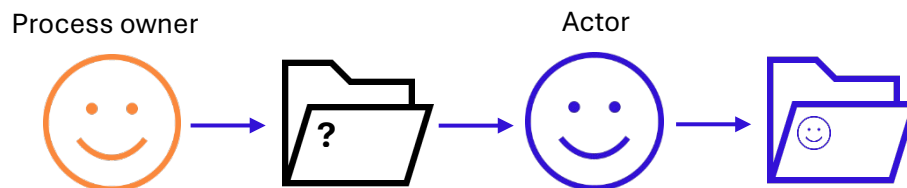
- **Respond** – Reply to a hearing by simply clicking *Respond*, or enter a comment in the *Add comment* field and then click *Respond*.
- **Skip** – If you do not wish to respond to the hearing, you can skip it.
- **Forward** – Use this option to forward the task to another person.

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Distribution:

When you start a distribution process, you select an actor to take ownership of the case. Once the actor has accepted ownership, they are assigned as the case handler for the case.

Example: A secretary prepares a case that a researcher is to be responsible for. The secretary distributes the case to the researcher through this process.



In a distribution process, the actor has the following response options:

- **Accept** – When you accept a distribution, you accept responsibility for the case. This means that you become the case handler for the case.
- **Reject** – If you reject the distribution, it is sent back to the process owner, who can choose to forward it to someone else or restart the process.
- **Forward** – You can forward a distribution to another employee if you want someone else to take over the case instead of you.