



2021.3  
User Guide

Contents

---

<b>User Guide for WorkZone Process 2021.3</b> .....	<b>16</b>
FAQ .....	16
Advanced features .....	17
Related product documentation .....	17
WorkZone links .....	17
<b>What's New</b> .....	<b>18</b>
New features in WorkZone Process 2021.3 .....	18
New advanced submission process .....	18
Submission (Extended) - Notify employees .....	20
SmartPost .....	22
Remerge of letter document if the recipient is changed .....	22
Letter date format in letters .....	22
Case activities .....	22
New Processes tab in WorkZone Client .....	22
Processes overview .....	23
Reorder user tasks .....	23
SmartPost .....	23
Doc2Mail is renamed to OneTooX .....	23
Case activities .....	24
SmartPost .....	24
Send attachments as separate documents .....	24
Save received messages sent to subunits on specific cases .....	25
Interact forms .....	26
SmartPost .....	26
Support for GDPR .....	26
Case content controls in standard letters and on cover pages .....	26
Case activities .....	26

---

SmartPost .....	27
Error code and description in the history document .....	27
Document number .....	27
Cancel button renamed to Reject .....	27
Allowed documents .....	29
SmartPost .....	30
Create cases, documents, and contacts automatically based on data from WorkZone Interact forms .....	30
Updates and cancellations of F2 requisitions .....	30
SmartPost: .....	31
New selector controls .....	36
Approved documents in F2 replies .....	36
Case activities .....	36
<b>Getting started .....</b>	<b>37</b>
Click to learn more: .....	37
Access .....	37
Actors .....	38
Process flows .....	38
Click to learn more about the process types: .....	38
Get an overview .....	39
<b>About WorkZone Process .....</b>	<b>40</b>
Click to learn more: .....	40
About process packages .....	40
Starting processes .....	41
Click to learn more: .....	41
The Processes overview .....	42
<b>Tips for working in the user interface .....</b>	<b>43</b>
Enter dates and times .....	43

Type date and time .....	43
Select a date in the calendar .....	43
Finish entering date and time .....	43
Adjust the time .....	43
About comments .....	44
Respond conditionally or reject .....	44
The comment fields .....	44
<b>Starting processes .....</b>	<b>45</b>
Start a new process .....	45
Start a process from Outlook .....	45
Start a process from an email .....	45
Start a process from the Cases & Documents folder .....	47
Start a process from Word, Excel, or PowerPoint .....	47
Start a process from WorkZone Client .....	48
Start a process from the ribbon .....	48
Start a process from the Processes tab on a case detail page .....	49
Work with active processes on the Processes tab .....	49
Get an overview of processes .....	49
Phase processes .....	49
About phase processes .....	49
Phases .....	50
Start a phase process .....	50
Phase processes in the Processes overview .....	51
Move a process to another phase .....	51
Edit phase process details .....	52
Change deadlines of phases .....	52
View the progress of a phase process .....	53
Save an email on a case .....	53

---

Look up and add approvers .....	55
Look up and add documents .....	57
Add one or more documents to a process .....	57
Document properties .....	57
Actors available for a process .....	57
Access rights to a process controlled by case .....	58
Access rights to a process controlled by case Documents .....	58
Access rights controlled by organizational unit .....	58
Allow access to cases across organizational units in a corporate configuration environment .....	59
<b>Phase processes .....</b>	<b>60</b>
About phase processes .....	60
Phases .....	60
Start a phase process .....	60
Phase processes in the Processes overview .....	61
Move a process to another phase .....	62
Edit phase process details .....	62
Change deadlines of phases .....	63
View the progress of a phase process .....	63
<b>The Processes Overview .....</b>	<b>64</b>
About the Processes Overview .....	64
Open the Processes Overview .....	64
View processes and tasks .....	65
View process information .....	66
View task information .....	67
Icons in the Processes Overview .....	68
About the Processes Overview .....	70
Open the Processes Overview .....	70

View processes and tasks .....	71
View process information .....	72
View task information .....	73
Icons in the Processes Overview .....	73
Use the Processes Overview .....	75
View a list .....	75
Process lists .....	75
Task lists .....	77
View a process .....	78
Open a task from the Processes Overview .....	79
Open a task as a PDF document .....	80
View my lists and shared lists .....	80
Edit process details .....	81
Cancel a process .....	82
Restart a process .....	83
Take ownership of a process .....	83
Customize the Processes Overview .....	84
Select columns .....	84
Change column order .....	84
Use column filters .....	84
Filter by process type .....	85
Filter by case handler .....	85
Combine filters .....	85
<b>Work with tasks .....</b>	<b>87</b>
Different ways of working with tasks .....	87
View smartmails when you do not have access to WorkZone .....	87
Task types and actions .....	88
Locked tasks .....	88

---

About smarttask .....	89
Actors in the task .....	90
Task icons .....	91
Open a task as a PDF .....	91
The Process Log .....	92
Response times .....	93
Respond to a task .....	93
Accept a task .....	93
Forward a task .....	93
View or edit a document in a task .....	94
View a document's meta data in WorkZone Client .....	94
Open and edit a document .....	94
View the status of a task .....	94
Resending a task .....	95
About resent tasks .....	95
Resend a task .....	95
Working with task documents .....	95
Forward documents from a smarttask .....	95
Enable or disable document versioning .....	96
Manage documents and actors on a task .....	96
Manage documents and actors .....	97
Reorder tasks .....	99
Order tasks in WorkZone Client .....	99
Order tasks in WorkZone Mobile .....	99
Reorder tasks of a user that you are a delegate for .....	100
<b>WorkZone Process Basis package .....</b>	<b>101</b>
Submissions .....	101
Hearings .....	101

Submission processes (Basis) .....	102
About submissions .....	102
The submission process flow .....	102
The process is started .....	103
The actors respond .....	103
The process history .....	104
Start a basis submission process .....	104
Start submission process .....	105
Respond to a submission .....	106
Approve .....	107
Reject .....	107
Skip .....	108
Forward .....	108
Receiving submission response .....	108
Rejected submission .....	108
Approved submission .....	108
Reminder date reached .....	109
response deadline reached .....	109
Hearing processes (Basis) .....	109
About hearings .....	109
The hearing process flow .....	110
The process is started .....	111
The actors respond .....	111
The process history .....	111
Start a basis hearing process .....	111
Start hearing process .....	111
Selecting how the hearing should end .....	114
Respond to a hearing .....	115



---

Add a response document .....	115
Respond .....	116
Skip .....	116
Forward .....	117
Receiving hearing response on deadline .....	117
Receiving a hearing summary .....	117
<b>Extended package .....</b>	<b>118</b>
Distributions .....	118
Submissions .....	118
Distribution processes (Extended) .....	119
About distributions .....	119
Starting a distribution .....	119
Responding to a distribution .....	120
The distribution process flow .....	120
The flow diagram of extended distributions .....	121
Start a distribution process .....	123
Respond to a distribution task .....	126
Respond as responsible contact .....	126
Accept .....	127
Reject .....	127
Forward .....	127
Respond as contributor .....	127
Accept .....	127
Reject .....	127
Forward .....	128
View responses .....	128
About reminders .....	128
Receiving distribution response .....	128

Response from the responsible contact .....	129
Accepted distribution .....	129
Rejected distribution .....	129
Restart the process .....	129
Stop the process .....	129
Forward the distribution task .....	129
Forwarded distribution .....	130
Reminder date reached .....	130
Response from contributors .....	130
Reminder date reached .....	131
No contributor responses by deadline .....	131
No responses by deadline .....	131
You selected the End distribution when deadline reached check box .....	131
You did not select the End distribution when deadline reached check box .....	131
Notification that the distribution has ended .....	132
Extended submission processes .....	132
About extended and advanced submissions .....	132
The submission process flow .....	133
The process is started .....	133
The approvers respond .....	134
The process history .....	134
Extended submission process flow .....	134
Start an extended submission .....	136
Start submission process .....	136
Notifications .....	138
Advanced options .....	139
Start an advanced submission .....	141
Start an advanced submission .....	142

---

Notifications .....	146
Advanced options .....	147
Respond to an extended or an advanced submission .....	149
Approve .....	152
Extended submission .....	153
Advanced submission .....	153
Sequential step .....	153
Parallel step .....	153
Conditional .....	153
Extended submission .....	154
Advanced submission .....	154
Reject .....	154
Extended submission .....	154
Advanced submission .....	155
Reject to .....	155
Extended submission .....	155
Advanced submission .....	155
Skip .....	156
Extended submission .....	156
Advanced submission .....	156
Sequential .....	156
Parallel .....	156
Forward .....	157
Extended submission .....	157
Advanced submission .....	157
Receiving an extended or an advanced submission response .....	157
Rejected submission .....	157
Approved submission .....	160

Reminder date reached .....	161
No response by deadline .....	161
<b>Agency package .....</b>	<b>162</b>
About ministerial processes .....	162
Phases in the Ministerial process .....	162
Deadlines .....	163
The steps in a ministerial process .....	163
The process start .....	163
The case responsible responds .....	164
The contributors respond .....	164
Submit for approval .....	164
Approval .....	165
Finalize the ministerial process .....	165
The process history .....	165
Start a ministerial process .....	166
Start a ministerial process .....	166
Submit for approval .....	167
Close the ministerial process .....	168
<b>SmartPost package .....</b>	<b>169</b>
About SmartPost messages .....	169
Starting the SmartPost process .....	169
SmartPost message creation .....	170
Use of content controls .....	171
Start a SmartPost process .....	172
Send a SmartPost message .....	172
What happens during the process? .....	179
Protected addresses .....	179
Copy recipients .....	180

---

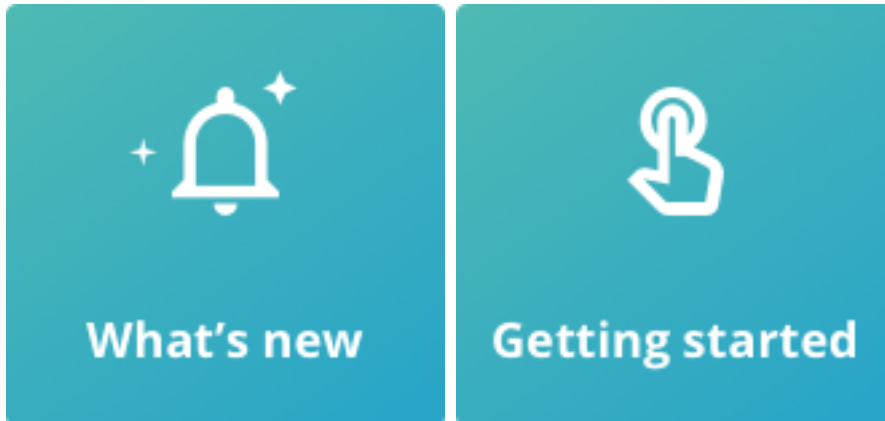
Cancel a SmartPost process .....	181
History document .....	181
Additional information about sent documents .....	184
Information tab .....	184
Respond to a SmartPost task .....	184
Approve .....	185
Manual .....	185
Undo (preview) .....	185
Reject (approval) .....	185
Forward .....	185
Receive messages from e-Boks .....	185
Replies .....	186
Unsolicited messages .....	186
What happens when a message is saved in WorkZone? .....	186
Main document .....	186
Supplementary documents .....	188
Parties .....	188
What happens if a case is closed? .....	188
No corporate access codes .....	189
Replies .....	189
Unsolicited messages .....	189
Corporate access codes .....	189
Replies .....	189
Unsolicited messages .....	189
SmartPost FAQs .....	190
Digital mail .....	190
Remote print .....	191
Local print .....	191

<b>Monitor mailboxes</b> .....	<b>192</b>
Receive emails from a monitored mailbox .....	192
Unsaved emails .....	192
<b>F2 Integration package</b> .....	<b>193</b>
Receive an F2 requisition .....	193
F2 requisitions to WorkZone users .....	193
Updated requisitions .....	194
Cancelled requisitions .....	195
F2 requisition tasks and notifications .....	195
Processing of F2 requisition tasks .....	196
Return input to F2 .....	196
Approved documents included in replies to the F2 department .....	197
<b>Interact integration</b> .....	<b>198</b>
Receive data from Interact forms .....	198
<b>Case Activities package</b> .....	<b>200</b>
<b>Work with actor sequences</b> .....	<b>201</b>
<b>Work with delegates</b> .....	<b>203</b>
Access to tasks .....	203
<b>About notifications</b> .....	<b>204</b>
Notifications via email .....	204
Notifications via a mobile device .....	204
Types of notifications .....	204
Notifications for actors .....	204
Notifications for the process owner .....	205
<b>Troubleshooting</b> .....	<b>206</b>
Note for the administrator .....	206
Note for the administrator .....	207
<b>Terms and conditions</b> .....	<b>208</b>

Intellectual Property Rights .....	208
Disclaimer .....	208

# User Guide for WorkZone Process 2021.3

WorkZone Process is a process tool that is embedded in WorkZone. It is fully integrated with WorkZone Client and WorkZone for Office, enabling you to work with your cases and documents directly from WorkZone.



## FAQ

[How do I start a submission process?](#)

You can start either a new basis submission or extended submission process from either Outlook or WorkZone Client.

See [Start a basis submission process](#) or [Start an extended submission](#).

[How do I start a hearing process?](#)

You can start a new basis hearing process from Outlook or WorkZone Client.

See [Start a basis hearing process](#).

[How do I start a distribution process?](#)

You can start a new distribution process from Outlook or WorkZone Client, if you have the extended WorkZone Process package. See [Start a distribution process](#).

[How do I view a document in a task?](#)

See [View or edit a document in a task](#).

[I received a submission that I cannot answer. What do I do?](#)



If you for some reason cannot respond to a submission, you can either skip the submission or forward it. See [Respond to a submission](#).

### [What is a phase process?](#)

A phase process is a highly configurable type of process. This means that your organization can define it in multiple ways. This help describes the standard features of phase processes. Read more in [About phase processes](#).

## Advanced features

- Enable or disable document versioning
- Resending a task
- Work with actor sequences
- Work with delegates

## Related product documentation

- [WorkZone 365 User Guide](#)
- [WorkZone for Office User Guide](#)
- [WorkZone Process Administrator Guide](#)

## WorkZone links

- [WorkZone documentation](#)
- [WorkZone support](#)
- [WorkZone website](#)
- [WorkZone portal](#)

# What's New

## New features in WorkZone Process 2021.3

No new features in this release.

### [WorkZone Process 2021.2](#)

No new features in this release.

### [WorkZone Process 2021.1](#)

## New advanced submission process

The new advanced submission process allows you to combine sequential and parallel process steps in a submission process. In addition to the overall process deadline, you can specify separate deadlines for each of the process steps. Use this process to keep track of the overall progress of a submission. See [Start an advanced submission](#).

To ensure consistent processes across an organization, you can create and share templates for the advanced submission processes. A template consists of predefined process steps, and possibly actor sequences. You create and maintain templates in WorkZone Client. See [Templates for advanced submissions](#).

The advanced submission process is part of the Extended process package and it requires the STEPSUBMISSION access code.

Start submission (Advanced) ✕

General
Notifications
Advanced

**Process template**  
Review and approval ✕ ▾

**Title**  
Review and approval

**Deadline** **Priority**  
 Normal ▾

**Description**  
Standard review and approval process

**Documents** 1

Case ▾ 🔍 Select documents (Search starts at 3 characters)

📄 D-74, Test, 27/01/2021 ✕

**Supplementary documents for the approval**

Case ▾ 🔍 Select supplementary documents for the approval (Search starts

**Steps**

Review ✕ > Approve ✕ > +

**Step title** **Deadline**  
Review 13/02/2021 09:30

Sequential step  Parallel step

**Approvers** 2

Select approvers (Search starts at 3 characters)

👤 Ann Secretary, ANN ✕

👤 Martin Specialist, MARTIN ✕

[Help](#)

Start
Cancel

No new features in this release.

### [WorkZone Process 2020.3](#)

No new features in this release.

### [WorkZone Process 2020.2](#)

No new features in this release.

### [WorkZone Process 2020.1](#)

Revised **Document Title** content control

The **Document title** content control has been revised to merge the name of the generated PDF document in to letter. Previously, the name of the letter document was merged.

See The document title content control.

### [WorkZone Process 2020.0](#)



Case: [19-00/2](#), Test

## Hearing

Process: **Høring**

Dette er en beskrivelse af høringen

**Assignee:** Ann Secretary, ANN  
**Case handler:**  
**Process owner:** Test Administrator, TESTADMIN  
**Process ID:** 5

**Task deadline:** 17/10/2019 00:00:00  
**Process type:** Hearing (Basis)  
**Process started:** 03/10/2019 13:51:32  
**Task started:** 03/10/2019 13:51:34  
**Process deadline:** 17/10/2019 00:00:00

Process Log			
Assignee	Action	Comments	Completed
Ann Secretary, ANN			
Elisabeth Section Manager, ELISABETH			

This is a reduced version of the smartmail. To see the full version, you need to be online and have access to WorkZone. If you are online, you can click the process link to open the task in WorkZone Client to see documents and respond to the task.

See View smartmails when you do not have access to WorkZone.

## Submission (Extended) - Notify employees

As a process owner, you can now inform employees that are not actors in an extended submission process when actions are performed. For example, you can select who should

receive a notification email when the submission has been approved or rejected or the deadline is reached. In the **Start Submission (Extended)** dialog box, a new **Notifications** tab allows you to select who should be informed and which actions they should be informed about.

The screenshot shows the 'Start Submission (Extended)' dialog box with the 'Notifications' tab selected. The dialog has three tabs: 'General', 'Notifications', and 'Advanced'. The 'Send notifications to' section is highlighted with a green circle containing the number '2'. Below this, there is a search bar with a magnifying glass icon and the text 'Select employees (Search starts at 3 characters)'. Two employees are listed: 'Charlotte Record Manager, CHARLOTTE' and 'Johan Organizer, JOHAN', each with a green person icon and a close button (X). Below the list, there are three checkboxes: 'Approved', 'Rejected', and 'Deadline reached', each with a close button (X). A blue 'Help' link is located at the bottom left. At the bottom right, there are 'Start' and 'Cancel' buttons.

See step 12 in [Start an extended submission](#).

## SmartPost

### Remerge of letter document if the recipient is changed

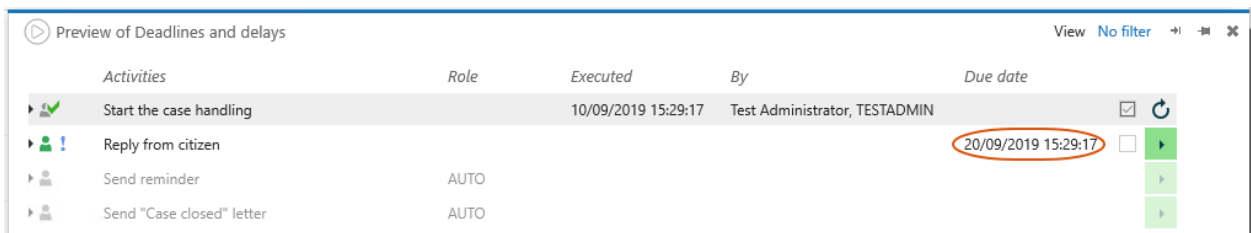
If you have selected a letter with merged recipient information in the **Send SmartPost** dialog box and then select another recipient, the letter document will be remerged so that the recipient information of the new recipients is merged in to the letter.

### Letter date format in letters

The date format in letters now uses the date format which is defined in the letter date content control.

## Case activities

You can now see deadlines for individual activities in the activities preview pane in WorkZone Client. Deadlines are calculated based on how the activity list is designed. For example, when you execute an activity in an activity list, the deadlines of subsequent activities are calculated and shown in the pane.



Activities	Role	Executed	By	Due date
Start the case handling		10/09/2019 15:29:17	Test Administrator, TESTADMIN	
Reply from citizen				20/09/2019 15:29:17
Send reminder	AUTO			
Send "Case closed" letter	AUTO			

See [Deadlines](#) in the WorkZone Client User Guide.

## WorkZone Process 2019.3

### New Processes tab in WorkZone Client

You can get an overview of processes on a case on the new **Processes** tab on the case detail page. On this tab, you can now start and manage processes. You can:

- Start a new process based on the current case or document.
- Export selected processes to Microsoft Excel.

- Open a selected process in a preview pane.
- Respond to tasks.
- Cancel a selected process.
- Refresh the tab to view the latest changes made by other users.

	Title	Process	Case handler	Responsible unit	Process owner	Created	Due date	Status
1	<input type="checkbox"/> Test case - Hearing	Hearing (Basis)	TESTADMIN, Test A...	PO1, Project Office 1	TESTADMIN, Test A...	26/06/2019 14:22:46		Persisted
2	<input checked="" type="checkbox"/> Test case - Submission	Submission (Basis)	TESTADMIN, Test A...	PO1, Project Office 1	TESTADMIN, Test A...	26/06/2019 15:14:45		Persisted

See [Start a process from WorkZone Client](#).

## Processes overview

You can now view information about changes that have been made to the process. Expand a process to see the changes.

Case	Title/Comment	Type
19-60/2	Test case - Submission The process is updated. Importance: (1-HIGH). Deadline: (7/19/2019 12:00:00 AM). Title (). Description (). The task is updated. Documents (+). Actors (+). Optional actors (-). Deadline (-).	Submission (Basis) Information Information Approve submission Approve submission Approve submission

See [Edit process details](#).

## Reorder user tasks

You can now reorder your tasks or the tasks of a user that you are a delegate for in the order you want them to be handled. You can order tasks in WorkZone Client and WorkZone Mobile.

See [Reorder tasks](#).

## SmartPost

### Doc2Mail is renamed to OneTooX

The name change is implemented in both the user interface and the documentation.

## Case activities

As from this release, you start and manage case activities using a new **Activities** tab on the case detail tab.

See [What's new in WorkZone Client](#).

[WorkZone Process 2019.2](#)

## SmartPost

### Send attachments as separate documents

You can now send attachments as separate PDF documents in messages sent to e-Boks. You can, for example, use this option if you know that the recipients will need to forward an individual attachment to a 3rd party later.

If your organization has enabled this feature, you will see a **Send attachments as separate documents (only e-Boks)** check box in the **Send SmartPost** dialog box.



Send SmartPost
✕

General
Advanced

**Title**

**Letter**

📄 D-50, Letter, 20/03/2019
▼

Delete original letter after sending

**Attachments** 1

Case
▼
🔍 Select attachments (Search starts at 3 characters)
📁

📄 D-50, Letter, 20/03/2019
✕

**Recipients** 1

Persons (with CPR)
▼
🔍 |

👤 Target User #1 , 5000 Odense C
✕

**Copy recipients**

Case
▼
🔍 Select copy recipients (Search starts at 3 characters)

**Dispatch sequence**

📁 Send by digital mail else remote print else local print
✕ ▼

**e-Boks material**

📁 Material with reply option
✕ ▼

**Print type**

📁 Standard mail - black/white
✕ ▼

**Send attachments as separate documents (only e-Boks)**

Preview

Approval

[Help](#)

Start

Cancel

See step 11 in Start a SmartPost process.

### Save received messages sent to subunits on specific cases

Unsolicited messages that are received in subunits' mailboxes in e-Boks are now automatically saved on specific cases corresponding to the subunits.

See Receive messages from e-Boks.

[WorkZone Process 2019.1](#)

## Interact forms

The actions that WorkZone can perform based on data retrieved from Interact forms have been extended. WorkZone can now perform the following actions:

- Update existing WorkZone cases.
- Add existing WorkZone contacts as parties on the case.

See Receive data from Interact forms.

## SmartPost

### Support for GDPR

The SmartPost process now supports the European Union's General Data Protection Regulation (GDPR). If your organization has configured SmartPost for GDPR support, you can only select documents with document classifications that are allowed by your organization in the **Send SmartPost** dialog box.

See GDPR classification.

### Case content controls in standard letters and on cover pages

You can now use case content controls in standard letters and cover letters. Standard letters and cover pages are saved on a template case but when the SmartPost message is generated, the content from the case you started the SmartPost process from is merged into the case controls.

## Case activities

- A new **Update** button in the **Case activities** pane, which updates the activity list to make sure that the list reflects data changes.
- You can now select **No filter** in the **View** list in the **Case activities** pane. If you select this filter, you will see all case activities including activities handled by the system.

See Case Activities package.

## WorkZone Process 2019.0

## SmartPost

## Error code and description in the history document

The **Status** column in the history document has been enhanced so that it now shows the error code and the error description that is generated if a dispatch cannot be sent due to errors.

KMD WORKZONE						November 23, 2018
<b>Dispatch: Letter</b>						
Dispatch started: 23/11/2018 14:39:04	Started by: Test Administrator, TESTADMIN		Dispatch sequence: Send via Doc2Mail			
Dispatch ended: 23/11/2018 14:39:22	Document case handler: Martin3 Specialist, MARTIN3		E-Boks material: Material with reply option			
Overall status: Undefined	Approval process: No		Remote print type: Standard mail - black/white			
Case number: 18-00/2	Process GUID: c5f94bdb-e107-41f0-bfab-0453e8b026fd		Delete original letter after sending: No			
<b>Recipients:</b>						
Doc. #	Recipient	Role	Sent by	External ID	Status	
70	Target User #1 , C-211282-8624	Recipient	Doc2Mail (19.0.6.0)		23/11/2018 14:39:22 Error Uncategorized error occurred (System.Exceptions). The message was Unexpected response from Doc2Mail service. Error code: 10030, reason: Dokumentet har ikke det rigtige format. Første side i et hoveddokument skal være A4 stående.	
71	Target User #2 , C-020206-8626	Copy recip.	Doc2Mail (19.0.6.0)	5997a35e-23d1-443d-bf69-78df31f2f328	23/11/2018 14:39:21 Completed	
72	Target User #3 , C-030306-8635	Copy recip.	Doc2Mail (19.0.6.0)	edf0b487-aa75-44ef-a06c-aea09184c704	23/11/2018 14:39:20 Completed	
<b>Original documents:</b>						
Document No.	Title	Document case handler				
46	Letter	Martin3 Specialist, MARTIN3				
49	Attachement	Martin3 Specialist, MARTIN3				
Page 1 of 2						

For more information, see [History document](#).

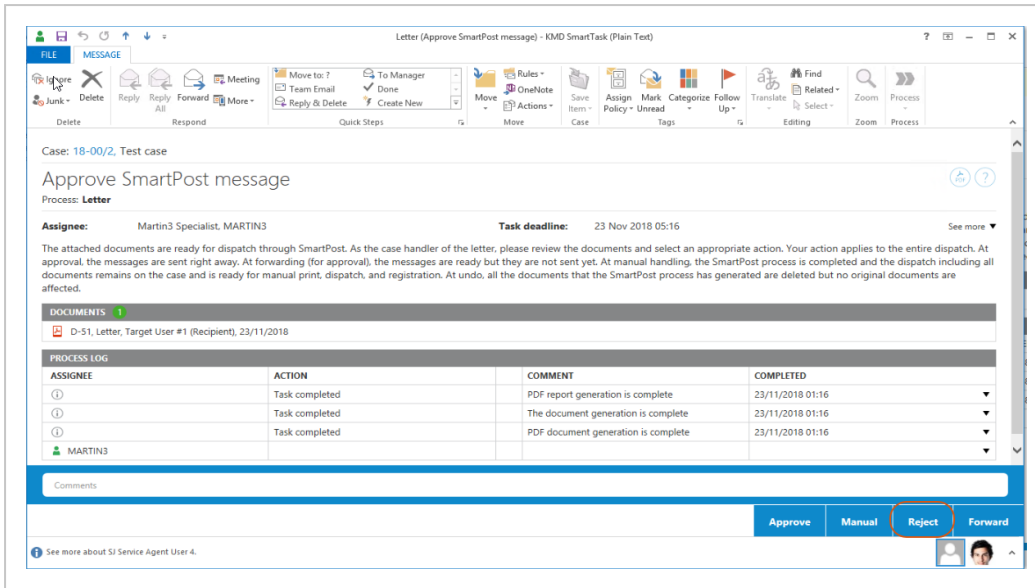
## Document number

If a letter document contains a **Document number** content control, the merged PDF document will show the document number of the merged PDF document and not the document number of the original letter. For more information, see [The document number content control](#).

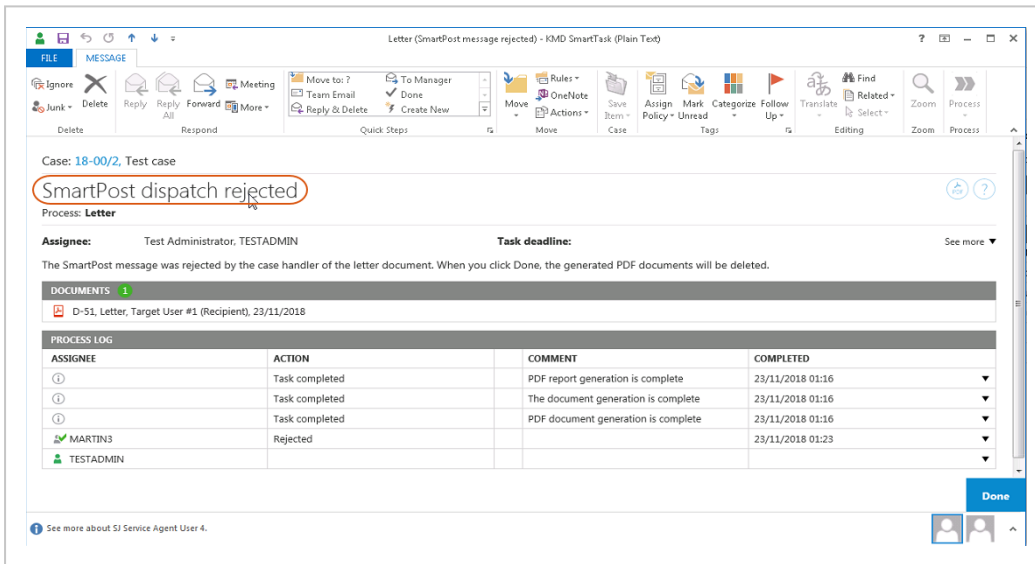
## Cancel button renamed to Reject

The **Cancel** button has been renamed to **Reject** in the approval smarttask.

# WorkZone Process 2021.3



If the case handler rejects a SmartPost message that you have sent for approval, you will as the process owner receive a smarttask notification.



In the Processes overview, the Canceled state in the State column has also been renamed to Rejected.

Case	Title/Comment	Type	State	Deadline	Pending
15-002	Letter	SmartPost	Rejected	23/11/2018	TESTADMIN
①	PDF report generation is complete	Information	Task compl...		
①	The document generation is complete	Information	Task compl...		
①	PDF document generation is complete	Information	Task compl...		
✓	Approve SmartPost mess...		Rejected	23/11/2018	MARTIN3

For more information, see Respond to a SmartPost task.

## Allowed documents

It is now possible to configure the SmartPost process to only make documents available in the **Send SmartPost** dialog box that are allowed to send through SmartPost. Your organization may have restrictions on which documents are allowed to send. If your organization has applied this configuration, it means that you can only see and select allowed documents when you click in the **Letter** and **Attachments** fields.

The screenshot shows the 'Send SmartPost' dialog box with the following fields and options:

- Title:** Letter
- Letter:** D-46, Letter, 23/11/2018 (highlighted with an orange circle)
- Delete original letter after sending
- Attachments:** 1 attachment listed: D-49, Attachement, 23/11/2018 (highlighted with an orange circle)
- Recipients:** 1 recipient listed: Target User #1, Vej 1, 5000 Odense C
- Copy recipients:** Search bar for copy recipients
- Dispatch sequence:** Send by digital mail else remote print else local print
- e-Boks material:** Material with reply option
- Print type:** Standard mail - black/white
- Preview
- Approval
- Approval deadline:** 26/11/2018 11:03
- [Help](#)
- Start** and **Cancel** buttons

For more information, see [Allowed documents](#).

WorkZone Process 2018.2 SP1

## SmartPost

The letter date in the PDF document and the **Letter date** field on the document detail page will be updated with the preview or approval date of the SmartPost message before the message is sent. See the steps 11 and 12 in the [Start a SmartPost process](#) topic.

You can use this feature if you want the letter date in the SmartPost message to show the preview or the approval date of the SmartPost message instead of the date when the PDF document was created and the SmartPost message was sent for approval.

**Note:** The SmartPost process must be configured to update the letter date at preview and approval. By default, the letter date is not updated.

## Create cases, documents, and contacts automatically based on data from WorkZone Interact forms

Several actions in WorkZone can now be performed automatically based on information that users have submitted using digital forms created with KMD WorkZone Interact. When users submit information through a form, the following actions are performed automatically:

- Create new case with documents
- Create new contact
- Add a contact as a party on a case

See [Receive data from Interact forms](#).

For more information about WorkZone Interact, please see [KMD WorkZone Interact](#).

## Updates and cancellations of F2 requisitions

The information in the updated F2 requisitions that WorkZone receives has changed but the way that WorkZone handles updated F2 requisitions has not changed. Cancelled F2 requisitions are now handled in WorkZone. See [Receive an F2 requisition](#).

For more information, see [F2 integration](#) in the WorkZone Process Administrator Guide.

[WorkZone Process 2018.2](#)

## SmartPost:

It is now possible to send SmartPost messages KMD Print Center for remote print using KMD Doc2Mail. See [About SmartPost messages](#) and [Start a SmartPost process](#).

### WorkZone Process 2018.1

- You can change ownership of a process from the Processes overview. Use this feature when, for example, the current process owner is no longer involved in the process or perhaps is no longer employed by your organization.



See [Take ownership of a process](#).

### WorkZone Process 2018.01

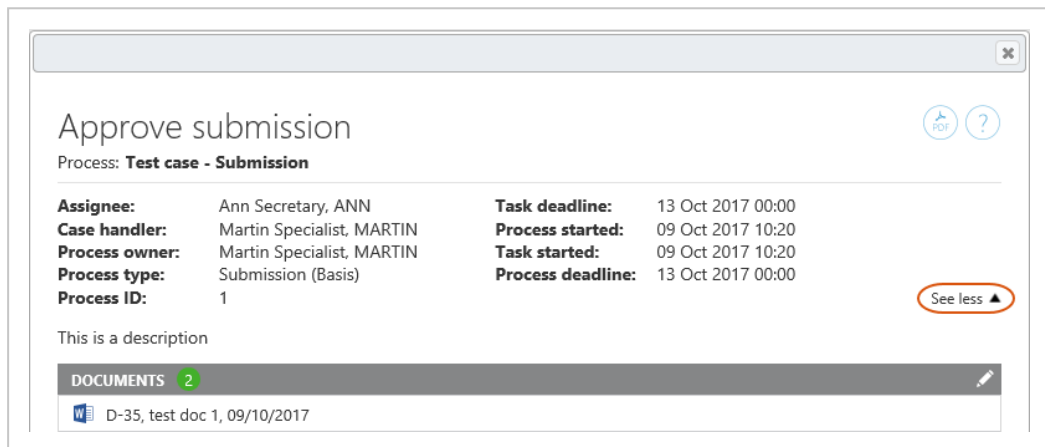
- You can now use standard letters provided by your organization in a SmartPost message. See [Start a SmartPost process](#).

**Note:** The **Standard letter** option is only visible if your organization has enabled the standard letter feature.

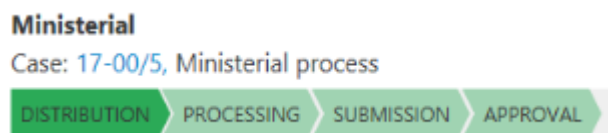
- The **Approval** check box in the **Send SmartPost** dialog box may have been disabled if your organization does not use the approval step in the SmartPost process.

### WorkZone Process 2018.0

- The SmartPost history document has been improved to show more information about the SmartPost dispatcher. See History document.
- Emails from a monitored mailbox that are not automatically saved on a case due to errors in the emails or their attachments can now be moved to a specific sub-folder for better overview of unsaved emails. See Receive emails from a monitored mailbox.
- You can now expand or collapse the information section in a smarttask by clicking **See more/See less**.



- F2 Integration - You can now see information on sender and copy recipients of a requisition in the ministerial process descriptions and on the case that was created by the F2 integration in WorkZone Client. See Receive an F2 requisition.
- Ministerial process improvements:
  - The Approval phase is now named Submission and the Delivery phase is now named Approval.



- The Ministerial phase process deadline is now automatically suggested in the **Submission (Extended)** form.
- The Ministerial phase process description is automatically suggested in the **Start Distribution (Extended)** and **Start Submission (Extended)** forms.

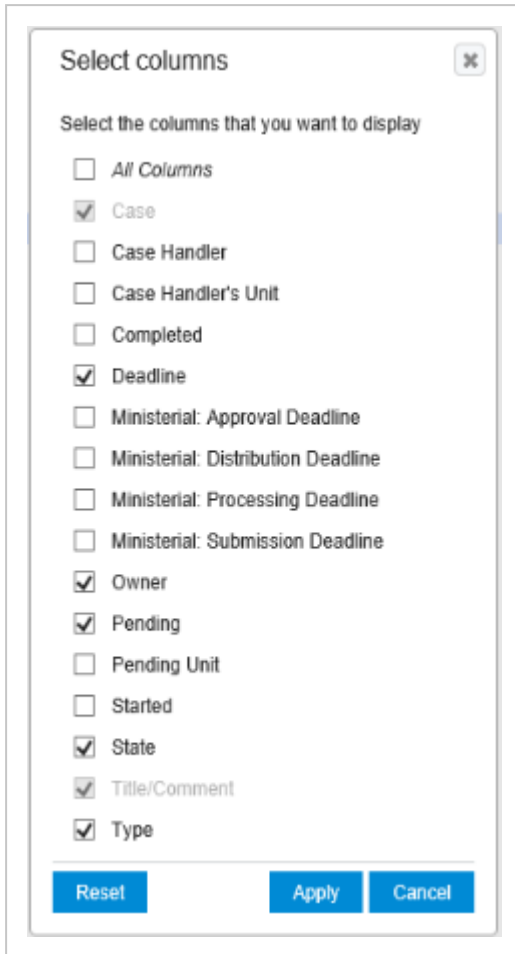


- When the Distribution process is started as part of a Ministerial process, no deadline is specified. In previous releases, the Distribution process was started with the same deadline as the Distribution phase.
- If there are more than 3 hours until the main deadline of the Ministerial process, the Distribution phase deadline is automatically set to process start + 3 hours.
- The deadline of the Submission phase is now suggested to be at 12:00 2 days from the main deadline of the Ministerial phase process.
- If the Ministerial process deadline is in the past, no phase deadlines are set. You can specify the deadlines manually.

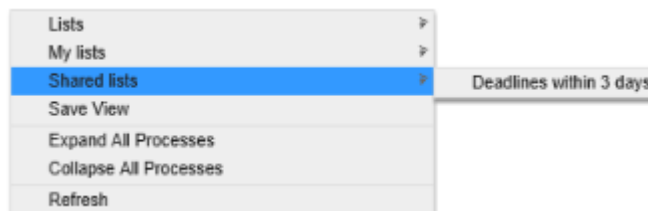
See Agency package.

- **Processes** overview improvements:
  - You can customize the **Processes** overview to display information that is relevant for you. You can select which columns to see and change the order of the columns, and then save the view so that you can easily access it again. See Cus-

customize the Processes Overview.



- You or a WorkZone system responsible can create customized lists based on queries created in WorkZone QueryBuilder and display them in the **Processes** overview. These lists can be shared with other users. See [View my lists and shared lists](#).



- You can now see who has canceled a process. Note that it does not apply to phase processes.

- Mailbox Monitor Service - Information about the sender is displayed in the **Sent from** field on the document detail page in WorkZone Client.

### WorkZone Process 2017 SP1

- A new SmartPost add-on package has been added. With the SmartPost package, you can send messages from your organization to case parties in WorkZone, such as citizens, authorities, or private companies, and you can receive replies to messages from case parties in your organization's digital mailbox. The messages are saved on cases in WorkZone. See WorkZone Process SmartPost package.
- You can use WorkZone Process to monitor your organization's inboxes and save incoming emails automatically on a case. See Monitor mailboxes. The mailbox monitor feature is part of the Basis Package.
- The Case Activities package is now in production. In the 2017 release, this package was released as a Beta version.
- Lists in the Processes overview have been changed.

Three new lists have been added:

- **Active on My Cases** - Lists processes on my cases that are in progress.
- **Active on My Unit's Cases** - Lists processes on my units cases that are in progress.
- **Active with Me as an Actor** - Lists processes in progress where you are assigned as an actor.

See View a list.

- The F2 Integration now supports a function that allows updated requisitions to be saved on existing cases. When an F2 requisition has been updated and resent, the new requisition is saved on the existing case with the same requisition ID. See Receive an F2 requisition.
- In the **Start F2 Delivery** dialog box, the **Documents** field now includes approved documents from the latest closed Extended Submission process on the same case.
- In the **Start Submission (Extended)** dialog box, the **Supplementary documents for Approval** field now includes approved documents from the latest closed Extended Distribution process on the same case. See Start an extended submission.

- User tasks on the sub-processes in a phase process now include phase process information. See [View the progress of a phase process](#).
- Now you can add external documents from your local drive in a user task when you open a task from the **Processes Overview**.
- Process history documents are now created using a WorkZone PDF template.

### [WorkZone Process 2017](#)

## New selector controls

The smart task layout has been updated to provide a more intuitive work experience and make navigation easier and faster. The improvements include the following new selectors, filters, and indicators:

- The document search field now includes a folder icon that you can click when you start a new process to add documents from a local drive or from a network drive.
- When in edit mode, you can filter for new elements or people such as documents or approvers to add to the list.
- A counter icon indicates the number of associated elements or people such as documents or approvers.
- It is now clearly indicated that search starts after you have entered at least three characters.

## Approved documents in F2 replies

When an F2 delivery is opened, approved documents from the extended submission that was most recently approved on the same case are now available for selection in the **Documents** section. See [Return input to F2](#).

## Case activities

For this version, a Beta release of the Case Activities package will be available. Case activities is a task management feature that enables you to create workflows with activities that are connected by a set of rules. With case activities you can map the possible events in a workflow and associate each event with a rule that calls for a certain action.

# Getting started

A key task in WorkZone Process is handling and tracking of information in a process.

Click to learn more:

## [Handle information in a process](#)

You can start a new process from Outlook or from WorkZone Client.

See [Start a new process](#).

When a process is started, the owner of the process can add or remove documents attached to the process or add or remove the actors involved.

See [Manage documents and actors on a task](#).

## [View previous versions of a document](#)

If your organization is working with versioning of documents, then you can enable or disable versioning for individual documents. From WorkZone for Office you can view and compare document versions.

For more information about how to set up and work with document versioning, see [Work with document versions](#) in the WorkZone for Office User Guide.

## [View and edit a document from a task](#)

When you receive a task, you can click  to open the document for viewing or editing.

See [View or edit a document in a task](#).

## [Manage actors and access](#)

### Access

Whether or not you are able to see the contents of a document or make changes to the contents is determined by the setup of access rights in WorkZone Client. This setup determines who can read and write to documents and who can access cases and contacts.

For more information about access rights, see [About access rights](#) in the WorkZone Client User Guide.

## Actors

Various roles are involved in the document process tasks such as the process owner and the people who receive tasks.

See [Work with tasks](#).

## Process flows

You can start a process from WorkZone Client or directly from Microsoft Outlook when you receive information that you want to handle in, for example, a hearing, a submission, or a distribution.

Processes in WorkZone Process are either parallel or sequential.

- The parallel flow: There is no particular order in which actors in a process should respond. They can respond in parallel. A hearing is a parallel flow.
- The sequential flow: Actors in the process should respond in a fixed order one after the other. A submission is a sequential flow.

Click to learn more about the process types:

### Hearings

A hearing is based on a parallel flow and a hearing process is applied to for example include a series of interested parties in a planning project to ensure that everyone get a chance to provide feedback.

See [About hearings](#).

### Submissions

A submission is based on a sequential flow and the submission process type is available with a basis and an extended set of options to navigate the flow.

See [About submissions \(basis\)](#) and [About submissions \(extended\)](#).

### Distributions

The purpose of a distribution process is to assign ownership of a case and find contributors. The concept of sequential or parallel does not apply to distributions.

See [About distributions](#).

## Get an overview

The **Processes** overview provides a snapshot of the state of all ongoing and closed processes. Processes are automatically documented, and you can use the **Processes** overview to track the state of your own work tasks and work tasks in your organization.

For more information, see [About the Process Views](#).

# About WorkZone Process

WorkZone Process allows you to manage WorkZone documents in a workflow, have your work process documented automatically, and to track information.

Click to learn more:

## [Structure your tasks](#)

Structure your tasks according to the type of work at hand. For example, if you want to send out one or more documents in a submission, you can start a process of the type Submission. The process provide helps you set up the sequence in which the information should be reviewed, by whom, and when the parties should provide feedback.

## [Work with processes from Outlook](#)

Work with processes such as hearings, submissions, and distributions directly from Outlook. For example, when you receive a document in an email, you can create or save on a case and start a process directly from Outlook. The parties that you invite to provide feedback or take ownership of the case will receive tasks via emails and you and the other parties will get email notifications to remind you about due dates.

## [Track processes](#)

Keep track of current and finalized processes from the **Processes Overview**. Use the filter and search options to request information by, for example, case or actor or use a combination of search options to track phases or other specific details of one or more processes. You can access the overview from Outlook or by entering the following URL in any of the supported browsers: `http(s)://app/client/overview`.

## About process packages

WorkZone Process includes a number of process packages that correspond to typical workflows in an organization. With the default installation of WorkZone Process, you get a WorkZone Process Basis package that includes a submission process and a hearing process. In addition to this package, your organization may have other packages installed. These packages are add-on packages:

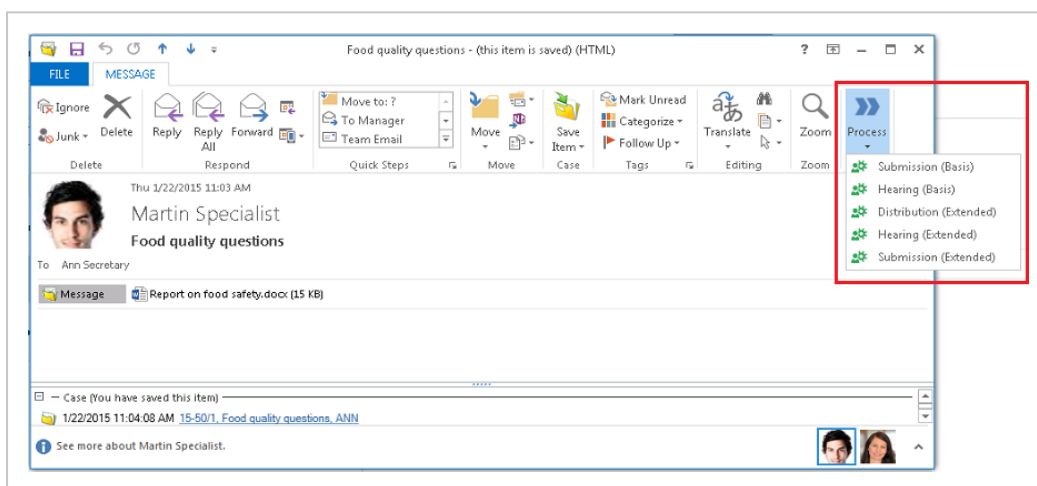


- Extended package
- Agency package
- SmartPost package
- Case Activities package
- F2 Integration package

## Starting processes

Examples of processes are submissions, hearings, and distributions. If, for example, you want

to start a process from Outlook, click  , and select a process type.



To start a process, add, for example, a deadline, documents and actors.

Click to learn more:

### [Process tasks from Outlook](#)

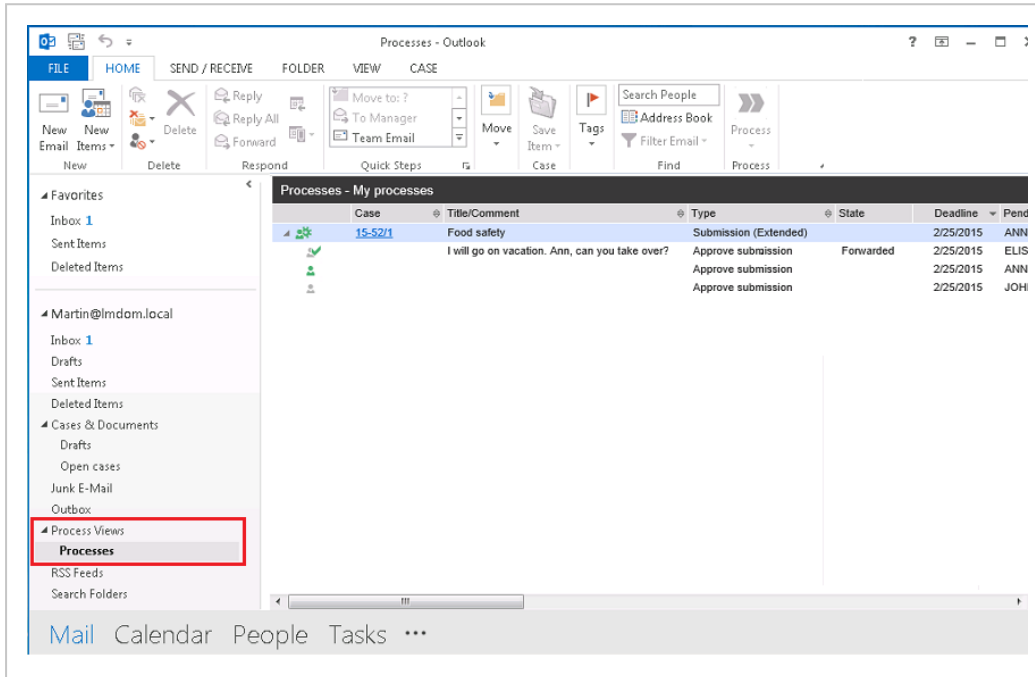
When a process is started, actors receive tasks as smarttask. A smarttask contains information about the task at hand and you can view it from WorkZone Client and as smartmail from Outlook. From the task you can also view and navigate to the case and the case documents.

From Outlook, you can approve or reject a task so that you can process a case from start to finish without leaving Outlook.

## The Processes overview

WorkZone Process provides a full overview of the process status from the **Processes** overview.

Processes and data are easy to manage in the **Processes** overview in the [Process Views](#) folder which is located in the Outlook navigation pane.



# Tips for working in the user interface

## Enter dates and times

When you specify date and time, you can either type the information directly in the field or you can select from a calendar.

### Type date and time

- To specify, for example, January 1, 2017 at 10:15, you can use a standard format such as 1/1-2017 10:15 or just type 01012017 10:15. To enter the date only, you can, for example, use the format 01-01-2017 or just type 010117.

### Select a date in the calendar

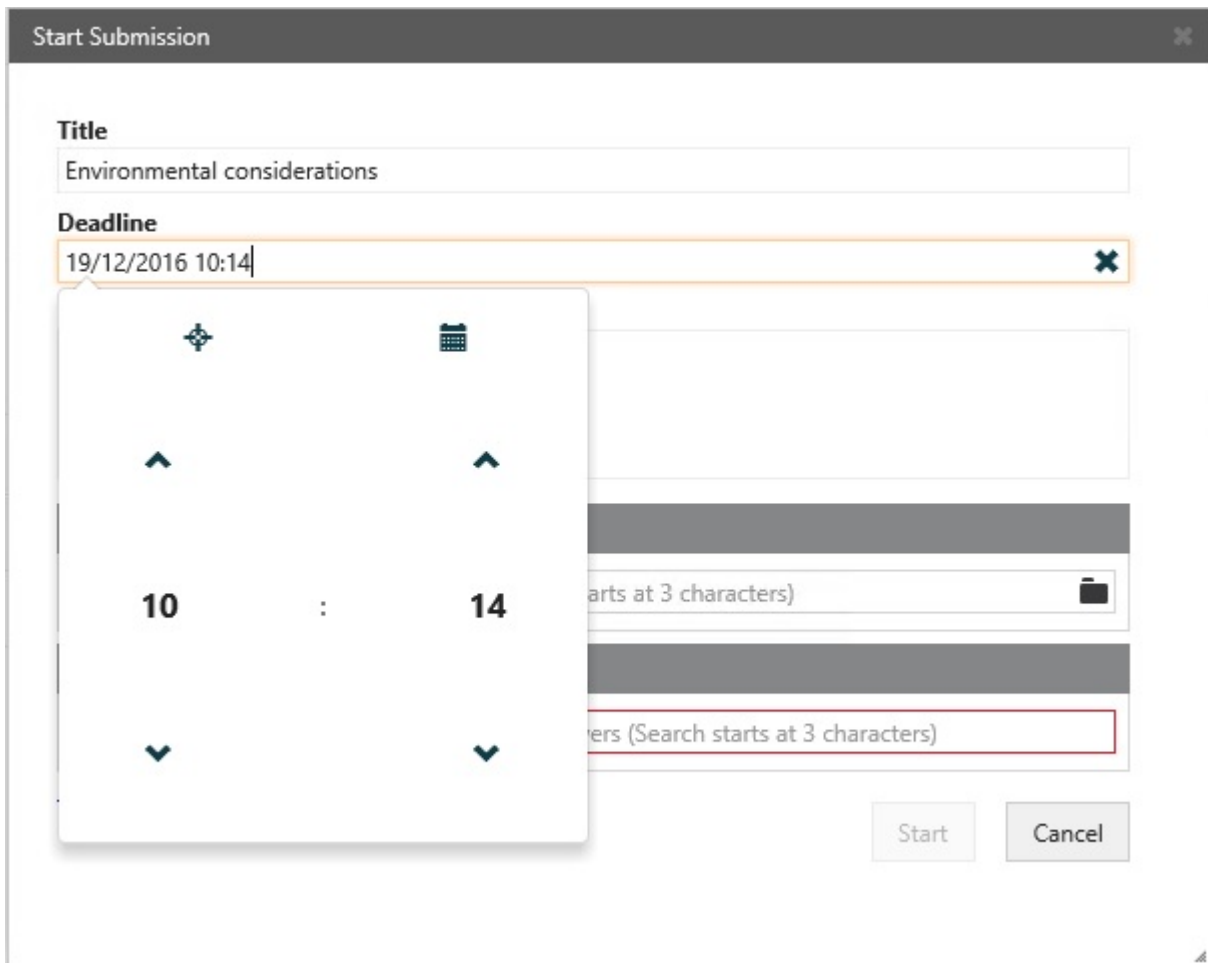
- Click the Calendar icon to select a date.

### Finish entering date and time

- When you have entered a date, you can press Tab to leave the field and continue with your task.

### Adjust the time

- To adjust hours and minutes, place the cursor on the date information and use the up and down arrows or the mouse wheel.



## About comments

When you respond to a task, you can add a comment on the task.

## Respond conditionally or reject

To respond to a task with the options **Conditional** or **Reject to**, you must add a comment in the **Add comment** field.

## The comment fields

The text you write as a comment can include up to 3999 characters. If the text exceeds this length you will be notified and you will not be able to process your task until the number of characters is reduced.

The text field expands as you write. When you select a comment field on a task, the full contents of the field is displayed.

# Starting processes

In Microsoft Outlook you can [start a process based on incoming emails](#) or you can [start it from a draft or an open case in the Cases & Documents folder](#). In WorkZone Client you [start a process on a case](#) or on a document.

Before you can start a process in Outlook, you need to select an email or a case. An email must be saved on an existing case, or you can create a new case. You can insert a process deadline based on the deadline configuration.

See also [Cancel a process](#).


## Start a new process

You can start a new process from Microsoft Outlook, Word, Excel, or PowerPoint or from a case or document in WorkZone Client.

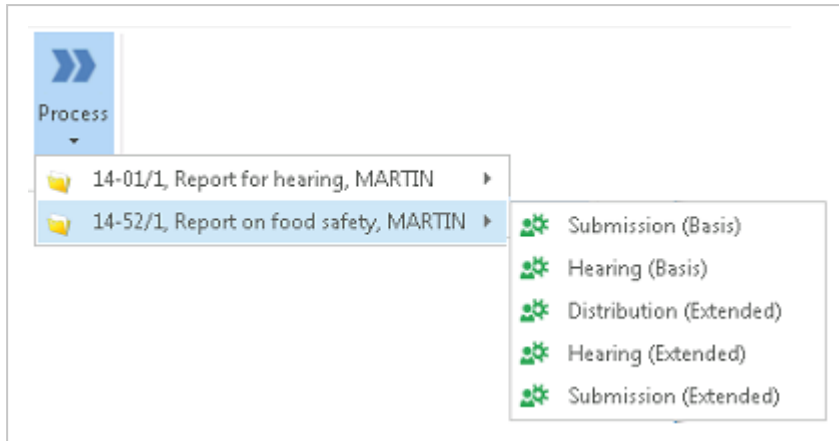
When you start a process, you become the process owner.

## Start a process from Outlook

### Start a process from an email

1. Select an email in any of the folders except the **Deleted** and **Drafts** folders.
2. Unless you have already done so, save the email on a case. You can create a new case for it or select an existing case. See [Save an email on a case](#).
3. Click  **Process** on the ribbon.

**Note:** If the email has been saved on multiple cases, then a list of these cases is displayed. Select a case.



4. Click on the type of process you want to start, for example, **Submission (Basis)**.

5. The **Start Submission** dialog box opens.

The case title is inserted automatically in the **Submission of** field (if you started a submission).

6. Optionally, select a process deadline.
7. Select documents. Click in the **Documents** field and select one or more documents from the list, for example, a case document and the saved email.
8. Select one or more approvers.

Click in the **Approvers** field and select from the list of contacts. You can choose either persons or organizational units as actors or approvers. For a person or an organizational unit to function as an actor or approver, the person or organization must have an email address. Delegates can respond on behalf of an actor or approver - see *Work with delegates*.

- You can rearrange the order of documents or approvers after you select them, if needed, by pulling them up or down.
- You can start typing a name to narrow down the list.

9. Click **Start**.

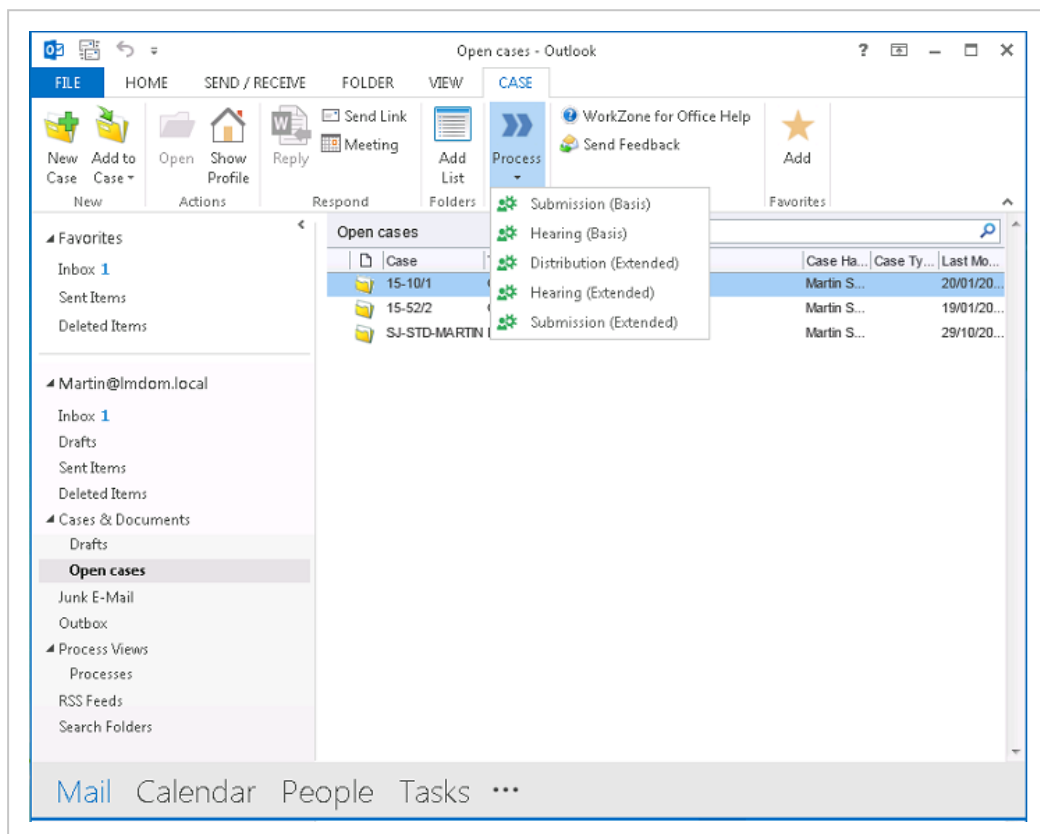
The process is started.

10. Click **OK**.

Your process is now visible in the **Processes** overview - see *About the Processes Overview*.

## Start a process from the Cases & Documents folder

1. Open the **Cases & Documents** folder.
2. Open a case folder and select a case.
3. Click **Process** on the ribbon.



4. Select a process type, for example, **Submission (Basis)**.

The **Start Submission** dialog box opens.

5. Click **Start**.

## Start a process from Word, Excel, or PowerPoint

**Prerequisite:** To start a process, the document must be [saved on a case](#).

You can start a process from a document. The process starts on a case where the document is saved. By default, this document is added to the process.

1. Open a document, where from you want to start a process.
2. On the **Home** tab, click **Process** and select a process type that you need, for example, **Submission (Basis)**.
3. In the **Start submission** dialog box, fill in the fields. Fields differ depending on the type of process you have selected.
4. Click **Start** and then **OK**.


Your process is now visible in the **Processes** overview. See [About the Processes Overview](#).

## Start a process from WorkZone Client

In WorkZone Client you can start a process based on a case or a document. See [Work with processes](#) in the WorkZone Client User Guide.

**Note:** When you start a basis process, you should have at least one document on the case. See, for example, [Start a basis submission process](#) or [Start a basis hearing process](#).

## Start a process from the ribbon

1. Open the case or document in WorkZone Client.
2. Click  **Process** in the ribbon.
3. Select a process type, for example, **Submission (Basis)**.


The **Start Submission** dialog box opens.

4. Fill in the fields and click **Start**.



## Start a process from the Processes tab on a case detail page

1. Open a case in WorkZone Client.
2. Click the **Processes** tab in the case details. If the tab is not visible on the detail page, you can add it. See [Manage tabs](#) in the WorkZone Client User Guide.

3. Click  and select a process, for example, **Submission (Basis)**.

The **Start Submission** dialog box opens.

4. Fill in the fields and click **Start**.

### Work with active processes on the Processes tab

The **Processes** tab lists all active processes on the case. You can:

- Refresh the tab to view the latest changes made by other users.
- Export selected processes to Excel.
- Double-click a process to open it and see the tasks. You can click a task to view it or respond to it if you are an actor.
- Cancel a selected process.

## Get an overview of processes

When you have started a process, you can follow its progress in it in the **Processes overview**. You can open the **Processes overview** in **Outlook** or in an Internet browser. See [About the Processes Overview](#).

## Phase processes

---

### About phase processes

A phase process is a highly configurable type of process. Your organization may have defined phase processes differently from the examples provided in this user guide.

## Phases

A phase process can be divided into phases. The **Phase** column in the **Processes overview** shows which phase a process is in.

Phases are configurable and depend on your organization's setup.

A process can be in one of the following phases:

- **Distribution**

The phase where a process is assigned a case handler.
- **Processing**

The phase where a process is undergoing case handling by the selected actors, for example, the department head.
- **Submission**

The phase where a process is reviewed by the approvers, for example, the minister, and a decision is reached.

## Start a phase process

You can start a new phase process from an email or the **Cases & Documents** folder in Outlook, or from WorkZone Client. A phase process can, for example, be a paragraph 20 question.

1. Click **Process** and select a phase process type, for example, **Paragraph 20 process**. For more information on starting processes in general, see [Start a new process](#).

The **Paragraph 20 question** dialog box opens.
2. Type a title in the **Title** field.
3. Select a deadline in the **Deadline** field. The default duration is 6 working days, but it may be defined differently in your organization.
4. Select an approval deadline in the **Approval deadline** field. This is the deadline for the approval phase, which has a default duration of 2 days from the main deadline.

5. Select a priority in the **Priority** field.
6. Type a description in the **Description** field.
7. Select who is responsible for the case. Click in the **Case responsible** field and select a contact from the list.
8. Select documents to be used as reference. Click in the **Reference documents** field and select one or more documents from the list.
9. Select contacts as contributors. Click in the **Contributors** field and select a contact from the list.
10. Click **Start**. The process is started and is now visible in the **Processes** overview.

## Phase processes in the Processes overview

When you expand a phase process, for example the Paragraph 20 question, the sub processes are displayed, in this example a distribution process.

You double-click the sub process to view the tasks belonging to it in the **Preview** pane.

Case	Process name	Process type	Pending	Case handler	Responsible unit	Process owner	Created	Pr...	Deadline	Phases
19-00/2, Test case, ...	Ministerial	Ministerial		ANN, Ann Secretary	RE, Region East	TESTADMIN, Test A...	10/12/2019 16:30:01		20/12/2019 00:00:00	✓✓✓
19-00/2, Test case, ...	Test case	Paragraph 20 question		ANN, Ann Secretary	RE, Region East	TESTADMIN, Test A...	17/12/2019 14:37:03		06/01/2020 00:00:00	▶▶▶▶▶
19-00/2, Test case, ...	Test case	Distribution (Extended)		ANN, Ann Secretary						

**Tip:** When you hover over each of the phase icons, you get a tool tip that displays the duration, deadline, and information about completion of the process. In addition, if you hover somewhere in the **Phases** column in the overview, a tool tip is displayed with information about the current phase.

## Move a process to another phase

If you manually want to show a phase change or move from a manually handled phase, you can move a process to the previous or next phase.

You can manually move any active process forward to the next phase or backward to the previous phase in the Processes overview.


If you move a process forward to the next phase, associated sub processes and user tasks (if any) are initiated.

If you move a process forward past the last phase of the process, the phase process completes, but any sub processes will still be running.

If you move back to the previous phase, associated sub processes and user tasks (if any) are initiated.


Follow these steps to move a process back or forward.

1. Select an active phase process.
2. Right-click the process.
3. Select **Move forward** or **Move back**. The action you performed and the changed status of the process is reflected in the **State** column.

If you want to refresh the entire process overview to see your changes,  **Refresh** in the ribbon.

### Edit phase process details

You can change the details of a phase process such as the title, deadline, description, and priority in the **Processes overview**.

1. Select the phase process which details you want to edit.
2. Click  **Edit** in the ribbon.
3. In the **Edit process** dialog box, you can change the title, deadline, description, and priority in the corresponding fields.

### Change deadlines of phases

You can change the deadlines for the individual phases in the phase process.

1. In the **Edit process** dialog box, click the **Phases** tab.
2. Click in the field and select a date.

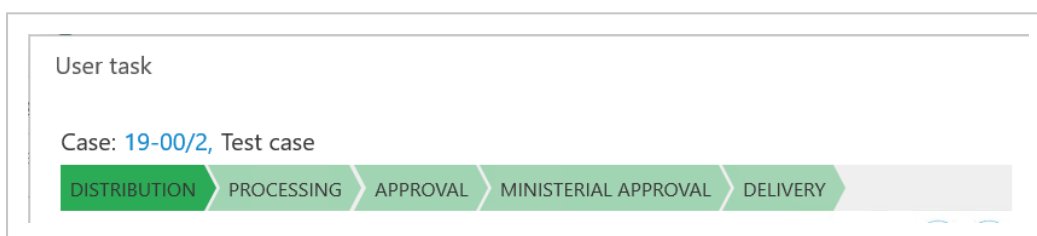
## View the progress of a phase process

When you open a task from the **Processes overview**, Outlook, or WorkZone Mobile, the following general information about the phase process is displayed:

- The process type
- A link to the case on which the process was started
- The phase process deadline.

You can click the deadline to open the **Edit** dialog box, if, for example, you want to change the deadline. See [Edit process details](#).

A phase bar displays the different phases in the phase process as well as the current status.



The progress bar displays the following information:

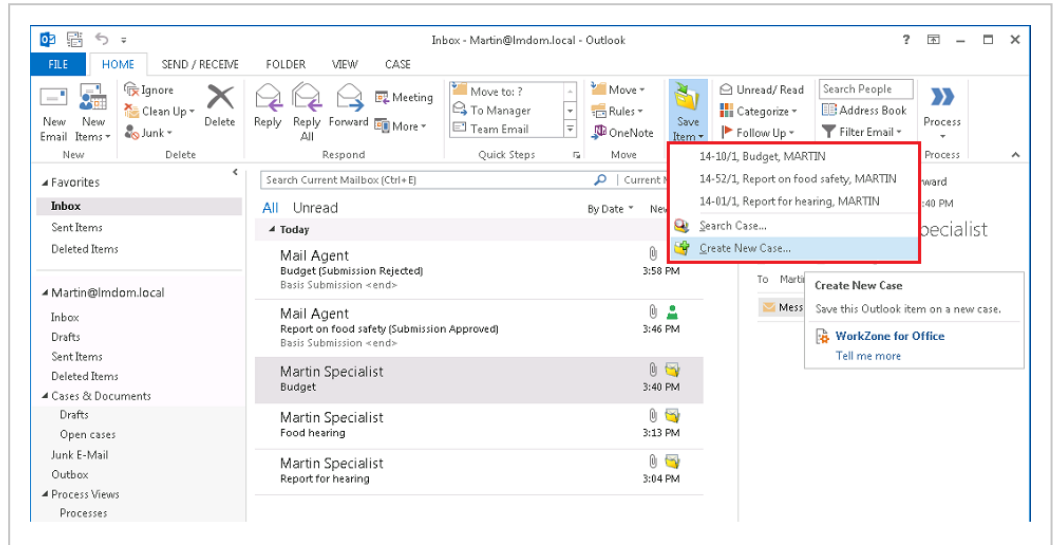
- Completed phases are marked with check marks and the titles are collapsed.
- Future phases are marked in light green and shown with the full titles.
- The current phase is marked in dark green.
- The phases are marked in green, yellow, or red according to deadline information.
- Each phase has a tool tip that shows the deadline of the current phase.

## Save an email on a case

As part of starting a process based on an incoming email in Outlook, you need to save the email and attached documents on a case. For more information, see [Save Outlook items on cases](#) in the WorkZone for Office User Guide.

**Note:** The **Process** button is disabled until you have saved the email you have selected.

1. Select or open the email that you want to start a process from.
2. On the **Home** tab, click **Save item** in the **Case** group.
3. Select a case in one of the following ways:
  - Select one of your recent cases from the list.
  - Click **Search Case** to search for a case.
  - Click **Create New Case** to create a new case.



For more information, use the help links in the dialog boxes.

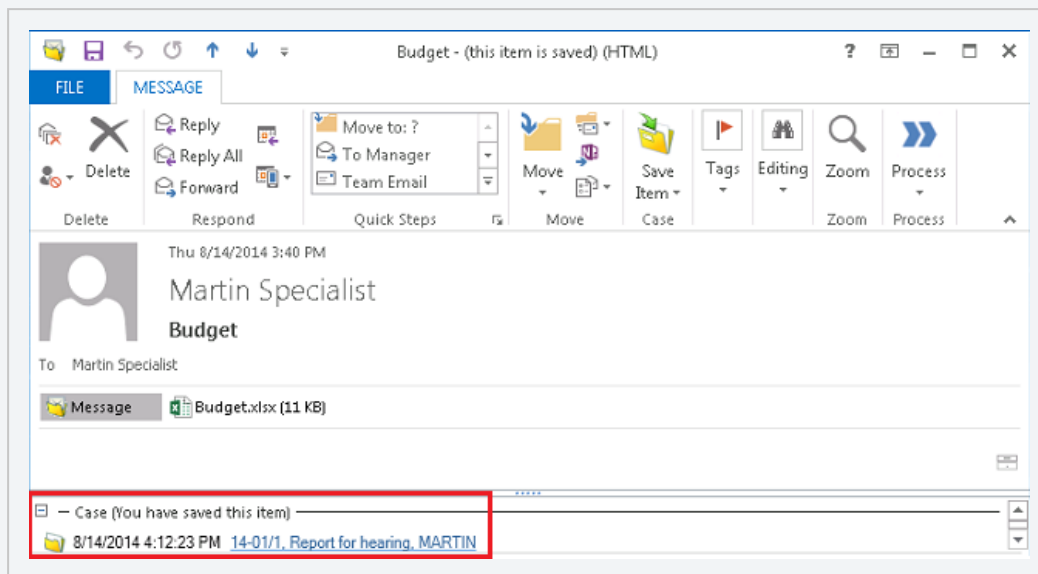
When you have selected a case, the **Save Outlook Item** dialog box is displayed. See [Register information](#) in the WorkZone for Office User Guide.

4. Select documents and add information on sender and recipient. For more information, use the help links in the dialog box.
5. Click **Save**. Your email is saved on the case.

**Tip:**

- On the Outlook ribbon, the **Process** button is now enabled, allowing you to start a process from Outlook - see [Start a process from Outlook](#).
- Next time you open the saved email, the case information is displayed at the

bottom.



## Look up and add approvers

1. Click the **Approvers** field and start typing to display a list of approvers. The list that is displayed is based on the three first characters that you enter.

2. Click the name of the approver that you want to add.

The screenshot shows the 'Start Submission (Extended)' dialog box. It contains the following fields and sections:

- Title:** Environmental considerations
- Deadline:** [Calendar icon]
- Priority:** Normal
- Description:** [Empty text area]
- Documents for submission:** Case [Search: Select documents for submission (Search starts at 3 chara)]
- Supplementary documents for the approval:** Case [List: Ann Secretary, ANN; Ann2 Secretary, ANN2; Ann3 Secretary, ANN3]
- Approvers:** Case [Search: ann]

Buttons: Start, Cancel. Link: Help.

- 3.

**Note:** Approvers that are available for a document or a case can be limited by the access rights that are set up for documents and cases.

See also:


- For more information about access rights and the effect on actors in processes, see [Access rights](#) in the WorkZone Client User Guide.
- For information on how to look up and add documents when you start a process, see [Look up and add documents](#).
- For information on lookups available when you work with tasks, see [Manage documents and actors on a task](#).



## Look up and add documents

When you start a process, you can add documents that are stored on your local system. For example, you can upload documents that you, when starting the process, realize should be part of the case.

### Add one or more documents to a process

1. Start a new process from WorkZone Client or from Outlook.
2. In the **Start [process]** dialog box, click the folder icon  .
3. In the **Choose File to Upload** dialog box, select the document or documents that you want to upload, and click **Start** to start the process.

### Document properties

The following properties are added to the documents that you add to a process.

Document type	DOK, Document
State	UÅ, Draft
Letter date	<current date>

### Actors available for a process

For WorkZone Process, access setup is defined by case and the access setup of the case controls what actors are available for selection in a process. The setup for documents that are associated with a case can also have an effect on actors.

For more information about access rights, see [About access rights](#) in the WorkZone Client User Guide.

## **Access rights to a process controlled by case**

A process is always associated with a case and, as a default, any access limitations that apply to a case will also apply to an associated process. So actors that are available for selection in process workflows are the people who have access to the case. If people do not appear for selection in a workflow, it is probably because they don't have access to the case.

If, for example, a case has access codes to allow access for three people, only these three people will be available for selection on any process that is based on the case.

## **Access rights to a process controlled by case Documents**

When it comes to read and write access, documents are, by default, restricted by case which means that documents inherit any access codes that are defined for the case. However, you can define specific access codes for individual documents and thus disregard the access codes of the case.

If, when starting a process, you add a document with restricted access rights and you include one or more actors that do not have access rights to the document, you will not be able to start the process.

## **Access rights controlled by organizational unit**

When you create a case, the unit that you are associated with is by default set as the responsible unit of the case.

- If you operate in an environment with a standard configuration of the application, any new cases that you create will as a starting point not be restricted by access codes and access is allowed regardless of what organizational unit people are associated with.
- If you operate in an environment with a corporate configuration, any new cases that you create will as a starting point be restricted by access codes that limit access to people in your own corporate unit.

For information about access codes for corporate and standard configurations, see [About access codes](#) in the WorkZone Client User Guide.

## Allow access to cases across organizational units in a corporate configuration environment

In a corporate configuration environment, a process that is started on a case is as a default restricted by access for members of the current unit. This means that only members of the current unit will appear on drop-down lists for selection in workflows. To be able to select members of other units as actors in workflows, you need to change the access rights of the associated case. See [Manage access rights](#) in the WorkZone Client User Guide.

# Phase processes

---

## About phase processes

A phase process is a highly configurable type of process. Your organization may have defined phase processes differently from the examples provided in this user guide.

## Phases

A phase process can be divided into phases. The **Phase** column in the **Processes overview** shows which phase a process is in.

Phases are configurable and depend on your organization's setup.

A process can be in one of the following phases:

- **Distribution**  
The phase where a process is assigned a case handler.
- **Processing**  
The phase where a process is undergoing case handling by the selected actors, for example, the department head.
- **Submission**  
The phase where a process is reviewed by the approvers, for example, the minister, and a decision is reached.

## Start a phase process

You can start a new phase process from an email or the **Cases & Documents** folder in Outlook, or from WorkZone Client. A phase process can, for example, be a paragraph 20 question.

1. Click **Process** and select a phase process type, for example, **Paragraph 20 process**. For more information on starting processes in general, see [Start a new process](#).

The **Paragraph 20 question** dialog box opens.

2. Type a title in the **Title** field.
3. Select a deadline in the **Deadline** field. The default duration is 6 working days, but it may be defined differently in your organization.
4. Select an approval deadline in the **Approval deadline** field. This is the deadline for the approval phase, which has a default duration of 2 days from the main deadline.
5. Select a priority in the **Priority** field.
6. Type a description in the **Description** field.
7. Select who is responsible for the case. Click in the **Case responsible** field and select a contact from the list.
8. Select documents to be used as reference. Click in the **Reference documents** field and select one or more documents from the list.
9. Select contacts as contributors. Click in the **Contributors** field and select a contact from the list.
10. Click **Start**. The process is started and is now visible in the **Processes** overview.

## Phase processes in the Processes overview

When you expand a phase process, for example the Paragraph 20 question, the sub processes are displayed, in this example a distribution process.

You double-click the sub process to view the tasks belonging to it in the **Preview** pane.

Case	Process name	Process type	Pending	Case handler	Responsible unit	Process owner	Created	Pr...	Deadline	Phases
19-00/2, Test case, ...	Ministerial	Ministerial		ANN, Ann Secretary	RE, Region East	TESTADMIN, Test A...	10/12/2019 16:30:01		20/12/2019 00:00:00	✓✓✓
19-00/2, Test case, ...	Test case	Paragraph 20 question		ANN, Ann Secretary	RE, Region East	TESTADMIN, Test A...	17/12/2019 14:37:03		06/01/2020 00:00:00	▶▶▶▶▶
19-00/2, Test case, ...	Test case	Distribution (Extended)		ANN, Ann Secretary						

**Tip:** When you hover over each of the phase icons, you get a tool tip that displays the duration, deadline, and information about completion of the process. In addition, if you

Hover somewhere in the **Phases** column in the overview, a tool tip is displayed with information about the current phase.

## Move a process to another phase

If you manually want to show a phase change or move from a manually handled phase, you can move a process to the previous or next phase.

You can manually move any active process forward to the next phase or backward to the previous phase in the Processes overview.


If you move a process forward to the next phase, associated sub processes and user tasks (if any) are initiated.

If you move a process forward past the last phase of the process, the phase process completes, but any sub processes will still be running.

If you move back to the previous phase, associated sub processes and user tasks (if any) are initiated.

Follow these steps to move a process back or forward.

1. Select an active phase process.
2. Right-click the process.
3. Select **Move forward** or **Move back**. The action you performed and the changed status of the process is reflected in the **State** column.

If you want to refresh the entire process overview to see your changes,  **Refresh** in the ribbon.

## Edit phase process details

You can change the details of a phase process such as the title, deadline, description, and priority in the **Processes overview**.

1. Select the phase process which details you want to edit.

2. Click  **Edit** in the ribbon.

3. In the **Edit process** dialog box, you can change the title, deadline, description, and priority in the corresponding fields.

## Change deadlines of phases

You can change the deadlines for the individual phases in the phase process.

1. In the **Edit process** dialog box, click the **Phases** tab.
2. Click in the field and select a date.

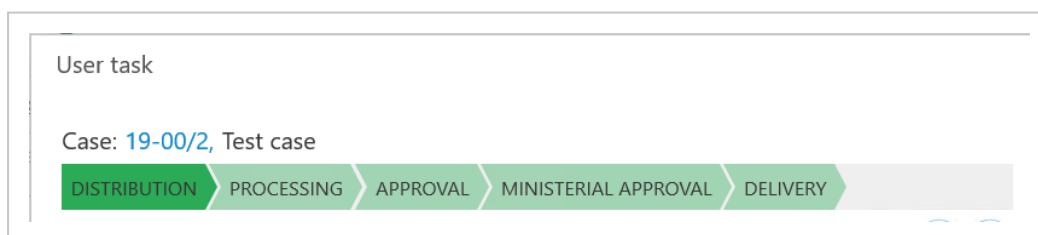
## View the progress of a phase process

When you open a task from the **Processes overview**, Outlook, or WorkZone Mobile, the following general information about the phase process is displayed:

- The process type
- A link to the case on which the process was started
- The phase process deadline.

You can click the deadline to open the **Edit** dialog box, if, for example, you want to change the deadline. See [Edit process details](#).

A phase bar displays the different phases in the phase process as well as the current status.



The progress bar displays the following information:

- Completed phases are marked with check marks and the titles are collapsed.
- Future phases are marked in light green and shown with the full titles.
- The current phase is marked in dark green.
- The phases are marked in green, yellow, or red according to deadline information.
- Each phase has a tool tip that shows the deadline of the current phase.

# The Processes Overview

The **Processes Overview** gives you an overview of the processes and tasks in your organization. You can customize the **Processes Overview** to fit your needs so that it shows information about the processes and tasks you have an interest in.

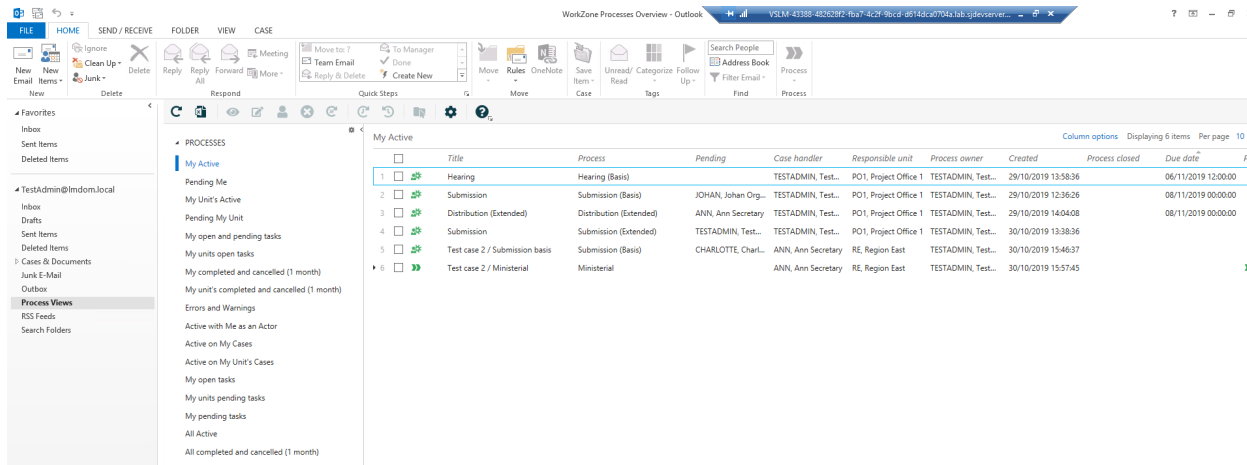
## About the Processes Overview

The **Processes Overview** gives you an overview of the process tasks in your organization. You can access the **Processes Overview** in Microsoft Outlook and in an Internet browser. You can, for example, open the **Processes Overview** in a browser on shared monitors to monitor the overall progress of processes in your organization. You can customize the **Processes Overview** to fit your needs so that it shows information about the processes and tasks you have an interest in.

## Open the Processes Overview

You can open the **Processes Overview** from Microsoft Outlook and in a browser.

- In Outlook, click **Process Views** in the navigation pane.



- In an internet browser, enter the URL: `http(s)://host-`



name/app/client/overview.


	Title	Process	Pending	Case handler	Responsible unit	Process owner	Created	Process closed	Deadline	Phase
1	Hearing	Hearing (Basis)		TESTADMIN, Test A...	PO1, Project Office 1	TESTADMIN, Test A...	05/11/2019 15:29:34		19/11/2019 00:00:00	
2	Submission	Submission (Basis)	JOHN, John Team ...	TESTADMIN, Test A...	PO1, Project Office 1	TESTADMIN, Test A...	05/11/2019 16:06:02		26/11/2019 12:00:00	
3	Extended submission	Submission (Extended)	ANN, Ann Secretary	TESTADMIN, Test A...	PO1, Project Office 1	TESTADMIN, Test A...	05/11/2019 16:25:45		29/11/2019 00:00:00	
4	Distribution	Distribution (Extended)	ANN, Ann Secretary	TESTADMIN, Test A...	PO1, Project Office 1	TESTADMIN, Test A...	05/11/2019 16:24:55			

## View processes and tasks

When you open the **Processes Overview**, it displays the **My active** processes list, which shows the processes that you have started. You can select other lists, for example, **All active** processes or **My unit's active** processes depending on what you want to see. See [View a list](#).

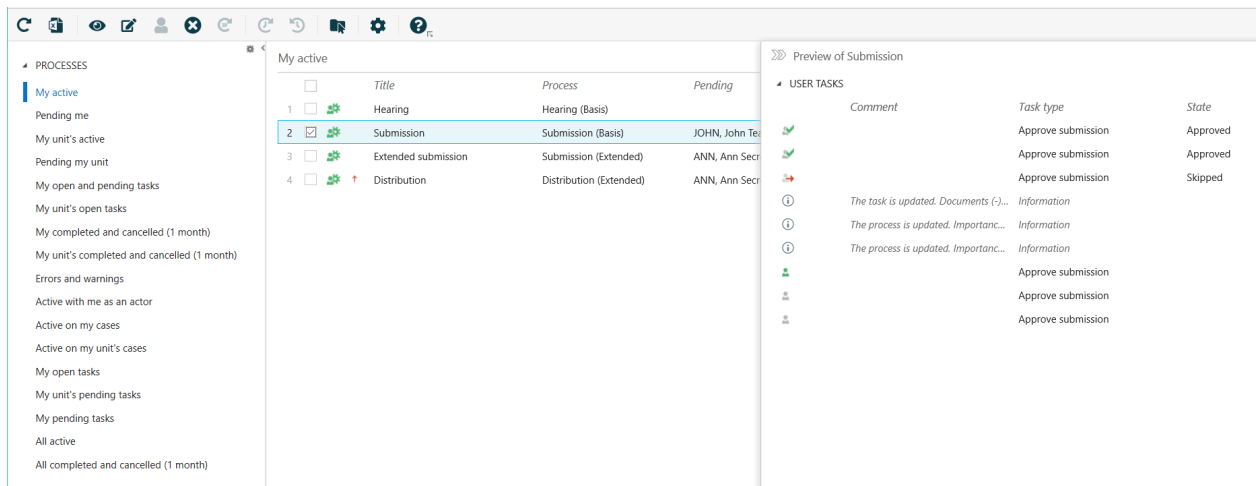
In the **Processes Overview**, you can view information about:

- Who the process awaits an action from.
- Case handler and responsible unit.
- Who is the process owner.
- When the process was started.
- The process deadline.
- Phases in phase processes.

You can select a process and click  **Preview** to open it in the **Preview** pane where you can view the details about the process, such as:

- Tasks and their order.
- The progression and deadline.
- The state of each task.
- Who has pending tasks.

You can keep the **Preview** pane open and switch between processes in the list to view the details.



**Important:** You can only view processes if you have access permissions to the cases associated with the processes.

## View process in formation

The **Processes Overview** shows default columns that are described below. You can add or remove columns to make the overview match your information needs.

Column name	Description
<b>Title</b>	The process name.
<b>Process</b>	The process type.
<b>Pending</b>	The actor who has pending tasks.
<b>Case Handler</b>	The employee who is responsible for handling the case.
<b>Responsible unit</b>	The case handler's unit.
<b>Process owner</b>	The employee who started the process.
<b>Created</b>	The start date of the process.
<b>Process closed</b>	The completion date of the process.
<b>Deadline</b>	The process deadline.
<b>Phases</b>	The progress of the phases in a phase process.

In the **Preview** pane, includes the following columns:

Column name	Description
<b>Comment</b>	The actor's comment.
<b>Type</b>	The task type.
<b>State</b>	The state of the task.
<b>Pending</b>	The actor who is pending the task.
<b>Deadline</b>	The task deadline.
<b>Process owner</b>	The employee who started the process.






## View task information













If you open a task list, for example **My open tasks**, the default columns shown below are displayed. You can add or remove columns to make the overview match your information needs.

Column name	Description
<b>Case number</b>	The case number on which the process was started.
<b>Title</b>	The process name.
<b>Task type</b>	The task type.
<b>Process type</b>	The process type.
<b>Pending</b>	The actor who has pending tasks.
<b>Deadline</b>	The task deadline
<b>Process owner</b>	The employee who started the process.

You can customize the **Processes Overview** to show only the information relevant to you. See [Customize the Processes Overview](#).

## Icons in the Processes Overview

Icons	Description
	The process is in progress.
	The process is completed.
	The process is overdue.
	<p>An error has occurred. See tool tip for information on the type of error. Failed processes are displayed in the <b>Processes with errors and warnings</b> list.</p> <p>Expand a process to see the errors that are associated with individual user tasks. Error types on user tasks:</p> <ul style="list-style-type: none"> <li>• No access - No more actors can access the process due to the access restrictions on the case.</li> <li>• Document(s) missing - One or more actors cannot access the documents that are associated with the process.</li> <li>• Email address is missing - An actor does not have an email address.</li> </ul> <p>If a process fails due to a series of errors, you see the error types:</p> <ul style="list-style-type: none"> <li>• More errors - Errors occurred in a series of user tasks. A WorkZone Process administrator needs to check the <a href="#">Investigate failed processes in the workflow log</a> in the WorkZone Operations Guide.</li> <li>• Process failed - A fatal error caused the process to stop. For more information about known issues, see Troubleshooting.</li> </ul>
	<p>An error has occurred due to a deviation from the expected process behavior. This warning is shown if, for example, the case handler is not associated with the case, a phase process could not be moved for-</p>

Icons	Description
	ward or back, or the state of the case could not be changed.
	The process has been canceled.
	The process has been completed after the deadline.
	The process has been completed after the reminder date.
	The process has reached the reminder date.
	The task has been canceled.
	The task is obsolete.
	The task has high priority.
	The task has high priority, and it is closed.
	The task has low priority.
	The task has low priority, and it is closed.
	The phase process is in progress.
	Information about the state of a task in a SmartPost process.

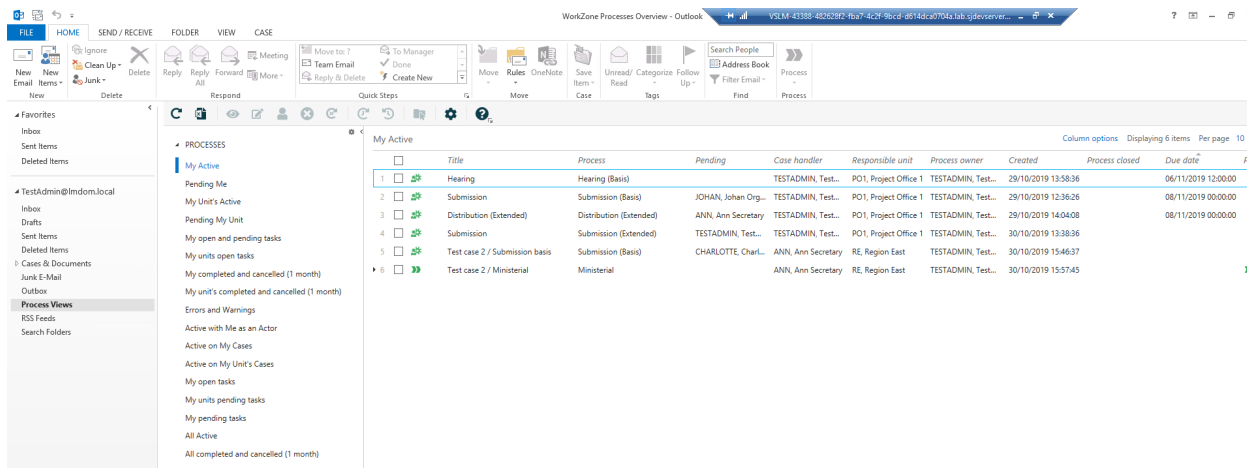
## About the Processes Overview

The **Processes Overview** gives you an overview of the process tasks in your organization. You can access the **Processes Overview** in Microsoft Outlook and in an Internet browser. You can, for example, open the **Processes Overview** in a browser on shared monitors to monitor the overall progress of processes in your organization. You can customize the **Processes Overview** to fit your needs so that it shows information about the processes and tasks you have an interest in.

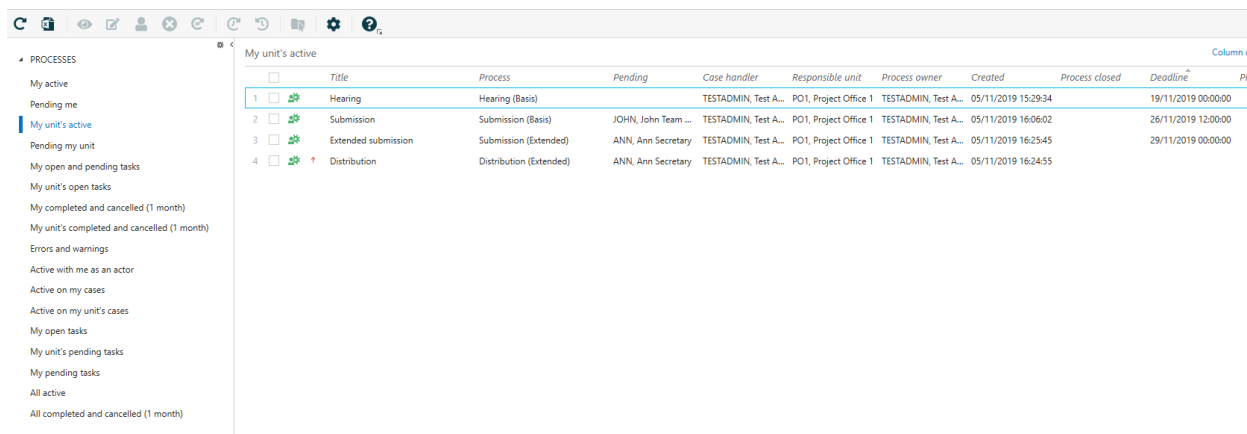
## Open the Processes Overview

You can open the **Processes Overview** from Microsoft Outlook and in a browser.

- In Outlook, click **Process Views** in the navigation pane.



- In an internet browser, enter the URL: `http(s)://hostname/app/client/overview`.




## View processes and tasks

When you open the **Processes Overview**, it displays the **My active** processes list, which shows the processes that you have started. You can select other lists, for example, **All active** processes or **My unit's active** processes depending on what you want to see. See [View a list](#).

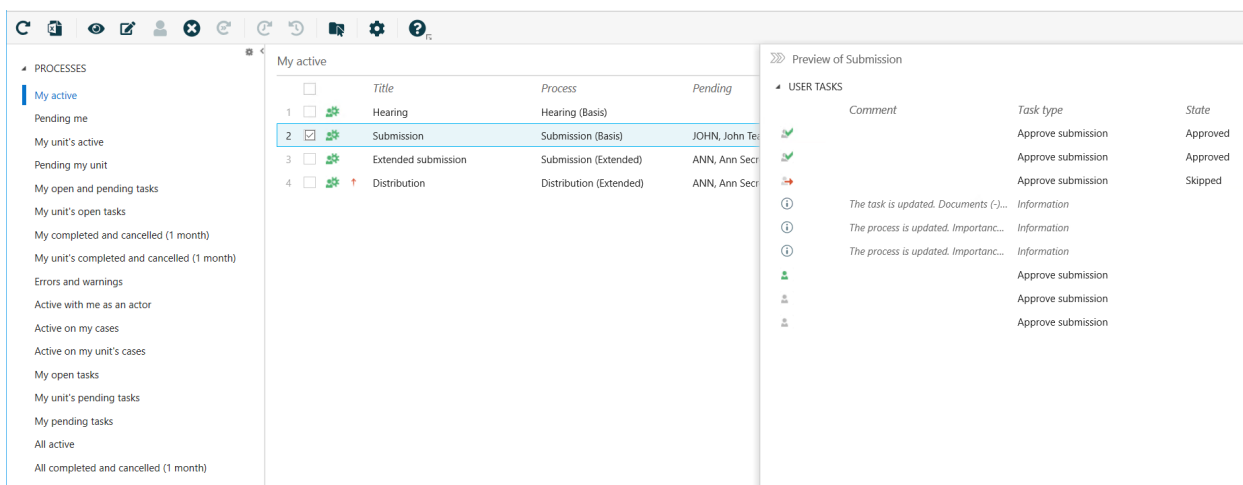
In the **Processes Overview**, you can view information about:

- Who the process awaits an action from.
- Case handler and responsible unit.
- Who is the process owner.
- When the process was started.
- The process deadline.
- Phases in phase processes.

You can select a process and click  **Preview** to open it in the **Preview** pane where you can view the details about the process, such as:

- Tasks and their order.
- The progression and deadline.
- The state of each task.
- Who has pending tasks.

You can keep the **Preview** pane open and switch between processes in the list to view the details.



**Important:** You can only view processes if you have access permissions to the cases associated with the processes.

#### View process information

The **Processes Overview** shows default columns that are described below. You can add or remove columns to make the overview match your information needs.

Column name	Description
<b>Title</b>	The process name.
<b>Process</b>	The process type.
<b>Pending</b>	The actor who has pending tasks.
<b>Case Handler</b>	The employee who is responsible for handling the case.
<b>Responsible unit</b>	The case handler's unit.
<b>Process owner</b>	The employee who started the process.
<b>Created</b>	The start date of the process.
<b>Process closed</b>	The completion date of the process.
<b>Deadline</b>	The process deadline.
<b>Phases</b>	The progress of the phases in a phase process.

In the **Preview** pane, includes the following columns:

Column name	Description
<b>Comment</b>	The actor's comment.
<b>Type</b>	The task type.
<b>State</b>	The state of the task.
<b>Pending</b>	The actor who is pending the task.
<b>Deadline</b>	The task deadline.
<b>Process owner</b>	The employee who started the process.







### View task information







If you open a task list, for example **My open tasks**, the default columns shown below are displayed. You can add or remove columns to make the overview match your information needs.








Column name	Description
<b>Case number</b>	The case number on which the process was started.
<b>Title</b>	The process name.
<b>Task type</b>	The task type.
<b>Process type</b>	The process type.
<b>Pending</b>	The actor who has pending tasks.
<b>Deadline</b>	The task deadline
<b>Process owner</b>	The employee who started the process.

You can customize the **Processes Overview** to show only the information relevant to you. See [Customize the Processes Overview](#).

### Icons in the Processes Overview

Icons	Description
	The process is in progress.
	The process is completed.
	The process is overdue.
	An error has occurred. See tool tip for information on the type of error. Failed processes are displayed in the <b>Processes with errors and warnings</b> list.  Expand a process to see the errors that are associated with individual user tasks. Error types on user tasks:

Icons	Description
	<ul style="list-style-type: none"> <li>• No access - No more actors can access the process due to the access restrictions on the case.</li> <li>• Document(s) missing - One or more actors cannot access the documents that are associated with the process.</li> <li>• Email address is missing - An actor does not have an email address.</li> </ul> <p>If a process fails due to a series of errors, you see the error types:</p> <ul style="list-style-type: none"> <li>• More errors - Errors occurred in a series of user tasks. A WorkZone Process administrator needs to check the <a href="#">Investigate failed processes in the workflow log</a> in the WorkZone Operations Guide.</li> <li>• Process failed - A fatal error caused the process to stop. For more information about known issues, see Troubleshooting.</li> </ul>
	<p>An error has occurred due to a deviation from the expected process behavior. This warning is shown if, for example, the case handler is not associated with the case, a phase process could not be moved forward or back, or the state of the case could not be changed.</p>
	<p>The process has been canceled.</p>
	<p>The process has been completed after the deadline.</p>
	<p>The process has been completed after the reminder date.</p>
	<p>The process has reached the reminder date.</p>
	<p>The task has been canceled.</p>

Icons	Description
	The task is obsolete.
	The task has high priority.
	The task has high priority, and it is closed.
	The task has low priority.
	The task has low priority, and it is closed.
	The phase process is in progress.
	Information about the state of a task in a SmartPost process.

## Use the Processes Overview

### View a list

In the **Processes Overview**, you can switch between different lists to get different overviews of your organization's processes.

- To view a list, click it in the navigation pane of the **Processes Overview**.

### Process lists

List name	Description
<b>My active</b>	Active processes with you as the process owner.
<b>Pending me</b>	Processes that await an action from you.

List name	Description
<b>My unit's active</b>	Active processes with process owners from your unit.
<b>Pending my unit</b>	Processes that await actions from you or your colleagues in your unit.
<b>My completed and canceled (1 month)</b>	All completed and canceled processes one month back with you as the process owner.
<b>My unit's completed and canceled (1 month)</b>	All completed and canceled processes one month back with process owners from your unit.
<b>Errors and warnings</b>	<p>Processes across your organization that have failed due to errors and warnings or tasks with errors and warnings. In the last case, the process may still remain active.</p> <p>You can mouse over the error icon and view a tool tip with information on the type of error. See <a href="#">Error types</a>.</p>
<b>Active with me as an actor</b>	Active processes where you have been assigned as actor no matter who are case handlers and process owners.
<b>Active on my cases</b>	Active processes on cases with you as the case handler.
<b>Active on my unit's cases</b>	Active processes on cases with your unit set as the responsible unit.
<b>All active</b>	All active processes across your organization no matter who are case handlers and process owners.
<b>All completed and canceled (1 month)</b>	All completed and canceled processes one month back across your organ-


List name	Description
	ization no matter who are case handlers and process owners.

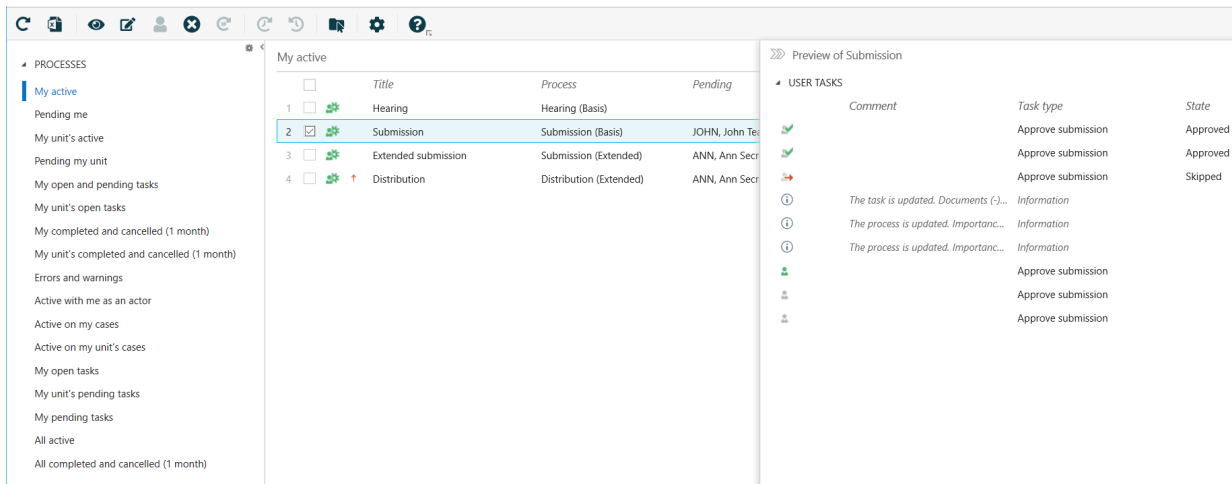
## Task lists

List name	Description
<b>My open tasks</b>	Tasks that await an action from you.
<b>My coming tasks</b>	Tasks that await an action from you but you cannot act on yet because other actions precede your action. Tasks from sequential workflows, for example submission processes, appear on this list.
<b>My open and coming tasks</b>	All your tasks that await an action from you. The list displays both the tasks that are pending your action now and the tasks that you will get but you cannot act on them yet because other actions precede your actions. Tasks from sequential workflows, for example submission processes, appear on this list.
<b>My unit's open tasks</b>	Tasks that await actions from you or other employees in your unit.
<b>My unit's coming tasks</b>	Tasks that await actions from you or your colleagues in your unit but you cannot act on yet because other actions precede your actions. Tasks from sequential workflows, for example submission processes, appear on this list.

**Note:** You can also view processes and task lists in navigation pane of WorkZone Client. You may need to add them to the navigation pane first.

## View a process

1. In the **Processes** overview, click a list to open it, for example **My active** to get an overview of your active processes.
2. Select a process and click  **Preview** or double-click a process to open it in the **Preview** pane. In the **Preview** pane, you can monitor the progress of the tasks in the selected process.



3. In the **Preview** pane, click a task to open it and respond to it. See Different

ways of working with tasks.

The screenshot shows a 'User task' window with the following details:

- Case:** 19-109/1, Test case
- Task:** Approve submission
- Process:** Submission
- Assignee:** John Team Manager, JOHN
- Task deadline:** 26 Nov 2019 12:00

**DOCUMENTS** (1)

- D-49, Test, 05/11/2019

**APPROVERS** (3)

**PROCESS LOG**

ASSIGNEE	ACTION	COMMENT	COMPLETED
ANN	Approved		05/11/2019 16:07
CHARLOTTE	Approved		05/11/2019 16:07
JOHAN	Skipped		05/11/2019 16:07
TESTADMIN		The task is updated. Doc...	05/11/2019 16:08
TESTADMIN		The process is updated. I...	05/11/2019 16:15
TESTADMIN		The process is updated. I...	05/11/2019 16:26

At the bottom, there is an 'Add comment' text box and four action buttons: **Approve**, **Reject**, **Skip**, and **Forward**.

**Tip:** You can customize the **Processes** overview to show only the information relevant to you. Click **Column options** to add or remove columns. See [Customize the Processes Overview](#).

## Open a task from the Processes Overview


You can either open a task from a process list as described in step 3 above, or you can open it directly from a task list.

1. In the **Processes** overview, click a list to open it, for example **My open tasks**.
2. Double-click a task to open it to view or respond to it.

## Open a task as a PDF document


You can open a task as a PDF document, if, for example, you want to print the task. The PDF document contains a task cover page, attachments, and document references.

**Prerequisite:** You must be online to perform this action.

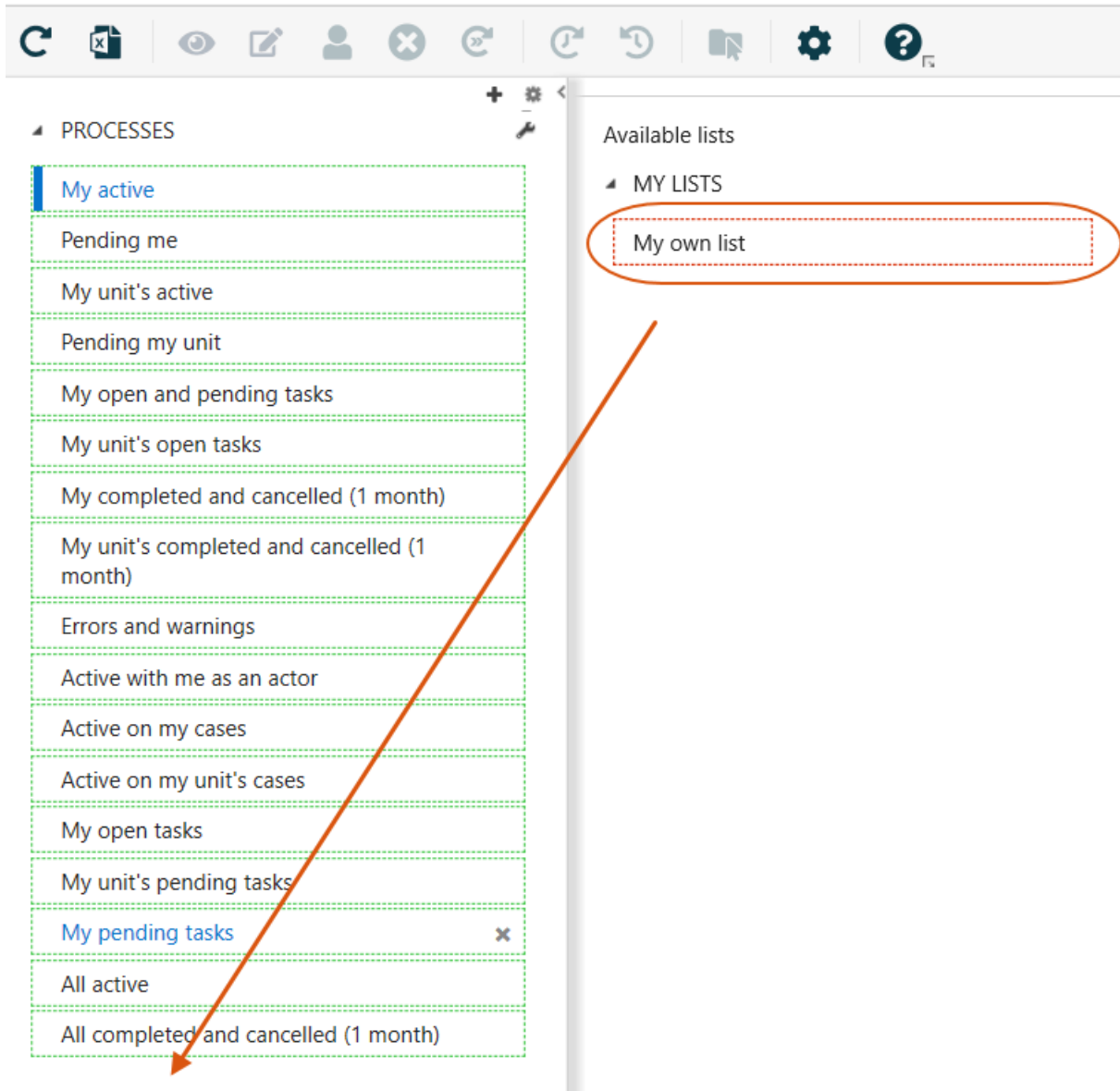
1. Open the **Processes** overview and double-click a process to open it in the **Preview** pane.
2. Click a task, for example **Approve Submission**.
3. In the task, click  to create a PDF version.

## View my lists and shared lists

You can create your own lists based on queries that you make using WorkZone QueryBuilder. When you save the queries in WorkZone QueryBuilder, the lists are shown under **My lists** in the navigation pane in WorkZone Client. If you want to see your own lists in the **Processes Overview**, you need to add them to the navigation pane first.

1. In the **Processes Overview**, click  **Configure navigation** in the navigation pane.
2. In the **Available lists** pane, double-click the lists under **My lists** that you want to add to the navigation pane.






If other users have shared lists with you, you will see these lists under **Shared lists** in the navigation pane.

See [Create and share lists](#) in the WorkZone Process Administrator Guide for information about creating your own lists.

## Edit process details

You can change the details of a process such as the title, deadline, description, and priority.

1. Select the process that you want to edit.
2. Click  **Edit**.

3. In the **Edit process** dialog box, you can change the title, deadline, description, and priority in the corresponding fields.
4. Click **Save**.

When you work on a task, you can also edit it. You can, for example, add a new document or a new actor.

1. In the **Preview** pane, click the task that you want to edit.
2. In the **Task** dialog box, you can add or remove documents and actors.
3. Click **SAVE** and close the task.

In the **Preview** pane, you can view information about what changes have been made in the **Comment** column.

In this example, actors have been added. The **+** next to **Actors** means that the list of actors have been changed.

Preview of Submission


USER TASKS

	Comment	Task type	State
✓		Approve submission	Approved
✓	The task is updated. Documents (-) <b>Actors (+)</b> . Optional actors (-). Deadline (-).		Approved
→			Skipped
i	The task is updated. Documents (-)...	Information	
👤		Approve submission	
👤		Approve submission	
👤		Approve submission	

## Cancel a process


You can cancel an active process in the process overview.

1. Open an active process using one of the lists that shows active processes, for example **My active**. See [View a list](#).

2. Select the process you want to cancel.
3. Select  **Cancel**. The process is no longer active, and can be viewed on the **Completed and canceled** lists.

## Restart a process


You can restart a process, for example if a process was canceled and you want to restart it, or if a process has failed due to errors caused by the system, you can restart it once the issue has been solved.

1. Navigate to a canceled process using one of the lists that shows completed and canceled processes, for example **My completed and canceled (1 month)**. See [View a list](#).
2. Select the process you want to restart.
3. Select  **Restart**. The process is active again, and can be viewed on the different active processes lists.

## Take ownership of a process

You can take over the ownership of a process, if, for example, the current process owner is no longer involved in the process or perhaps is no longer employed by your organization.

**Note:** You can only take over the ownership of a process if you have access to the current case.

- Select the process for which you want to take the ownership, and click  **Take ownership**.

If the previous owner is an active user, the user is notified by email that you have taken over the process ownership. The email includes a link to the process.

## Customize the Processes Overview

You can customize the **Processes Overview** to display information that is relevant for you and save the view so that you can easily access it again.

You can use one of the standard lists as your starting point, and then you can select columns, order columns, and filter on columns. You can, for example, select the contacts whose processes you want to follow, or perform free text searches.

The changes you make to the current view will be available next time you open the **Processes Overview**. You can also save a customized view that you can later open from Outlook.

This topic describes the various ways that you can customize a view.

### Select columns

You can choose which columns you want to see in the overview.

1. Click the **Columns options** button.
2. Select or clear the check boxes next to the columns you want to add or remove from the overview.
3. Click **Apply**.

Some columns in the **Columns options** dialog box are selected by default but you can remove them from the overview.


Click **Reset** to reset to the default columns.


### Change column order


You can drag a column and drop it at the desired location.

### Use column filters

You can limit the number of processes that are displayed in the **Processes** overview by


using a column filter. You can filter on columns that have a  filter icon.

1. Click the  filter icon.
2. In the **Filter list by <name of column>** dialog box, select the values you want to filter on.
3. Click **Apply** to apply the filter to current list or select the **Save filter** check box to save the filter so that next time you open this list, the filter will be applied.

To clear the filter, click the  filter icon, and then click the **Reset all filters**.


## Filter by process type

You can filter by any combination of process types.

1. Click the  filter icon next to the **Process** column, and select the process type or types that you want to display.
2. In the **Filter list by process** dialog box, select the process types you want to view, for example **Submission (Basis)** and **Submission (Extended)**.
3. Click **Apply**.

## Filter by case handler

You can use the **Case handler** column filter to view a specific case handler's active processes.

1. Click the  filter icon next to the **Case handler** column.
2. In the **Filter list by case handler** dialog box, type a name or part of a name to look up a case handler. You must enter at least three characters to start a search.
3. Click **Apply**.

## Combine filters

You can apply several filters to a list to narrow your result in the overview.

Say, that you use the standard list **My active** and get a list of 6 processes. Then you can filter on the process title **Customer2**, and on the two process types **Hearing (Basis)** and **Submission (Basis)**.

By using this combination filters, you can reduce the number of processes on the list from 6 to 2.

Predefined list:	Filter on:	Filter on:
My active	Customer2	Hearing (Basis) and Submission (Basis)
SubmissionCustomer1		
SubmissionCustomer2	x	x
HearingCustomer1		
HearingCustomer2	x	x
DistributionCustomer1		
DistributionCustomer2	x	

# Work with tasks

## Different ways of working with tasks

You can open a task as a smartmail in Outlook or you can open the task from the **Processes** overview in Outlook or in an Internet browser.

If you have responded to a task, for example, from the **Processes** overview, and you later open the same task as a smartmail in Outlook, the task will be updated with your response.

You can work with tasks assigned to you or persons you are a delegate for, and you can edit tasks that you have created. For some process types, you can edit the list of actors while the process is ongoing, see [Manage documents and actors on a task](#).

## View smartmails when you do not have access to WorkZone

If you, for example, work on a mobile device or on a public computer where you do not have access to WorkZone or you work in Outlook but the WorkZone for Office add-in is not installed, you will receive smartmails as plain text. The text version contains overall information about the process and the specific task so that you can get enough information about the task to be able to act on it, for example, contact a colleague (your delegate) to take action on your behalf.

The text version does not contain action buttons and any attached documents are not shown due to security reasons. If you are online and have access to WorkZone, you can click the process link to open the task in WorkZone Client and in this way open attached documents and respond to the task. You can also click the case link to open the actual case in WorkZone Client.

Svar Svar til alle Videresend

sa\_wzprocess Ann Secretary 1 1:52

Høring (Hearing)

SmartTask-740a41c12ff140c885a5d3bab849a6ec.html 27 KB

Case: [19-00/2](#), Test

## Hearing

Process: **Høring**

Dette er en beskrivelse af høringen

Assignee: Ann Secretary, ANN  
 Case handler:  
 Process owner: Test Administrator, TESTADMIN  
 Process ID: 5

Task deadline: 17/10/2019 00:00:00  
 Process type: Hearing (Basis)  
 Process started: 03/10/2019 13:51:32  
 Task started: 03/10/2019 13:51:34  
 Process deadline: 17/10/2019 00:00:00

Process Log			
Assignee	Action	Comments	Completed
Ann Secretary, ANN			
Elisabeth Section Manager, ELISABETH			

This is a reduced version of the smartmail. To see the full version, you need to be online and have access to WorkZone. If you are online, you can click the process link to open the task in WorkZone Client to see documents and respond to the task.

## Task types and actions

The content of a task and the actions you can perform in your task, depends on the process types that are used in your organization.

For example, actions associated with tasks for distribution and submission processes :

- **Distribution: Accept or forward**

You can accept or forward the task.

- **Submission: Approve document**

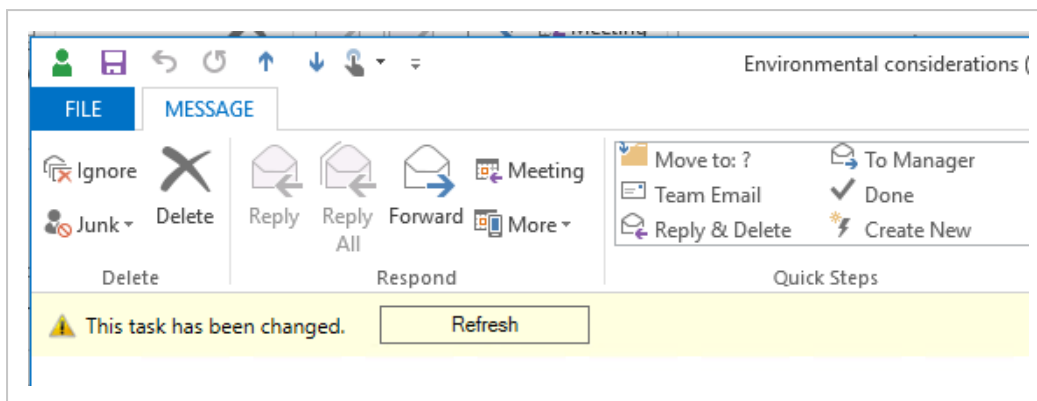
You can skip, forward, reject, or approve the task.

When you have performed an action in a task, the status is changed to **Closed**. Then the process can proceed. For example, the next actor receives a task where he or she is requested to approve the case document.

## Locked tasks

When a user has a task open, it is locked for other users. This means that other users cannot edit the task until the first user has closed it. If you open a task that is already opened by another user, you will be notified that you cannot edit it.





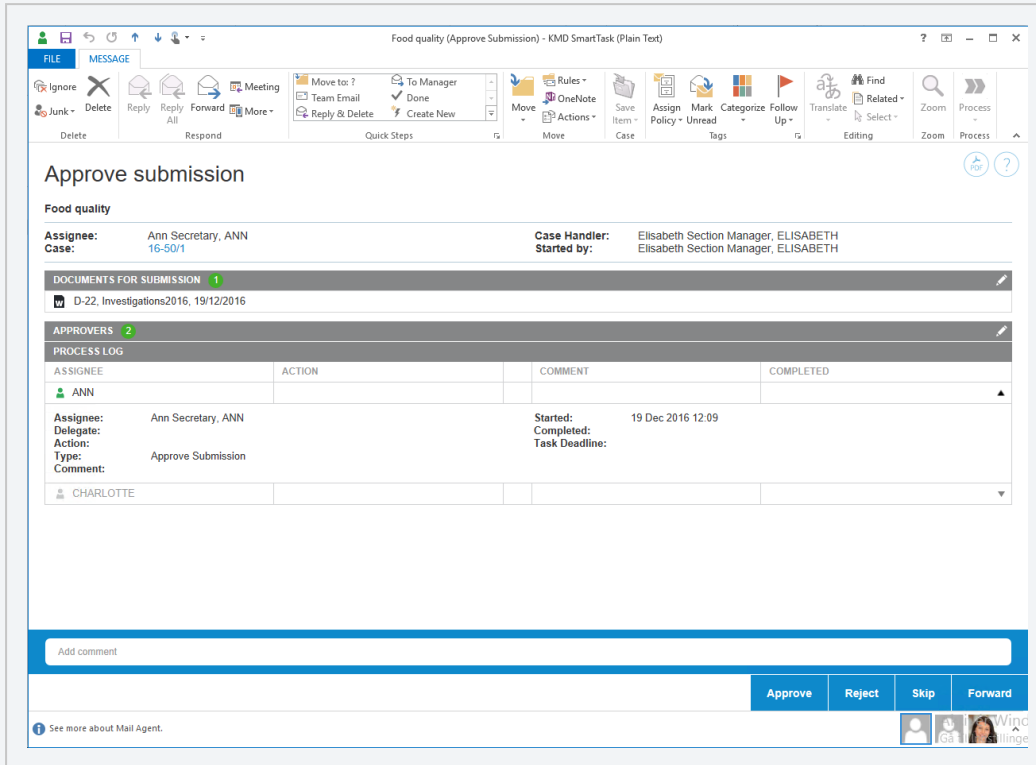
It requires special access rights to unlock a locked task. If you have these rights, and you open a locked task, there will be a **Take over** button and a message showing the name of the user who has the task open. Click **Take over** to unlock the task.

For information about access rights to take over locked tasks, see [Unlocking a locked task](#) in the Operations Guide.

## About smarttask

A smarttask contains a task and response buttons. When you receive a smarttask, it means that you have been assigned a task that you are requested to carry out, for example, take ownership of the task. You can open smarttasks from the Processes overview and in Outlook as emails.

**Example:** A submission task that is opened as an email in Outlook.



**Tip:** A task contains a link to the case that it is based on at the top of the task. If you have access to the case, it opens in WorkZone Client.

## Actors in the task

In a task, various roles are defined. These roles are described below.

Actor	Description
Assignee	The person or organizational unit who has received this task.
Case handler	The person who is responsible for handling the case.
Started by	The person who started the process, that is, the process owner.

**Example:** In the this example, Martin has started a distribution process, thereby becoming the process owner. He has selected Elisabeth to respond to the task, making her the assignee. In a distribution process, for example, the assignee could be the responsible contact or the contributor. The process is based on a case which Ann is responsible for as case handler.

#### Questions about food quality

Assignee: Elisabeth Section Manager, ELISABETH

Case: [15-51/1](#)

Case Handler: Ann Secretary, ANN



Started by: Martin Specialist, MARTIN

Task Deadline: Saturday, January 10, 2015 10:09 am

Process Deadline: Saturday, January 10, 2015 10:09 am

In some process types, you can edit the list of actors while the process is ongoing. See Manage documents and actors on a task.

## Task icons

Task icon	Description
	Indicates that the task has been completed.
	Indicates an open task.

## Open a task as a PDF

You can generate a PDF document from the contents of a task. This is useful if, for example, you want to print the task directly from a mail.

You can open the PDF document in three different ways:

Open the mail, that you received in your inbox, and click the link **Open as PDF**.

-Or-

Expand the **Processes** overview in Outlook, open the smarttask, and then click the link **Open as PDF**.

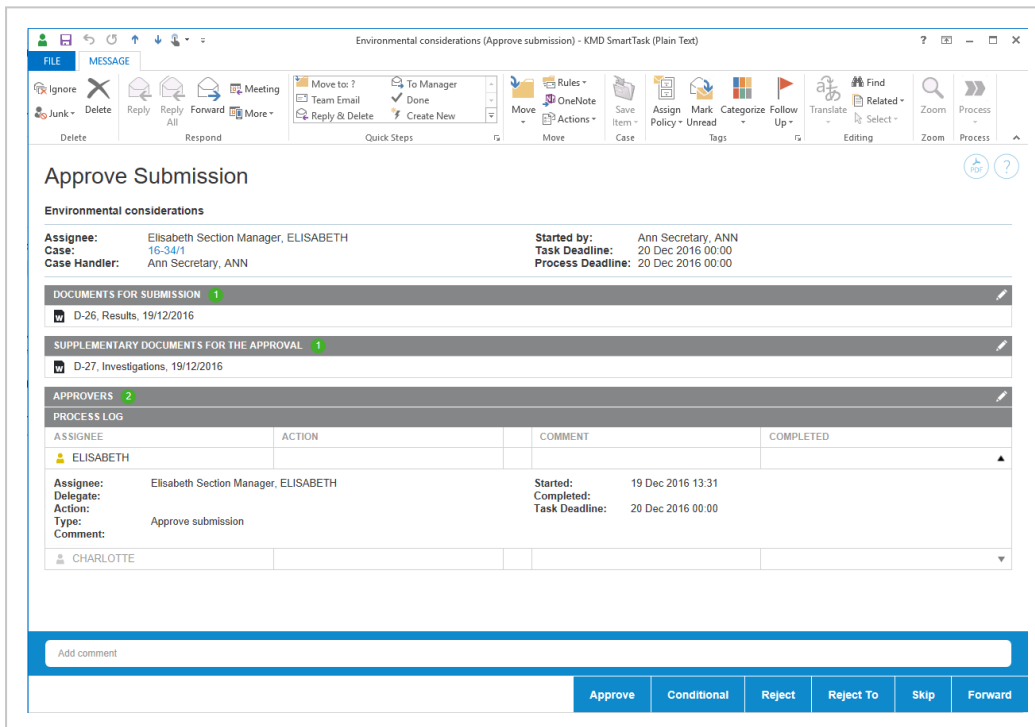
-Or-

Expand the **Processes** overview in Outlook, right-click the smarttask, and select **Open as PDF** on the menu.

## The Process Log

The **Process Log** of the task displays for example any actions that are done, pending actions and future actions together with the **Assignee** and relevant dates, such as the **Task Deadline**. If previous assignees have made comments, these are also displayed. See the example below, which is a submission task opened from the **Processes** overview.


You can click the arrows on the right hand side of a log entry to view details such as the type of the pending task.




If a response contains a document, a document icon is displayed. You can click the icon to open the document.

You can copy comments from the **Process Log** to your clipboard.

## Response times

If you have not responded to your task by the reminder date, the task icon in the **Process log** of the task will change to the yellow reminder icon . The reminder date is by default 24 hours before the response deadline, but your organization can define it differently.

If you have not responded by the process deadline defined by the process owner, the process icon will change to red .

The process owner will be notified when the reminder date or the process deadline have passed.

## Respond to a task

You respond to a task using the response buttons at the bottom of the task. When responding, you can write a comment of maximum 3999 characters.

Depending on the process type, you have different response options. You can, for example, accept or forward a task.

## Accept a task

Accepting a distribution task means that you take ownership of the case handling. If you accept to carry out the task, click **Accept** in the bottom right corner. Unless you are the only or the last actor to receive this task, it will now be sent to the next actor defined in the process.

## Forward a task

You can forward a task to another member of your department, organizational unit, or authority, if another person should carry out the task instead of you. The person you forward the task to must have access to the case on which the process is running. However, this may be configured differently in your organization.

**Tip:** You can also forward documents from the task.

## View or edit a document in a task


When you receive a task with a document attached, for example a Word document, an Excel spreadsheet, or a PowerPoint presentation, you can view or edit the document.

## View a document's meta data in WorkZone Client


Click the title of a document to view its meta data. The document opens in WorkZone Client, if this is set as your default client, otherwise Captia Web Client.

### DOCUMENTS

---

 D-7, Docs for process, 12/05/2014


## Open and edit a document

Click  to open the document for editing. The document opens in the document program, for example, Word or Excel.

**Note:** You can only edit a document if it is a draft (**UÄ**). If the document is archived (**ARK**) or closed (**AFS**), or the document is locked (**UL**), you cannot edit it.


### DOCUMENTS

---


 D-7, Docs for process, 12/05/2014

## View the status of a task

In the **Processes** overview, the task icons show the status of a task.

Task icon	Description
	The task is active.

---

Task icon	Description
	The task is waiting for the previous task to be completed.

## Resending a task

### About resent tasks

If you have a pending task in your inbox and the smartmail with the same task is sent to you again, it is probably because the deadline has been changed.

Tasks/smartmails are resent automatically when someone changes the deadline of the process which has a pending task. This is to ensure that you are notified of the changed deadline.

When a process is started, a task is sent to someone who is expected to perform an action. Until that person performs the action, the task is pending. If, meanwhile, the process owner changes the deadline of a process, then the task is resent.

You can see the new deadline as the action **Deadline changed** in the **Process Log** of the task. The status of the task is shown as **Task Resent** in the **Action** column.

### Resend a task

You can resend a task. This could be relevant if, for example, the response deadline is approaching and you - as process owner - have not yet received a response.

1. Under **Process Views** in Outlook, open the **Processes** overview.
2. Right-click on a process which has an active task, and select **Resend**.

## Working with task documents

### Forward documents from a smarttask

You can forward documents from a smarttask to any contact, including contacts who do not have case or document access.

1. In Outlook, click or open the smarttask containing the document(s) you want to forward.
2. On the ribbon, click **Forward** in the **Reply** group.

A new email opens.

- The process title is inserted as subject.
- The latest version of the document(s) are attached to the smart-task are attached.

**Note:** If you are using WorkZone for Outlook add-in, **Save on send** is selected automatically, and the process case is selected.

3. Enter one or more recipients and click **Send**.

## Enable or disable document versioning

If your organization uses versioning of documents, then you can enable or disable versioning for individual documents.

For a document, versioning can be either enabled, disabled, or not configured. See more information about [enabling and disabling versioning](#) in the WorkZone for Office User Guide.

If you open a document for editing from a smarttask and versioning has not been set on that document, you are asked if you want to enable versioning or not.

## Manage documents and actors on a task

After a process has been started, for example a basis submission or an extended distribution, the process owner can at any time make changes to a task on any actor's behalf. If you are an actor (or delegate for an actor) in a process, you can reorder, add or remove content such as documents and actors.

**Prerequisite:** You must work online to be able to edit a task.







## Manage documents and actors

To edit the content of a task, follow these steps:


1. Open the task. For example, you can open a task from the **Processes** overview, from a common mailbox, or the inbox of a person who you are a delegate for (if this person has as given you access to it). You can also open it from WorkZone Mobile. See [WorkZone Mobile User Guide](#).
2. Make your changes, for example, editing approvers (actors) and documents.


### Edit actors or approvers

Click  to enable edit mode.

- Under **Approvers**, click the following icons to add an actor or approver:
  -  Search for actors or approvers. You can search for contacts of the type Employee and Organizational unit that have email information registered.
  -  Select an actor sequence. For more information, see Work with actor sequences.
- Remove an actor or approver: In the **Actors** section, click  to remove an actor or approver.
- Reorder the list of actors or approvers: Select a name and drag it up or down to change the order of approvers for a task.

### Edit documents

Click  to enable edit mode.

- Under **Documents for approval** or **Supplementary documents**, click the following icons:
  -  Search for documents associated with the case.


Click to apply a filter for documents such as Recent documents. When you apply a filter, documents that are archived or closed are show only if you have added them as favorite documents. Otherwise archived and closed documents are not shown on filtered document lists.



When working with basis hearings, click to search or filter for documents.

**Note:**

- In hearing processes, you cannot edit process documents or actors, but when you provide a reply to a task, you can add a document in addition to a comment.
- In advanced submission processes, you cannot edit the current step. You can edit all other steps in the process.

- Remove a document: In the **Documents** section, click  to remove the document.
- Reorder documents: Drag a document up or down.

3. Save your changes in one of two ways:

- Click **Save**. You can now close the window.  
- Or -
- If the task is assigned to you, or you are the delegate of this person, respond by clicking **Approve**, **Reject**, **Skip**, or **Forward** - see also, for example, Respond to a submission.

The task has now been updated. Future actors will receive the updated content in their tasks.

**Note:**

- A task will be locked, if someone else is already working on it when you open it. See [Locked tasks](#).
- If someone else has updated a task after you have opened it, and before you have responded to it, it will be updated automatically. However, from WorkZone for Office, you need to refresh it before you respond. See [Refresh a changed task](#) in the WorkZone for Office User Guide.

## Reorder tasks

When a process is started, the order of user tasks is assigned automatically but you can reorder your tasks and the tasks of users that you are a delegate for according to the order that you want the tasks to be processed. You can reorder open and pending tasks. You can reorder tasks in WorkZone Client and WorkZone Mobile.

### Order tasks in WorkZone Client

In WorkZone Client, you can change the order of your tasks on the **My Open tasks** and **My pending tasks** lists on the **Home** tab and on the **User tasks** tab on your own contact detail page.

1. On the **Home** tab, click **My open tasks** or **My pending tasks** in the navigation pane to open the list. You may have to add the lists to the navigation pane first. See [Manage lists](#) in the WorkZone Client User Guide.

–Or–

Click your name in the lower right corner to open your contact page, and click the **User task** tab. You may have to add the tab first. See [Manage tabs](#) in the WorkZone Client User Guide.

2. Drag and drop the tasks according to the order you want to work with them.

### Order tasks in WorkZone Mobile

- In WorkZone Mobile, tap **Rank** at the top of your task.

See [Rank your tasks](#) in the WorkZone Mobile User Guide.

## Reorder tasks of a user that you are a delegate for

You can reorder tasks for users that you are a delegate for.

1. Open the contact detail page of the user you are a delegate for.
2. Click the **User task** tab. You may have to add the tab first. See [Manage tabs](#) in the WorkZone Client User Guide.
3. Drag and drop the tasks so they match the order in which you want the user that you are a delegate for to process the tasks.

See also Work with delegates.

# WorkZone Process Basis package

The WorkZone Process Basis Package is a standard package that can be installed with WorkZone Process.

The Basis Package contains the two standard processes Submission (Basis) and Hearing (Basis). Both processes are simple versions of submission and hearing workflows that can assist in controlled yet flexible interaction when a submission or hearing is needed. If configured, both processes are available from any case context in WorkZone for Office, WorkZone Client and, if activated, Captia Web Client.

**Note:** More advanced versions and further processes can be found in the extended package. Your organization can tailor processes using the process modeling capabilities for WorkZone Process.

## Submissions

A submission is based on a sequential flow, as opposed to a hearing, where the flow is parallel.

This means that when you start a submission, you select actors to approve, for example, a document in a fixed order one after another.

A typical submission could be a report requested from the Board of Directors, prepared by a department. The knowledge worker prepares the report and starts a submission with an actor approval order. The submission process sends it for approval, for example, internally in the department, and then to the department manager, and further to the Board of Directors' office, before finally going to the Board of Directors.

## Hearings

A hearing is based on a parallel flow, as opposed to a submission, where the flow is sequential. This means that when you start a hearing, you select actors who should respond, but in no particular order. They can work in parallel.

A typical hearing could take place during the preparation of a report where the knowledge worker requests assistance from several other people or departments in providing relevant feedback or material required to completing the report.

## Submission processes (Basis)

### About submissions

In the WorkZone Process Basis Package you can work with submissions.

A submission is based on a sequential flow, as opposed to a hearing, where the flow is parallel.

This means that when you start a submission, you select actors to approve, for example, a document in a fixed order one after another.

A typical submission could be a report requested from the Board of Directors, prepared by a department. The knowledge worker prepares the report and starts a submission with an actor approval order. The submission process sends it for approval, for example, internally in the department, and then to the department manager, and further to the Board of Directors' office, before finally going to the Board of Directors.

You can start a submission in the following ways:

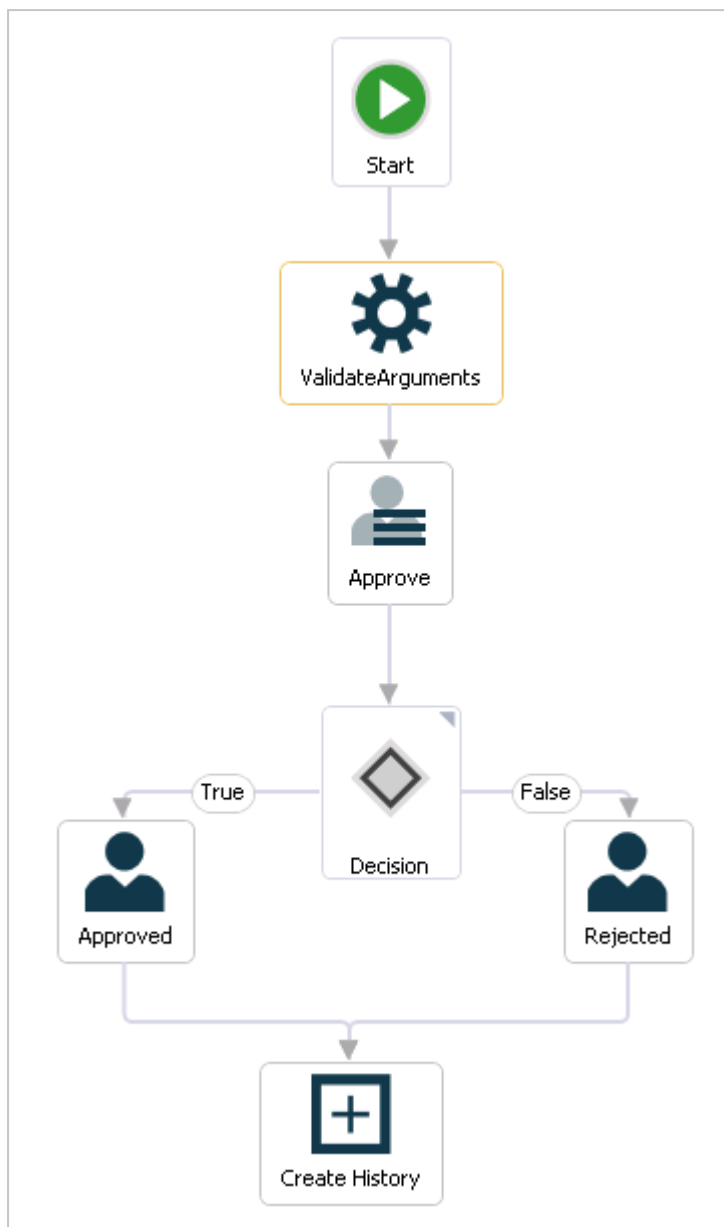
- From Outlook - see Start a process from an email or Start a process from the Cases & Documents folder.
- From document - see [Start a process from Word, Excel, or PowerPoint.](#)
- From WorkZone Client - see Start a process from WorkZone Client.

A submission contains a process deadline, documents and actors. The process owner selects these when starting the submission.

When the process has been started, the first actor receives a task with the available actions - see Respond to a submission.

### The submission process flow

The flow of a submission can be described by the following diagram.



### The process is started

The process owner starts a submission of one or more documents, and selects one or more actors who must all approve the submission within a fixed deadline.

When the process owner starts the submission, a task is sent to the first actor selected by the process owner. The actor can either reject, skip, or approve the submission.

### The actors respond

- If the actor rejects the submission, it is sent back to the process owner who should then typically edit the submission document and start a new submission with the new version of the document (see Rejected submission).

- If the actor skips the submission, the task is sent to the next actor (if any). If there are no more actors, the submission is approved.
- If the actor approves the submission, the task is sent to the next actor defined in the process. If there are more actors, the task is sent to the next actor for approval. If the actor is the last actor, then the process owner is notified that the submission has been approved (see [Approved submission](#)).
- If the actor approves the submission conditionally, the submission is sent back to a previous approver who is requested to make a change to a submission document. When the actor has completed the change, the submission is approved. The actor who requested the change and any subsequent approvers in the sequence are not requested to approve the submission again.
- If an actor rejects the submission to a previous approver, the previous approver is requested to make a change to a submission document. When the actor has completed the change, subsequent approvers, including the approver who requested the change, will receive the submission for approval in the same sequence as before.
- If an actor has not responded to the task before the process deadline, a notification mail is sent to the process owner (see [response deadline reached](#)).

#### The process history

The response of the actors is logged in the history of the process. You can see actor responses in the **Processes Overview**. See [About the Processes Overview](#).

When a process is completed, a process history document is created. It is saved on the case as a case document. You can open it from the case in WorkZone Client.

### Start a basis submission process

You can start a new basis submission process from an email or from the **Cases & Documents** folder in Outlook, or from WorkZone Client. For more information, see [Start a new process](#).

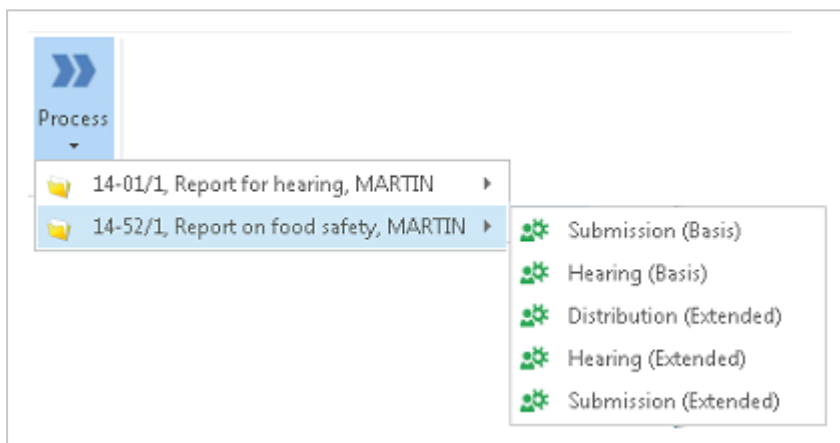


## Start submission process

1. Open, for example, a case from the **Cases & Documents** pane in WorkZone for Office.
2. Click **Process** on the ribbon.

**Note:** If the email has been saved on multiple cases, then a list of these cases is displayed. Select a case.

3. Click **Submission (Basis)**.



4. The **Start Submission** dialog box opens. Automatically the case title is inserted in the **Submission of** field.

The screenshot shows a 'Start Submission' dialog box. It has a title bar with the text 'Start Submission' and a close button. Below the title bar, there are several sections: 'Title' with a text input field containing 'Food quality'; 'Deadline' with a text input field and a calendar icon; 'Description' with a large text area; 'Documents for submission' with a search input field containing 'Select documents for submission (Search starts at 3 characters)'; and 'Approvers' with a dropdown menu and a search input field containing 'Select approvers (Search starts at 3 characters)'. At the bottom, there is a 'Help' link and 'Start' and 'Cancel' buttons.

5. Optionally, select a **Deadline**.
6. Type a description in the **Description** field.
7. Select documents. Click in the **Documents** field and select one or more documents from the list, for example, a case document and the saved email.
8. Select one or more actors. Click in the **Actor** field and select from the list of contacts.

Start typing a name to narrow down the list.

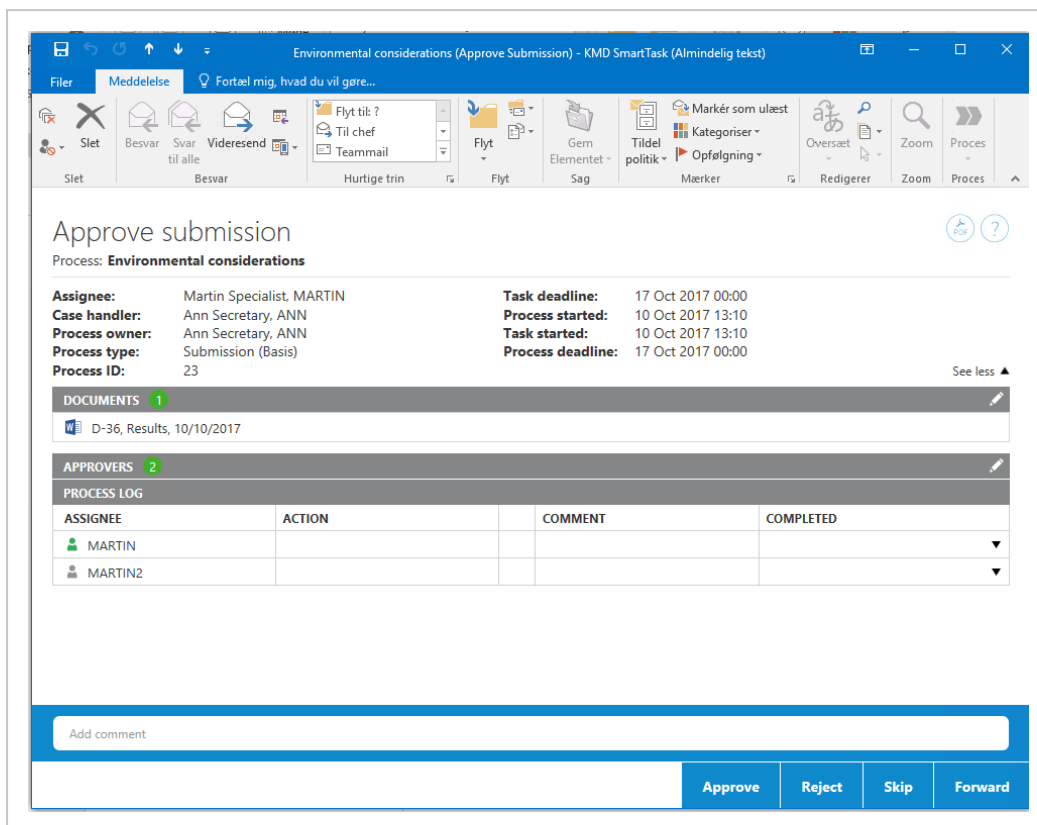
9. Click **Start**.

The process is started and is now visible in the **Processes** overview - see About the Processes Overview.

## Respond to a submission

When you receive a submission task, you have the following options of responding:

You must open the task to be able to use the response buttons.



You can write a comment to, for example, explain your decision. If you respond by using the **Reject** button, you must add a comment.

For more information on working with tasks, see [Work with tasks](#).

## Approve

If you approve a submission, and there are more approvers, a task is sent to the next approver. If you are the last approver, then the employee who created the submission is notified that the submission has been approved.

## Reject

Use **Reject**, if you want the first case handler to change the case and you want to see the case again. If you reject a submission, the task is sent back to the case handler who created the submission mail. This case handler will then typically edit the submission document and restart the submission process with the new version of the document. The submission is then started over again with the first case handler. The approval process is resumed when you send the submission mail again.

## Skip

If you don't think that you will need to approve a case, you can skip the submission. The task is sent to the next approver (if any). If there are no more approvers, the submission is approved.

## Forward

You can forward a submission task to someone else, if this other person should carry out the submission task instead of you. The remainder of the approval sequence remains the same.

## Receiving submission response

As the process owner you will receive notification of the progress of the basis submissions you have started, for example, if a submission has been approved, rejected, or if the process deadline is overdue.

This section describes how to work with submission responses in the basis package.

### Rejected submission

If an actor has rejected a submission that you have initiated, you will receive a smarttask with this response.

Open the smarttask and click **OK**.

### Approved submission

If an actor has approved a submission that you have initiated, you will receive a smarttask with this response.

- Open the smarttask and click **OK**.

## Reminder date reached

If an actor has not responded to a submission before the reminder date is reached, you will receive a notification smarttask. The reminder date is by default 24 hours before the response deadline, but your organization can define it differently.

- Open the smarttask and click **OK**.

See also Resend a task.

## response deadline reached

If an actor has not responded to a submission in time, that is, if the process deadline has passed, you will receive a notification smarttask.

- Open the smarttask and click **OK**.

## Hearing processes (Basis)

### About hearings

In the WorkZone Process Basis Package you can work with hearings.

A hearing is based on a parallel flow, as opposed to a submission, where the flow is sequential. This means that when you start a hearing, you select actors who should respond, but in no particular order. They can work in parallel.

A typical hearing could take place during the preparation of a report where the knowledge worker requests assistance from several other people or departments in providing relevant feedback or material required to completing the report.

You can start a hearing in the following ways:

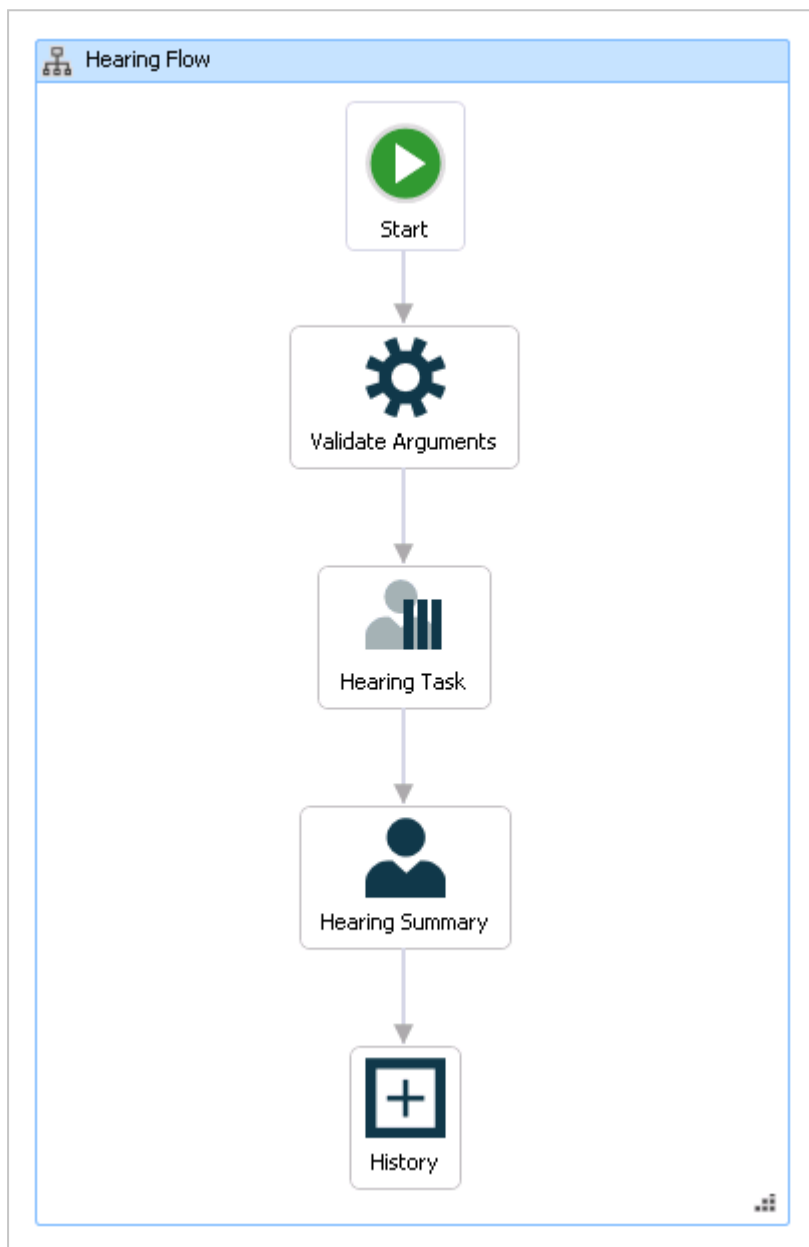
- From Outlook - see Start a process from an email or [start a process from the Cases & Documents folder](#).
- From document - see [Start a process from Word, Excel, or PowerPoint](#).
- From WorkZone Client - see Start a process from WorkZone Client.

A hearing contains a deadline, documents and actors. The process owner selects these when starting the hearing.

When the process has been started, the first actor receives a task with the available actions - see Respond to a hearing.

### The hearing process flow

The flow of a hearing can be described by the following diagram.



### The process is started

The process owner starts a hearing of one or more documents, and selects one or more actors who should respond to the hearing within a fixed deadline.

When the process owner starts the hearing, a task is sent to all actors selected by the process owner. The actors can either reject, skip, or reply to the hearing.

### The actors respond

When the hearing process is started, a task is sent to each actor.

If an actor skips or forwards the hearing, this is displayed in the hearing summary, the Process log and in the **Processes Overview** .

When all actors have responded to the hearing, the process owner is notified with a email containing a hearing summary (see Receiving a hearing summary).

If an actor has not responded to the task before the process deadline, this will be stated in the email that is sent to the process owner when the due date is reached - see Receiving hearing response on deadline.

### The process history

The response of the actors is logged in the history of the process. You can see actor responses in the **Processes** overview. See About the Processes Overview.

When a process is completed, a process history document is created. It is saved on the case as a case document. You can open it from the case in WorkZone Client.

## Start a basis hearing process

You can start a new basis hearing process from an email or the **Cases & Documents** folder in Outlook, or from WorkZone Client. For more information, see Start a new process.

### Start hearing process

1. Open, for example, a case from the **Cases & Documents** pane in Outlook.
2. Click **Process** on the ribbon.

**Note:** If the email has been saved on multiple cases, a list of these cases is displayed. Select a case.

3. Click **Hearing (Basis)**.



4. The **Start Hearing** dialog box opens. The case title is inserted automatically into the **Title** field.



**Start Hearing** [Close]

**Title**  
Report on food safety

**Deadline**  
21/12/2016 00:00 [X]  End hearing on deadline

**Description**  
New results now available

**Documents for submission** 1

Case [v] [Search] Select documents for submission (Search start [icon])

[w] Results

**Approvers** 2

[v] [Search] Select approvers (Search starts at 3 characters)

[person] Charlotte Record Manager, CHARLOTTE  Mandatory response

[person] Ann Secretary, ANN  Mandatory response

Number of responses by which the hearing will be ended

[Help](#)

[Start] [Cancel]

5. Select a deadline.

Optionally, select **End hearing on deadline**. See the section **Selecting how the hearing should end** below.

6. Add a description of the hearing in the **Description** field.
7. Select documents. Click in the **Documents** field and select one or more documents from the list, for example, a case document and the saved email.
8. Select one or more actors. Click in the **Actor** field select from the list of contacts.

- You can start typing a name to narrow down the list.
- You can choose to mark the response of an actor as mandatory by selecting the check box **Mandatory response** next to the name of the actor. If an actor's response is mandatory, then this actor must respond to the hearing. If you do not select this check box, it is considered as optional.
- If you have marked three actors as mandatory but set a lower number of responses by which the hearing will be ended (see below), for example, two, then the hearing will be ended before the third mandatory actor responds.

9. Click **Start**.

The process is started and a hearing task is sent to all actors as a smarttask.

10. Click **OK**.

Your process is now visible in the **Processes** overview - see About the Processes Overview.

#### Selecting how the hearing should end

Choose one of the following options.

##### [End the hearing at the hearing deadline](#)

To end the hearing at the hearing deadline, select the **End hearing on deadline** check box. Regardless of the number of responses, the hearing will end at this date. If you also enter a number in the **Number of responses by which the hearing will be ended** field, then the hearing will end on the earliest possible date.

- Or -

##### [End the hearing after a certain number of hearing responses](#)

To end the hearing after a certain number of hearing responses, enter a number in the **Number of responses by which the hearing will be ended** field.

For example, you need 2 people to review a budget. You add 4 actors to your hearing process because you are not sure who has time to do the review. Since you only need 2 answers, type 2 in the field.

If you enter a number, and you have selected both optional and mandatory actors, then the mandatory actors take precedence.

This means that if you entered the number 4 in the field and you have 3 mandatory actors and 2 optional, then all 3 mandatory actors must respond and one of the two optional actors.

**Note:**

- If an actor chooses to skip a hearing, this does not count as a response. This means that if one of the 3 mandatory actors skips the hearing, then both of the optional actors must respond (and not skip).
- The number in the **Number of responses by which the hearing will be ended** field cannot be lower than the number of responding actors. In the above example, if the second optional actor also skips the hearing, then the number you entered in the **Number of responses by which the hearing will be ended** field will automatically be lowered from 4 to 3 because out of 5 actors, 2 skipped the hearing - leaving you with 3 responding actors.

- Or -

**End the hearing when all selected actors have responded**

To end the hearing when all selected actors have responded, leave the two options above unselected.

**Respond to a hearing**

When you receive a hearing task, you can respond to, skip, or forward the hearing using the response buttons. See [Respond](#), [Skip](#), or [Forward](#).

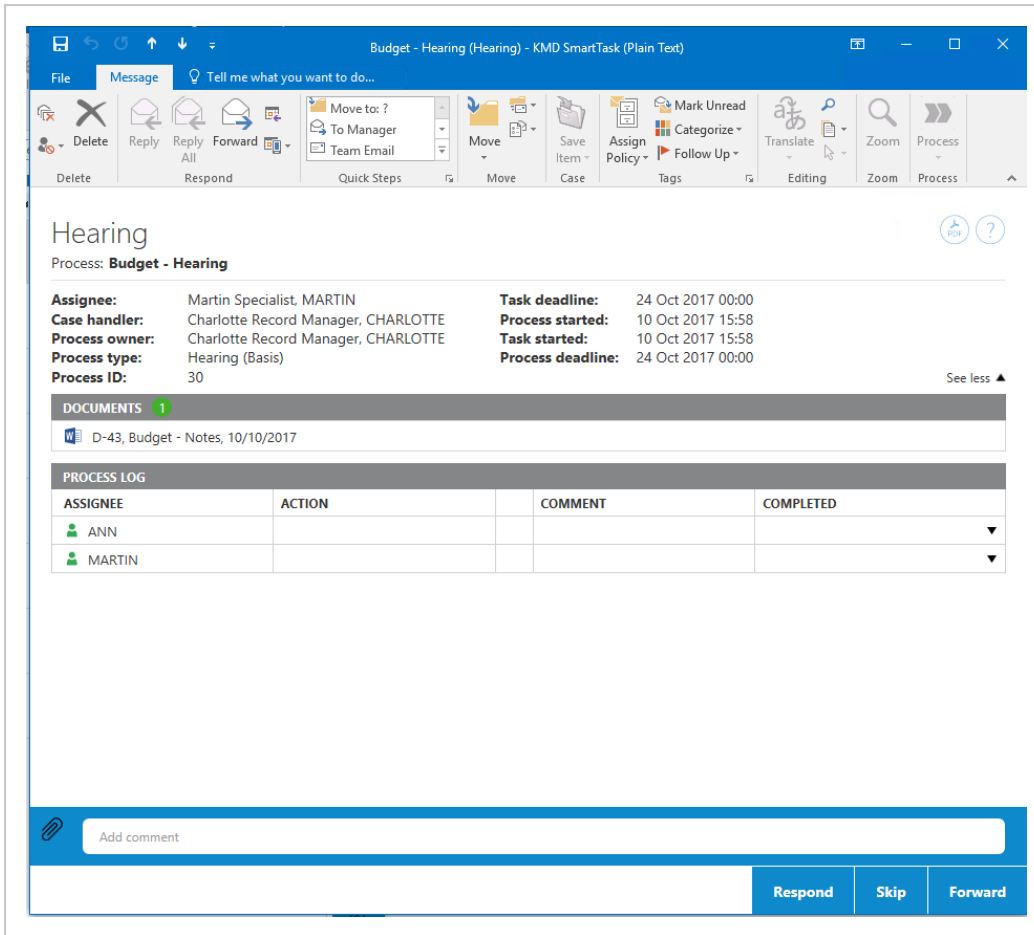
For all response options, you can add a response document.

**Add a response document**

Before you click a response button, click  to search and filter for documents to be added.

For more information, see [Manage documents and actors on a task](#).

You must open the task to be able to use the response buttons.



For more information on working with tasks, see [Work with tasks](#).

**Tip:** When an answer to a hearing includes a document, this is visible in the [The Processes](#) overview. You can open the document by clicking the document icon in the [Process log](#).

## Respond

To respond to a hearing, just click **Respond** or enter a comment in the **Add comment** field, and then click **Respond**.

## Skip

If you do not want to respond to a hearing, you can skip it. Click **Skip**.

## Forward

You can forward a task to another employee in your department, organizational unit, or authority, if another person should carry out the task instead of you. Select a name in the **Forward to** list and click **Forward**. See also Forward a task.

## Receiving hearing response on deadline

When a hearing process has reached its response deadline, you will, as process owner, receive a notification smarttask.

The **Hearing deadline reached** smarttask contains the hearing documents and the Process log - see The Process Log.

The process log will display the responses from the actors who have responded to the hearing by the response deadline as a task completed icon.

**Note:** If any actor has not responded to the hearing by the deadline, then an icon in the **Process Log** will indicate that the task is still active.

## Receiving a hearing summary

When all actors have responded to your hearing process, you will, as process owner, receive a hearing summary smarttask.

The hearing summary contains the hearing documents and the Process log - see The Process Log.

You can click **Forward** to forward the hearing summary or click **Complete** to end the process.

# Extended package

The WorkZone Process Extended package is an add-on package. The extended package contains the two advanced processes submission (extended) and distribution (extended). The extended submission process is an advanced version of the basis submission process that can assist in controlled yet flexible interaction within the process flow.

The distribution process is only available in the extended package. If configured, both processes are available from any case context in WorkZone for Office, WorkZone Client and, Captia Web Client (if activated).

## Distributions

The purpose of an extended distribution process is to assign ownership of a case to a responsible contact and, perhaps, find contributors.

When you start a distribution, you select a case handler or a responsible unit who should take ownership of the case, and contributors, who are responsible for providing content to the case. Once the responsible contact has accepted ownership of the case, the contributors, if they accept the role as contributor, can start working on the case.

The process owner can choose to have the process history saved on the case, or receive a notification when a distribution process ends. Also, he can choose that a distribution process should end when the process deadline is reached.

A typical distribution could be a question sent in an email to a secretary. The secretary creates a case containing the email and the most important documents concerning the case. The secretary selects the organizational unit or person who he or she thinks should take responsibility for this question as responsible contact, as well as contributors who the secretary thinks are most likely to be able to contribute with content to the case. If the selected responsible contact or contributors do not accept their roles, they can reject or forward the task to someone else.

## Submissions

An extended submission is a type of process where the approvers must respond to a task, for example, approve a document in a fixed order. The process is dynamic, that is, approvers and documents may be changed while the process is ongoing.

The extended submission includes a description of the submission process, one or more documents for submission, which are essential to the process, as well as one or more supplementary documents. These documents do not have to be saved on the process case, but can come from other cases, or from the file system.

An advanced submission process allows you to combine sequential and parallel process steps in a submission process. In addition to the overall process deadline, you can specify separate deadlines for each of the process steps. Use this process to keep track of the overall progress of a submission.

## Distribution processes (Extended)

### About distributions

In the extended WorkZone Process package, you can work with distributions.

The purpose of an extended distribution process is to assign ownership of a case to a responsible contact and, perhaps, find contributors.

When you start a distribution, you select a case handler or a responsible unit who should take ownership of the case, and contributors, who are responsible for providing content to the case. Once the responsible contact has accepted ownership of the case, the contributors, if they accept the role as contributor, can start working on the case.

The process owner can choose to have the process history saved on the case, or receive a notification when a distribution process ends. Also, he can choose that a distribution process should end when the process deadline is reached.

A typical distribution could be a question sent in an email to a secretary. The secretary creates a case containing the email and the most important documents concerning the case. The secretary selects the organizational unit or person who he or she thinks should take responsibility for this question as responsible contact, as well as contributors who the secretary thinks are most likely to be able to contribute with content to the case. If the selected responsible contact or contributors do cannot accept their roles, they can reject or forward the task to someone else.

---

### Starting a distribution

You can start a distribution in the following ways:

- From Outlook - see Start a process from an email or Start a process from the Cases & Documents folder.
- From document - see [Start a process from Word, Excel, or PowerPoint.](#)
- From WorkZone Client - see Start a process from WorkZone Client.

When you start a process, you become process owner. A distribution contains a priority, documents, a responsible contact, contributors, and, optionally, a process deadline. You select these when you start the distribution. You can also choose to define entry and exit states.

Furthermore, you can choose to save the process history on the case, receive a notification when the distribution is completed, and end the distribution when the deadline is reached. See Start a distribution process.

### Responding to a distribution

When the process has been started, the selected responsible contact (a person or an organizational unit) receives a task - see Respond as responsible contact. If this contact does not accept the task, he has the option of rejecting the task, thereby sending it back to the process owner, or forwarding the task to another contact.

Once a contact has accepted the role as responsible contact, tasks are sent automatically to all contributors - see Respond as contributor. These persons or organizational units can either accept the role of contributor, or, if he or she does not accept, he or she can forward the task to someone else.

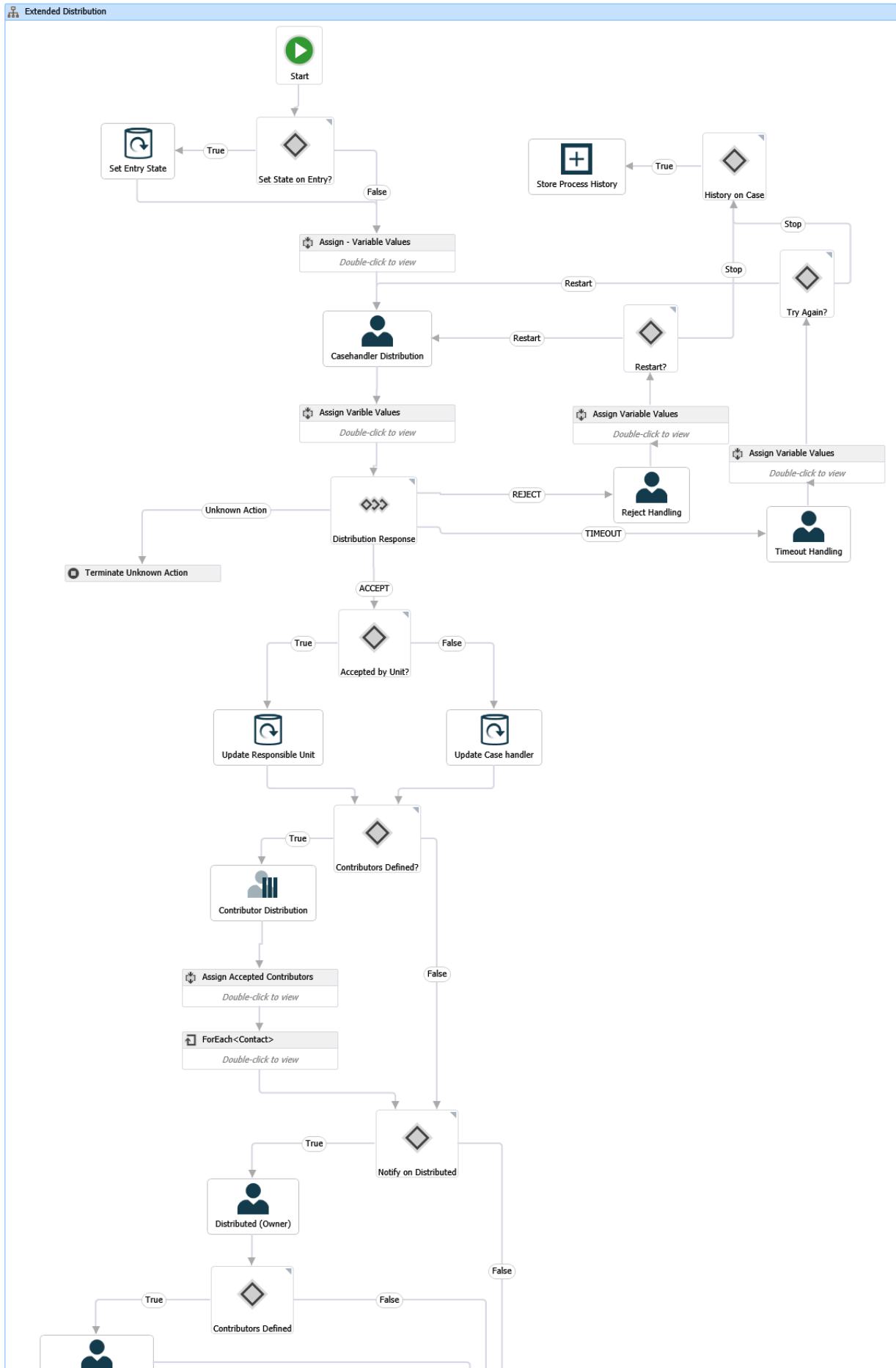
**Note:** You can choose either persons or organizational units as actors or approvers. For a person or an organizational unit to function as an actor or approver, the person or organization must have an email address. Delegates can respond on behalf of an actor or approver - see Work with delegates.

### The distribution process flow

The flow of a distribution can be described by the following [diagram](#).







## Start a distribution process

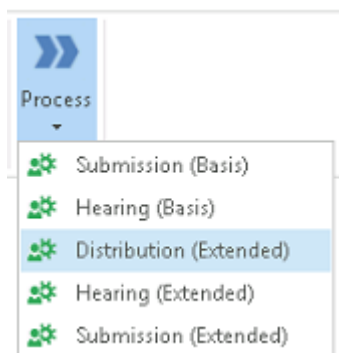
You can start a new distribution process from an email or the **Cases & Documents** folder in Outlook, or from WorkZone Client. When you start a process, you become the process owner. For more information, see [Start a new process](#).

**Note:** You can only have one ongoing distribution on a case at a time.

1. Open, for example, a case from the **Cases & Documents** pane in Outlook.
2. Click **Process** on the ribbon.

**Note:** If the email has been saved on multiple cases, then a list of these cases is displayed. Select a case.

3. Click **Distribution (Extended)**.



4. The **Start Distribution (Extended)** dialog box opens, displaying the **General** tab (see below). The case title is inserted automatically into the **Title** field.
5. Optionally, in the **Deadline** field, select a process deadline.
6. In the **Priority** field, you can set the priority to, for example, **High**, **Normal**, or **Low**. **Normal** is the default value.
7. Type a description of the distribution in the **Description** field.

8. Select a responsible contact. Click in the **Responsible contact** field and select a contact from the list. The contact can be either a person, for example, a case handler, or an organizational unit.
9. Optionally, select one or more contributors. Click in the **Contributors** field and select one or more contributors from the list. A contributor can be either a person, for example, a case handler, or an organizational unit.
10. Select documents. Click in the **Documents** field and select one or more documents from the list, for example, a case document and the saved email. By default, you have access to all documents from the list - depending on your access rights.

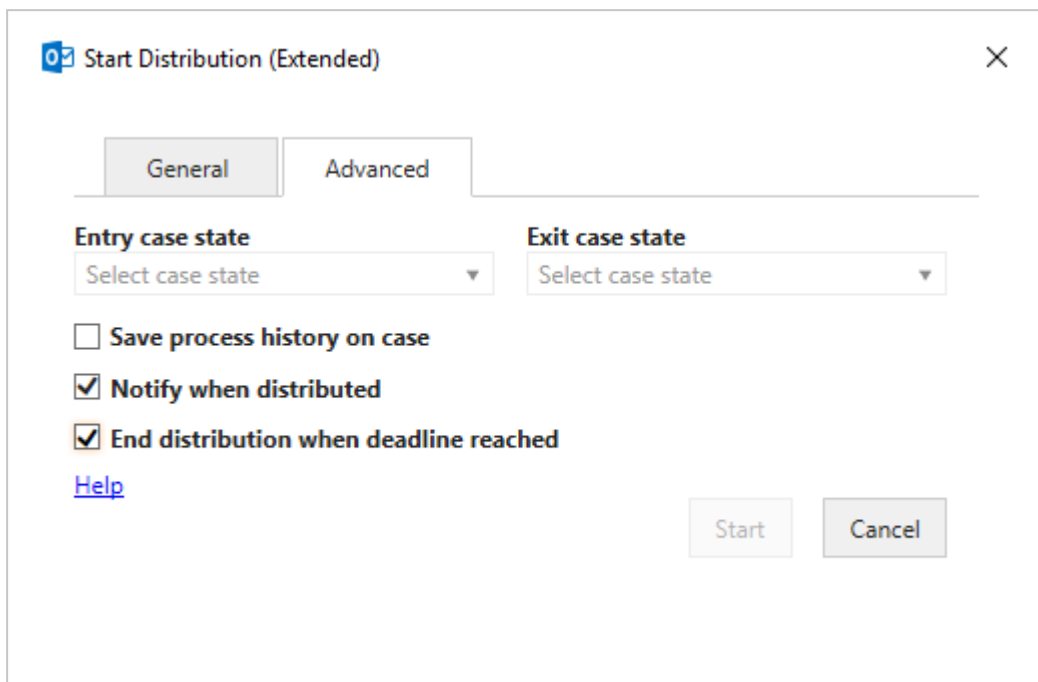
**Tip:** To easily find your documents, select a filter. Click ▾ next to **Documents**, and select a filter. The filter reduces the number of documents on the **Documents** list to, for example, your favorite or recent documents.

The screenshot shows the 'Start Distribution (Extended)' dialog box with the 'Advanced' tab active. The 'Title' field contains 'Food quality'. The 'Deadline' is set to '09/03/2015 11:35' and the 'Priority' is 'Normal'. The 'Description' field contains 'Can you be the case handler o...'. The 'Responsible contact' is 'Elisabeth Section Manag...'. The 'Contributors' list includes 'Ann Secretary, ANN' and 'Johan Organizer, JOH...'. The 'Documents (Not selected)' dropdown is open, showing a list of document categories: 'Default', 'Documents', 'Documents with reminders', 'Documents with no case handler and unit', 'Changed documents', 'Today' (highlighted), 'Favorite documents', 'Followed documents', and 'Default'. The 'Start' and 'Cancel' buttons are located at the bottom right of the dialog.

11. Optionally, open the **Advanced** tab and fill in the fields.

- Select the state your process should start in. In the **Entry case state** field, select a state from the list, for example, **New**.
- Select the state your process should end in. In the **Exit case state** field, select a state from the list, for example, **Clarified**.
- Save the process history on the case in WorkZone Client. Select the **Save process history on case** check box.
- You can choose to receive a notification when the distribution has taken place, that is, when all contributors have responded. Select the **Notify when distributed** check box.
- You can choose to end the distribution when the deadline is reached. This will allow you to restart the distribution, if it is not accepted before the dead-

line is reached. Select the **End distribution when deadline reached** check box.



12. Click **Start**.

The process starts. Your process is now visible in the **Processes** overview. See [About the Processes Overview](#).

---

## Respond to a distribution task

### Respond as responsible contact

If you receive a task with the title **Accept case responsibility**, you are asked to accept the role as responsible contact in a distribution process.

You can either accept, reject, or forward the task, see [Accept, Reject, or Forward](#). You must open the task either from your inbox or from the **Processes** overview to be able to use the response buttons. You can write a comment to, for example, explain why you reject or forward to someone else.

You can also edit the task before you respond, for example, add contributors or documents.

For more information on working with tasks, including editing documents and contributors, see [Work with tasks](#).

### Accept

When you accept a distribution you accept the responsibility of the case. This means that you become the case handler.

Tasks are now sent to the contributors who were selected when the process was started. If there are no contributors, the process ends.

### Reject

If you reject the distribution, the task 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 of your department, organizational unit, or authority, if you want someone else to respond instead of you. See [Forward a task](#).

## Respond as contributor

When you receive a distribution task with the title **Accept distribution contributor role**, you are asked to accept the role as a contributor in a distribution process.

You can either accept, reject, or forward the task - see [Accept](#), [Reject](#), or [Forward](#). You must open the task - either from your inbox or from the **Processes** overview - to be able to use the response buttons. You can write a comment to, for example, explain why you reject or forward to someone else.

For more information on working with tasks, see [Work with tasks](#).

### Accept

If you accept the distribution, the process owner will in some cases be notified that the distribution has been accepted (depending on how the process was defined).

### Reject

You can reject the distribution.

### Forward

You can forward a distribution task to another employee of your department, organizational unit, or authority, to ask another person to respond instead of you. See [Forward a task](#).

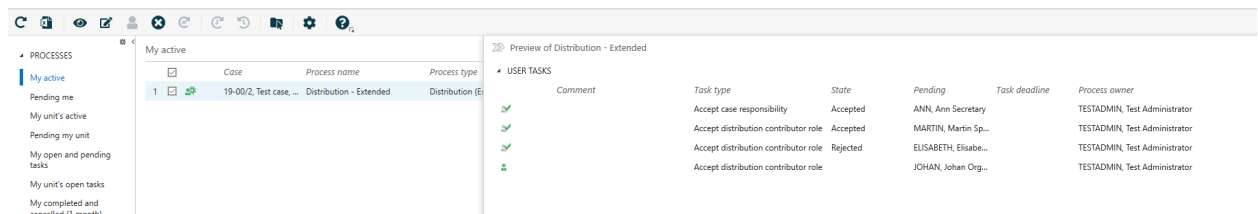
### View responses

You can view the responses in the **Process log** of a task and in the **Processes** overview.

### The Process Log:

PROCESS LOG			
ASSIGNEE	ACTION	COMMENT	COMPLETED
ANN	Accepted		19/12/2019 16:10
MARTIN	Accepted		19/12/2019 16:10
ELISABETH	Rejected		19/12/2019 16:10
JOHAN			

### The Processes Overview:



### About reminders

As a responsible contact or a contributor you will receive a reminder when a task assigned to you has reached its reminder date. The reminder date is by default 24 hours before the response deadline, but your organization can define it differently.

### Receiving distribution response

As a process owner you will receive notification of the progress of the distributions you have started, for example, if a distribution has been approved, rejected, or if the process deadline is reached.

This section describes how to work with distribution responses in the extended WorkZone Process package.

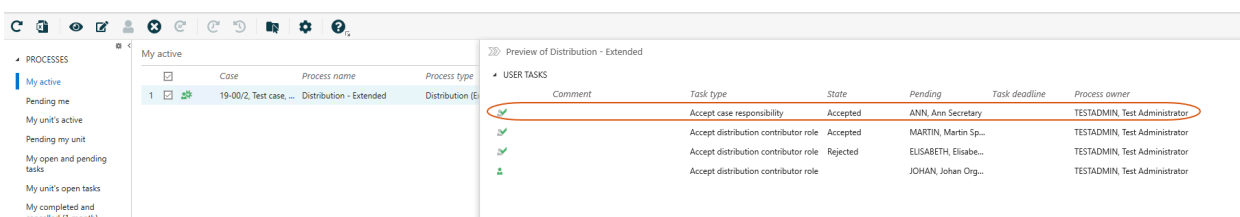


## Response from the responsible contact

The contact you selected as responsible contact when starting the distribution process can either accept, reject or forward the task - see Accepted distribution, Rejected distribution, or Forwarded distribution.

### Accepted distribution

If the responsible contact has accepted a distribution that you have initiated, you will be able to see this in the **Processes Overview** . For example, under **My active**.



Comment	Task type	State	Pending	Task deadline	Process owner
	Accept case responsibility	Accepted	ANN, Ann Secretary		TESTADMIN, Test Administrator
	Accept distribution contributor role	Accepted	MARTIN, Martin Sp...		TESTADMIN, Test Administrator
	Accept distribution contributor role	Rejected	ELISABETH, Elisabe...		TESTADMIN, Test Administrator
	Accept distribution contributor role		JOHAN, Johan Org...		TESTADMIN, Test Administrator

### Rejected distribution

If the responsible contact has rejected a distribution that you have initiated, you will receive a **Distribution rejected** smarttask with this response.

You have the following options: Stopping, restarting, or forwarding the rejected distribution process.

#### Restart the process

Click **Restart**, and select a new responsible contact. As shown below, the list with contacts becomes available once you click the **Restart** button.

The distribution task **Accept case responsibility** is sent to the new responsible contact, and the history is displayed in the **Process Log** of the task. See Respond as responsible contact.

#### Stop the process

Click **Stop** on the **Distribution rejected** task.

The process will appear as completed on the **Closed processes** list in the **Processes** overview. See View a list.

#### Forward the distribution task

1. Select a new responsible contact in the field next to the **Forward** button as shown below.

2. Click **Forward**.

**Forwarded distribution**


The responsible contact can forward the distribution task to another contact. This information will appear in the **Processes** overview.

In the example below the state of Charlotte's task shows that she has forwarded the distribution task to Johan.

Comment	Task type	State	Pending	Task deadline	Process owner
	Accept case responsibility	Accepted	ANN, Ann Secretary		TESTADMIN, Test Administrator
	Accept distribution contributor role	Accepted	MARTIN, Martin Sp...		TESTADMIN, Test Administrator
	Accept distribution contributor role	Rejected	ELISABETH, Elisabe...		TESTADMIN, Test Administrator
	Accept distribution contributor role	Forwarded	JOHAN, Johan Org...		TESTADMIN, Test Administrator
	Accept distribution contributor role		CHARLOTTE, Charl...		TESTADMIN, Test Administrator

**Reminder date reached**

If the responsible contact has not responded to the distribution task before the reminder

date is reached, the task icon in the **Processes** overview turns yellow  - see **Icons** in the Processes Overview. You will, as process owner, receive a smarttask with the title **Distribution reminder**. The reminder date is by default 24 hours before the response deadline, but your organization can define it differently.

See also **Resend a task**.

**Response from contributors**

The contacts you selected as contributors when starting the distribution process, or which have been added by the responsible contact, can either accept, reject, or forward their task.

You can follow their actions in the **Processes** overview as shown below, or in the **Process Log** of the **Distribution completed** smarttask, which you will receive unless you deselected the option **Notify when distributed** when you started the process.

Comment	Task type	State	Pending	Task deadline	Process owner
	Accept case responsibility	Accepted	ANN, Ann Secretary		TESTADMIN, Test Administrator
	Accept distribution contributor role	Accepted	MARTIN, Martin Sp...		TESTADMIN, Test Administrator
	Accept distribution contributor role	Rejected	ELISABETH, Elisabe...		TESTADMIN, Test Administrator
	Accept distribution contributor role	Forwarded	JOHAN, Johan Org...		TESTADMIN, Test Administrator
	Accept distribution contributor role	Accepted	CHARLOTTE, Charl...		TESTADMIN, Test Administrator
	Distribution completed	Completed	TESTADMIN, Test A...		TESTADMIN, Test Administrator

### Reminder date reached

If a contributor has not responded to the distribution before the reminder date is reached, you will receive a notification smarttask with the title **Distribution contributor reminder**. The reminder date is by default 24 hours before the response deadline, but your organization can define it differently. See also [Resend a task](#).

### No contributor responses by deadline

If no contributor has responded to a distribution before the distribution deadline, you will receive a smarttask with the title **Distribution contributor deadline reached**.

Open the smarttask and click **OK**. The process will continue until all contributors have responded.

### No responses by deadline

If nobody (the responsible contact or contributors) have responded to a distribution by the distribution deadline, you will receive a smarttask with the title **Distribution deadline reached**.

You can receive one of two smarttasks, depending on whether or not you selected the **End distribution when deadline reached** check box when you started the distribution. These smarttasks contain different options.

#### You selected the End distribution when deadline reached check box

When the process deadline has been reached, you will receive a smarttask with the following options (the same as when you receive a Rejected distribution smarttask):

- Stop the process
- Restart the process
- Forward the distribution task

In the **Processes** overview, the task icon is changed to  and the process icon changes to



- see [Icons in the Processes Overview](#).

#### You did not select the End distribution when deadline reached check box

If you did not select the **End distribution when deadline reached** check box, the process is not closed. The actors may still respond.

Open the **Distribution contributor deadline reached** smarttask and click **OK**.

## Notification that the distribution has ended

If you, as the process owner, selected the check box **Notify when distributed** (default) when you started the distribution process, you will (that is, both the process owner and the responsible contact) receive a smarttask with the title **Distribution completed** when all actors (that is, the responsible contact and all contributors) have responded.

Open the smarttask and click **OK**.

## Extended submission processes

### About extended and advanced submissions

In the extended WorkZone Process package you can work with extended and advanced submissions.

An extended submission is a type of process where the approvers must respond to a task, for example, approve a document in a fixed order. The process is dynamic, that is, approvers and documents may be changed while the process is ongoing.

The extended submission includes a description of the submission process, one or more documents for submission, which are essential to the process, as well as one or more supplementary documents. These documents do not have to be saved on the process case, but can come from other cases, or from the file system.

An advanced submission process allows you to combine sequential and parallel process steps in a submission process. In addition to the overall process deadline, you can specify separate deadlines for each of the process steps. Use this process to keep track of the overall progress of a submission.

You can start an extended and advanced submissions in the following ways:

- From Outlook - see [Start a process from an email](#) or [Start a process from the Cases & Documents folder](#).
- From document - see [Start a process from Word, Excel, or PowerPoint](#).
- From WorkZone Client - see [Start a process from WorkZone Client](#).



responding, for example, add or remove approvers and documents. See [Manage documents and actors](#).

### The approvers respond

If an approver rejects the submission, it is sent back to the process owner who should then typically edit the submission document and restart the submission with the new version of the document (see [Rejected submission](#)).

If an approver skips the submission, the task is sent to the next approver (if any). If there are no more approvers, the submission is approved.

If an approver approves the submission, the task is sent to the next approver defined in the process. If there are more approvers, the task is sent to the next approver for approval. If the approver is the last approver, then the process owner is notified that the submission has been approved (see [Approved submission](#)).

If an approver has not responded to the task before the process deadline, an email is sent to the process owner (see [No response by deadline](#)).

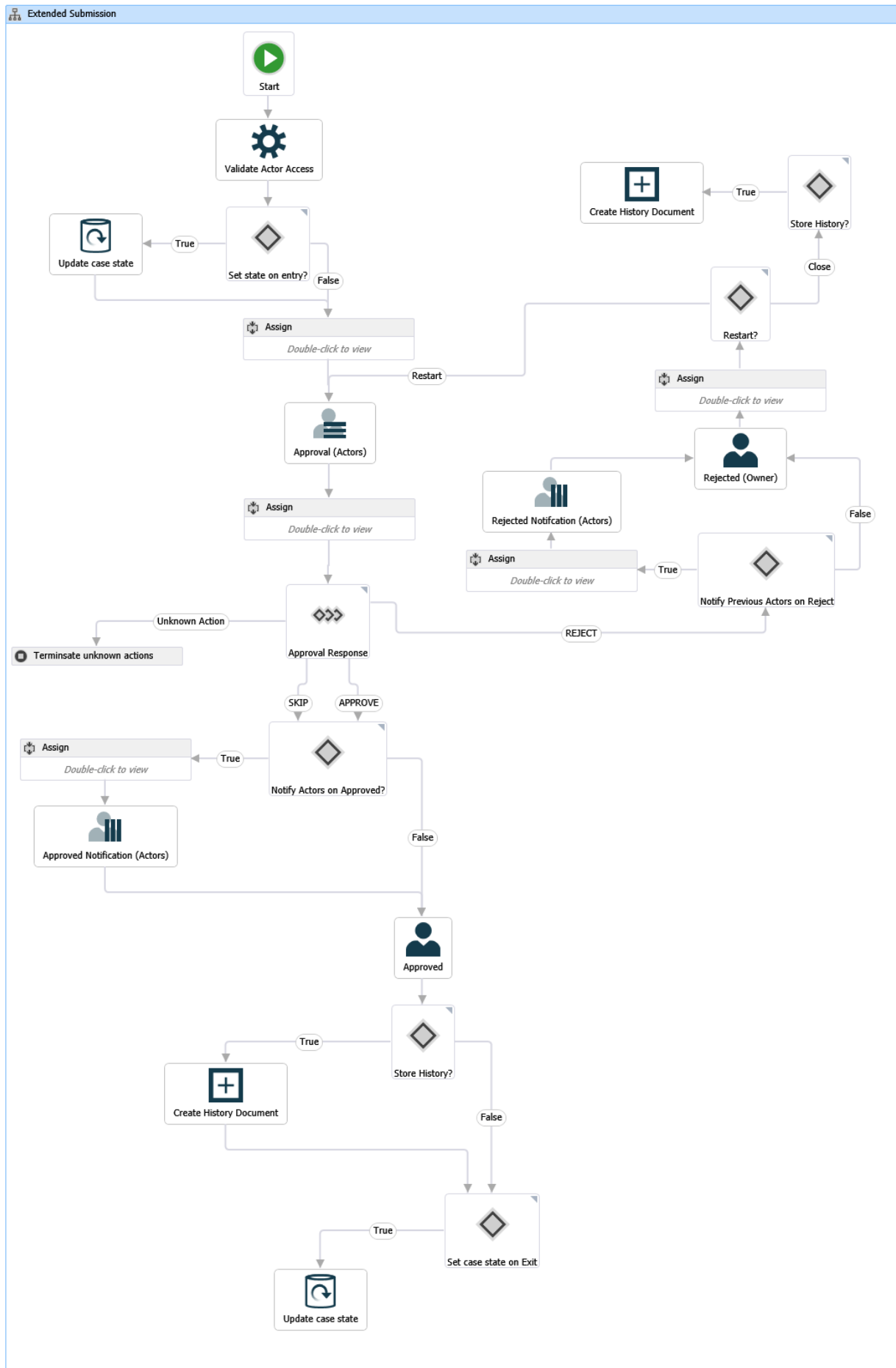
### The process history

The response of the approvers is logged in the history of the process. You can see approver responses in the **Processes** overview.

When a process is completed, a process history document is created. It is saved on the case as a case document. You can open it like any other case document from any client in WorkZone. That is, from the case in WorkZone Client, WorkZone Explorer, or from WorkZone for Office.

## Extended submission process flow

This diagram illustrates the flow of an extended submission process.



## Start an extended submission

You can start a new extended submission process from an email or the **Cases & Documents** folder in Outlook, or from WorkZone Client. For more information, see [Start a new process](#).

### Start submission process

1. Open, for example, a case from the **Cases & Documents** pane in Outlook.
2. Click **Process** on the ribbon.

**Note:** If you are starting the process from your Outlook inbox and the email has been saved on multiple cases, then a list of these cases is displayed. Select a case.

3. Click **Submission (Extended)**.
4. The **Start Submission (Extended)** dialog box opens. The case title is inserted automatically into the **Title** field.



**Start Submission (Extended)**

General Advanced

**Title**  
Food quality Vinduesklip

**Deadline** **Priority**  
Normal

**Description**

**Documents for approval**  
Case Select documents for approval (Search starts at 3 characters)

**Supplementary documents**  
Case Select supplementary documents (Search starts at 3 characters)

**Approvers**  
 Select approvers (Search starts at 3 characters)

[Help](#) Start Cancel

5. Optionally, select a deadline.

If the extended submission process is part of a phase process, the deadline of the current phase with a deadline is suggested. If the current phase does not have a deadline, then the following phase deadline is suggested, and so on.

6. In the **Priority** field, you can set the priority to, for example, **High**, **Normal**, or **Low**. **Normal** is the default value.
7. In the **Description** field, type description of the submission process.

8. Select documents for approval. Click in the **Documents for approval** field and select one or more documents from the list, for example, a case document and a saved email.
9. Select supplementary documents for submission. Click in the **Supplementary documents for approval** field and select one or more documents from the list.

The **Supplementary documents for approval** field may include approved documents from the latest closed extended distribution process on the same case. If this is the case, you will see a message that tells you from which extended distribution process, the documents have been imported.

10. Select one or more approvers in one of the following ways.
  - Click in the **Approvers** field and select from the list of contacts. The contact can be either an employee or an organizational unit.
  - Select an actor sequence - see Work with actor sequences.
11. Optionally, select who you want to notify about this submission on the **Notifications** tab.
12. Optionally, select more options on the **Advanced options** tab.
13. Click **Start**.

The process is started and is now visible in the **Processes** overview - see About the Processes Overview.

### Notifications

On the **Notifications** tab, you can select employees that you want to be notified by email when specific actions are performed. Select which actions you want to notify about and who you want to send notification emails to. The **Notifications** tab is the same for extended and advanced submission processes.

The employees that you select here are typically not actors in the submission process. They are employees that you want to inform about the actions in the submission process. Actors receive notifications automatically. See About notifications.

### Advanced options

Optionally, fill in the fields on the **Advanced** tab.

The **Advanced** tab is the same for extended and advanced submission processes.

**Closing responsible** Select an actor from the list, if you want another user to close the process when all actors have responded. If you do not fill in this field, you will as the process owner be responsible for closing the process.

**Entry case state** Select the state your process should start in, for example, **New**.

**Exit case state** Select the state your process should end in, for example, **Clarified**.

---

Select or deselect the following options. All options are selected by default.

**Save process history on case** Select this check box if you want to save the process history on the case.

---

**Notify approving actors on rejected** Select this check box if you want to notify the approvers if the submission is rejected. Only actors who have already responded to the process will be notified.

---

**Notify actors when approved** Select this check box if you want to notify the approvers when the submission is approved by all. Only actors who have already responded to the process will be notified.

---

The screenshot shows a dialog box titled "Start Submission (Extended)" with a close button (X) in the top right corner. It features three tabs: "General", "Notifications", and "Advanced", with "Advanced" currently selected. Under the "Advanced" tab, there are several configuration options:

- Closing responsible:** A dropdown menu showing "Elisabeth Section Manager, ELISABETH" with a close (X) and dropdown (V) icon.
- Entry case state:** A dropdown menu with the text "Select case state" and a dropdown arrow.
- Exit case state:** A dropdown menu showing "FB, Fully processed" with a folder icon, a close (X) and dropdown (V) icon.
- Checkboxes:** Three checked checkboxes:
  - Save process history on case
  - Notify approving actors on rejected
  - Notify actors when approved
- Help:** A blue hyperlink.
- Buttons:** "Start" and "Cancel" buttons at the bottom right.

## Start an advanced submission

The advanced submission process is part of the extended package. It allows you to combine sequential and parallel process steps in one submission process.

If you, for example, would like some colleagues to review and approve a document that you have written. Your colleagues can comment and edit the document in no particular order but they must have reviewed and approved the document by a certain deadline. When the review is completed, you want to submit the document for final approval by management, which in this example, is represented by two managers who must approve the document in turn. The entire review and approval process has an overall deadline.

In this example, you can create and start an advanced submission process with two steps:

1. A parallel process step where your colleagues can review and make changes to the document, and approve the document independently of each other.
2. A sequential process step where the document is sent for approval by management. When the first manager has approved the document, the document is sent for final approval by the next manager.

The procedure below describes how you create an advanced submission. The review and approval scenario described above will be used as an example.

You can start an advanced submission from an email, the **Cases & Documents** folder in Outlook, or from WorkZone Client. For more information, see [Start a new process and Process flows](#).

### Start an advanced submission


1. Open a case, for example in WorkZone Client or from the **Cases & Documents** pane in Outlook.
2. Click **Process** on the ribbon. If you are starting the process from your Outlook inbox, and the email has been saved on multiple cases, then select a case from the list of cases.
3. Click **Submission (Advanced)**.
4. Select a template in the **Process template** field. Depending on how the template is defined, you may want to use it as it is, or you can make adjustments before you start the process. If your organization has not made templates available for you, or you want to define a process from scratch, you can define a process yourself by following the steps below.

For information about templates and how to create them, see [Templates for advanced submissions](#) in the WorkZone Client User Guide.


5. Fill in basic information about the process using the following fields:
  - **Title** The case title is inserted automatically. You can change the title.
  - **Deadline** Select a deadline for the entire process.

- **Priority** Set the priority of the process to, for example, **High**, **Normal**, or **Low**. **Normal** is the default value.
  - **Description** Enter a description of the entire submission process.
  - **Documents** Select one or more documents that you want to include in the submission. Click in the field, and select one or more documents from the list, for example, a case document, or select a document from File Explorer.
  - **Supplementary documents** Select one or more documents from the list. The **Supplementary documents for approval** field may include approved documents from the last closed extended distribution process on the same case. If this is the case, you will see a message that tells you from which extended distribution process the documents have been imported.
6. In the **Steps** section, you can add and define the steps of the process. For each step, you can specify:
- A step title. Instead of using the default **Step 1** title, you can give the step a more descriptive title in the **Step title** field.
  - A deadline for the step in the **Deadline** field.
  - Whether it is a sequential or parallel step.
  - Approvers. Click in the **Approvers** field and select from the list of contacts. The contacts can be employees or an actor sequence - see Work with actor sequences.



In this example, the first step is named *Review* and it is a parallel step.

Start submission (Advanced) 

General Notifications Advanced




**Process template**  
Review and approval 



**Title**  
Review and approval

**Deadline**  **Priority**  
Normal 




**Description**  
Standard review and approval process

**Documents** 1




Case   Select documents (Search starts at 3 characters) 


 D-74, Test, 27/01/2021 

**Supplementary documents for the approval**

Case   Select supplementary documents for the approval (Search starts at 3 characters) 



**Steps**



Review  > Approve  > 



**Step title** **Deadline**  
Review 13/02/2021 09:30 


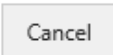
Sequential step  Parallel step

**Approvers** 2

  Select approvers (Search starts at 3 characters)

 Ann Secretary, ANN 

 Martin Specialist, MARTIN 

[Help](#)  



- Click + to add another step to the process, and fill in information about the step as described in step 10. In this example, the second step is named *Approval* and is a sequential step.

Start submission (Advanced)
✕

General

Notifications

Advanced

**Process template**

Review and approval
✕ ▾

**Title**

Review and approval

**Deadline**

**Priority**

Normal
▾

**Description**

Standard review and approval process

**Documents** 1

Case ▾

📁

📄 D-74, Test, 27/01/2021

✕

**Supplementary documents for the approval**

Case ▾

📁

**Steps**

Review ✕

>

Approve ✕

>

+

**Step title**

Approve

**Deadline**

15/02/2021 09:30
📅

Sequential step

Parallel step

**Approvers** 2

📁

👤 Elisabeth Section Manager, ELISABETH

✕

👤 Charlotte Record Manager, CHARLOTTE

✕

[Help](#)

Start

Cancel

8. Optionally, select who you want to notify about this submission on the **Notifications** tab.
9. Optionally, select more options on the **Advanced options** tab.
10. Click **Start**.

The process is started and is now visible in the **Processes** overview - see [About the Processes Overview](#).

### **Notifications**

On the **Notifications** tab, you can select employees that you want to be notified by email when specific actions are performed. Select which actions you want to notify about and who you want to send notification emails to. The **Notifications** tab is the same for extended and advanced submission processes.

The employees that you select here are typically not actors in the submission process. They are employees that you want to inform about the actions in the submission process. Actors receive notifications automatically. See [About notifications](#).

The screenshot shows a dialog box titled "Start Submission (Extended)" with a close button (X) in the top right corner. It has three tabs: "General", "Notifications", and "Advanced". The "Notifications" tab is active. At the top of the Notifications section, it says "Send notifications to" with a green circle containing the number "2". Below this is a search bar with a dropdown arrow and a search icon, containing the text "Select employees (Search starts at 3 characters)". Below the search bar are two entries: "Charlotte Record Manager, CHARLOTTE" and "Johan Organizer, JOHAN", each with a green person icon and a close button (X). Below the list are three buttons: "Approved" (with a close icon), "Rejected" (with a close icon), and "Deadline reached" (with a close icon). At the bottom left is a blue "Help" link. At the bottom right are "Start" and "Cancel" buttons.

### Advanced options

Optionally, fill in the fields on the **Advanced** tab.

The **Advanced** tab is the same for extended and advanced submission processes.

**Closing responsible** Select an actor from the list, if you want another user to close the process when all actors have responded. If you do not fill in this field, you will as the process owner be responsible for closing the process.

**Entry case state** Select the state your process should start in, for example, **New**.

**Exit case state** Select the state your process should end in, for example, **Clarified**.

---

Select or deselect the following options. All options are selected by default.

**Save process history on case** Select this check box if you want to save the process history on the case.

---

**Notify approving actors on rejected** Select this check box if you want to notify the approvers if the submission is rejected. Only actors who have already responded to the process will be notified.

---

**Notify actors when approved** Select this check box if you want to notify the approvers when the submission is approved by all. Only actors who have already responded to the process will be notified.

---

Start Submission (Extended) ✕

General Notifications Advanced

**Closing responsible**  
Elisabeth Section Manager, ELISABETH ✕ ▾

**Entry case state** Select case state ▾ **Exit case state** FB, Fully processed ✕ ▾

Save process history on case  
 Notify approving actors on rejected  
 Notify actors when approved

[Help](#)

Start Cancel

## Respond to an extended or an advanced submission

When you open an extended or an advanced submission task that you have received as a smartmail in Outlook, or you open a task from the preview pane or from the Processes overview in WorkZone Client, you have the following response options:

- Approve
- Conditional
- Reject
- Reject to

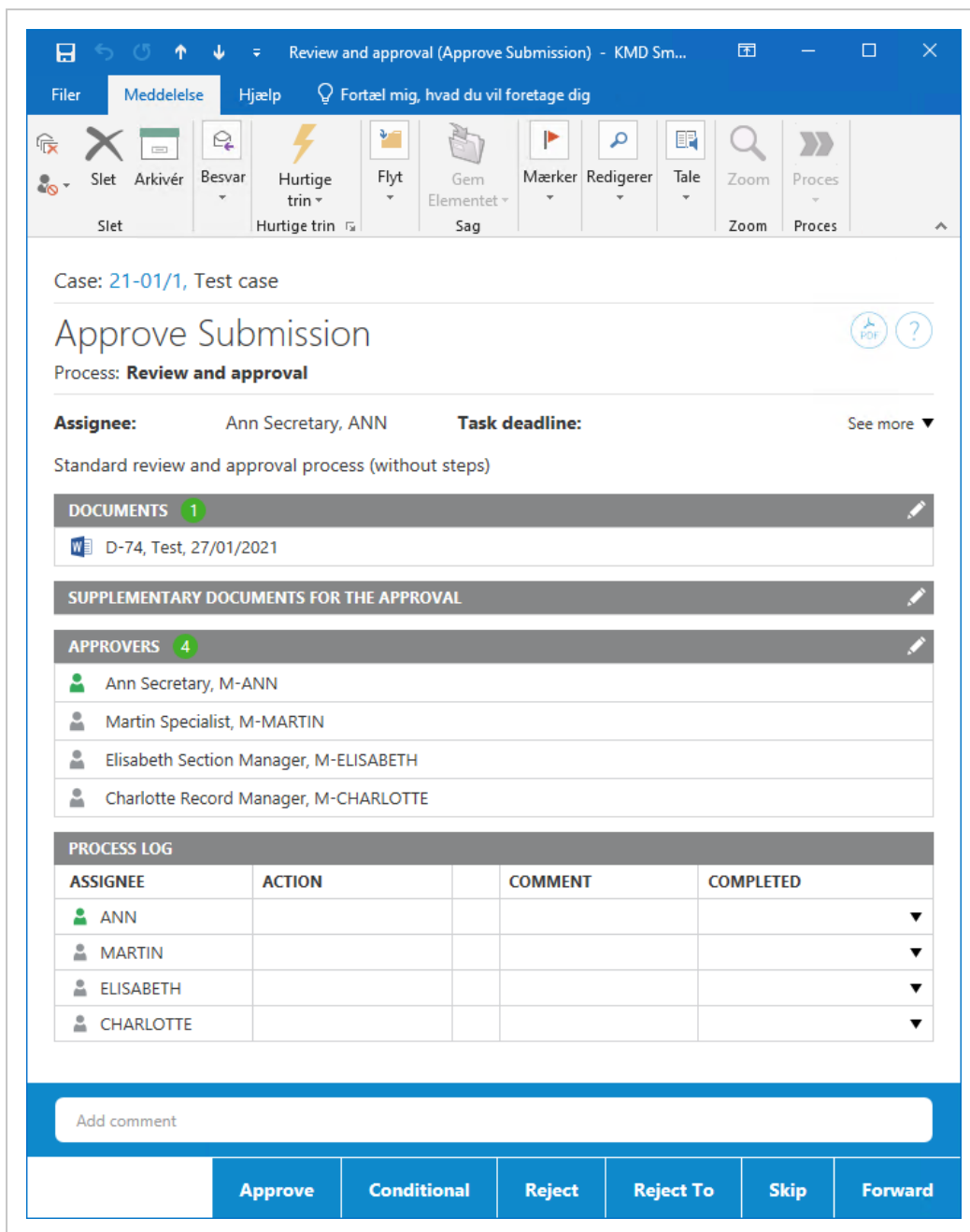
- Skip
- Forward

Before you respond to a task, you can edit the documents for approval, supplementary documents, and approvers. For more information, see [Work with tasks](#).

If the deadline is approaching and you have not yet responded to a task, you will receive a reminder. As an approver you will receive a reminder when a task that is assigned to you has reached its reminder date. The reminder date is by default 24 hours before the response deadline, but your organization can define it differently.

The submission tasks from an extended or an advanced submission are slightly different from each other because the advanced submission can contain sequential and parallel process steps in the same submission process. The response buttons for the two submission types are the same but for some buttons, the action varies depending the type of submission.

An extended submission task:



An advanced submission task showing two steps:

Case: 21-01/1, Test case

## Approve Submission

Process: **Review and approval**

**Assignee:** Ann Secretary, ANN      **Task deadline:** 13 Feb 2021 09:30      See more ▾

Standard review and approval process

**DOCUMENTS** 1

D-74, Test, 27/01/2021

**SUPPLEMENTARY DOCUMENTS FOR THE APPROVAL**

**STEPS**

Review > Approve

**Step title**      **Deadline**

Review      13/02/2021 09:30

Sequential step       Parallel step

**APPROVERS** 2

Ann Secretary, M-ANN

Martin Specialist, M-MARTIN

**PROCESS LOG**

ASSIGNEE	ACTION	COMMENT	COMPLETED
<b>Review</b>			
ANN			▼
MARTIN			▼
<b>Approve</b>			
ELISABETH			▼
CHARLOTTE			▼

Add comment

Approve    Conditional    Reject    Reject To    Skip    Forward

## Approve

Approve if you accept the submission.



### Extended submission

- If you approve a submission, and there are more approvers, a task is sent to the next approver.
- If you are the last approver, the process owner is notified that the submission has been approved.

### Advanced submission

#### Sequential step

- If you approve a task in a sequential step, and there are more approvers, a task is sent to the next approver in the step.
- If you are the last approver in the step, the process will automatically move on to the next step.
- If you are the last approver in the last step of the process, then the process owner is notified that the entire submission has been approved.

#### Parallel step

- If you approve a task in a parallel step, the task will be marked as approved.
- If you are the last approver in the step, the process will automatically move on to the next step.
- If you are the last approver in the last step of the process, then the process owner is notified that the entire submission has been approved.

## Conditional

Approve conditionally when you expect your request for changes to a document to be accommodated and you do not want to see the submission again. With a conditional approval, you can request changes to one or more documents from a previous approver in the process and from the process owner.

When you click **Conditional**, the following happens:

#### Extended submission

- When you select a previous approver, and request a change, the selected approver receives a task and becomes the next approver in the approval sequence.
- When the selected approver has completed the change and approved, the approval sequence is resumed.
- Approvers who have already approved the submission are skipped.

#### Advanced submission

With a conditional approval, you can request a changes to a document from a previous approver in the process and from the process owner. The selected approver can be from previously completed steps. The following applies to both sequential and parallel steps:

- When you select a previous approver, and request a change, the selected approver receives a task, and becomes the next approver in the current step.
- When the selected approver has completed the requested change and approved the task, the step is resumed. If you are the last approver in the step, the process will automatically move on to the next step.
- Approvers who have already approved the submission are skipped.

## Reject

Reject the submission, if you want the process owner to change the documents for approval, and you want to see the submission again. When you click **Reject**, the following happens:

#### Extended submission

- If you reject a submission, a task is sent to the process owner. The process owner will then typically edit the documents for approval and restart the submission process with new versions of the documents. The submission process is then started over again. When the process owner restarts the process, you will see that tasks in the process are repeated in the preview pane.
- The process owner can also choose to forward the task to someone else for changing the documents. A task for this new approver will be added to the process.

When the approver approves after making changes to the documents, the submission process is started over again.

#### Advanced submission

The following applies to both sequential and parallel steps:

- If you reject a submission, a task is sent to the process owner regardless of whether it is a sequential or parallel step. The process owner will then typically edit the documents for approval and restart the submission process with new versions of the documents. The submission process is then started over again. In the preview pane, the process owner task is shown under **Administrative task and information**. When the process owner restarts the process, you will see that all steps in the process are repeated.
- The process owner can also choose to forward the task to someone else, and a task for this new approver will be added to the process and shown under **Administrative task and information** in the preview pane. When the approver approves after making changes to the documents, the submission process is then started over again.

#### Reject to

Click **Reject to**, if you want someone different from the process owner to make changes to the documents, and you want to see the submission again.

#### Extended submission

- When you reject a submission to a previous approver in the process, the selected approver receives a task and becomes the next approver in the process. When the selected approver has completed the change, subsequent approvers, including the approver who requested the change, will receive the submission for approval in the same sequence as before.
- Approvers who have already approved the submission are skipped in the approval sequence.

#### Advanced submission

The following applies to both sequential and parallel steps:

- When you reject to a previous approver, the selected approver receives a task, and becomes the next approver in the step. When the selected approver has completed the change, the process is resumed and subsequent approvers in the current step, including the approver who rejected it, will receive the submission for approval.
- Approvers who have already approved the submission are skipped in the approval sequence.

## Skip

Skip the submission, if you don't think that you will need to approve the submission.

### **Extended submission**

The task is sent to the next approver (if there are any). If there are no more approvers, the submission is approved.

### **Advanced submission**

#### **Sequential**

- If you skip a task in a sequential step, and there are more approvers, the task is sent to the next approver in the step.
- If you are the last approver in the step, the process will automatically move on to the next step.
- If you are the last approver in the last step of the process, then the process owner is notified that the entire submission has been approved.

#### **Parallel**

- If you skip a task, the task will be marked as skipped.
- If you are the last approver in the step, the process will automatically move on to the next step.
- If you are the last approver in the last step of the process, then the process owner is notified that the entire submission has been approved.

## Forward

Forward a submission task to someone else, if you want this person carry out the submission task instead of you.

### Extended submission

A task for the person that you forwarded the submission to is then added to the submission process.

### Advanced submission

Both sequential and parallel steps

A task is added to active step regardless of whether it is a sequential or a parallel step. The remainder of the submission remains the same.

## Receiving an extended or an advanced submission response

As the process owner you will receive a task/smartmail if, for example, a submission that you are the owner of has been approved, rejected, or, if the process deadline is overdue.

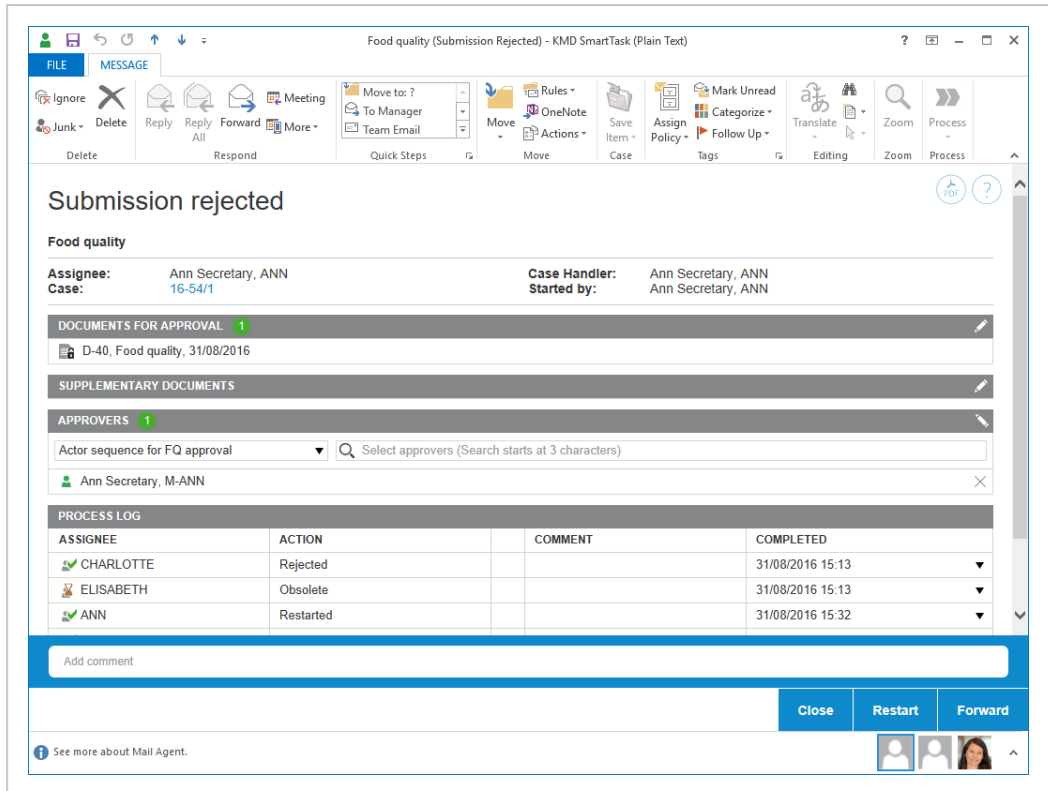
This section describes how to work with submission responses in the extended package.

---

## Rejected submission

If an approver has rejected a submission that you have initiated, or that you have approved, you will receive a task /smartmail with this response.

You have the options to close, restart, or forward the process



### Close the process

If you want to close the process, click **Close**. The process will be displayed in the **Closed processes** list.


The process will appear as canceled on the **Closed processes** list in the **Processes** overview.

### Restart the process


You can restart a process with new approvers.


1. Follow these steps to edit documents or approvers:


#### Edit actors or approvers

Click  to enable edit mode.

- Under **Approvers**, click the following icons to add an actor or approver:


 Search for actors or approvers. You can search for contacts of the type Employee and Organizational unit that have email information registered.

 Select an actor sequence. For more information, see [Work with actor sequences](#).


- Remove an actor or approver: In the **Actors** section, click  to remove an actor or approver.


- Reorder the list of actors or approvers: Select a name and drag it up or down to change the order of approvers for a task.


### Edit documents

Click  to enable edit mode.

- Under **Documents for approval** or **Supplementary documents**, click the following icons:

 Search for documents associated with the case.

 Click to apply a filter for documents such as Recent documents. When you apply a filter, documents that are archived or closed are show only if you have added them as favorite documents. Otherwise archived and closed documents are not shown on filtered document lists.


 When working with basis hearings, click to search or filter for documents.

#### Note:

- In hearing processes, you cannot edit process documents or actors, but when you provide a

reply to a task, you can add a document in addition to a comment.

- In advanced submission processes, you cannot edit the current step. You can edit all other steps in the process.

- Remove a document: In the **Documents** section, click  to remove the document.

- Reorder documents: Drag a document up or down.

2. Click **Restart**.

The process starts again.

### Forward the process

If you want to forward the process, click **Forward**, and select the person that you want to take action.

### Approved submission

If an approver has approved a submission that you have initiated, you will, as process owner, receive a task/smartmail with this response. Process participants will also receive a notification that the process has been approved.

Open the task/smartmail and select one of these options: **Close** or **Forward**.

### Close the process

- Click **Close** to close the process. A history document will be created and saved on the case in WorkZone Client.

### Forward the process

- Click **Forward** to forward the task to another person or organizational unit who should then decide if the process should be closed.



If you have approved a submission (as an approver), you will receive a notification in the form of a task/smartmail with the title **Submission approved** when the submission is approved.

### Reminder date reached

If an approver has not responded to a submission before the reminder date is reached, you will, as process owner, receive a notification task/smartmail. The default reminder date is 24 hours before the response deadline, but your organization can define it differently.

See also Resend a task.

### No response by deadline

If an approver has not responded to a submission in time, that is, if the process deadline has passed, you will, as process owner, receive a **Deadline reached** task/smartmail.

Open the smarttask and click **OK**.

# Agency package

The WorkZone Process Agency package is an add-on package that supports handling of processes within an agency.

With the Agency package installed, you can, for example, work with ministerial case processes. The deadlines of a process can be changed and tailored for the needs of your organization.

**Prerequisite:** The Agency package must be installed with the WorkZone Process Extended package.

## About ministerial processes

In the WorkZone Process Agency Package you can work with ministerial processes. You can start a ministerial process manually in the same way as any other type of process or it can be started automatically when a requisition is received from F2. It depends on how the ministerial process is set up for your organization.

## Phases in the Ministerial process

The ministerial process is a phase process consisting of 4 phases.

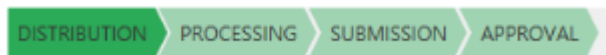
Phase	Description
Distribution	Phase for distribution of the process to a case handler. The distribution is automatically started with a deadline of +3 hours from now.
Processing	Phase for preparing the case. The phase usually includes manual tasks, but the tasks can be supported by the use of hearing and submission processes.
Submission	The deadline of the submission phase is usually specified from the point where a basis or an extended submission is sent for approval. The deadline is automatically set to - 2 days at 12:00 from the phase process deadline. See Submission processes (Basis) and Extended submission processes.
Approval	The final approval deadline, the deadline of the ministerial process, is handled manually. The only exception is if the approval phase is handled in a

Phase	Description
	combination with the features of the F2 Integration package.

You can see the phases and the current status for the ministerial process in the phase bar in the smarttasks and in the **Processes** overview.

#### Ministerial

Case: 17-00/5, Ministerial process



## Deadlines

The deadlines are automatically suggested based on the process start but you can change the deadlines according to your needs.

- The deadline of the Submission phase is set to be 2 days from the main deadline of the Ministerial phase process at 12:00.
- If there are more than 3 hours until the main deadline of the Ministerial process, the Distribution phase deadline is automatically set to the process start + 3 hours.
- If the Ministerial process deadline is in the past, no phase deadlines are set. You can specify the deadlines manually.

## The steps in a ministerial process

The steps below describe the standard setup of a ministerial process but your organization may have configured the ministerial process in a different way in order to adapt to your organization's specific workflow. For information about configuration options, see [Configure Ministerial Process](#) in the WorkZone Process Administrator guide.

### The process start

The process owner starts a ministerial process with one or more reference documents, specifies a deadline, and adds a case responsible who will accept the case responsibility.

When the process owner starts the process, a task is sent to the case responsible. The case responsible can either accept, reject, or forward the task. Before responding, the case responsible can change the process, for example by adding or removing contributors and documents,

see Manage documents and actors on a task. When the case responsible accepts, he or she also becomes the case handler on the case.

**Note:** If your organization has set up WorkZone Process to run with the F2 integration, the ministerial process is started automatically and information from the F2 requisition is merged into the distribution process. See F2 Integration package.

### The case responsible responds

When the process owner starts the process, the case responsible is asked to respond to the task and the flow of the process depends on the response.

- If a case responsible rejects the process, it is sent back to the process owner who can then edit the document, change the contributors, or restart the process with another case responsible.
- If the case responsible accepts the process, the task is sent to all contributors (if any).
- The process owner is notified that the ministerial process has been accepted.
- If a case responsible has not responded to the task before the process deadline, a smarttask is sent to the process owner (see No response by deadline).

### The contributors respond

Once the case responsible has accepted the role as a case responsible, tasks are sent automatically to all contributors. The employees or organizational units can either accept or reject the role as contributor or forward the task to someone else. When all contributors have replied and the distribution process is complete. The process owner is notified that the distribution is completed and the ministerial process moves to the Processing phase.

### Submit for approval

When the processing phase is complete either manually or handled by other processes, for example a hearing process, the process owner can start the submission for approval. See Start a basis submission process or Start an extended submission. The ministerial process

remains in the Processing phase. Documents that have been added to the ministerial process in the Distribution phase are suggested as documents for approval when the process owner starts the submission process.

**Note:** The ministerial process may have been set up to move to the Submission phase automatically.

## Approval

Tasks are sent to the approvers who were specified in the extended submission process. The approvers can either Respond to an extended or an advanced submission, Respond to an extended or an advanced submission, Respond to an extended or an advanced submission, Reject to, Respond to an extended or an advanced submission, or Respond to an extended or an advanced submission. Once approved, the process owner is notified and can close the extended submission process. The ministerial process moves to the next phase, which is the Submission phase.

**Note:** The ministerial process may also have been set up to move to the Approval phase automatically when the submission process reaches a specific employee or organizational unit.

## Finalize the ministerial process

To finalize the process, the process owner closes submission process, and the ministerial process moves to the next phase, which is the Approval phase, and completes the ministerial process.

## The process history

The process responses are logged in the process history of each of the sub processes in the ministerial process such as the extended distribution process and the extended submission process.

When a process is completed, a process history document is created. It is saved on the case as a case document (a PDF document with the document type PROHIST, History), for example **Distribution (Extended): Ministerial process**.

**Tip:** You can see all responses for the ministerial process in the **Processes** overview.

## Start a ministerial process

This topic describes the steps that take place in the different phases of the ministerial process.

### Start a ministerial process

When you start a ministerial process, you become the process owner. As the process owner, you must enter information such as a case responsible and contributors, and reference documents.

1. Open, for example, a case from the **Cases & Documents** folder in Outlook.
2. Click **Process** on the ribbon.

If you start the process from your Outlook inbox and the email has been saved on multiple cases, you can select a case from a list of these cases.
3. Click **Ministerial**. The case title that is applied in the **Ministerial Processing** dialog box reflects the title of the case. This case title is inserted automatically in the **Title** field but you can change the title.
4. Click in the **Deadline** field to select a deadline for the entire ministerial process.
5. Optionally, in the **Priority** field, set the priority to **High** or **Low**. **Normal** is the default value.
6. In the **Description** field, enter a description of the ministerial process.
7. Select a case responsible. Click in the **Select case responsible** field and select a contact from the list. The contact can be either a person, for example, a case handler, or an organizational unit.
8. Select the document or documents that support the case. Click in the **Reference documents** field and select one or more documents from the list, for

example, a case document and the saved email. The documents that appear on the list depend on your access rights.

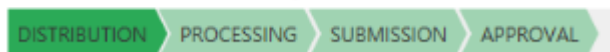
9. Optionally, select one or more contributors. Click in the **Contributors** field and select one or more contributors from the list. A contributor can be either a person, for example, a case handler, or an organizational unit.
10. Click **Start**.

**Note:** If your organization receives requisitions from F2, the ministerial process is started automatically.

The process is now in the Distribution phase and the distribution process starts.

#### Ministerial

Case: 17-00/5, Ministerial process

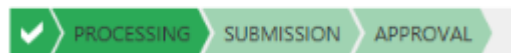


- The case responsible receives a smarttask and is asked to accept the case responsibility. The case responsible can make changes to the process before accepting the case responsibility.
- The contributors receive a smarttask and are asked to accept the distributor role.

When all contributors of the distribution process have replied, the ministerial process moves to the Processing phase.

#### Ministerial

Case: 17-00/5, Ministerial process



During the processing phase, the case handler works with the case and prepares it for approval.

## Submit for approval

Once the Processing phase is completed, the next step is to start a submission process (Basis or Extended) in order to send the case for approval.

You can start the submission from Outlook, from the Office applications, or WorkZone Client.

- Click **Process > Submission (Basis)** or **Submission (Extended)**.

See Start a basis submission process or Start an extended submission.

The ministerial process now moves to the Submission phase and an email is sent to the approver.

**Ministerial**

Case: 17-00/5, Ministerial process



When the submission process reaches a specific approver, the ministerial process moves to the Approval phase. The approver may be an employee or an organizational unit, which has been assigned a specific process role.

**Ministerial**

Case: 17-00/5, Ministerial process



Once, the approver has approved the case, the process owner is notified and can close the submission process.

## Close the ministerial process

To close the ministerial process, move it forward once.

- In the **Processes** overview, right-click on the ministerial process, and then click **Move forward**.

**Ministerial**

Case: 17-00/5, Ministerial process





# SmartPost package

The WorkZone Process SmartPost package is an add-on package that allows you to send messages from organizations to case parties in WorkZone as well as receive replies to messages from case parties in the digital mailbox of an organization. Both sent and received messages are saved on cases in WorkZone.

## About SmartPost messages

The SmartPost process is used to send messages to, for example, citizens, companies, or organizations that are registered as case parties on a case in WorkZone.

With the SmartPost process, you can:

- Send messages electronically by digital mail (Digital Post) to e-Boks or generate physical letters for remote print to Strålfors or KMD Print Center through KMD OneTooX.
- Receive replies to messages from case parties in your organization's digital mailbox, which are then saved on cases in WorkZone.

Sent messages and replies to messages are saved on the current case.

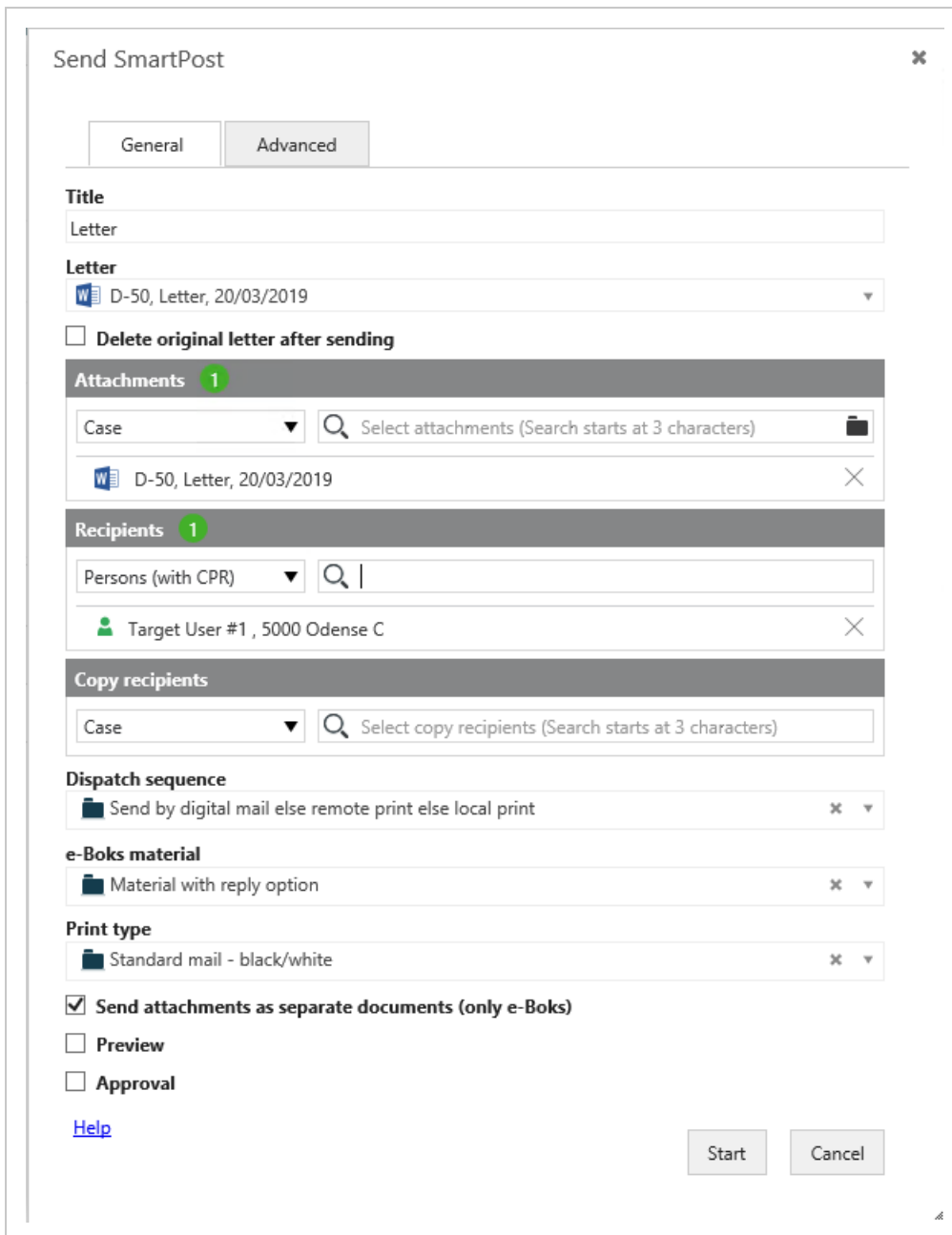
With the SmartPost process, you can send messages through the following channels:

- Digital mail - The message is sent to the recipient's inbox in e-Boks.
- Remote print - The message is sent to Strålfors or KMD Print Center that handles the printing, putting letters in envelopes, and handing over to PostNord.
- Local print - You, as a WorkZone user, receive an email with the message attached in PDF format that you can print, put in an envelope, and send manually.

## Starting the SmartPost process

You can start a SmartPost process from WorkZone Client from either a case or a document or from WorkZone for Office. Note that you cannot start SmartPost processes from cases that have the SJ-TEMP case group (temporary case group) assigned.

When you start the SmartPost process, you must fill in information such as message title, letter template, documents to include, recipients, and copy recipients in a **Send SmartPost** dialog box before sending the message.



The **Send SmartPost** dialog box has a **General** tab and an **Advanced** tab. The **General** tab includes the basic mandatory information that you need to supply in order to start the SmartPost process and send a message. The **Advanced** tab includes specific optional settings or, in some cases, settings that are specific to your organization.

## SmartPost message creation

When you start a SmartPost process, messages are created on the basis of the selected letter and attachments. Information about the case parties, such as name, address information, and the documents you want to include, is merged into one PDF document, which is

then included in the message. After merging the data, the SmartPost process sends the message to the recipients and copy recipients that you have selected. The sent messages are saved on the current case together with a history document that summarizes the actions during the sending process. The sent documents inherits the document type and document group from the letter document.

For instructions on how to fill in information in the **Send SmartPost** dialog box, see [Start a SmartPost process](#).

**Note:** If you send to e-Boks, you can also choose to send the letter and attachments as separate PDF documents. This is useful if you know that the recipient will want to forward an individual attachment to a 3rd party.

## Use of content controls

To fully benefit from the SmartPost way of merging information automatically in to the documents in the SmartPost message, for example, name and address information of recipients and copy recipients, you must use content controls in the documents. In this way, the SmartPost process ensures that up-to-date information is merged in to the SmartPost message. For example, if the letter document contains content controls that represent the recipient's name and address, the name and address will be merged automatically from the WorkZone contact into the SmartPost message. Contact information is also merged into the cover pages that are created in connection with [Protected addresses](#) and [Copy recipients](#).

**Note:** If a contact's address is marked as protected, the address information will be hidden.

You insert content controls using Microsoft Word. Your organization may also have created a letter template that already contains the necessary content controls.

Please see [Templates and content controls](#) in the WorkZone for Office User Guide, or contact your WorkZone system responsible for help.

## Start a SmartPost process

### Send a SmartPost message

1. Select **Process** > **SmartPost** from either a case or a document page in WorkZone Client or from WorkZone for Office.
2. Enter a title in the **Title** field. By default, the title of the current case is used. When you select a letter, the title changes to the name of the letter automatically. You can change the title. The title will be used as the name of the process and as the title of the email that is sent to the recipient's inbox in e-Boks.
3. If you started the process from a case, select a letter document in the **Letter** field. If you started the process from a document, this document is already selected in the **Letter** field.

#### Requirements for the letter

To send a letter by SmartPost, the document that is used as the letter needs to fulfill the following requirements:

- The document must be a Word document (docx or docm) or a Word template (dotx or dotm).
- The document must not have the states UP (Personal draft) or O (Information).
- The document must not be empty.
- The document must be saved on the current case.

#### Standard letters

If your organization has enabled use of standard letters, you can click the **Standard letter** option, and then select a letter from a list of standard letters provided by your organization. A standard letter is a letter with predefined content that you can use as it is without making any changes.

Note that if the standard letter includes case handler information from the case, the process owner will be inserted as the case handler when SmartPost merges information into standard letters.

The approval option is disabled when you select a standard letter.

## GDPR classification

If your organization has applied GDPR support for SmartPost, you can only send documents with certain document classifications as defined by your organization. For example, it may not be allowed to include documents with the document classifications Confidential and Personal in a SmartPost message.

## Allowed documents

Your organization may have defined rules that restrict which documents are allowed to be sent through SmartPost. If this is the case, the list of documents to select from will only contain documents that comply with the rules.

An organization may use both GDPR classification and custom rules to restrict which documents can be sent through SmartPost.

SmartPost merges information, such as name and address, into this document if the letter contains content controls that represent name and address information.

**Important:** Be careful if you edit the letter document. Do not remove content controls or replace them with text in the letter document as information will not be merged automatically in to the SmartPost message. See [Use of content controls](#).

## The document number content control

If a letter document contains a **Document number** content control, the merged PDF document will show the document number of the merged PDF document and not the document number of the original letter (the Word document). If the SmartPost message has copy recipients, the copies will also show the document number of the merged PDF document.

## The document title content control

If a letter document contains a **Document title** content control, the merged PDF document will show the title of the merged PDF document. If the SmartPost message has copy recipients, the copies will also show the document title of the merged PDF document.

4. Select the **Delete original letter after sending** check box, if you want the letter to be deleted automatically after the message has been sent. This can be useful if the letter is written for the current dispatch only, and you want to clean up WorkZone. All dispatch information is stored on the case, so no information will be lost.
5. Under **Attachments**, select the documents you want to attach to the message. By default, the list shows the documents of the current case, but you can add other documents that you have access to.

You cannot add documents with the states UP (Personal draft), AFS (Closed), or O (Information) as attachments, and the documents must not be empty.

#### Allowed documents

If the list of documents to select from does not contain all the documents that you expect to see, it is because your organization has a restriction on which documents are allowed to be sent through SmartPost. For example, an organization may only allow that documents with certain confidentiality levels can be sent through SmartPost.

6. Under **Recipients**, select who you want to send the message to. You can choose to select parties from the current case or other contacts. Select a type of contact to narrow your search, and then select recipients from the list of contacts.

When you have selected a letter, the parties with the role **Recipient** on the selected letter are added automatically to the list of recipients. You can remove these recipients and replace them with other recipients.

7. Under **Copy recipients**, select who you want to send the message to as copy recipients in the same way as you selected recipients above.

When you have selected a letter, the parties with the role **Copy recipient** on the selected letter are added automatically to the list of copy recipients. You can remove these recipients and replace them with other recipients.

8. Select the dispatch sequence in the **Dispatch sequence** field. The dispatch sequence defines the channels that will be used in a prioritized order.

If, for example, you select **Send by digital post or else remote print or else local print**, SmartPost will try to send the message to e-Boks first. If, for some reason, the sending is not successful, the message will be sent to remote print. If this sending is also unsuccessful, the message will be sent to you in an email for you to print locally.

**Note:** If you see the message *The recipient with id <CPR number> is not subscribing to the material ID <material ID>?"*, you are trying to send the message to a recipient who is not registered as an e-Boks user. See *Why do I get the message The recipient with id <CPR number> is not subscribing to the material ID <material ID>?"* in the SmartPost FAQ.

### Default dispatch sequences

The default dispatch sequences are listed below, but your organization may have defined other dispatch sequences.

Dispatch type	1st priority	2nd priority	3rd priority
<b>Send by digital mail or else remote print or else local print</b>	Digital mail	Remote print	Local print
<b>Send by remote print or else local print</b>	Remote print	Local print	
<b>Send by local print</b>	Local print		
<b>Send by digital mail or else local print</b>	Digital post	Local print	

Why do I get the message *The recipient with id <CPR number> is not subscribing to the material ID <material ID>?"*

9. Select a material in the **e-Boks material** field. The materials on the list are defined by your organization and e-Boks. For example, you may be able to select a material that enables the recipients to reply to the message that you are about to send.
10. In the **Print type** field, select how you want the letter to be printed.

A print type specifies how Strålfors or KMD Print Center prints and handles the message, for example, it specifies the size of the page and envelope, A or B post, simple- or double-sided, and so on.

Default print types

By default, SmartPost includes the following print types. It is possible to reconfigure the types.

Name	Postage category	Urgency level	Single-sided/-double-sided	Print color	Envelope type
Standard mail - black/white	Economic	Normal	Double-sided	Black/White	C5
Standard mail - color	Economic	Normal	Double-sided	Color	C4
Standard mail - color - single-sided	Economic	Normal	Single-sided	Color	C5
Urgent mail - black/white	Priority	Normal	Double-sided	Black/White	C4
Urgent mail - color	Priority	High	Double-sided	Color	C4
Urgent mail - color - single-sided	Priority	Normal	Single-sided	Color	C5
Registered mail	Registered	Normal	Double-sided	Black/White	C5
Registered mail with receipt	Registered with receipt	Normal	Double-sided	Black/White	C5
Served mail	Served mail	Normal	Double-sided	Black/White	C5

11. Select the **Send attachments as separate documents (e-Boks)** check box if you want to send the attachments as separate PDF documents when sending the message to e-Boks.



- This option will only take effect if e-Boks is part of the selected dispatch sequence.
- Recipients will receive a message with separate PDF documents whereas copy recipients will still receive one merged PDF document.
- You can see in the history document whether this option has been selected. The **Send attachments as separate documents (e-Boks)** field will be set to **Yes**.

**Note:** You will only see this option if your organization has turned on this feature, and depending on your organization's setup, the message to the recipients may be split in one of the following ways:

- A PDF document with the letter and the attachments merged together and separate PDF documents for each of the attachments.
  - A PDF document with only the letter and separate PDF documents for each of the attachments.
12. Select the **Preview** check box if you want to preview the messages in the dispatch before sending it. The messages are sent to you as an attached PDF documents in a smarttask. You can then review, approve, and/or handle the messages manually, or undo the dispatch. See Respond to a SmartPost task.

If you approve, the SmartPost messages are sent to the recipients. If you undo, the SmartPost process is left undone and the case is left unchanged.

### Letter date

The letter date in the PDF document and the **Letter date** field on the document detail page show the date when the PDF document was created and the SmartPost message was sent for preview.

Depending on your organization, SmartPost may be set up to update the letter date with the preview date before the SmartPost message is sent. This is to ensure that the letter date is correct even if an internal preview process takes a few days.

13. Select the **Approval** check box if you want to send the messages in the dispatch to the case handler for approval before sending it. The messages are sent as attached PDF documents in a smarttask to the case handler. The case handler can then approve, handle manually, forward to another employee, or reject the messages. See Respond to a SmartPost task.

If another user but the case handler of the letter document starts the SmartPost process, the SmartPost process always suggests to send the message for approval (the check box is always selected). This is to ensure that the responsible case handler sees the message before it is sent in his/her name. You can turn off the approval by clearing the **Approval** check box.

If the case handler (or the employee to whom the smarttask was forwarded) approves, the messages are sent. If the case handler rejects, you will, as the process owner, receive a notification smarttask. When you click **Done** in the smarttask to acknowledge the notification, the generated PDF documents are deleted. The case is left unchanged.

#### Letter date

The letter date in the PDF document and the **Letter date** field on the document detail page show the date when the PDF document was created and the SmartPost message was sent for approval.

Depending on your organization, WorkZone Process may be set up to update the letter date with the approval date before the SmartPost message is sent. This is to ensure that the letter date is correct even if an internal approval process takes a few days.

**Note:** If you do not see the **Approval** check box, it is because your organization does not use the approval step in the SmartPost process and has disabled the check box.

14. Enter an approval deadline. If the deadline is exceeded, you will be informed by email.

15. Optionally, click the **Advanced** tab if you want to close the case after successful completion of the process, or change the case state when the process starts.
16. Click **Start** to start the process.

## What happens during the process?

When a SmartPost process is started, the SmartPost messages are created on the basis of the selected letter document and attachments, if any. The messages are created by merging data on the selected case with contact data on the recipients and copy recipients into a PDF document which contains both the letter and attachments, which is included in the messages as the main letter. If you send a message to e-Boks, you can also choose to send attachments as separate PDF documents in the message.

The process creates one message for each of the main recipients and one message for each of the copy recipients per selected main recipient.

For example, if you have selected two recipients and three copy recipients, one message will be created for each of the main recipients and two messages for each of the copy recipients (eight messages in total).

The messages are sent to all recipients at the same time.

**Note:** Supplementary documents are not included in the message.

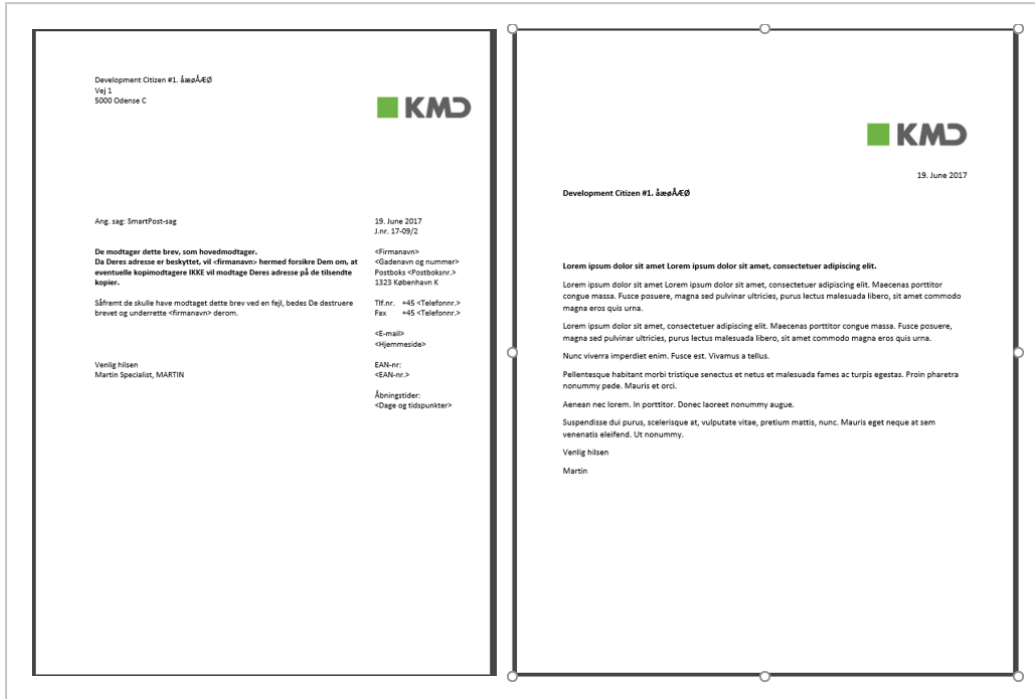
All sent data is saved on the current case together with a History document.

## Protected addresses

The SmartPost process hides address information automatically if the contacts have protected addresses. It means that only the recipient's name is shown in the messages (never the full address).

The recipient who has a protected address will receive a message with only the name, but this message also includes a cover page with the complete address information and information about the address not being passed on. This way, the mailman can still deliver the mail to the recipient.

**Prerequisite:** Both the letter document and the cover page must contain content controls that represent name and address information. See Use of content controls.

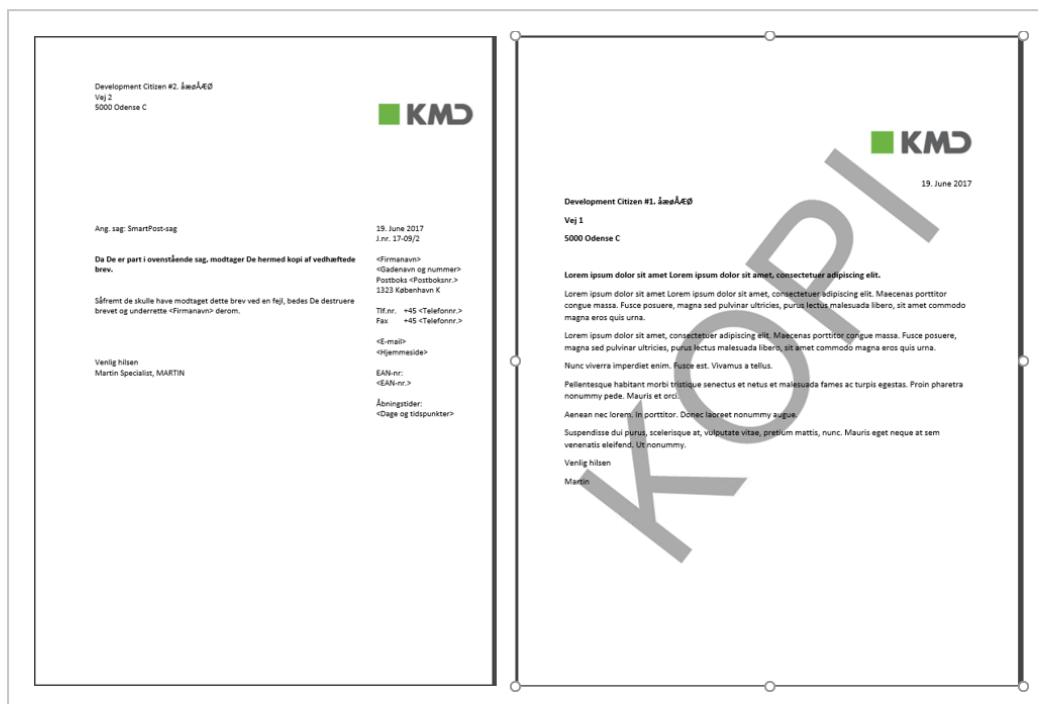


**Note:** If you have selected the **Send attachments as separate documents (e-Boks)** check box because you want to send attachments as separate PDF documents (see step 11), the message will not include a protected address cover page. The cover page is only used for local and remote print where the address information is needed to deliver the letter.

## Copy recipients

The SmartPost process generates a cover page as part of the message that the copy recipients receive. The cover page displays the name of the copy recipient and address information and describes why this is a copy. A watermark is inserted on all pages except on the cover page.

**Prerequisite:** Both the letter document and the cover page must contain content controls that represent name and address information. See [Use of content controls](#).



**Note:** Your WorkZone administrator can change the default watermark text KOPI to another text using WorkZone Configurator.

## Cancel a SmartPost process

You can cancel a SmartPost process from the **Processes** overview.

## History document

When all messages have been sent, a history document is saved on the current case. The document is an archived document that summarizes the actions during the sending process. The document contains the following information:

- Dispatch dates such as the start and end dates of the dispatch and the date when the final status of the message is registered.
- The name of the employee who started the process.


- Overall status information that is set to **Success** if the dispatch is successful. If a dispatch cannot be sent due to errors, the overall status will be either:
  - **Failed**
  - **Partly succeeded**
  - **Undefined**

An error code and a description will be shown in the **Status** field next to each recipient who did not receive the message.

- The selected dispatch sequence, for example Send by digital mail else remote print else local print.
- Recipients and their roles.
- Sent by, which shows the dispatcher that was used, for example e-Boks, OneTooX, Strålfors, or local print.
- External ID, which is used to track the delivery of the message.

If the message is sent through e-Boks and the field contains an ID, it means that the dispatch is completed and that e-Boks has acknowledged the receipt of the message.

- Status, which show the status of the message sent to each recipient. If the dispatch was successful, the status will be **Completed**. If it has failed, an error code and a description will be shown.
- A list of documents included in the message.
- The actions that were made in the **Send SmartPost** dialog box, for example, approvals.


November 23, 2018

---

**Dispatch: Letter**

Dispatch started: 23/11/2018 14:57:42	Started by: Test Administrator, TESTADMIN	Dispatch sequence: Send by digital mail else remote print else local print
Dispatch ended: 23/11/2018 14:58:03	Document case handler: Martin3 Specialist, MARTIN3	E-Boks material: Material with reply option
Overall status: Success	Approval process: No	Remote print type: Standard mail - black/white
Case number: 18-00/2	Process GUID: b090c73c-14b9-4104-be95-bd92cb1854c2	Delete original letter after sending: No

**Recipients:**

Doc. #	Recipient	Role	Sent by	External ID	Status
74	Target User #1 , C-211282-8624	Recipient	EBoks (19.0.6.0)	003085636785818821713181	23/11/2018 14:58:02 Completed
75	Target User #2 , C-020206-8626	Copy recip.	EBoks (19.0.6.0)	003085636785818807966384	23/11/2018 14:58:01 Completed
76	Target User #3 , C-030306-8635	Copy recip.	EBoks (19.0.6.0)	003085636785818782654724	23/11/2018 14:58:00 Completed

**Original documents:**

Document No.	Title	Document case handler
46	Letter	Martin3 Specialist, MARTIN3
49	Attachement	Martin3 Specialist, MARTIN3

**Approvals and other actions:**


Party	Delegate	Type and Action	Comment	Start date	End date	Deadline
		:				

Page 1 of 1

**Note:** While the sending process is in progress, you will see a "Preliminary" watermark across the history document and "Preliminary" is included in the name of the history document.

On the case, you will find the generated and sent PDF documents as supplementary documents below the history document. If, for example, you have sent messages to 5 recipients, you will see five supplementary documents below the history document, each containing the letter and merged contact and address information. If you have sent the message to copy recipients, the supplementary documents will contain an exact copy of the main recipient's letter with a "Copy" watermark and cover page, see Copy recipients.

Documents
Parties



**Documents**

		Title	Docu...	Letter date	Document type	Reply de...
1		SmartPost: Letter (23-11-2018)	73	23/11/2018	PROHIST, History	
		74 Letter, Target User #1 (Recipient)				
		75 Letter, Target User #2 (Copy recip.)				
		76 Letter, Target User #3 (Copy recip.)				

## Additional information about sent documents

### Information tab

If you open a PDF document and click the **Information** tab, you will find the following additional information about the document:

---

<b>Shipment channel</b>	Information about the dispatcher that was used to send the SmartPost message.
<b>PDF count</b>	The number of generated PDF documents. The number corresponds to the number of recipients and copy recipients that are part of the dispatch.
<b>Print option type</b>	The print type used if documents were sent using remote print. This is the print type that you have selected in the <b>Send SmartPost</b> dialog box. The information will be shown even if SmartPost uses a different dispatcher.
<b>Shipment role</b>	Information about the recipient role. The role can be either recipient or copy recipient.
<b>Workflow instance id</b>	<p>Information about the process ID. The information is added to all documents that are generated by the SmartPost process. The information includes a GUID (Globally Unique Identifier) that identifies the WorkZone process.</p> <p>You can, for example, use the information if you suspect that something is wrong with a specific dispatch. A WorkZone system responsible will need this ID to analyze the details of the dispatch.</p>

---

## Respond to a SmartPost task

You receive a SmartPost task, if you want to preview the SmartPost dispatch before you send it or if you have been assigned to approve a SmartPost dispatch, because you are the case handler on the letter document. You have the following reply options:

**Note:** You must open the smarttask to be able to use the response buttons.



## Approve

If you approve a SmartPost dispatch, the messages are sent to the recipients right away.

## Manual

Click **Manual** if you want to print the SmartPost messages on your local printer and handle the dispatch manually. The dispatch is canceled, but the PDF documents that the SmartPost process has generated are saved on the case for you to process manually.

## Undo (preview)

If you undo the SmartPost dispatch, the dispatch is canceled and the PDF documents that the SmartPost process has generated are deleted. The original documents are kept as is on the case.

## Reject (approval)

If you reject the SmartPost dispatch, the SmartPost process owner is notified in a smarttask that you have rejected the approval. When the process owner clicks **Done** in the notification smarttask, the dispatch is canceled and the PDF documents that the SmartPost process has generated are deleted.

## Forward

You can forward a SmartPost dispatch to someone else to preview or approve before sending it.

## Receive messages from e-Boks

Citizens, companies, and authorities can send messages to your organization from e-Boks. The received messages can either be replies to messages sent from WorkZone or they can be unsolicited messages.

## Replies

When SmartPost receives a message from e-Boks, it is checked if the message is a reply to a message that was sent from WorkZone as part of a SmartPost process. If the message is a reply, it is saved as a document on the case that contains the original message along with any supplementary documents.

## Unsolicited messages

When SmartPost receives an unsolicited message, the message is saved as a document with possible supplementary documents on a predefined default case.

If subunits such as different authorities or subdivisions in your organization have specific mailboxes in e-Boks, unsolicited messages that are received in these mailboxes will be saved on predefined subunit cases that function as dossiers corresponding to each of the subunits' mailboxes.

## What happens when a message is saved in WorkZone?

If the received message includes attachments, the attachments become supplementary documents on the document that is created. Meta data are automatically added to the main document and to any supplementary documents as shown in the tables below.

### Main document

The main document automatically gets the following meta data:

Field	Description
<b>Title</b>	The title of the message specified by the sender in e-Boks.
<b>Document type</b>	The document type is set to <b>Incoming (I)</b> by default.
<b>State</b>	<ul style="list-style-type: none"><li>• If the message is a reply, the document gets the state <b>Archived (ARK)</b>.</li><li>• If the message is an unsolicited message, the document gets the</li></ul>

---

Field	Description
	<p>state <b>Locked draft (UL)</b>.</p> <ul style="list-style-type: none"> <li>When a reply to a message is saved on a default case because the case to which replies to a specific e-Boks message are saved is closed, the document gets the state <b>Locked draft (UL)</b>. See <a href="#">What happens if a case is closed?</a></li> </ul>
<b>Origin</b>	The origin of the document is set to <b>DP, DigitalPost</b> by default.
<b>Letter date</b>	The date that e-Boks assigns to the message. This is the date on which the sender sends the message from e-Boks.

In addition, the following information is added to the **Information** tab of the main document:

Information type	Information
<b>Answer to case</b>	If the message is a reply to a message, and the case from which the original message was sent cannot be found or is closed, the reply will be saved on a default case. This field displays the case number of the case that the original message was sent from.
<b>Shipment Id</b>	A message from e-Boks contains an e-Boks ID that identifies the message. You can use this ID if you want to contact e-Boks about a message.
<b>Digital post source CPR</b>	If the sender is a citizen, the sender's CPR number is saved on the document in the <b>Digital post source CPR</b> information type field.
<b>Digital post source CVR</b>	If the sender is an organization, the sender's CVR number is saved on the document in the <b>Digital post source CVR</b> information type field.
<b>Digital post source</b>	If the sender is an authority that has sent the message by using a sender system without CVR setup, the name of the authority is saved on the document in the <b>Digital post source</b> information type field.

## Supplementary documents

Any attachments to the message are saved as supplementary documents with the following meta data:

Field	Description
<b>Title</b>	The file name of the supplementary document becomes the title of the supplementary document in WorkZone.
<b>Document type</b>	Supplementary documents always get the document type <b>Document</b> .
<b>State</b>	If the message is a reply, the supplementary document gets the state <b>Archived (ARK)</b> . If the message is an unsolicited message, the supplementary documents gets the state <b>Locked draft (UL)</b> .
<b>Origin</b>	The origin of the document is set to <b>DP (DigitalPost)</b> by default.

## Parties

If the received message includes sender information such as a CPR number, a CVR number, or a name of an authority, and the contact exists in WorkZone, the sender will be added as a party on the main document.

**Note:** SmartPost must be configured to add parties automatically. See [Configure CPR and CVR](#) in the WorkZone Process Administrator Guide.

## What happens if a case is closed?

If a case is closed, WorkZone will try to save a received message on it. By default, SmartPost is configured to allow opening of closed cases but your organization may have turned off this configuration. Depending on the case type and whether your organization uses corporate access codes, the following will happen.

## No corporate access codes

### Replies

- If the message is a reply to a message sent from WorkZone, and the corresponding case is closed, the message is saved on the default case. The default case is always open.

### Unsolicited messages

- If the default case or a subunit's case is closed, the case is reopened and the message is saved on it. The case will stay open. This is the default behavior.
- If your organization has configured WorkZone to not allow reopening of closed cases, the message will be saved on the default case. The default case is always open.

## Corporate access codes

### Replies

- If the message is a reply to a message sent from WorkZone, and the corresponding case is closed, the case will be reopened and the message will be saved on it and the case will remain open. This is the default behavior.
- If your organization has configured WorkZone to not allow reopening of closed cases, the message will be saved on the subunit's case. If the subunit's case is also closed, it will be saved on the default case. The default case is always open.

WorkZone identifies the authority's case based on a unique identifier in the received message. The identifier refers to the case from which the original message was sent. WorkZone determines the authority based on the user who created the case and the authority that this user belongs to. The reply is saved on the authority's case. If the authority's case is not found, the message is saved on the default case.

### Unsolicited messages

- If a subunit's case is closed, the case is reopened and the message is saved on it. The case will stay open. This is the default behavior.

- If your organization has configured WorkZone to not allow reopening of closed cases, the message will be saved on a default case. The default case is always open.

**Note:** Your organization may have mapped specific authorities to cases that function as dossiers. An authority can only be mapped to one case. See [Handling receipt of messages on closed cases](#) in the WorkZone Process Administrator Guide.

## SmartPost FAQs

This section contains a list of frequently asked questions about the SmartPost process. Click any question below to see the answer.

### Digital mail

*Why do I get the message `The recipient with id <CPR number> is not subscribing to the material ID <material ID>?`*

You see this message if you have selected a dispatch sequence that only includes digital mail and you have selected a recipient who is:

- Registered as an e-Boks user but not to the material ID that you have selected.
- Not registered as an e-Boks user.
- Exempted from digital mail.

In this case you can try to select another material ID. If you still get the error, you can remove the recipient and start the process again to send the message to any other recipients that you have selected, and then send a separate message to the recipient who is not registered as an e-Boks user using another dispatcher.

If possible, you can also select a dispatch sequence that includes more dispatch options such as remote print and local print. The SmartPost process will then try to send the message using the next dispatcher in the dispatch sequence, for example through remote print.

## Remote print

How long time does it take Strålfors to reject a letter, if the recipient's address is missing from the letter?

It depends on Strålfors, but it happens within about a minute.

Why can't I send a letter through remote print?

There may be several reasons:

- Some address information is probably missing. SmartPost can only send letters to remote print, if as minimum **Name 1**, **Address 1** and **Postcode** are filled in for the contact.
- The postcode is 1000, you cannot send a letter using remote print. Letters with this postcode go to local print local print directly, if the recipient is not a registered as a digital mail user and the dispatch sequence includes local print.
- The address is a foreign address, the SmartPost process sends the country code and only the post code if it is 4 digits long as Strålfors cannot receive it. If the foreign post code has a different format, the SmartPost process sends 0000 as the postcode. The post code is not show in the letter. The postcode must be filled in using one of the **Address** fields.

## Local print

How long time does it take until the case handler receives a smartmail saying that the letter must be sent through local print?

It depends on a number of circumstances. Usually it happens within a few minutes from the time that SmartPost has identified local print as the channel to use. It depends on whether local print is selected directly or the message is tried sent through other dispatchers first.

If for some reason, there is an error in the communication with a dispatcher, SmartPost will try to send the message several times. The number of retries depends on your organization's SmartPost configuration.

The time that it takes for Exchange to deliver the smartmail varies from one organization to the other.

# Monitor mailboxes

WorkZone Process can be set up to monitor specific mailboxes and save incoming emails on cases.

## Receive emails from a monitored mailbox

When emails are received from a monitored mailbox, incoming emails are automatically saved on cases.

An incoming email is saved on a case based on the information in the title of the email.

- If an email title contains a case number in brackets, for example "[00001234-2016]", and the case exists, the email is saved on this case.
- If an email title does not contain a case number in brackets, all incoming emails are saved on the default case.
- If there is no case number in an email title or a default case is not identified, a new case is created for the individual email. The new case gets the title of the mail subject.

**Tip:** In WorkZone Client, search for cases with case numbers starting with "SJ-TEMP" to see these cases.

## Unsaved emails

It may happen that incoming emails are not saved on cases due to issues in the emails or and their attachments. You must save these emails manually on cases.

Your organization may have decided to separate faulty emails from the emails in the monitored mailbox to get a better overview of emails that need to be handled manually. It is possible to set up that faulty emails are moved to a specific subfolder and that a user is notified when an email is not saved automatically. For more information, see [Mailbox Monitor](#) in the WorkZone Process Administrator Guide.



# F2 Integration package

The F2 Integration package is an add-on package that allows you to use a phase process to handle communication between work groups that use F2 and WorkZone.

When an F2 requisition that requires information from your work group is issued from F2, you can handle the case as a phase process in WorkZone Process.

Based on the F2 requisitions that are registered in your work group's mailbox, cases are automatically created, processes are started, and the parties of a case receive tasks as emails according to their roles on the case.

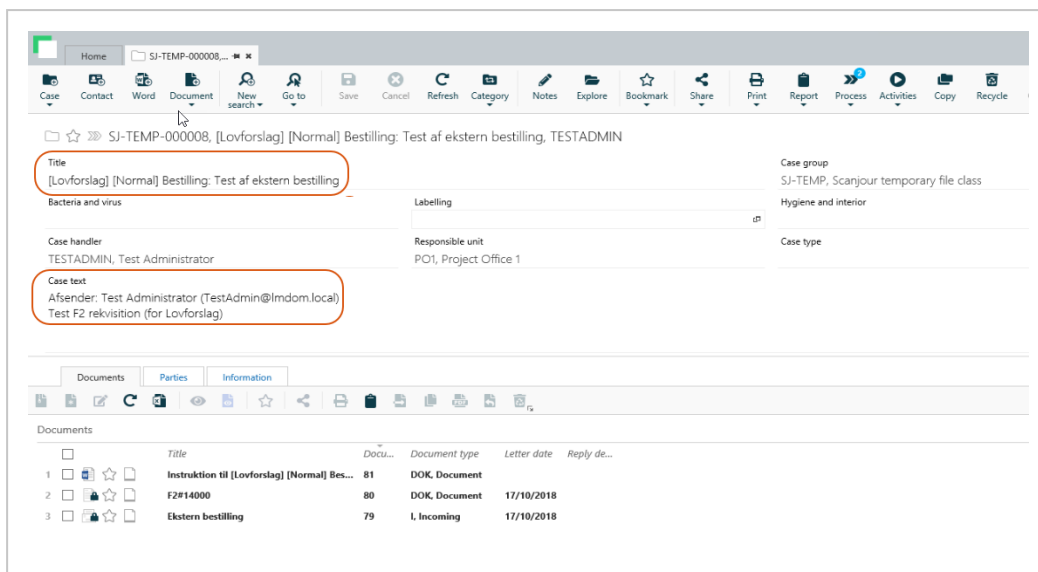
## Receive an F2 requisition

You can handle F2 requisitions using the work routines that you normally use to handle cases and processes.

## F2 requisitions to WorkZone users

When an F2 requisition is sent, the following happens in WorkZone:

- A case is created in WorkZone. The case reflects the purpose of the F2 requisition in the case title and case text. Documents and other meta data are added to the case according to the F2 requisition.



**Note:** You can view the requisition ID on the **Information** tab on the case.

- A phase process of the type Ministerial is started with suggestions for deadlines and stakeholders.
- F2 information about sender and copy recipients is merged to descriptions in the following places:
  - The Ministerial process description. The Extended distribution process description, which is started as part of the Ministerial process, inherits the description from the Ministerial process. The information is available in the distribution smarttask.
  - Case text on the case.

### Updated requisitions

If an F2 requisition is updated and recent, the case with the corresponding requisition ID is updated:

- The case title and phase process title is updated. The text in the square brackets in the title is changed according to what is defined in F2, for example [Ministersvar på henvendelse (Minister reply to requisition)] Bestilling: Test af ekstern bestilling.

- The case text and the Ministerial process description is updated if they are defined in the updated F2 requisition. Note that the Extended distribution process, which is started as part of the Ministerial process, is not updated.
- The deadline of the Ministerial phase process is adjusted if the updated F2 requisition contains a change of the deadline.
- The case handler and the mailbox that receives information about requisitions are notified in a email that the F2 requisition has been updated.

## Cancelled requisitions

If an F2 requisition is cancelled, the following happens in WorkZone:

- The Ministerial phase process that is started on the case with the corresponding requisition ID is cancelled.
- The case handler and the mailbox that receives information about requisitions are notified about the cancellation of the F2 requisition in a email.
- The sub processes are not cancelled. You have to handle them manually.

**Note:** The case will not be closed. Processes on the case that are not related to the cancelled F2 requisition are not affected and will still be active.

## F2 requisition tasks and notifications

You are automatically notified about F2 requisition tasks that await your action. You can also be notified about requisitions sent to other work groups. Notifications about requisitions to other work groups are just for your information and they do not involve any tasks on your part.

When an F2 requisition is sent to you, you are notified as follows:

- You receive a smarttask that asks you to accept case ownership. This means that within your work group, you are defined as the person to receive and process F2 requisitions so when an F2 requisition is sent, it is automatically passed along to you.

- You receive a smarttask that asks you to accept the role as a case contributor. This means that a colleague of yours has been appointed as the owner of a case and he or she has added you as a contributor to ask for your input.

When an F2 requisition is sent to another work group with your work group on the CC line, you are notified with the following message:

- Your work group's F2 Information mailbox receives a smarttask with links to the requisition and the case.

## Processing of F2 requisition tasks

From the point where a case is created and a distribution is started, the subsequent tasks available are similar to the usual user tasks in WorkZone Process. When the requisition is to be returned, follow the guidelines to return input: [Return input to F2](#).

## Return input to F2

When a requisition has been processed in your work group, you can return the case using the **F2 Delivery** process task.

1. In Outlook, select **Cases and Documents > Open Cases > F2 case**, and then select **Process**.  
-or-  
In WorkZone Client, select a case and then select **Process**.
2. Select the case that has been processed, and then select **Process > F2 Delivery**.
3. Optionally, in the **Additional CC receivers** field, add recipients in the work group, that will be notified about the delivery.

**Note:** The documents available on the **Documents** list are approved documents from the extended submission that was most recently approved on the same case. For more information, see [Approved documents included in replies to the F2 department](#).

**Note:** The delivery is sent to an F2 mailbox and to one or more users that are set up for this type of delivery. For more information, see [F2 integration](#) in the WorkZone Process Administrator Guide.

## Approved documents included in replies to the F2 department

When an F2 delivery is opened, approved documents from the extended submission that was most recently approved on the same case are available in the **Documents** section. The documents are retrieved from submissions in the following order of priority:

1. Approved documents from the submission that was most recently completely closed.
2. Approved documents from the submission that most recently reached the state of pending to be closed.

# Interact integration

WorkZone Process can retrieve data that users have entered in digital forms created with WorkZone Interact and automatically perform actions on cases, documents, and contacts.

**Prerequisite:** WorkZone Process must be configured to retrieve data from WorkZone Interact. It requires that an Interact connector service workflow is set up. See [Interact integration](#) in the WorkZone Process Administrator Guide.

## Receive data from Interact forms

When users submit information using digital forms that have been created with WorkZone Interact, WorkZone retrieves the information and creates new cases or updates existing cases automatically. The following actions are performed automatically in WorkZone:

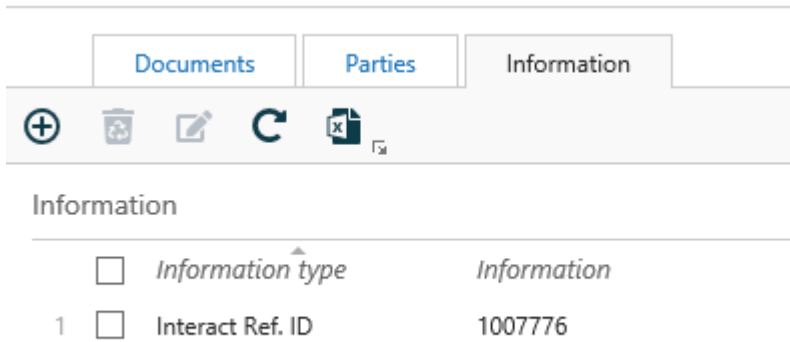
- A new case is created with the case title, case group, and case text that the user has specified in the form. Information is also inserted into other fields on the case corresponding to fields that users have filled in in the Interact form. If the case already exists in WorkZone, the case will be updated.
- Documents that a user has attached to the form are added to the case. The documents are created with the document title that the user has specified in the form.

If a user specifies a document title in the form, the title will be applied to all attached documents. If the user does not specify a title, the file names of the attached documents will be used as document titles.

- A new contact is created of the type that the user has specified, for example persons with CPR or companies with CVR. If a contact already exists in WorkZone, it will be added as a party on the case.

In addition to attached documents, a PDF document is always added to the case. The PDF document shows what the user has submitted through the form. The PDF document has an XML document as a supplementary document. The XML document is the corresponding technical document. It has the same content as the PDF document but also additional meta data about the submitted data.

On the **Information** tab, you will see an Interact reference ID if the case has been created or updated automatically through an Interact form.



**Note:** A new reference ID, a PDF document, and an XML document will be added to the case every time the case is updated by Interact

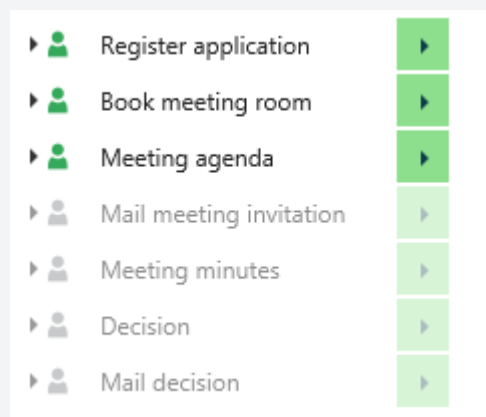
# Case Activities package

The Case Activities package supports the case handling process by providing a predefined list of activities that must be carried out in relation to a specific case.

Activity lists are created based on common case workflows in an organization. Users with administrative rights create the activity lists and make them available for use throughout the organization.

An activity list may consist of activities that are dependent of each other and therefore must be carried out in a specific order, for example, activities connected to a hiring process such as registration of applications, booking interviews, follow-up meetings, and so on. An activity list may also consist of activities that are unordered and independent of each other, for example, a check list with items that need to be followed up on in no particular order.

**Example:** An activity list that contains activities in a hiring workflow.



You work with case activities in WorkZone Client. For information on how to work with case activities in WorkZone Client, see [Case activities](#) in the WorkZone Client User Guide.

For information about how to create and configure case activity lists, see [Case activities](#) in the WorkZone Process Administrator Guide and [Case Activities](#) in the WorkZone Configurator Administrator Guide.



# Work with actor sequences

You can select an actor sequence when you, for example, start a process. An actor sequence is an ordered list of actors, for example, approvers.

**Prerequisite:** Actor sequences must be created in WorkZone Client before you can use them in WorkZone Process. See [Work with actor sequences](#) in the WorkZone Client User Guide.

**Start Submission** [Close]

**Submission of**  
Food quality  
Vinduesklip


**Deadline**

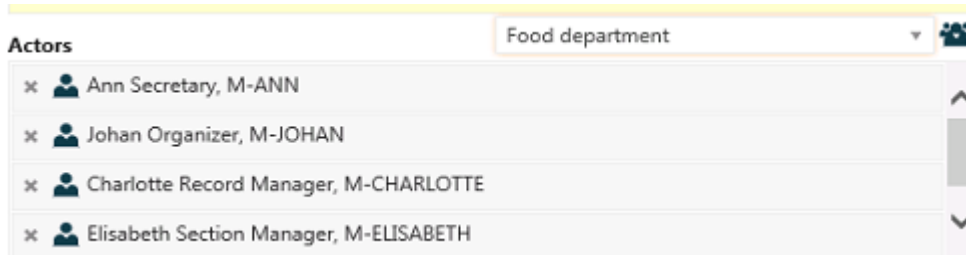
**Description**

**Documents**  
Select documents (Search starts at 3 characters)

**Actors**  
Select actors (Search starts at 3 characters)

[Help](#) [Start] [Cancel]

Click  and select an actor sequence. The actors are added to the **Actors** list (or **Approvers**, depending on the type of process). You can change the order of the contacts and delete the ones that you do not need.



# Work with delegates

You can allow others to act on your behalf by setting up one or more delegates. You can select one or more delegates to act on your behalf in WorkZone Client - see [Add, edit, or remove delegates](#) in the WorkZone Client User Guide.

A delegate has access to seeing and responding to your tasks from two places:

- The **Processes** overview.
- From your inbox. The person you are a delegate for can allow you access to his or her inbox in Outlook. If you have access, you can respond to smarttasks from that person's inbox.

To respond to a task of a person that you are a delegate for, follow these steps:

1. Open the **Processes** overview.
2. Open a list that contains the relevant process, for example, **All active**. See [View a list](#).
3. Expand the relevant process and right-click on the task that you want to respond to.
4. Respond to the task.

See also [Manage documents and actors on a task](#) and [Open a task from the Processes Overview](#).

## Access to tasks

Different access rights can be defined on tasks. One of the following access rights may be defined on a task:

- Only you can see and respond (available in the extended package).
- You and your delegates can see and respond (default in both the basis and the extended package).
- Everyone can see and respond (available in the extended package).

See also [View who a contact is delegate for](#) in the WorkZone Client User Guide.

# About notifications

You can receive notifications as emails in Outlook and as notifications that pop up on your mobile device. The types of notifications that you can receive and the actions that can cause the notifications to be sent are similar for the notifications received via and email and mobile device.

## Notifications via email

Email notifications must be enabled by your system administrator. For more information about how to enable email notifications for one or more users, see [Configure email notifications](#) in the WorkZone Process Administrator Guide.

**Note:** Before you decide to have email notifications enabled, consider the fact that the number of emails that are generated as notifications can easily get very high.

## Notifications via a mobile device

If you want to receive notifications on your mobile phone or tablet, you must have WorkZone Mobile installed. For information on how to turn on notifications on mobile device, see [How can I receive notifications](#) in the WorkZone Mobile User Guide.

## Types of notifications

There are the following types of notifications.

### Notifications for actors

You will get the following notifications on processes that you are an actor in. That is, when you have active tasks assigned to you.

- You have a new task.
- Your task has been updated by another actor.
- Your task has reached its reminder date.

- The response deadline of your task has been reached.
- Your task has been canceled by another actor.
- Your task has been made obsolete by another actor.
- The priority of your task has changed.

## **Notifications for the process owner**

You will get the following notifications on processes that you have started yourself, or if you are the delegate of the process owner.

- An actor performed an action.
- An actor updated the process title.
- An actor has a task that has reached its reminder date.
- An actor has a task that has reached its response deadline.
- An actor has canceled your process.

When relevant, you can perform various actions from the notification, for example, answer, skip or reject.

# Troubleshooting

Click an issue below to see the solution or workaround.

## [Process cannot be started](#)

If you try to start a process with actors that do not have sufficient access rights to the documents that you include on the process, you will be blocked.

The issue can be resolved by either changing the access rights of the documents or by changing the actors of the process.

See [Actors available for a process](#).

## [Actors not available for selection](#)

If actors that you expect to see on a list for selection in a process are not available, the reason could be that the case of the process is restricted.

See [Actors available for a process](#).

## [The SmartPost process cannot start because the message is too large](#)

When you click **Start** in the **Send SmartPost** dialog box, you get an error message that says that the message you are about to send exceeds the maximum document size.

This means that your organization has set a maximum size of messages that the SmartPost process can send. The limit is exceeded and therefore the process cannot start. You can try to reduce the size of the message by splitting it in to several messages, or you can contact your local WorkZone responsible to increase the maximum size of messages.

## Note for the administrator

You can configure the maximum message size for each dispatcher in WorkZone Configurator. Adjust the **MaxCombinedMessageLength** (only e-Boks) parameter in the SmartPost process parameters and the **MaxDocumentSize** parameter for each of the dispatchers, e-Boks, Strålfors, and OneTooX.

See [Configure SmartPost](#) and [Configure dispatchers](#) in the WorkZone Process Administrator Guide.

## [The SmartPost process starts but the message is not sent because the message is too large](#)

e-Boks, KMD Print Center, and Strålfors have a maximum size that they can send. If a message exceeds the limit, the message will not be sent and you will receive a notification email.

### Note for the administrator

The event log will show error codes returned from e-Boks, KMD Print Center, and Strålfors. See [Dispatcher error handling](#).

You experience this behavior if the SmartPost dispatchers are not set up correctly. If the values of the **MaxCombinedMessageLength** (only e-Boks) parameter in the SmartPost process parameters and the **MaxDocumentSize** parameter for each dispatcher are higher than the limit set by e-Boks, KMD Print Center, and Strålfors, change the configuration to be less than the dispatchers' limit.

See [Configure SmartPost](#) and [Configure dispatchers](#) in the WorkZone Process Administrator Guide.

# Terms and conditions

## Intellectual Property Rights

This document is the property of KMD. The data contained herein, in whole or in part, may not be duplicated, used or disclosed outside the recipient for any purpose other than to conduct business and technical evaluation provided that this is approved by KMD according to the agreement between KMD and the recipient. This restriction does not limit the recipient's right to use information contained in the data if it is obtained from another source without restriction set out in the agreement between KMD and the recipient or by law.

## Disclaimer

This document is intended for informational purposes only. Any information herein is believed to be reliable. However, KMD assumes no responsibility for the accuracy of the information. KMD reserves the right to change the document and the products described without notice. KMD and the authors disclaim any and all liabilities.

Copyright © KMD A/S 2021. All rights reserved.