Q&A States

Question & Answer states explained in Firmex Q&A.

Question State	Description	User Visibility	Notes
Draft Question	A proposed question for review by a Question Coordinator before being submitted.	Can be seen by anyone in the Question Group that drafted the question.	Only used if there are both Question Coordinators and Question Authors in the group.
		Cannot be seen by any other Question Groups or the Answer Group.	
Submitted Question	A question that has been sent to the Answer Group to be answered.	Can be seen by anyone in the Question Group that submitted the question, and the Answer Group.	
		Cannot be seen by any other Question Groups.	
Assigned Question	A question to be worked on that has been assigned to one or more users in the Answer Group.	Can be seen by anyone in the Answer Group. The Question Group that submitted the question continues to only see that it is a Submitted Question.	
		Cannot be seen by any other Question Groups.	
Draft Answer	A question with a potential answer that is still being worked on by users in the Answer Group.	Can be seen by anyone in the Answer Group. The Question Group that submitted the question continues to only see that it is a Submitted Question.	
		Cannot be seen by any other Question Groups.	
Proposed Answer	A question with an answer that is ready for review and approval.	Can be seen by anyone in the Answer Group. The Question Group that submitted the question continues to only see that it is a Submitted Question.	Only used if there is at least one Approver.
		Cannot be seen by any other Question Groups.	
Approved Answer	A question with an answer that has been approved and is ready to be submitted back to the Question Group.	Can be seen by anyone in the Answer Group. The Question Group that submitted the question continues to only see that it is a Submitted Question.	Only used if there is at least one Approver and the Q&A option is turned on.
		Cannot be seen by any other Question Groups.	
Rejected Answer	A question with an answer that has been rejected by an Approver and is available to be reassigned by an Answer Coordinator.	Can be seen by anyone in the Answer Group. The Question Group that submitted the question continues to only see that it is a Submitted Question.	Only if there is at least one Approver and the Q&A option is turned on.
		Cannot be seen by any other Question Groups.	
Submitted Answer/ Answer	A question with an answer that has been submitted back to the Question Group.	Can be seen by anyone in the Answer Group. The Question Group that submitted the question sees it as an answer.	
		Cannot be seen by any other Question Groups unless the answer has been made public.	
Archived Question	A question that has been removed from the view of all users except Answer Coordinators.	Can be seen by Answer Coordinators.	
		Cannot be seen by any Question Groups, Experts, or Approvers.	

User Roles

A helpful guide to user roles in Firmex Q&A.

Side of the Deal	Q&A Role & Action	Resulting Question State	Notes
Question Side	**Question Author** drafts a question	Draft Question	
Question Side	**Question Coodinator** reviews question and submits to Answer Side	Submitted Question	Separate Question Coordinator and Author roles are only needed when Question Group wants to review questions before submitting. Otherwise all users can submit.
Answer Side	**Option 1:** **Answer Coodinator** reviews question and assigns to Expert	Assigned Question	Answer Coordinator manages the Q&A session, routing questions and acts as final reviewer of answers.
Answer Side	**Option 2:** **Expert** answers question or assigns	Draft Answer	Questions can be assigned to multiple experts.
Answer Side	**Option 3:** **Answer Coodinator** reviews answer and submits for approval	Proposed Answer	Answer Coordinator reviews answers from one or more experts and submits for approval (they can answer directly on their own of course).
Answer Side	**Approver** reviews the answer and approves	Approved Answer	Alternatively the Approver can reject the answer which will send the answer back to the Answer Coordinator for correction or assignment.
Answer Side	**Answer Coordinator** submits answer	Submitted Answer	Final Review before Submitting. Optionally approves can directly submit (in Settings).
Question Side	**Question Author** and **Question Coodinator** review answer to their original question	Answer	Answer will only be visible to users within the Question Group that asked the original question unless the answer was marked as public.

Note: The two steps appearing in grey, above, only apply to a Q&A workflow containing the role of an Approver. If there is no Approver, the AC may directly submit answers to the Question group.

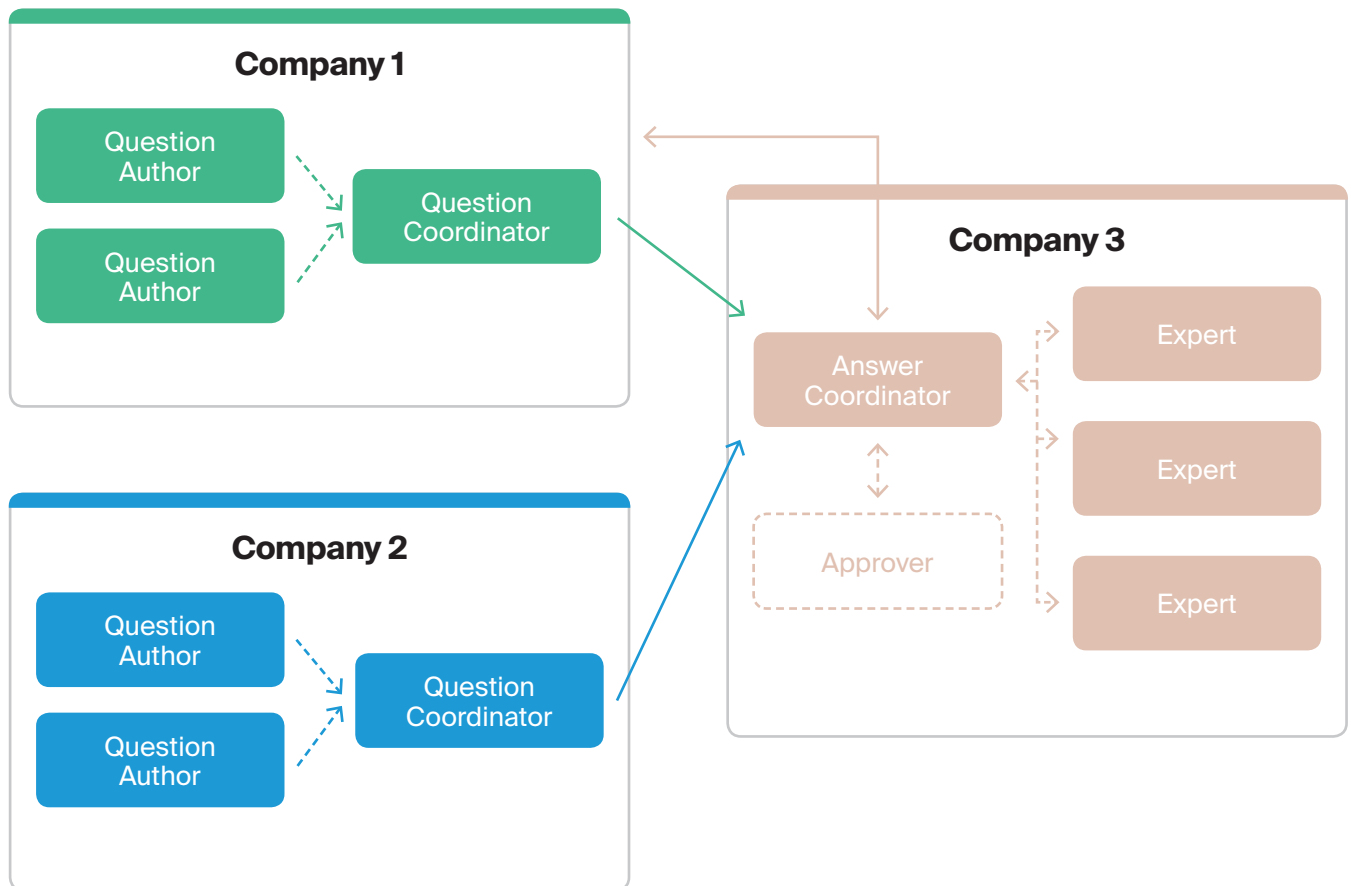Still have questions? Find more help in our Knowledgebase.

Sample Question Flow
The question flow and visibility in Firmex Q&A.

Question Side

Answer Side

Company 1

Question Author

Question Author

Question Coordinator

Company 2

Question Author

Question Author

Question Coordinator

Company 3

Answer Coordinator

Approver

Expert

Expert

Expert

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Question Visibility

The question flow and visibility in Firmex Q&A.

	Question Author	Question Coordinator	Answer Coodinator	Expert	Approver
Draft Question	████	████			
Submitted Question	████	████	████	████	████
Assigned Question			████	████	████
Draft Answer			████	████	████
Proposed Answer			████	████	████
Approved Answer	████	████	████	████	████
Rejected Answer			████	████	████
Submitted Answer			████	████	████
Archived Question			████		

Still have questions? Find more help in our Knowledgebase.

FIRMEX

Q&A Email Notification

Email task and digest notifications within Firmex Q&A.

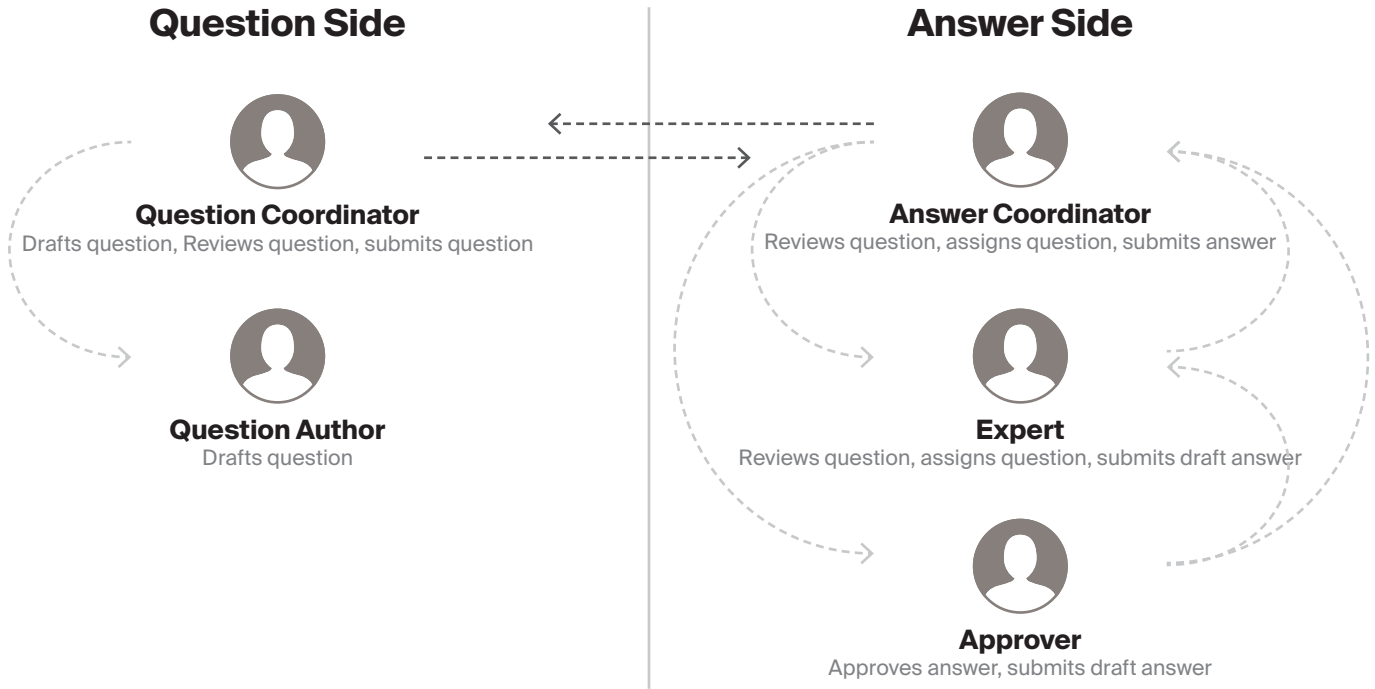| Event	Email Recipient
New Question Submitted	Answer Coodinator
New Question Assigned to: User/Role/Group	Assigned User
New Answer Proposed	Approver (if in M&A w/ Approver)
Answer Submitted	Question Group who submitted the question, all question groups (if public)

Event	Digest - Question Group	Digest - Answer Group
New Question Drafted/Edited	# of individual new questions that were created by the question group in the period	N/A
New Question Submitted	# of questions submitted by the question group in the period	# of questions submitted by all groups in the period
New Question Assigned	N/A	Questions assigned w/o being drafted in the period
New Answer Drafted	N/A	Questions drafted w/o being proposed in the period
New Answer Proposed	N/A	Questions proposed w/o being approved in the period
New Answer Approved	N/A	Questions approved w/o being submitted in the period
New Answer Rejected	N/A	Questions rejected w/o being assigned in the period
Answer Submitted	# of questions that had answers submitted in the period for the group. Includes any public answers submitted.	# of questions that had answers submitted in the period to all q-side groups

? Still have questions? Find more help in our Knowledgebase.

Q&A User Roles

User Roles in Firmex Q&A.

Question Side

Question Coordinator
Drafts question, Reviews question, submits question

Question Author
Drafts question

Answer Side

Answer Coordinator
Reviews question, assigns question, submits answer

Expert
Reviews question, assigns question, submits draft answer

Approver
Approves answer, submits draft answer

❓ Still have questions? Find more help in our Knowledgebase.