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DocFlow Creatio

Document libraries and digital processes of
document management

Version 1.0

Admin's Manual





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1. Introduction

Application DocFlow Creatio is supplied in .zip file containing all the necessary packages. Installation is carried out from section Installation; deletion of the application is carried out in System designer. Future updates will be supplied as separate packages to be installed through console.

After installation, in sections Lookups and System settings in System designer, static groups Paper case archive and Record-keeping are created. They contain lookups and settings necessary for the solution to function. Some lookups and settings will be filled in with demo values by default.

Detailed description of system settings and lookups designed for DocFlow Creatio is provided in this admin's manual.

Learn more about basic functionality of Creatio on company's website: <https://academy.creatio.com/>



2. Lookups

The Lookups section is designed to manage DocFlow Creatio lookups. You can also edit existing lookups and register the new ones in this section.

To access the section, open the system designer by clicking the  button in the top right corner of the application. In the System setup block, click the Lookups link.

Lookups for DocFlow Creatio are grouped in a separate branch. The folders are named according to sections: Paper case archive and Record keeping.

Attention

When you edit the content of lookups, do not delete basic content, as this can lead to incorrect operation of pre-configured business processes.

When a lookup is selected in the section, on the top of the standard options, some additional options are available:

- Open content – opens a page for editing the content of a lookup 0.
- Open settings — opens a page for editing the lookup settings specified when registering a lookup 0.

2.1. Lookup content page

A special window is used to view and edit lookup records. To open this page, select a lookup in the list and click the Open content button.

Most system lookups are standard and contain only the [Name] and [Description] fields. Certain custom lookups have record edit pages.

You can modify the content in the most lookups in the editable list (Image. 1).



Image. 1. Example of saving changes in editable list of the lookup

You can deactivate lookup values to prevent the users from selecting these values in the future.

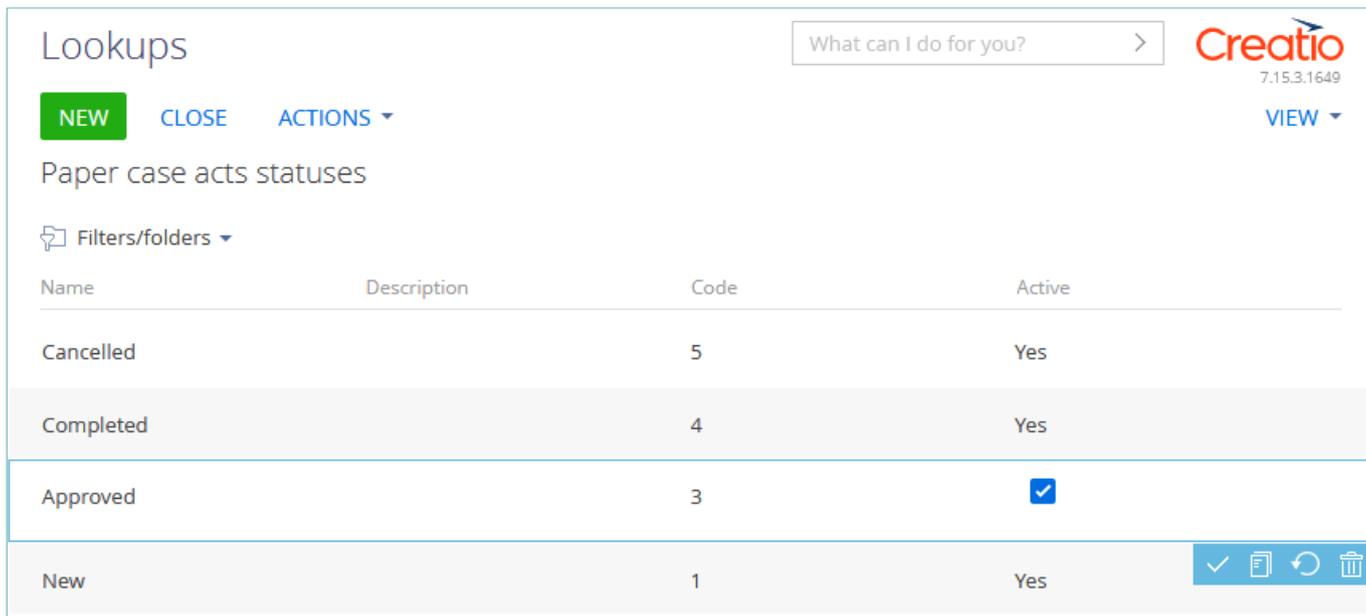


Image 2. Active value of lookup Paper case act status in document archive

Deactivated values will not be available for selection in the corresponding lookup fields. All existing records where an inactive lookup value had been previously set will remain unchanged.

2.2. Lookup settings page

Use the lookup settings page to add or change settings of existing lookups. To open this page, select a lookup in the list and click the Open settings button.

Field	Description
Name	Lookup name
Object	Object that contains the structure of lookup content. For example, in the registration card of the Normative document levels of confidentiality lookup, the Normative document levels of confidentiality object is specified in this field. The lookup of this field contains items of the "Object" type.
List page	Page schema used for editing the content of the lookup. If this field is not populated, the standard lookup content page will be used.
Description	Description of the lookup, e.g., its purpose and function.

2.3. List of lookups

The system contains several principal configurable lookups, which are used upon filling in the document.



Lookup	Description
Tab Paper case archive	
Paper case acts types	Standard lookup Contains fields: Name, Description, Code, Active
Record keeping archive storage methods	Standard lookup Contains fields: Name, Description, Code, Active
Paper cases archive statuses	Standard lookup Contains fields: Name, Description, Code, Active
Paper case issue status	Standard lookup Contains fields: Name, Description
Paper cases archive types	Standard lookup Contains fields: Name, Description, Code Value in field Type in section Paper cases archive
Paper case acts statuses	Standard lookup Contains fields: Name, Description, Code, Active
Paper case acts statuses	Standard lookup Contains fields: Name, Description, Code, Active
Tab Record keeping	
Record keeping related employees role	Standard lookup Contains fields: Name, Description A feature indicating the role of the approver
Record keeping document type for company	Non-standard lookup Settings are provided below in clause 2.4.2
Record keeping delivery types	Standard lookup Contains fields: Name, Description
Record keeping document statuses	Standard lookup Contains fields: Name, Description Value in field Status in section Record-keeping
Record keeping document basic subtypes	Standard lookup Contains fields: Active, Code, Parent type, Name This setting enables classification of types of documents
Record keeping document relation types	Standard lookup Contains fields: Name, Description
File versioning	Standard lookup Contains fields: Name, Description, Code, Active Setting is intended for defining the version of the document
Record keeping document basic types	Standard lookup Contains fields: Name, Description, Code, Active Setting defines the types of documents



Lookup	Description
Characteristics in record keeping type	Non-standard lookup In a separate lookup Characteristics in the document types, there are available additional attributes defined for this type of document.

2.4. Description of non-standard lookups

This chapter describes the non-standard lookups used in DocFlow Creatio.

2.4.1 Email templates lookup

The [Email templates] lookup is used to create email templates for business processes and customer communications.

Field	Description
Template name	The title of a template. The field is required. In localized templates, the template name is followed by abbreviations of the used languages.
Macro source	System object (section or detail), whose fields will be used in the template as macros..
Template area	<p>The template displays the template text If the template is localized, different tabs are used to display its text in different languages.</p> <p>The  button in the top right area of the template enables adding new language tabs.</p> <p>Each tab contains:</p> <ul style="list-style-type: none"> • [Edit] button, which is used for opening the content designer; • [Subject] field. This field value is automatically populated in the Subject field of the message page, when you select a bulk email (in Creatio marketing) or a lookup template.

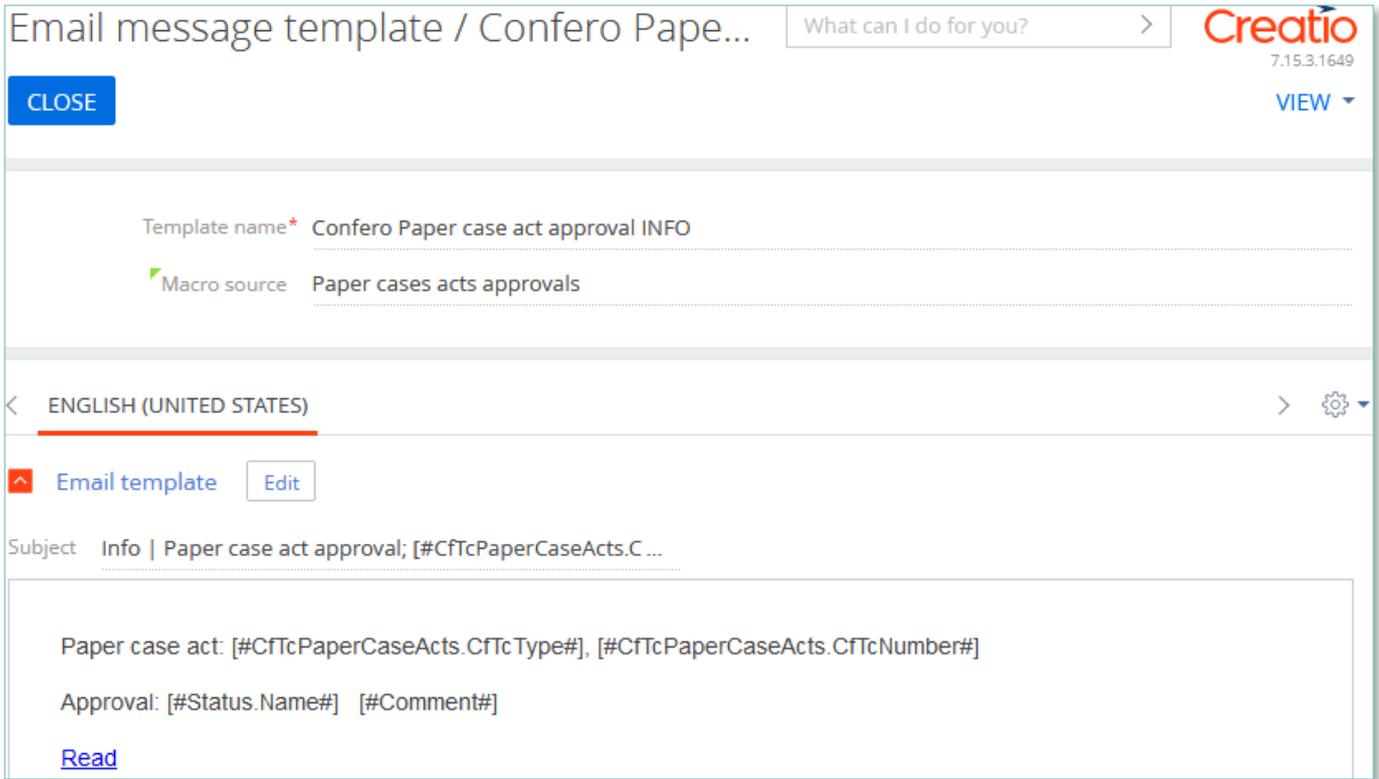


Image. 3. Confero Paper case act approval INFO

Product DocFlow Creatio is using several templates to create body text for emailing.

Template	Subject
Confero Paper case act approval INFO (US)	Info Paper case act approval; [#CfTcPaperCaseActs.CfTcNumber#]; [#Status#]
Confero Paper case act approval rejected INFO (US)	Info Paper case act approval; [#CfTcPaperCaseActs.CfTcNumber#]; [#Status#]
Confero Paper case act approval To Do (US)	To Do Paper case act approval; [#CfTcPaperCaseActs.CfTcNumber#]
Confero Record Keeping document acquaintance (US)	Info Record keeping document acquaintance; [#DocumentNumber#]
Confero Record Keeping document approval INFO (US)	Info Record keeping document approval; [#RecordKeeping.DocumentNumber#]; [#Status#]
Confero Record Keeping document approval rejected INFO (US)	Info Record keeping document approval; [#RecordKeeping.DocumentNumber#]; [#Status#]



Template	Subject
Confero Record Keeping document approval To Do (US)	To Do Record keeping document approval; [#RecordKeeping.DocumentNumber#]
Confero Record Keeping document save (US)	Info Record keeping document registered; [#DocumentNumber#]

2.4.2 Lookup Record keeping document type for company

Minimum requirements in order to start work is to define the document types available to the particular company in the lookup Record-keeping document type for company.

Field	Description
Parent company	Heading of the system setting that will be displayed in the system interface for the user
Type	Type of field of system setting Value from Record keeping document basic types
Name	Read only Equal to value in field Type
Code	A code to identify the Type of document Value of this field should contain Latin alphabet letters and digits, and should not have spaces.
Auto numbering	The set feature means it is necessary to generate the number automatically
Last used number by year	Detail Number counter (within each year)
Document subtypes for company	Detail For more detailed classification of the document, there is an option to choose from the available subtypes of documents under the given type
Access rights	Detail Access rights for this type of documents by default
Record keeping visas chain settings	Detail Chain of approvers by default
Record keeping default notification receivers	Detail Default receivers of notifications on record-keeping document

Confero Technologies: Protocol

What can I do for you? > **Creatio**
7.15.3.1649

SAVE CANCEL ACTIONS ▾

Parent company Confero Techn...

Type* Protocol

Name Protocol Code PR

Auto numbering

< GENERAL AUDIT FEED >

⬆ Last used number by year + ⋮

Year	Document type	Document subtype	Last used number
2018	Protocol	Board meeting protocol	87
2020	Protocol	Change advisory board protocol	5
2019	Protocol	Board meeting protocol	80
2020	Protocol	Board meeting protocol	4

⬆ Document subtypes for company + ⋮

Name	Description	Type	Subtype
Change advisory board protocol		Protocol	Change advisory board protocol
Board meeting protocol		Protocol	Board of directors protocol

▾ Access rights

▾ Record keeping visas chain settings

▾ Record keeping default notification receivers

Image. 4. Setting the type of document in lookup Record keeping document type for company



3. Section System settings

The System settings section is designed for managing additional Creatio settings. For example, here you can assign a colour for the section panels, select the base currency for calculating the Creatio financial indicators, specify parameters for sending emails, etc.

With the help of system settings, you can also specify default values for various fields when new records are created, like a default activity status, for example.

To access the section, open the system designer by clicking the  button in the top right corner of the application. Click the [System settings] link in the [System setup] block.

3.1. System setting page

To register a system setting, use the system setting page.

Field	Description
Name	The [Name] field shows the title of the system setting that will display to users.
Type	System setting field type. The type of field defines the method of filling in the value of system setting. This field is editable while adding a new system setting and is non-editable for the previously registered records.
Default value	Use this field to set the value for the system setting. For example, you can set the “Not Started” value for the activity default status, or “5 minutes” value as an interval for notification check. The method of filling in the Value field depends on the type of system setting. For example, activity default status can be selected from the Activity statuses lookup, while the interval for notification check is specified as an integer number.
Code	The code is used for the unique designation of the system setting to identify it in the system. The field value can consist of Latin letters and numbers only and must not contain spaces.
Cached	Select the [Cached] checkbox if the value of the system setting changes relatively rarely and thus must be calculated only once per user session. Examples of cached system settings could be the main menu logo or login page colour of overdue activities or base currency settings.
Personal	Select this checkbox to have the system setting be configured for the current user individually.
Allow for portal user	Select this checkbox to make the system setting available for the portal users.

3.2. List of system settings

The system contains several system settings used for filling in a document in DocFlow Creatio. The settings for DocFlow Creatio are grouped in a separate branch. The folders are named in accordance with the section: Paper case archive and Record keeping.



Name	Code	Note
Tab Paper case archive		
Paper case archive code mask	CfTcPaperCasesArchiveCodeMask	Format of the code of paper case {0}-{1}/{2:00000}
Paper case archive registration status	CfTcPaperCaseArchiveRegistrationStatus	Value by default Setting from lookup
Paper case archive new status	CfTcPaperCaseArchiveNewStatus	Value by default Setting from lookup
Paper case act stage (in signing)	CfTcPaperCaseActSigningStage	Value by default Setting from lookup
Paper case act code mask	CfTcPaperCaseActsCodeMask	Format of the code of paper case {0}-{1}/{2:00000}
Paper case issue received in archive status	CfTcPaperCaseIssueReceivedStatus	Value by default Setting from lookup
Mailbox for sending email with information on approval NDB	VisaNDBMailboxSettings	On whose behalf will the memos be sent
Tab Record keeping		
Record keeping notification receiver role	RecordKeepingNotificationReceiverRoleId	Value by default Setting from lookup
Mailbox for sending email with information on approval	VisaMailboxSettings	On whose behalf will the memos be sent
Record keeping document approving process	RecordKeepingVisaProcess	Value by default Setting from lookup
Record keeping signer role	RecordKeepingSignerRoleId	Value by default Setting from lookup
Record keeping validate record keeping number	RecordKeepingValidateNumber	Logical



Name	Code	Note
Record keeping document number mask	CfTcRecordKeepingDocumentNumberMask	Document number format {0}/{1}/{2}/{3}
Record keeping appendix number mask	CfTcRecordKeepingAppendixNumberMask	Document appendix number format {0}-p.{1}

NB!

Elements available for generating document number: {0} – company code (to be indicated in the field “Numbering code” in Account card), {1} – document type code, {2} - year, {3} – document’s index number (within the given type or subtype).

Elements available for forming the number of the appendix document: {0} – number of the main document, {1} – index number of the appendix.