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DocFlow Collegial for Creatio

Add-on to the application DocFlow Creatio,
enabling collegial meetings

Version 1.0

Admin's Manual





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1. Introduction

Application DocFlow Collegial for 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 group Board meeting is created. It contains 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 Collegial for Creatio is provided in this admin's manual.

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



2. Lookups

The Lookups section is designed to manage DocFlow Collegial for Creatio. 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 Collegial for Creatio are grouped in a separate branch. The folder is named Meetings.

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.

Upon choosing the lookup in the section, apart from the standard ones, there are also the following buttons:

Open content — open the page for amending the content of lookup 2.1.

Open settings — open the page for amending features of 0 set upon registering of the lookup.

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).

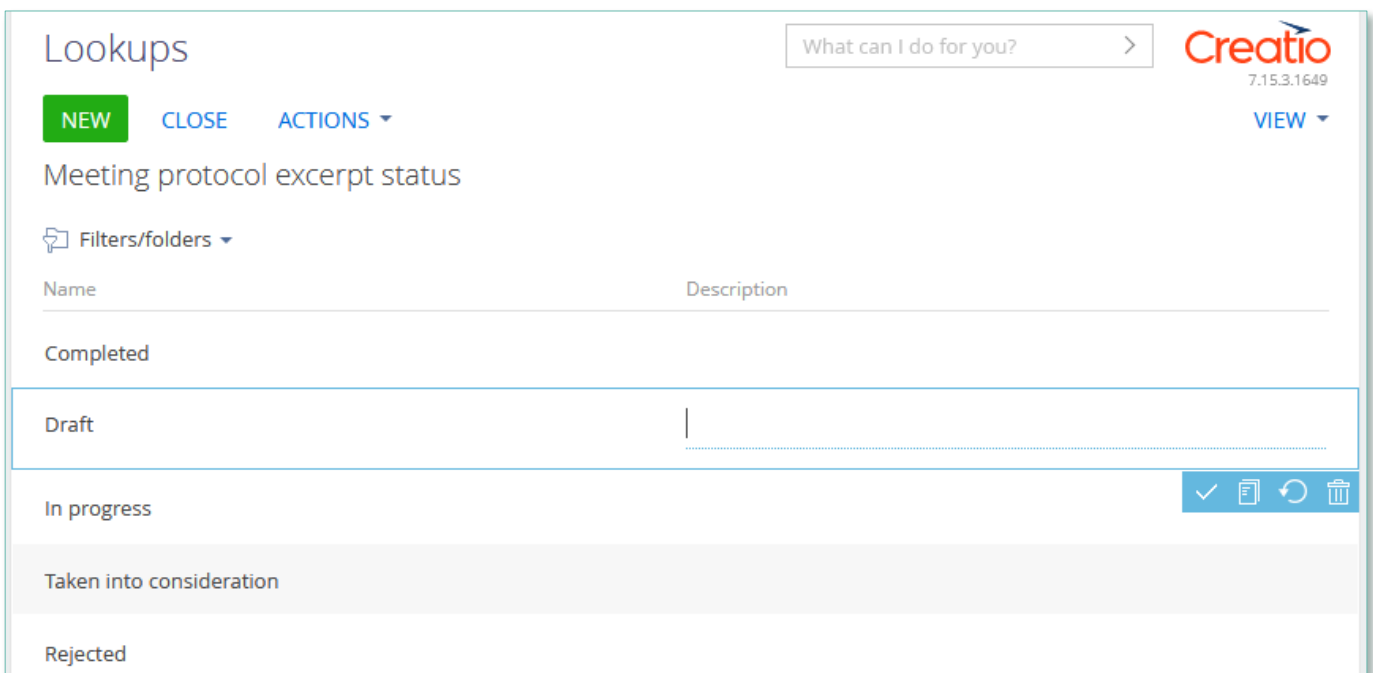


Image. 1. Saving changes in a lookup list of records



You can deactivate lookup values to prevent the users from selecting these values in the future. 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
Board meetings	
Meeting institution	Non-standard lookup The settings are described below in clause Error! Reference source not found.
Meeting question status	Standard lookup Contains fields: Name, Description
Meeting status	Standard lookup Contains fields: Name, Description
Meeting protocol excerpt status	Standard lookup Contains fields: Name, Description


2.4. Description of non-standard lookups

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

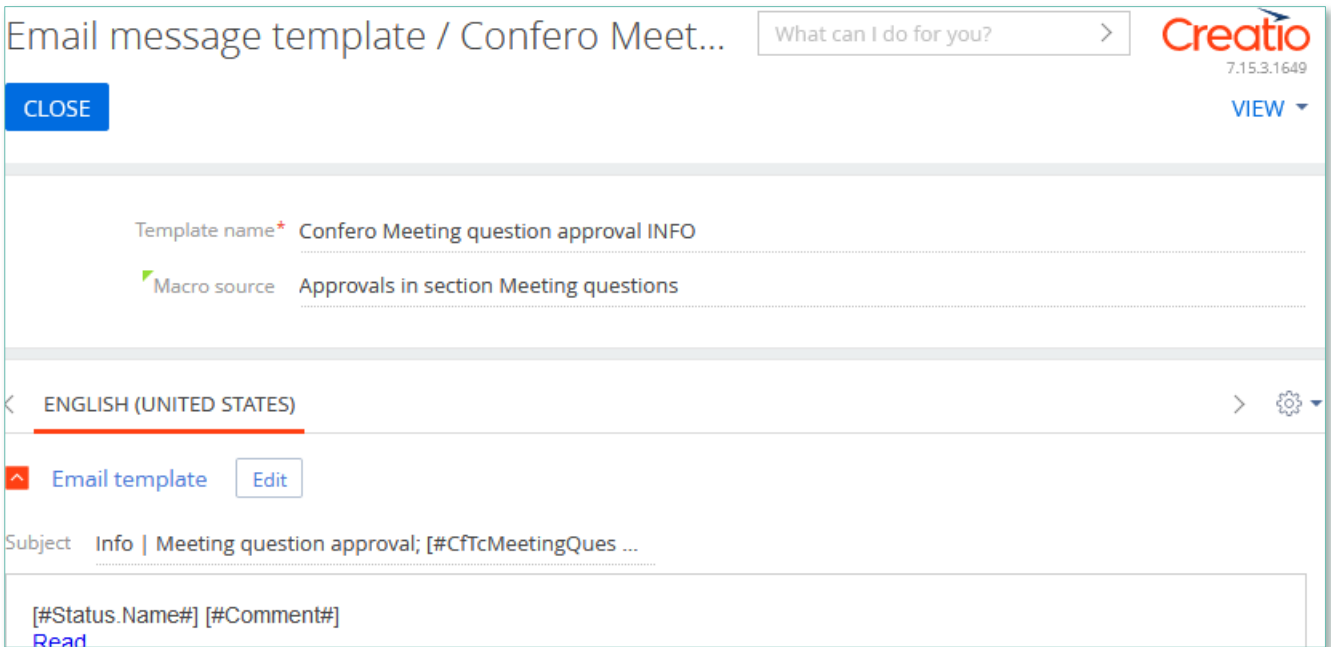


Image. 2. Confero Meeting question approval INFO

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

Template	Subject
Confero Meeting question approval INFO (US)	Info Meeting question approval; [#CfTcMeetingQuestion.Subject#]; [#Status#]
Confero Meeting protocol excerpt INFO (US, RU)	Info Meeting protocol excerpt [#Subject#]
Confero Meeting question INFO (US, RU)	Info Meeting question [#Subject#]



Template	Subject
Confero Meeting question approval To Do (US)	To Do Meeting question approval; [#CfTcMeetingQuestion.Subject#]

2.4.2 Lookup Meeting institution

Granting rights from the lookup Meeting institution.

On form Meeting institution there are details, using which one can manage access rights to meeting documents of the chosen collegial body.

The access rights are assigned upon creating the entry.

Field	Description
Account	Value from lookup
Name	Text field
Code	A code for identification purposes Value of this field should contain Latin alphabet letters and digits, and should not have spaces
Email	Text field
Default members	Detail Members are assigned by default
Default invited	Detail Invited persons are assigned by default
Meeting / protocol excerpts access rights	Detail Default rights to access the meeting and creating Meeting protocol excerpt
Meeting questions access rights	Detail Default access rights to meeting questions



Compliance Risk and AML / CFT Committee

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

SAVE CANCEL ACTIONS ▾

Account

Name*
Compliance Risk and AML / CFT Com...

Code
CT-AML

Email

< PARTICIPANTS **AUDIT** **FEED** **>**

Default members + :

Meeting institution	Participant
Compliance Risk and AML / CFT Committee	Aleksandr Dmitriev

Default invited + :

Meeting institution	Invited
Compliance Risk and AML / CFT Committee	Aleksey Lukin

Meeting / protocol excerpts access rights

Read group	Administrator for organizati...
Edit group	System administrators
Delete group	Tester

Meeting questions access rights

Read group	Administrator for organizati...
Edit group	Tester
Delete group	All portal users

Image. 3. Form of the card Institution



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 Collegial for Creatio. The settings for DocFlow Collegial for Creatio are grouped in a separate branch. The folder is named in accordance with the section: Board meetings.



Name	Code	Note
Board meetings		
Meeting question approving process	CfTcMeetingQuestionVisaProcess	Value by default Setting from lookup
Meeting number format	MeetingRegNumberFormat	Meeting number format {p1}/{p2}
Meeting protocol excerpt number format	MeetingProtocolExcerptNameFormat	Meeting protocol excerpt number format {p1}-{p2}

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.