DocFlow Creatio

Document libraries and digital processes of
document management

Version 1.0

User's Manual

List of Contents

1. Record Keeping

Section Record keeping provides registration, storage of record keeping documents, their grouping and search by any parameter of the document.

The section is of standard structure that does not change in comparison to the basic version.
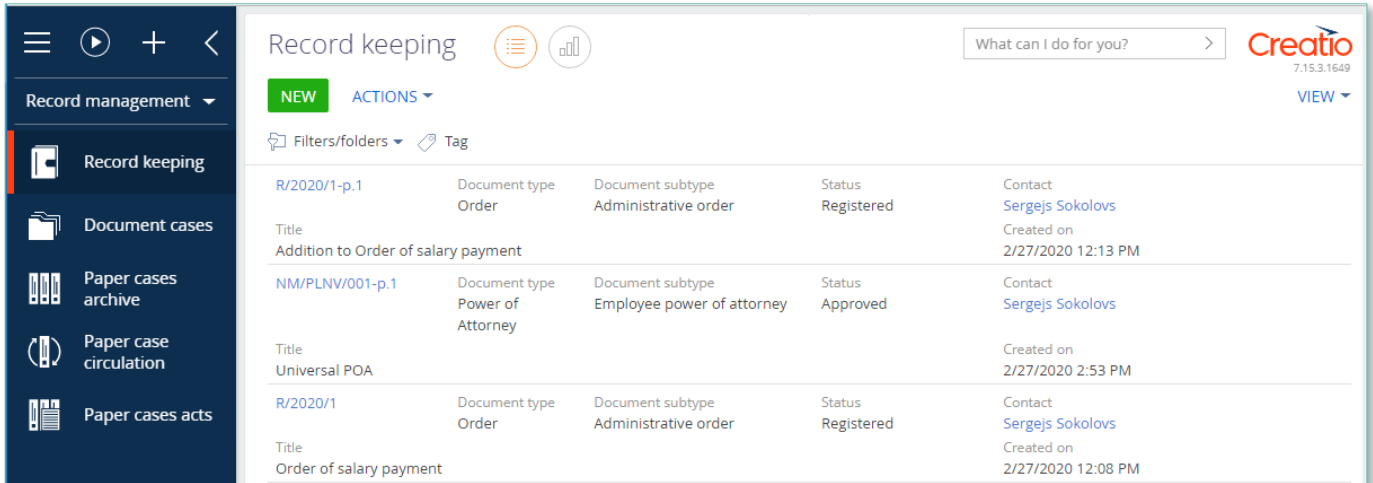Standard registry view of this section is provided below:

Image 1. Record keeping section view

Document's recordkeeping card consists of a set of fields of general data, as well as several tabs. In order to create new entry, one should click **NEW** and fill in the fields on the page. An example of a change query editing page is provided below.

PLEASE NOTE
Field "Status" by default displays value "Draft"

List and description of fields is provided below:

Field	Description
Profile fields	
Document number	Full number of the document Generated automatically by the system in accordance with the mask upon initial saving Read only
External number	External number of the document Text field
Company*	Value from the lookup Account Read only after saving
Document type*	Value from the lookup Record keeping document type for company Read only after saving
Document subtype*	Value from the lookup Record keeping document subtype for company

	Read only after saving
Document date*	Document date
Main document	Value from table Record keeping
Appendix number	Mandatory field, only if Main document is set. In that case one should fill in the number of the appendix in this field. Number generated: <number of main document>-p.<appendix number>
Status	Value from the lookup Record keeping document statuses
Account	Value from table Account
Contact	Value from table Contact
Tab General	
Description	Document name Text field, maximum size: 250 characters
Attachments	Files (Detail) Files are placed on the detail
Notes	Text field
Comments	Add new comment by clicking ＋ System registers user name, date and time
Appendixes	Attachments (Detail) appendixes that are attached to the current document with a status Valid displayed on Detail
Document properties	Document properties (Detail) Attach document property by clicking ＋
Tab Details	
Responsible employee	Value from table Employee
Department	Department of the employee in charge Value from table Departments
Responsible lawyer	Value from table Contact
Is digitally signed	Mark about the document being signed digitally Select a checkbox if document is digitally signed
Paper case archive	Number of the paper case Filled in by the system from the paper case card when this document is put in it Read only
Expect paper document	Mark in case of expecting a paper document Select a checkbox in case of expecting paper document
Received paper document	Mark in case of receiving a paper document Select a checkbox in case of receiving a paper document
Tab Relations	
Related accounts	One can add a relation from a table Accounts
Related contacts	One can add a relation from a table Contact

Related documents	Related documents (Detail) One can add relation to a document from table Record keeping
Related employees	One can add relation from table Contact
Tab Approvals	
Approvals	Approval (Detail) Detail intended for carrying out approval upon request. The procedure of approval is described in details in section 6.5
Approvers	One can add participants to the approval process from the table Record keeping related employees
Tab History	
Activities	Activities (Detail) Displays all activities related to this document
Email	Emails (Detail) Displays all emails related to this document
Tab Audit	
Created by	Value from table Employee Author of the entry Generated by the system automatically upon initially saving the document Read only
Created on	Date and time of creation Generated by the system automatically upon initially saving the document Read only
Modified by	Value from table Employee Last person who modified the entry Generated by the system automatically each time upon saving the document Read only
Modified on	Date and time the entry was last modified Generated by the system automatically each time upon saving the document Read only
Record keeping status history	History of amendments (Detail) Displays all history of amendments done to this document
Tab Feed	
	The tab displays chat history among the employees regarding this document

Configurable lookups

The system provides several configurable lookups which are used upon filling in the document:

- Record keeping document type for company
- Record keeping document subtype for company
- Record keeping document statuses
- Characteristics in record keeping type

2. Document Cases

Section Document cases enables one to merge the existing documents from the Record keeping section into logical groups for more convenient access to them in the course of working on one project / client / product / audit of documents by a certain criterion.

The section is of a standard structure which is not subject to amendments in comparison to basic version.
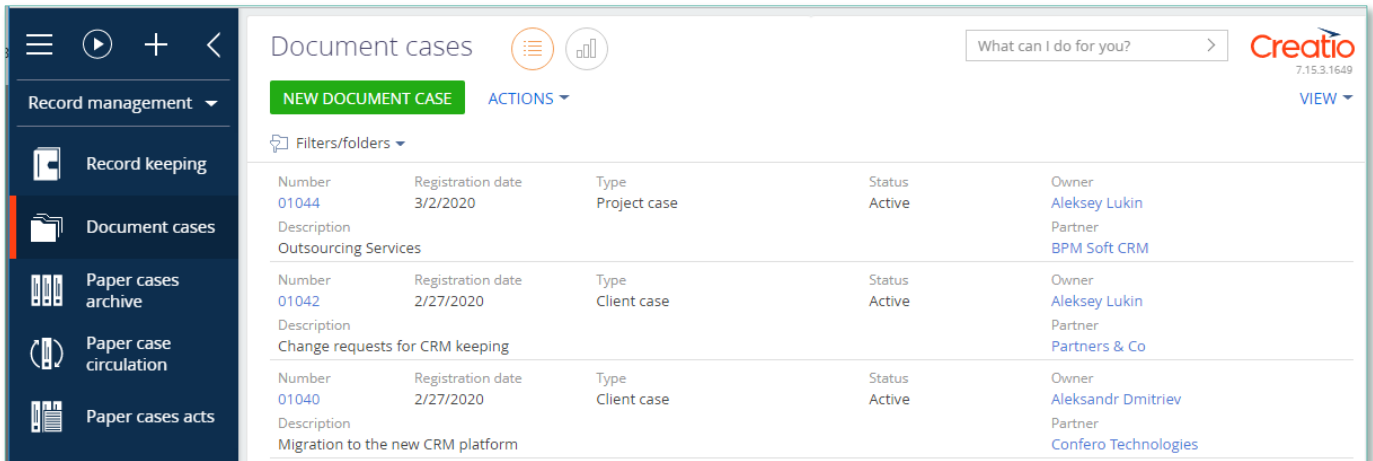

Image 2. View of Document Cases section

A card Document Case consists of a set of general data fields and several tabs. To create a new entry, click

   and fill in the fields in the page.

The list and description of fields is provided below:

Field	Description
Profile fields	
Number	Number Generated automatically according to the settings Read only
Registration date *	Registration date
Type *	Case type Chosen from the lookup Record keeping document type for company
Status *	Status Chosen from the lookup Generated automatically according to status in a status bar Read only
Account	Account - Counterparty Chosen from lookup Account
Paper case	Paper case Chosen from lookup Paper Case

Field	Description
Owner *	Owner Chosen from table Employee Mandatory field
Status bar	
	By default Active See more in section 6.1
Description *	Text field Mandatory field
Tab Documents	
Record keeping documents	Record keeping documents (detail) Chosen from section Record keeping
Tab Access management	
Access rights settings	Access rights settings (detail)
Tab Audit	
Created by	Value from table Employee Author of the entry Generated by the system automatically upon initially saving the document Read only
Created on	Date and time of creation Generated by the system automatically upon initially saving the document Read only
Modified by	Value from table Employee Last person who modified the entry Generated by the system automatically each time upon saving the document Read only
Modified on	Date and time the entry was last modified Generated by the system automatically each time upon saving the document Read only
Record keeping status history	History of amendments (detail) Displays all history of amendments done to this document
Tab Feed	
	The tab displays chat history among the employees regarding this document

3.   Paper Cases Archive

This section is designed for paper cases in archiving, as well as for registration and further processing of enquiries for obtaining/receiving registered cases. The section is of a standard structure which is not subject to amendments in comparison to basic version.
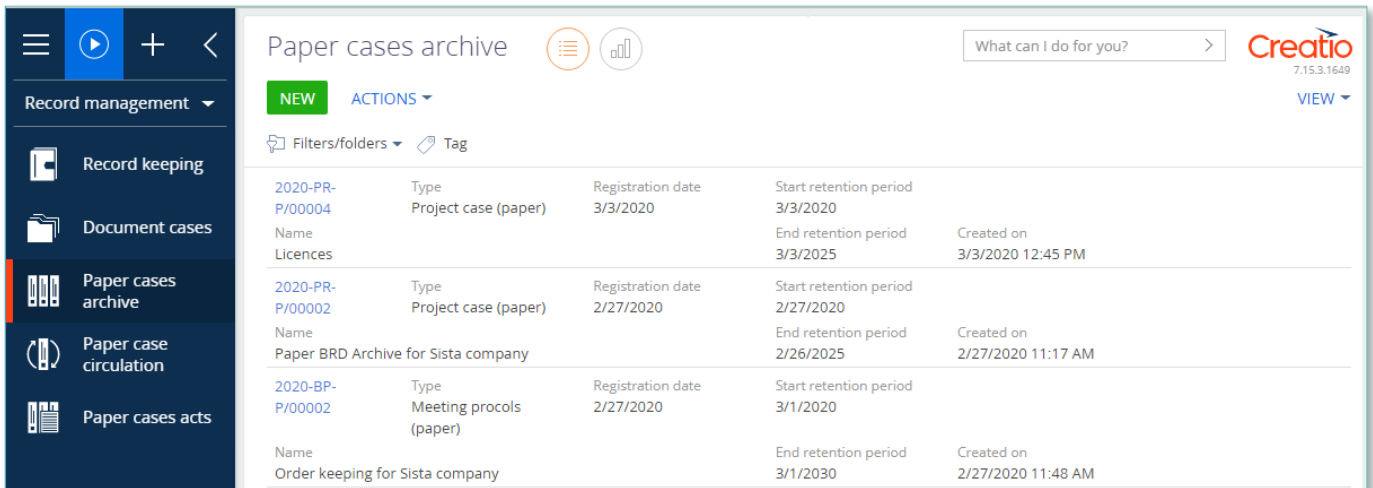

Image 3. Archive of paper cases

A card of archive case consists of a set of general data fields and several tabs. To create a new entry, click **NEW** and fill in the fields in the page.
The list and description of fields is provided below:

Field	Description
Profile fields	
Registration date	Case registration date; value from the calendar
Number	Full document number Generated automatically by the system according to mask upon first saving Read only after first saving
Type*	Document type Value from lookup Paper cases archive types Read only after first saving
Status*	Case status Value from lookup Paper cases archive statuses
Barcode	Value of sticker barcode on the document
Document case	Number of document case Value from lookup Document case
Tab General	
Description*	Short description

	Text field, maximum 250 characters
Reference documents	Documents to which this document is referring (Detail)
Tab Circulation	
	Tab displays history of issuing of the case
Tab Audit	
Created by	Value from table Employee Author of the entry Generated by the system automatically upon initially saving the document Read only
Created on	Date and time of creation Generated by the system automatically upon initially saving the document Read only
Modified by	Value from table Employee Last person who modified the entry Generated by the system automatically each time upon saving the document Read only
Modified on	Date and time the entry was last modified Generated by the system automatically each time upon saving the document Read only
Tab Feed	
	The tab displays chat history among the employees regarding this document

Configurable lookups

The system provides several configurable lookups which are used upon filling in the document:

- Paper case issue status
- Paper cases archive types

4.   Paper Case Circulation

This section is design for control and management of issued cases (persons in charge, term of returning), as well as generating reports on the lists of cases issued to a particular employee.

The section is of a standard structure which is not subject to amendments in comparison to basic version.

The standard view of the registry of this section is provided below:

Image 4. View of Paper Cases Circulation section

A card of control of case circulation consists of a set of general data fields and several tabs. To create a new entry, click

NEW and fill in the fields in the page.

NB!
Field Issue date is generated automatically as a current date.

The list and description of fields is provided below:

Field	Description
Profile fields	
Paper case*	Case number Value from table Paper cases archive Read only after first saving
Issue date*	Case issue date Value from calendar Read only after first saving
Return date (planned)*	Date of return (planned) Value from calendar
Return date (actual)	Date of return (actual) Value from calendar
Employee	Employee that ordered the case

Field	Description
	Value from table Employee
Status	Status Value from lookup Paper case issue status
Tab General	
Description*	Description of reason for issuing a case Text field, maximum 250 characters
Issued documents	Issued documents (Detail) Can add several documents Value from table Record keeping
Reminders	Reminders (Detail) A note to remind to the author Reminder date for the person in charge; value from the calendar A note to remind to the receiver Reminder date for the receiver; value from the calendar
Tab Audit	
Created by	Value from table Employee Author of the entry Generated by the system automatically upon initially saving the document Read only
Created on	Date and time of creation Generated by the system automatically upon initially saving the document Read only
Modified by	Value from table Employee Last person who modified the entry Generated by the system automatically each time upon saving the document Read only
Modified on	Date and time the entry was last modified Generated by the system automatically each time upon saving the document Read only
Tab Feed	
	The tab displays chat history among the employees regarding this document

Configurable lookups

The system provides several configurable lookups which are used upon filling in the document:

- Paper case issue status

5.   Paper Cases Acts

This section is designed for registering acts about activation of seizure or destruction of cases stored in archive, as well as for coordination of seizure and destruction. The section is of a standard structure which is not subject to amendments in comparison to basic version.

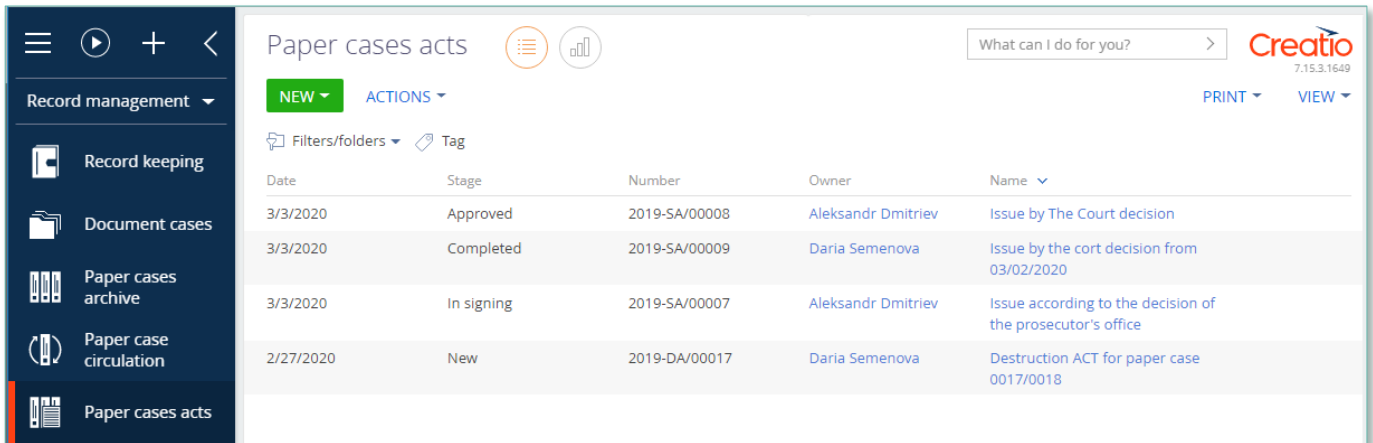The standard view of the registry of this section is provided below:

Image 5. Act of extraction and destruction of paper case

The act of seizure or destruction of a paper case consists of a set of general data fields and several tabs. To create a new entry, click **NEW** and choose the type of act – for seizure or destruction, and fill in the fields in the page. After obtaining status Approved, one should physically seize the document or destroy it and manually set the status Completed. In paper cases archive the seized or destroyed case will be labelled accordingly.

The list and description of fields is provided below:

Field	Description
Profile fields	
Number	Act number Value is generated automatically Read only after first saving
Date*	Date of creation of the act Value is generated from the calendar with a current date, Read only
Owner*	Employee who is creating the act of the case Automatically filled in with act author's data; can be changed to a value from table Employee
Tab General	
Description	Act description Text field, maximum 250 characters
Paper cases	Paper cases, regarding which seizure or destruction should be carried out through an act (Detail) Can add several documents Value from table Paper cases archive

Tab Attachments and Notes	
Attachments	Files (Detail) In details field one can place files and links
Notes	Text field for saving notes to the act
Tab Audit	
Created by	Value from table Employee Author of the entry Generated by the system automatically upon initially saving the document Read only
Created on	Date and time of creation Generated by the system automatically upon initially saving the document Read only
Modified by	Value from table Employee Last person who modified the entry Generated by the system automatically each time upon saving the document Read only
Modified on	Date and time the entry was last modified Generated by the system automatically each time upon saving the document Read only
Tab Approvals	
Approvals	Approval (Detail) Detail intended for carrying out approval to the inquiry. Approval process is in details described in section 6.5
Signers	Possibility to add a participant to approval from table Contact, specifying the sequence. The sequence will determine the order in which the participants will receive voting invitations one by one.
Tab Feed	
	The tab displays chat history among the employees regarding this document

Configurable lookups

The system provides several configurable lookups which are used upon filling in the document:

- Paper cases archive statuses
- Paper cases archive types

6. Configurable System Details

6.1. Status change process

In sections where the workflow implies change of statuses, there is a special element on the page – status bar. It helps you to see in what status is the entry at any given time and quickly switch from one status to another. It helps to keep better focus on moving forward and makes the work more intuitive and simple.

Depending on the chosen status the colour of the status bar may change.

NB!
Status bar setup is carried out in case designer.

In order to process a query use the status bar and action panel, which you can see in the upper side of the inquiry page. Move forward in the process or case, using status bar.

Change the status of the query using Status bar.
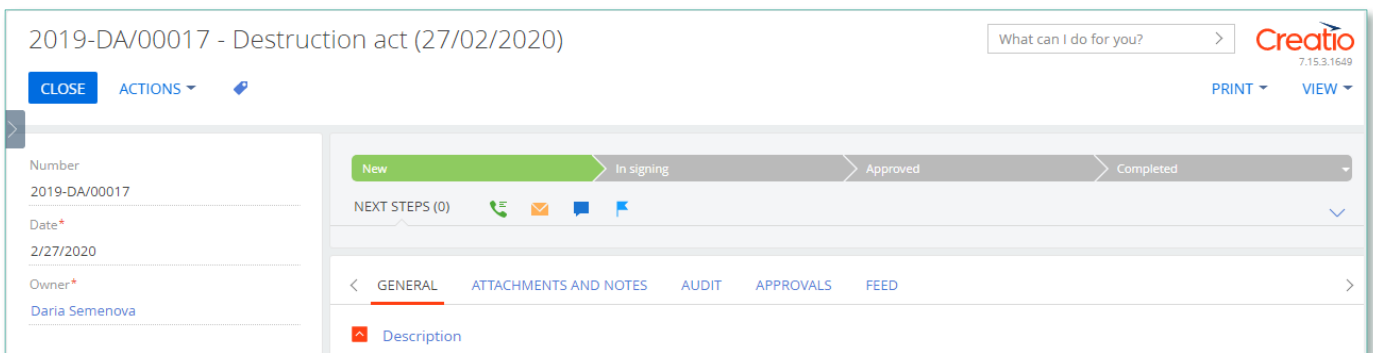
Image 6. Document status change

The order of switching from status to status is determined in the settings of each type of document. The change of status is duplicated to the field Status.

6.2. Attachments and notes

To work with additional materials in entries of the sections, the system is using a detail Attachments. This detail is available in every section of the system.

In the Attachments detail you can use the following display options:

tile view. Use it to display files and links to details as icons. The image of the icons will differ depending on the file extension.
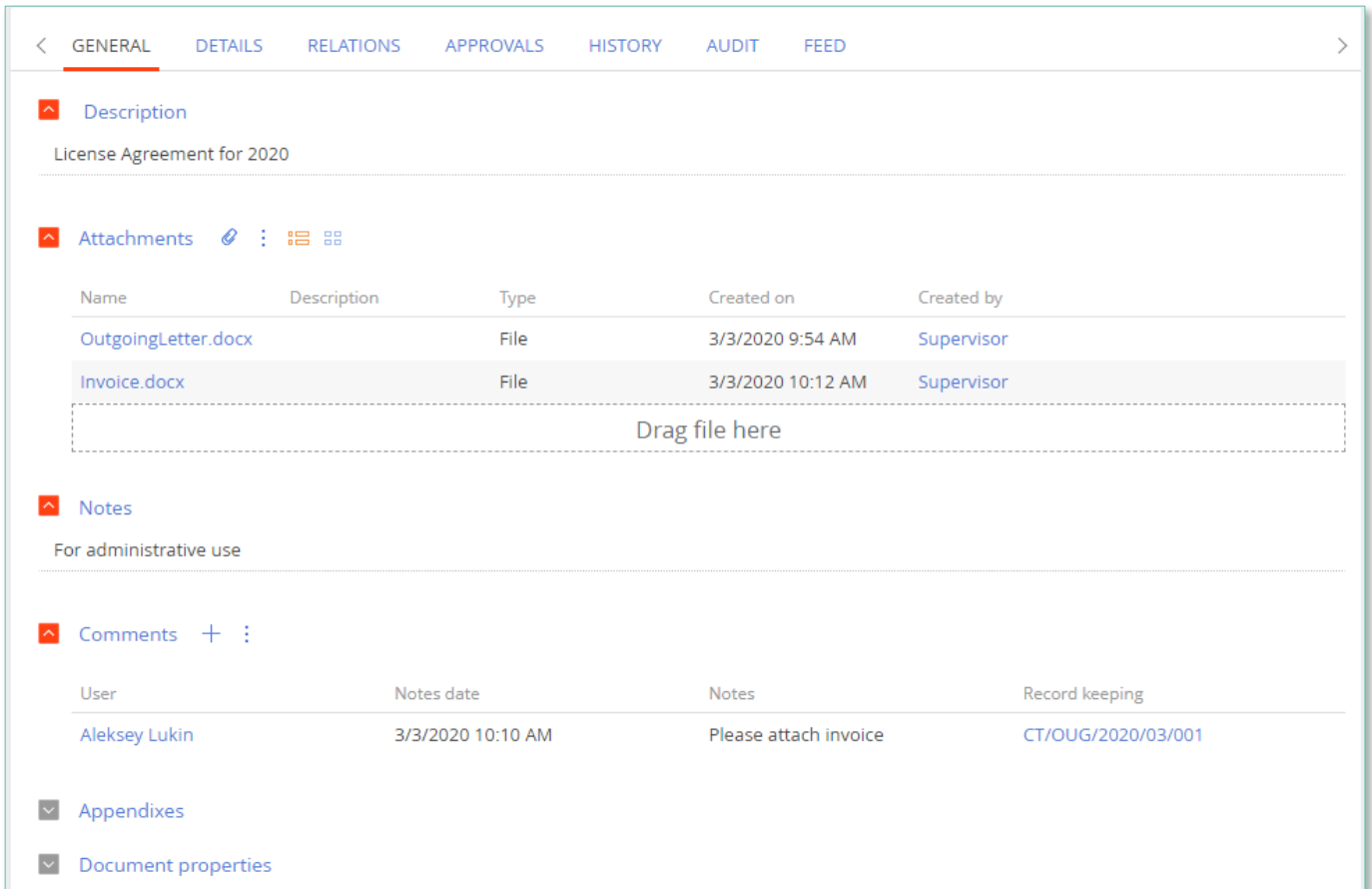
NB!
Icons for various types of files can be set in the lookup [File extensions]. For the files having no defined type in this lookup, the system shall use default icon.

list view. In this view one can see all entries in the detail as a list of entries. Use this view if you need to delete a file or edit a link.

6.3. Details

The details are located in the form and are designed for storing any additional information. You can open and close the detail by clicking

Image 7. View of details in the form

One can add and configure the information to be displayed in detail by clicking ⋮ through action Columns setup.
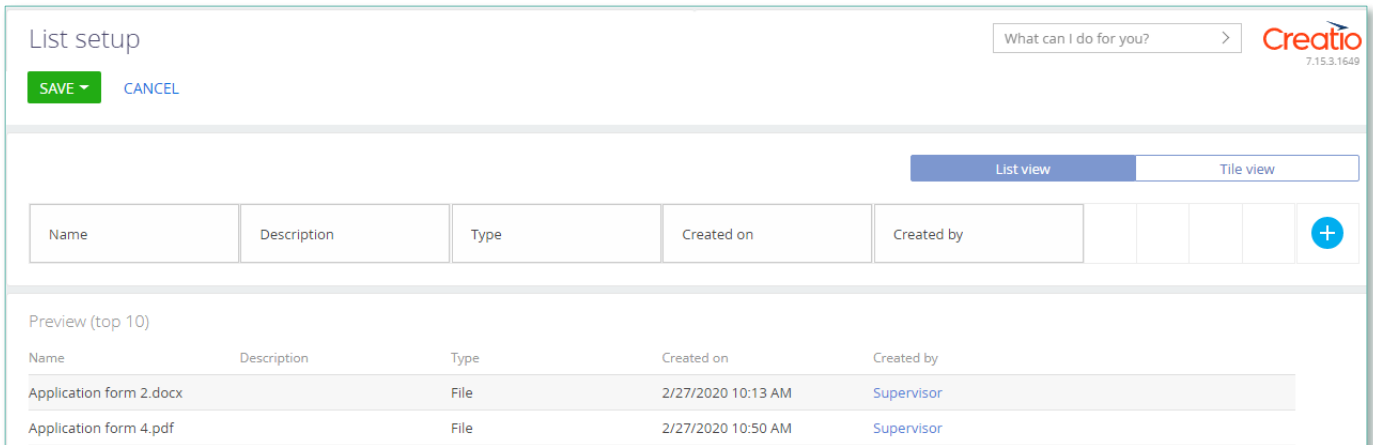
Image 8. Setup of information to be displayed in detail

User can individually change the sequence of columns and add new ones.

Administrator can set up and save the sequence and sets for all users. Administrator can change the arrangement of details in the form.

One can add a new document by clicking ╋ and filling in the form.

6.4. Setting up access rights

You can control access to certain operations with the entries. There are three groups of such operations: Read, Edit and Delete. For example, access to operation "Read" means the user or group of users can view the entry in the section or on the entry page. For each operation there are two levels of access:

- Granted — right to execute the operation of reading, amending or deleting an entry.
- Granted/delegation permitted — the right to execute operations with the entry, as well as the right to control access to this operation.

NB!
Absence of any level of access means absence of access to the entry. By default the user who created the entry has the right to execute and delegate all the operations with the entry. Access to the entry created by you is set by default and configured by the system administrator.

In order to start managing access to the entry, open the page of this entry and in Actions menu choose Set up access rights.

6.5. Approval process

Adding approvals is carried out in tab Approvals. The view of the page is provided below:
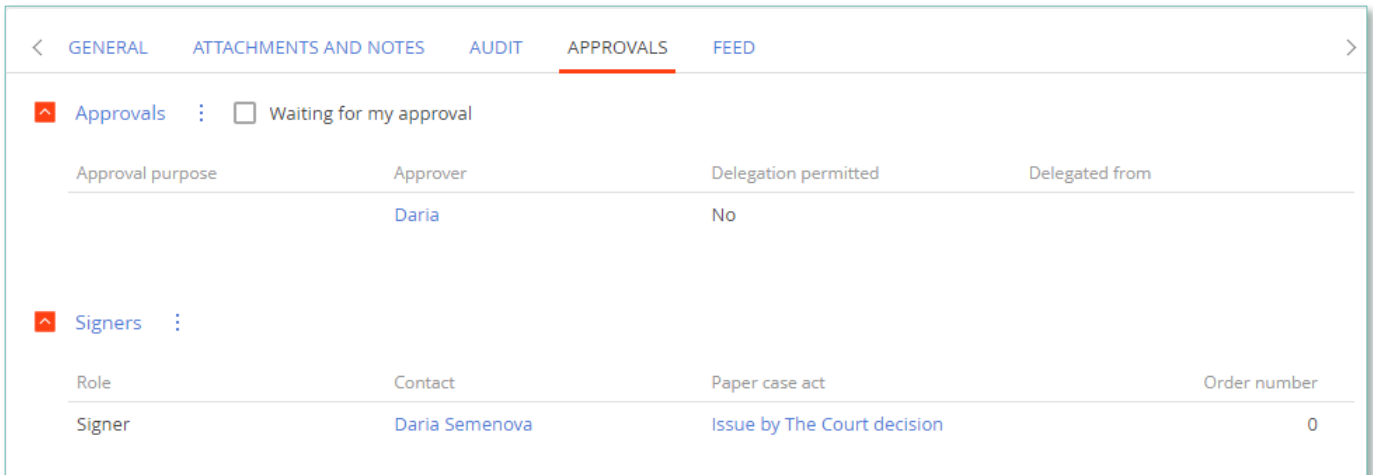
Image 9. Approval page view

Actions in the detail:

Approve – an action available only for users appointed by the approving person. Upon carrying out this action, a page is opened where approver can add a comment. After clicking "OK" the status of the approval shall automatically change to Positive.

Reject – the action is available only for users appointed by the approving person. Upon carrying out this action, a page is opened where approver can add a comment. After clicking "OK" the status of the approval shall automatically change to Negative.

Change approver – the action is available only for users appointed by the approving person. Upon carrying out this action a page will open to appoint a new approver (field Approval participant). After clicking "OK", the value in the field Participant will automatically change to the new value.

Adjustable fields:

Field	Description	Type
Contact	In this field the approving person is registered	Lookup (lookup Contact)
Role	A sign indicating the role of the approving person	Lookup (lookup Record keeping related employees role)
Order number	Order number of the approving person. In this precise order the persons in charge of approval will receive the notifications.	Number

Attention!
Upon adding new approval process an automated email notification is sent to the approving contacts, while the condition of inquiry for amendments is set from the system settings «Change Approval Status».

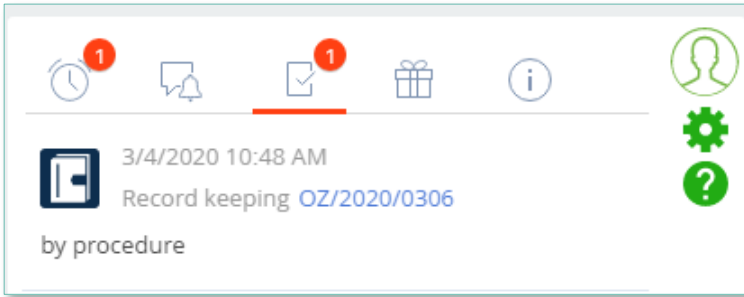Also the person in charge of approval shall receive a notification on communication panel.

Image 10. Notification on communication panel

6.6.   Creating an appendix

New appendix to the document can be created by clicking COPY in section Record keeping.
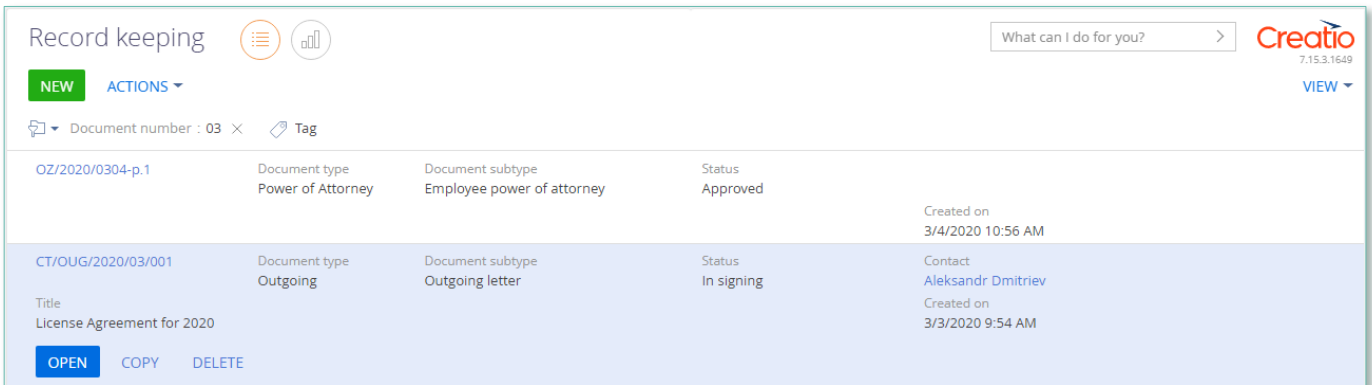

Image 11. View of Record-keeping section in a form of a list

A new appendix to the document is created and it is given next index number in the fields External number and Document Number. The information from the profile fields is copied to this new document.

6.7.   Setting up a workplace

In order to set up a workplace, go to System Designer -> Workplace setup -> Record management –> Open
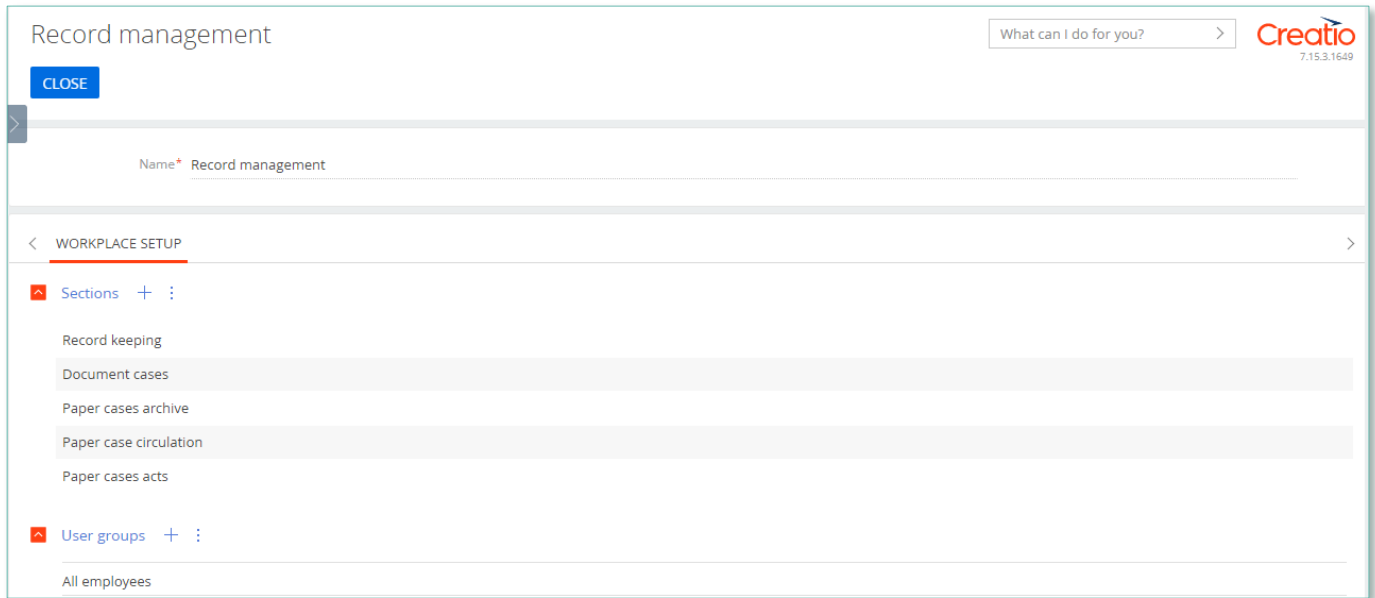
Image 12. Adding a workplace

In the detail User Groups one should add the previously created organizational roles. Having saved the data, one should log out and log in to Creatio system in order for the changes to take effect and the workplace rights to appear.