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NormaDocs for Creatio

Libraries of Normative Documents and Reports

Version 1.0

Admin's Manual





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1. Introduction

Application NormaDocs 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 groups Normative documents and Reports are 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 NormaDocs 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 NormaDocs for 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 NormaDocs for Creatio are grouped in a separate branch. The folders are named according to sections: Normative documents и Reports.

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 2.1.
- Open settings — opens a page for editing the lookup settings specified when registering a lookup **Error! Reference source not found..**

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).

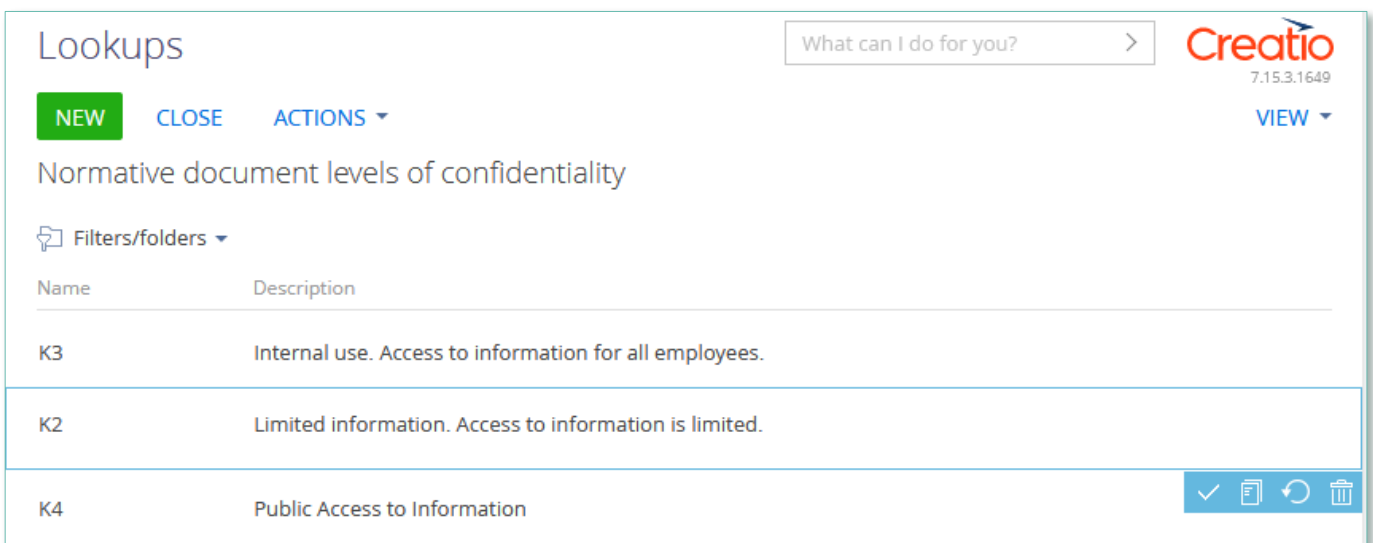


Image. 1. Saving changes in a lookup list of records



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 scheme 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 Normative Documents	
Normative document types	Standard lookup Contains fields: Name, Code Value in field Document type
Normative document business processes	Standard lookup Contains fields: Name, Description, Parent, Code In this lookup a list of business processes is set for choosing from fields Business process group, Business process и Responsible in tab Details
Normative document relation type	Standard lookup Contains fields: Name, Description, Reverse type
Normative document status	Standard lookup Contains fields: Name, Description
Normative document levels of confidentiality access	Standard lookup Contains fields: Levels of confidentiality, Company, Reader access, Editor access Defines level of access rights to this document in the company
Normative document levels of confidentiality	Standard lookup Contains fields: Name, Description Value in field Confidentiality level




Lookup	Description
Tab Reports	
Reports statuses	Standard lookup Contains fields: Name, Description Value in field Status
Reports periods	Standard lookup Contains fields: Name, Description Value in field Periods
Reports themes	Standard lookup Contains fields: Name, Description, Code Value in field Theme
Reports submission deadlines	Standard lookup Contains fields: Name, Description Value in field Deadline for submission

2.4. Description of non-standard lookups

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

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	The template displays the template text. If the template is localized, different tabs are used to display its text in different languages. The  button in the top right area of the template enables adding new language tabs. Each tab contains: <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.

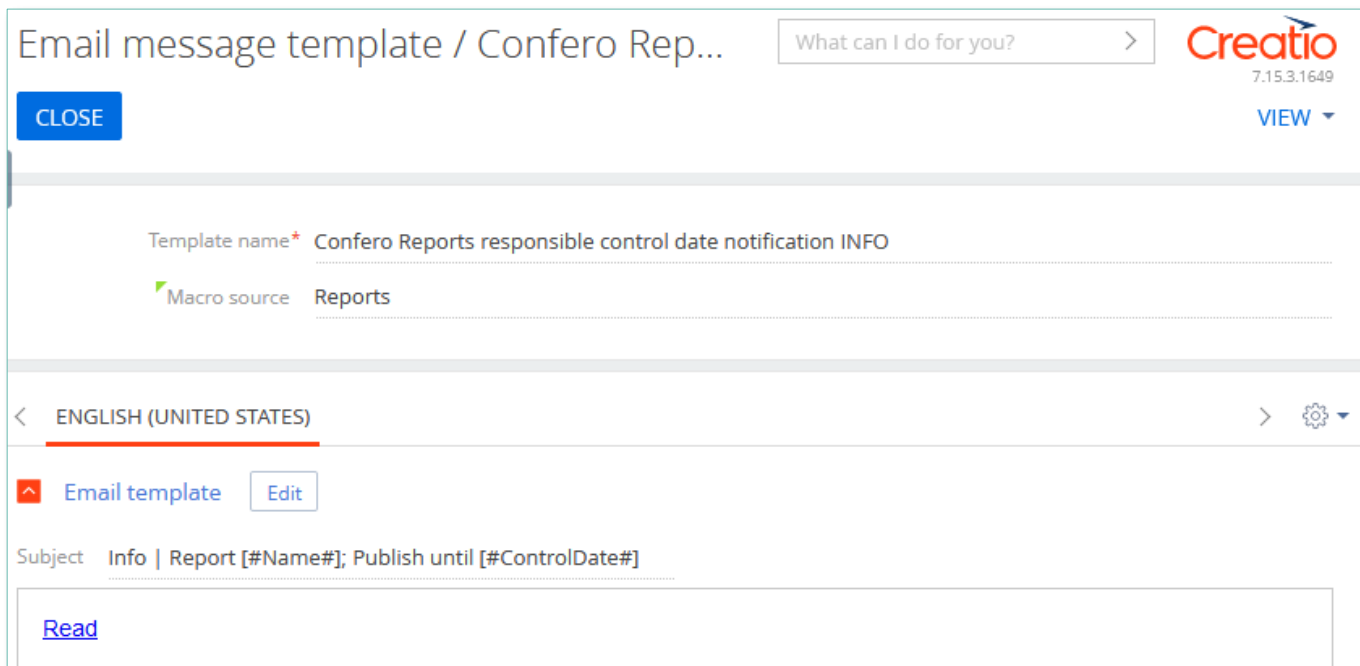


Image. 2. Template Confero Reports responsible control date notification INFO

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

Template	Subject
Confero NDB external regulation followers notification INFO (US)	Info External regulation [#CfTcName#]; Updated
Confero Normative document approval INFO (US, RU)	Info Normative document approval; [#NormativeDocument.DocumentNumber#]; [#Status#]
Confero Normative document approval To Do (US, RU)	To Do Normative document approval; [#NormativeDocument.DocumentNumber#]
Confero Reports followers notification INFO (US)	Info Report [#Name#]; [#Status#]
Confero Reports responsible control date notification INFO (US)	Info Report [#Name#]; Publish until [#ControlDate#]



3. Section System settings

The System settings section is designed for managing additional Creatio settings. For example, here you can assign a color 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. The 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 color 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 NormaDocs for Creatio. The settings for NormaDocs for Creatio are grouped in a separate branch. The folders are named in accordance with the section: Normative documents, Reports.



Name	Code	Note
Tab Normative Documents		
Normative document approving process	CfTcNormativeDocumentVisaProcess	Process of work environment in the package Setting from lookup
Normative document archived document status	CfTcNormativeDocumentArchiveDocumentStatus	Value by default Setting from lookup
Normative document appendix number mask	CfTcNormativeDocumentAppendixNumberMask	Meeting protocol excerpt number format {0}.{1:000}.p.{2:00}/{3}-{4:00}
Normative document short number mask	CfTcNormativeDocumentShortNumberMask	Format of short number of normative document {0}.{1:000}/{2}
Normative document short link template	CfTcNormativeDocumentShortLinkTemplate	Value by default Link Text field
Normative document actual document status	CfTcNormativeDocumentActualDocumentStatus	Value by default Setting from lookup
Normative document cancelled document status	CfTcNormativeDocumentCancelDocumentStatus	Value by default Setting from lookup
Normative document accepted document status	CfTcNormativeDocumentAcceptedDocumentStatus	Value by default Setting from lookup
Normative document default document status	CfTcNormativeDocumentDefaultDocumentStatus	Value by default Setting from lookup
Normative document appendix short number mask	CfTcNormativeDocumentAppendixShortNumberMask	Format of short number of appendix of normative document
Normative document external regulation followers notification process	CfTcNormativeDocumentExtRegulationNotification	Value by default Setting from lookup



Name	Code	Note
Normative document number mask	CfTcNormativeDocumentNumberMask	Format of normative document number
Mailbox for sending email with information on approval NDB	VisaNDBMailboxSettings	On whose behalf the emails will be sent
Tab Reports		
Reports notification control days before	CfTcReportsNotificationControlDaysBefore	Value by default Counting number
Reports followers notification process	CfTcReportsFollowersNotificationProcess	Value by default Setting from lookup
Reports archived status	CfTcReportsArchivedStatus	Value by default Setting from lookup

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.