CONFERO

ServicePoint for Creatio

Add-on providing registration of user requests

Version 1.0

User's Manual

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1. Document Services

This section provides registration of user requests related to record keeping processes, for example, request for a new report, request for issuing a paper case from the archive, request for access rights to a document, request to creating a new edition of a normative document etc. It is assumed that a user shall send a request in a few form to a certain email address, which will automatically generate a new entry in the register Document Services. After that an employee in charge shall forward the entry to an assigned specialist.
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:
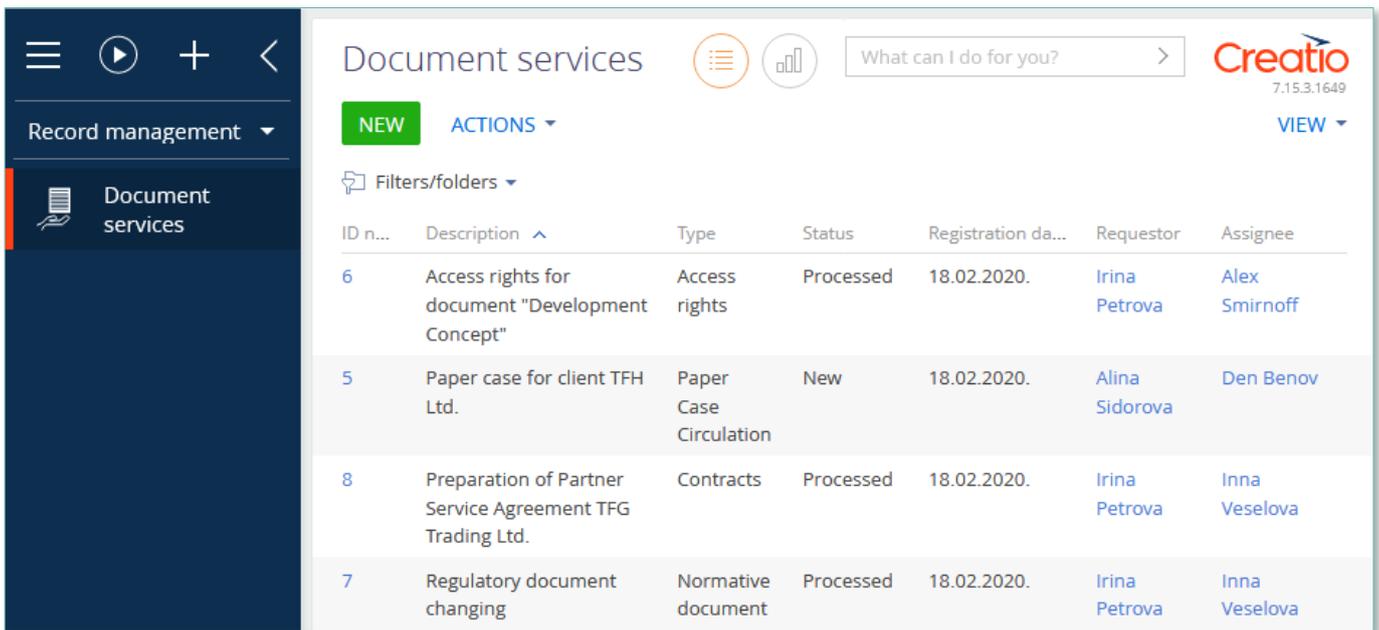
Image 1. Document services section view

Document request 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.

List and description of fields is provided below:

Field	Description
Profile fields	
ID number	Request number Generated automatically
Type *	Request type Value from lookup Document services types
Account	Value from section Account
Requestor	Value from section Requestor
Assignee	Value from section Assignee Depends on the selected Assignee group

Registration date *	Value from calendar
Status *	Status Value from lookup Document services status By default New
Request origin	Value from lookup Document services origin
Caller	The employee that placed a request Value from section Contact
Assignee group *	Group of assignees in charge Value from lookup System administration object In case the request is generated from the email, then the field is automatically filled in from the setting Assignee group by default in lookup Document request types All assignees from the Assignee group will receive a notification via email
Tab General	
Description	Text field
Information *	Text field
Planned due date	Value from calendar
Document service properties	Document service properties (Detail) The properties in the types of document service requests To be filled in through mini-form Document service properties Properties available for the type of service are indicated in lookup Characteristics in document services type Automated fill in of properties is available upon generating a service (see 2.7)
Activities	Activities (Detail) Shows all activities related to this document
Email	Email (Detail) Shows all the emails related to this document
Tab Attachments and notes	
Attachments	Attachments (Detail) Files are placed on the detail The form displays values: file name, annotation, type, date of placing and the author of the entry
Notes	Text field
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 principal configurable lookups which are used upon filling in the request:

- Document service origin
- Document service types
- Document service status
- Characteristics in document services type
- System administration object usage

2.   Configurable system elements

2.1.   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.
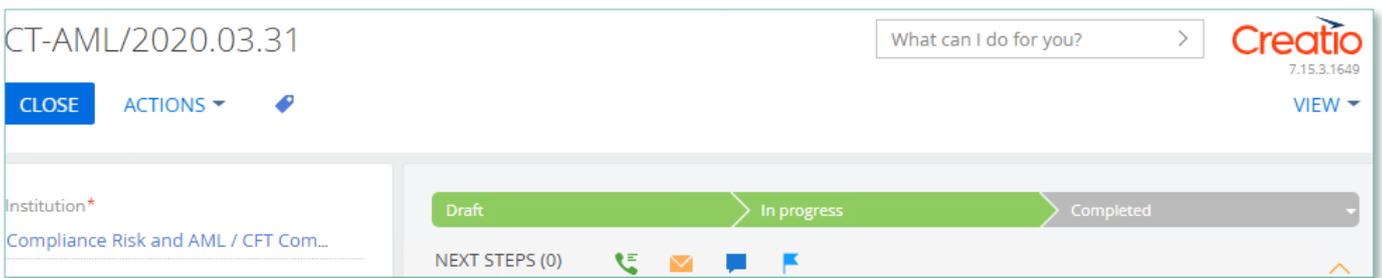
Image 2. Document status change

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.

2.2.   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.

2.3. 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
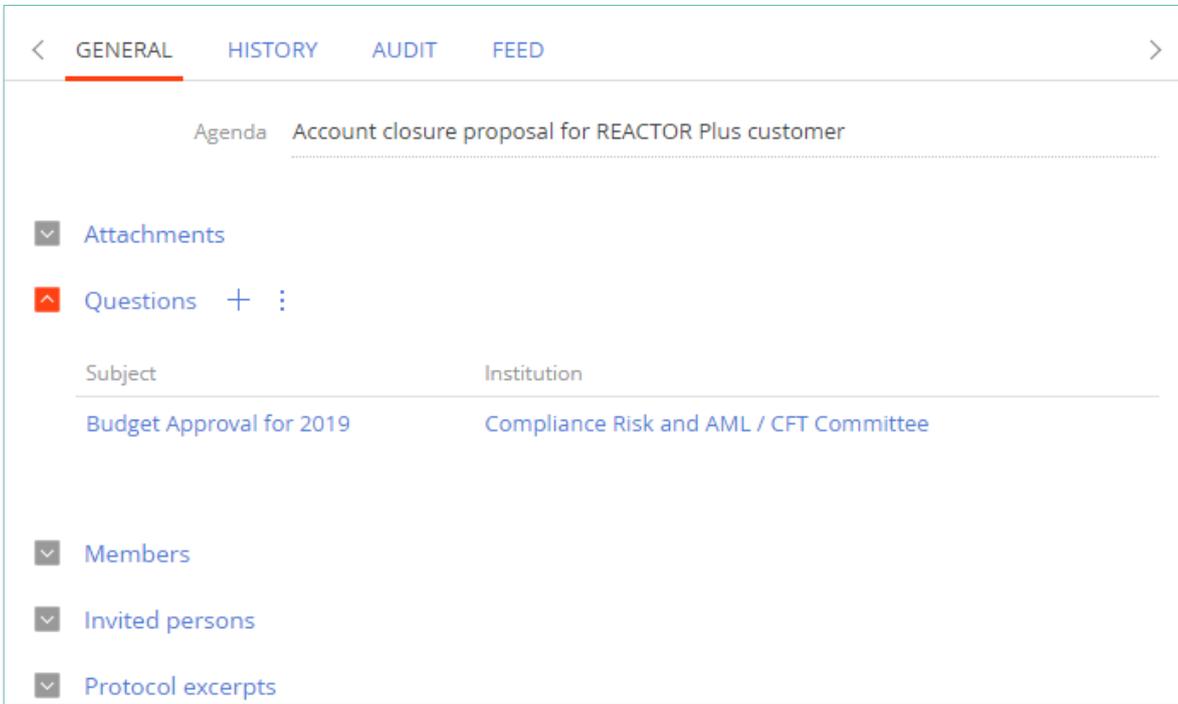
Image 3. View of details in the form

One can add and configure the information to be displayed in detail by clicking ⋮ through action Columns.
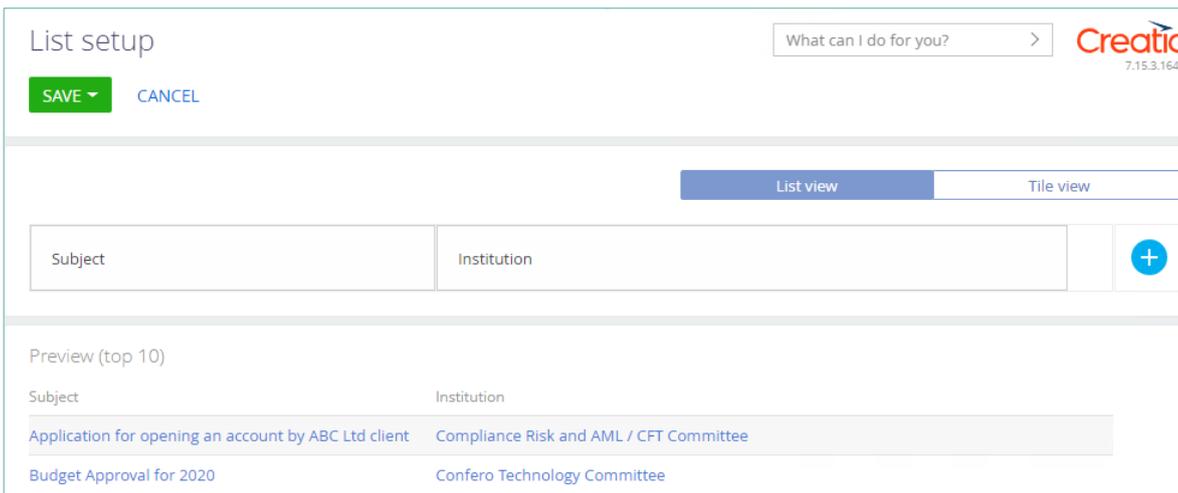
Image 4. Setup of information to be displayed in detail

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.

2.4.   Set 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.
- 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.

2.5.   Attributing access rights according to Assignee Group

In system settings in section Users and administration in subsection Organizational roles there is a tree-type organisational structure of the company consisting of the organizational roles, as well as information about chosen organizational role. All users belonging to this organizational role inherit the access rights set up for this role.
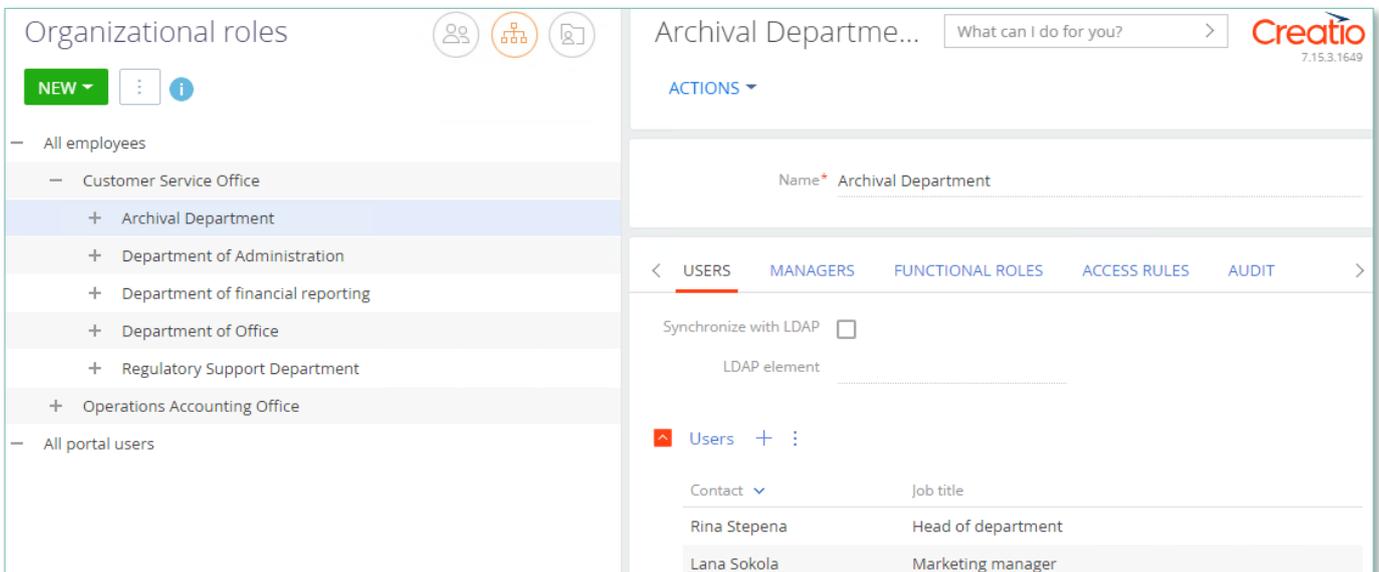
Image 5. Setup of Organizational role

Then in order for the Organizational role to be displayed in field Assignee group, one should set value Yes in columns "Is manager group" and "Is responsible department" in lookup System administration object usage.

Image 6. Setup of System administration object usage

Access rights to a particular Document service can be reassigned in the course of execution process.

Image 7. Document service request form

Upon changing the Assignee group, the access rights to the Document service request will automatically change. The new Assignee group for executing the document service is entered on the detail Edit and Delete, and the rights of the previous group are deleted, leaving it with reading rights only.
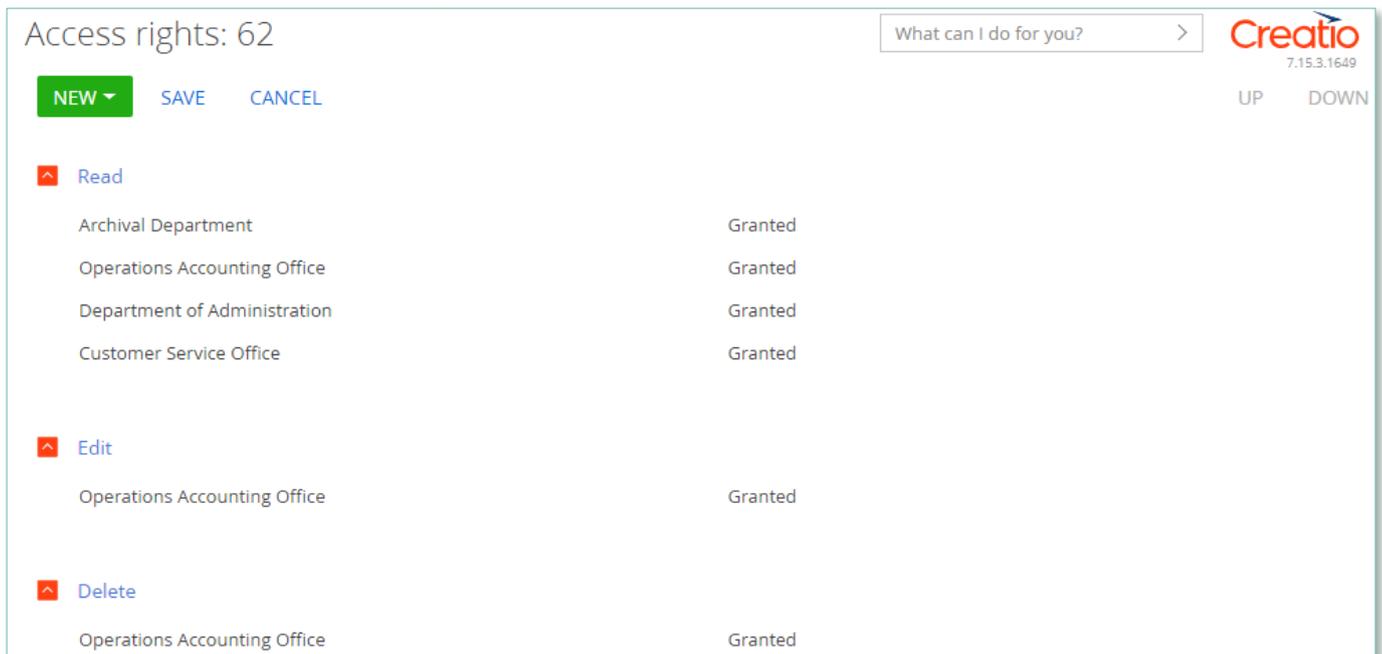
Image 8. Setup of access rights to Document service

Also all employees from the new Assignee group receive notification by email about that they are not in charge of execution of the document service.

2.6. Creating a new request

Request for a service is created as follows:

1. Click **NEW** in section Document services
2. Send an email indicated in the lookup in the folder / Document services - Document services types. A separate email should be indicated for each type of request.

Image 9. Setup in lookup Document services types

A new Document service will be automatically generated with the following fields filled in automatically:

- ID number – order number of section Document services
- Registration date – date of receiving the email
- Status – by default: New
- Description – information from the email description
- Information – information from the email subject
- Attachments and notes – fill in if there are attachments in the email
- Type – choose depending on that to what address the email was sent. Setup in the lookup Document services types
- Document service properties – in this detail fill in the properties linked to this type of request from the lookup Document services types
- Assignee group – to be filled in from setup in lookup Document Service Types
- An email is sent to assignees from the field Assignee group

2.7.   Automated adding of characteristics

Upon generating a new request there is an option to automatically add characteristics. If there is a mark Yes in the checkbox Add by default in the lookup Characteristics in document service types, then the characteristic will be added upon initial saving of the service request.

Lookups

What can I do for you?   >

Creatio
7.15.3.1649

NEW   CLOSE   ACTIONS ▾   VIEW ▾

Characteristics in document services type

⬚ Filters/folders ▾

Characteristic	Document services type	Add as default
Author	Access rights	No
Contract valid to	Reports	Yes
Delivery date	Access rights	Yes
Report to Regulatory	Contracts	Yes
Contract valid from	Normative document	Yes
Financial loss	Access rights	No

Image 10. Adding characteristics by default