# nuxeo

# Nuxeo CMF 1.x

**User Guide** 

# **Table of Contents**

1. Nuxeo CMF User Guide	
1.1 Nuxeo CMF concepts	3
1.2 Browsing Nuxeo CMF	4
1.3 Searching Nuxeo CMF	6
1.4 Working with mailboxes	10
1.4.1 Create a mailbox	
1.4.2 Delete a mailbox	
1.4.3 Manage a mailbox	
1.5 Working with cases	
1.5.1 Creating a case	
1.5.2 Editing a case	
1.5.3 Distributing a case	19
1.6 Working with routes	
1.6.1 Creating a route	
1.6.2 Adding steps to a route	25
1.6.3 Editing a route	
1.6.4 Validating a route	28
1.7 Working with classification folders	29

# **Nuxeo CMF User Guide**

Nuxeo Case Management Framework is a framework based on our open source ECM platform Nuxeo Enterprise Platform (EP). It enables you to create applications dedicated to management of documents composed of items that evolve by being transfered to different persons responsible for their review or approval. A case can be for instance: a loan case composed of the different documents required for loan processing; a mail envelope with one or several documents; a legal case, etc.

Based on Nuxeo Enterprise Platform (EP) - like all Nuxeo ECM solutions - Nuxeo Case Management uses some principles of the Nuxeo Document Management (DM) application, such as access rights management inside filing folders, user and vocabulary management, relations creation, etc. References to the Nuxeo DM User Guide for these common features are available in this guide.

Download

Download this documentation in PDF.

#### In this user guide:

- Nuxeo CMF concepts
- Browsing Nuxeo CMF
- Searching Nuxeo CMF
- Working with mailboxes
  - Create a mailbox
  - Delete a mailbox
  - Manage a mailbox
- Working with cases
  - Creating a case
  - Editing a case
  - Distributing a case
- Working with routes
  - Creating a route
  - Adding steps to a route
  - Editing a route
  - Validating a route
- Working with classification folders

# Nuxeo CMF concepts

Nuxeo Case Management Framework (CMF) is a framework that allows you to create and distribute cases and their content. Being a framework, it can be used as a technical basis for the development of case-centric applications such as mail or invoice management applications. Nuxeo CMF also includes many end-user features that are directly accessible from your web browser. As you work with Nuxeo CMF, you will use some concepts that are explained here.

# Mailboxes, Cases, Case items, Classification folders

A case item is a simple document composed of an optional attachment, or textual content, and metadata.

A case is a folder-like document that holds one or several case items.

Cases are created, edited, distributed and stored in folders called mailboxes which can belong to a single person (personal mailbox) or to an entity (generic mailboxes).

To help users organize case processing, Nuxeo CMF features classification folders, where users can organize cases received in their mailboxes.

Typically users have access to one or several mailboxes which are used for case transfer and storage. Inside a mailbox user can edit the received cases by filling in their metadata, or adding for instance a new case item to the case. If needed the case can then be distributed to other users or entities, who in turn can receive the case in their own mailboxes.

Here are some examples of domains where case management can be applied:

In a correspondence application the case is an envelope that can hold one or several documents. This envelope can be transferred to one or several mailboxes related to email recipients.

In the insurance domain, a case can be a car accident case. The case items would be the car accident report, the insurance contracts of involved persons, photos of the accident, and all other pieces added to the case being qualified. The mailboxes could then be matched against the services of the insurance company.

# **Distribution and routing**

Cases are created in a mailbox and can be completed by different users. To enable other users to edit and complete the case, the creator of the case or the first recipient can either:

- use a simple distribution, sending the case to selected mailboxes,
- or apply a route to the case, sending the case to selected mailboxes while creating tasks for the recipients (on Nuxeo CMF 1.7).

Copyright © 2010-2016 Nuxeo.

# **Access rights**

Not all application areas are accessible to all users.

#### Access to mailboxes

When users have access to a mailbox, they have access to all the cases inside the mailbox and can manage the mailbox: they can see and edit the cases in the mailbox, edit and manage the mailbox, and grant other users access to it.

#### Access to classification folders

Users can be granted different rights to classification folders. Those rights allow them to perform various actions:

Right	Actions available
Read	Consult cases and sub-folders
Classify	Create folders Classify cases in the folder Unclassify cases + Read actions + Remove actions
Remove	Delete folders
Manage	Manage access rights Set alerts for other users Manage deleted documents + write and read actions

#### Access to cases

Users get access to cases and case-items in two ways:

- because they have access to a mailbox in which the case is available: they can then edit, distribute and classify the cases;
- because they have access to a classification folder in which the case is classified: in this context they only have viewing rights on the case.

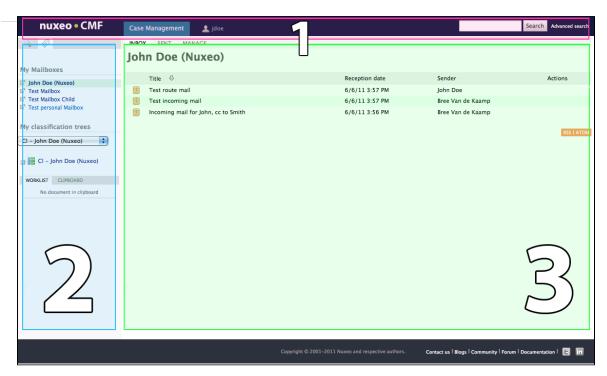
In both cases, the same rights are applied to the case and to all its items.

Cases and case items are shared by all users who can access them. This means that whatever the mailbox or the classification folder you consult the case or the case item from, you will always see the latest version of the case, even if it was modified from another mailbox or classification folder.

# **Browsing Nuxeo CMF**

# Nuxeo CMF User Interface

Nuxeo CMF 1.0 to 1.6 User interface is divided into 3 main parts:



#### 1. The page header

This is where you can access the quick and advanced search.

- On Nuxeo CMF 1.0 to 1.6, you can also access your dashboard and the users and groups directory.
- On Nuxeo CMF, you can access your personal workspace, from which you can create routes.

#### 2. The left pane

The left pane gives you access to:

- your mailboxes
- your classification folders
- the tag cloud to browse cases by tags,
- the case item type virtual navigation to browse case items by type
- the faceted search form.
- The wordlist/clipboard that enables you to copy, paste, move cases,
- The case tree that displays the structure of the current case (from Nuxeo CMF 1.7).

#### 3. The content area

In this part of the screen you can see the selected content, depending on where you clicked. This would be:

- · the selected mailbox content,
- the selected case item,
- the advanced search form,
- the search results,
- the classification folders content.

## Browse your mailboxes

The list of all the mailboxes you have access to is displayed in the **My mailboxes** box in the left pane. To browse the content of a mailbox, click on the mailbox's name. You see the mailbox tabs and the list of cases available in the mailbox.

My Mailboxes	
Olivia Jones (Company A)	
Production	
Image: Background State St	

## Browse your classifications folders

The list of all the classification folders you can access is available in the **My classification trees** section of the left pane. This displays the different classification trees you can access, and the structure of the selected tree. Click on the folder you want to open to see all the cases that are classified in it.

Copyright © 2010-2016 Nuxeo.

My classification trees				
CI - Production				
CI – Production Closed projects Upcoming projects URGENT				

#### Browse cases by tags

Users have the possibility to add their own keywords to cases and case items, in order to find them more easily. These keywords are called tags, and are grouped in a tag cloud. The more cases and case items hold a given tag, the larger the tag font becomes in the tag cloud. Users can then use the tag cloud to find in a single click all the cases and case items that are tagged with this keyword.

	To browse cases and case items by tag:
1.	Click on the tab .
	The tag cloud is displayed.
2.	Click on the keyword you are interested in.
	In the main part of the screen, the list of cases and case items tagged with this keyword is displayed.
3.	Click on the case item that interest you to consult it.

# Browse case items by type

(i) The Type of case items navigation is available on Nuxeo CMF 1.0 to CMF 1.6.

When you create or edit case items, you can select the type of the case item from a list: an invoice, an article, a contract, etc. It is then possible to quickly find all the case items for which the same type was filled in, using virtual navigation.

	To browse case ite	ms by type:			
<ol> <li>In the left pane of the sc The <b>Type of case item</b></li> <li>Unfold the case item typ</li> <li>Click on the case item ty</li> </ol>	virtual navigation is displayed. e list.				
In the main part of the se	Creen, the list of case items that have t	he selected type is displa	ayed.		M Đ
Type of Case Item	Title	Modified	Author	Version	
Acknowledgement of receipt	Invoice 974764 🖉 👳	6/16/11 5:41 PM	system	Proje	ct
Certificate	Invoice 1/2 – order 763532 🖙 👳	6/16/11 5:39 PM	system	Proje	ct
Credit Credit invoice Assessment Purchase order Delivery note	Invoice 2/2 - order 763532 g* €       Paste       Delete       Copy       Add content to worklist	6/16/11 5:40 PM	system	Proje	t

# **Searching Nuxeo CMF**

Nuxeo CMF, like all Nuxeo EP-based applications, includes several means to find documents:

- Simple search
- Advanced search
  - Search results customization
    - Adding new search results columns
    - Removing search result columns
    - Changing search result sorting
- Faceted search
  - Save your faceted searches
    - Save a search

• Share a saved search

# Simple search

To be able to quickly search for documents from any page, users are provided with a simple search field in the header of all pages. When a user types a keyword in the quick search field, the CMF search engine searches this keyword in:

- the title of cases and case items,
- the content of case items (both textual content and main attachment),
- the description of cases and case items.

The simple search is actually full text search. Full text search uses stemming. The Stemming search option will return the assets containing words that have the same stem as the word you entered into the "Keywords" field.

If you enter the world "Reading", you will find the assets containing in their text metadata "Read", "reads" etc. This is not the same thing as a search with a wildcard like "\*".

This is not the same thing as a search with a wildcard like .

The application's search engine uses boolean operators, to enable you to associate keywords. The Boolean operators used by the search engine are:

- +: the word after the + symbol must be in the found documents.
   Example: you are looking for documents that must contain "Nuxeo" and may contain "release". Type release +Nuxeo.
- -: The keyword after this symbol must not be in the found documents.
   Example: you are looking all the documents referring to the Nuxeo but not about meetings. Type Nuxeo -meeting.



# Advanced search

Advanced search allows you to search documents on specific parameters.

	Т	o search do	locuments using detailed criteria:
1. Click on the	Advanced searc	h link, located	d next to the search box.
P		Search	Advanced search
2. Type your cr	teria in the Sear	ch criteria form	rm.
3. Possibly, cha		esults columns	ns.
<ol> <li>Click on the Search result</li> </ol>		n a table. Click	ck on the document's name to open it.

#### Search results customization

You can choose which informations are displayed on the results page. The default informations are the document's title, its creation date and its modification date. You can add or remove fields from search results display.

All users can customize search results columns.

Adding new search results columns

Depending on the version of Nuxeo CMF that you use, the steps to add search results columns could vary.

Click on the		ew search results column on Nuxeo CMF 1.0 to 1.6:
		ink in the top rights corner of the page. m is displayed below the Search criteria form.
▼ Search	Result Column	s
	Schema	Select a value Uid Dublincore
Title	Creation date 🤤	Modification date   Description
	Order By	Select a value
c	Order Direction	OAscending Oescending
	Advanced search	In new search results column on Nuxeo CMF 1.7: link in the top rights corner of the page. form is displayed below the Search criteria form.
The Search	Advanced search results columns for Available columns Coverage Created at Description Expire on Format Language Rights Source	link in the top rights corner of the page.
The Search	Advanced search results columns for Available columns Contributors Coverage Created at Description Expire on Format Language Rights	link in the top rights corner of the page. form is displayed below the <b>Search criteria</b> form.
The Search Search results Search result columns	Advanced search results columns for Available columns Contributors Source Subjects	link in the top rights corner of the page. form is displayed below the <b>Search criteria</b> form.
The Search Search result Search result columns Order by Search Clear 2. Select the co The new field	Advanced search results columns for Available columns Coverage Coverage Coverade at Description Expire on Expire on	link in the top rights corner of the page. form is displayed below the Search criteria form.
The Search Search result Search result columns Order by Search Clear	Advanced search results columns for Available columns Coverage Coverage Coverage Coverage Coverage Description Format Language Rights Subjects We Add Reset column selection	link in the top rights corner of the page. form is displayed below the Search criteria form.
The Search Search results Search result Order by Search Clear Clea	Advanced search results columns for Available columns Contributors Coverage Created at Language Rights Subjects Add Reset column selection Available columns d is added in the se Contributors Contributors Contributors Contributors Created at Expire on Format Language Rights Subjects	Ink in the top rights corner of the page. The displayed below the Search criteria form. Sected columns The with link The with link State Live edit link State Live edit link State Live dit link

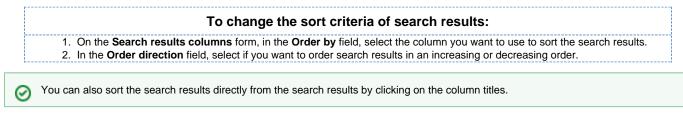
Removing search result columns

CMF 1.0 to 1.6: To remove a column, click on the icon 🥯 after the column name.

On Nuxeo CMF 1.7: To remove a column, select the column to be removed and click on the

Changing search result sorting

You can sort the results on any of the search results column. You can also change the order direction.



arrow

# **Faceted search**

Faceted search is available in the version 1.7 of Nuxeo CMF.

Faceted search is an easy way to browse the content of your application, by creating filters on the content of the application. You can filter content using:

- keywords (full text search based on stemming, see the simple search section for more details on full text search)
- dates (creation and last modification dates)
- author

(i)

- documents categorization (nature, coverage, subjects of documents)
- · location of the documents in the folders

Faceted search is available in the stab of the left hand side of the page.

	To browse the content of the application using faceted search:
	In the Faceted Search tab, fill in the form with the properties of the documents you want to browse.
	For instance, we only want the documents created by user John Doe.
2.	Click on the <b>Go</b> button.
	The documents that were created by John Doe are displayed in the content part of the page.
3.	If needed, edit your filter criteria in the faceted search form that is still available.
	For instance, let's say we only want the documents created by John Doe that are "booklets".
4.	Click on the <b>Go</b> button again.
	The list of documents matching both selected criteria is shown - the refresh happens automatically

With faceted search comes the possibility to save your searches, so you can reuse them at anytime. You can also share these saved searched to make them available for other users.

 $\odot$ 

Save

Only faceted searches can be saved.

#### To save a search:

- 1. Start a search using the faceted search form.
- 2. When you are satisfied with the results of your designated filter type a name for your search.
- 3. Click on the **Save** button.

The search is saved. It is stored in your personal workspace, in a "Saved searches" section created automatically by the system.

The new filter is now available in the Saved searches drop down list, in the "Your searches" part.

#### Save a search

When you save a search, you save the criteria of the search. This means that the results displayed when you reuse the search may be different from the results at the time you saved the search, as the content of the application may (and probably will) have changed. You can save as many searches you need. Saved searches are available in the faceted search tab, in the "Saved searches" drop down list. To load a search, just click on it in the list. It is automatically executed.

#### To save a search:

- 1. Start a search using the faceted search form.
- 2. When you are satisfied with the results of your designated filter type a name for your search.
- 3. Click on the **Save** button.
- The search is saved. It is stored in your personal workspace, in the "Saved searches" section created automatically by the system.
- It is now available in the **Saved searches** drop down list, in the "Your searches" part.

#### Share a saved search

Saved searches are stored in your personal workspace, in a Saved Searches folder that is created automatically by the system the first time you save a search. This folder is a regular folder, in which you can perform the same actions as in a folder created manually. This enables you to organize your saved searched the way you want, and to share them.

#### To share a search:

- 1. Create a folder in the "Saved searches" folder of your personal workspace.
- 2. Move the saved search you want to share in this new folder, using the clipboard or drag and drop.
- 3. Give the users you want to share the search with access to the folder. They just need read right to use the search.

# Working with mailboxes

Mailboxes are spaces where cases are managed. In mailboxes users can create cases, receive cases, edit and classify them.

In this section

- Mailbox types
- Mailbox profile
- Mailbox views
- Mailbox synchronization

#### Mailbox types

There are 2 types of mailboxes:

- personal mailboxes are mailboxes for individual users.
- By default, every user of an application built on Nuxeo CMF has a personal mailbox.
- generic mailboxes are mailboxes for groups of users, such as a unit, team or a manager group of a company or an organization.

The presentation and management of mailboxes works the same for personal and generic mailboxes.

#### Mailbox profile

Mailboxes can also have a profile. A single profile called "Case creation" ("Incoming Case Item Management" on versions prior to 1.7) is available in the default application which enables the manual creation of cases in the mailbox. Mailboxes without this profile will receive distributed cases and users will be able to perform all the actions on the documents (distribution, edition, classification), however, users won't be able to create new cases from this mailbox.

#### **Mailbox views**

Mailboxes display several different views for cases to distinguish between draft cases, sent cases and distributed cases. The views are shown as tabs.

Below you can see the currently available views:

Inbox: this tab displays all the cases distributed to the mailbox, for action and for information.

John	Doe		
Inbox	Sent Draft Manage		
	Title	Reception date 🕈	Sender
Ŷ	John Doe's HR case	6/29/10 11:28 AM	Marge Jackson
			RSS   ATOM

• Sent: this tab displays all the cases that were distributed from the mailbox.

Human Resources							
Inbox Service mailbox Sent Draft Manage							
	Reference	Title 🏺	Sender	Sent Date			
	1	John Doe's HR case	marge	Jun 29, 2010			
Paste	Delete	Add content to worklist					

• Draft: this tab displays the cases created in the mailbox and not yet sent.



• Service mailbox : this tab displays the cases distributed to the affiliated mailboxes.

mama	ii Resources		
Inbox S	ervice mailbox Sent Draft Manage		
	Title 🕈	Reception date	Sender
1	John Doe's HR c	case ⊵ <sup>∞</sup> 6/29/10 11:28 AM	M Marge Jackson
Paste	Delete Copy Add content to worklist		

## **Mailbox synchronization**

If you connect your user directory to Nuxeo CMF for user management, you may want the mailboxes to be synchronized with your user directory as well.

This enables automatic creation of mailboxes from directory groups instead of having them created manually one by one. The mailboxes are updated every time the synchronizer is run.

Synchronizing your mailboxes with your directory doesn't mean that all mailboxes will have to be created and updated by the synchronizer. You can still create mailboxes manually.

Mailboxes have a "Synchronizer state" metadata that indicates if the mailbox has been synchronized with the directory. There are 3 states available:

- synchronized: this is the state of the mailbox after it has been updated by the synchronizer.
- unsynchronized: this is the state of mailboxes created manually and whose name doesn't correspond to any group in the directory. Mailboxes created manually and whose name corresponds to a group or a user in the directory will go from "unsynchronized" to "synchronized" when the synchronizer is run.
- doublon: this state is used for mailboxes that were created manually, corresponding to a group in the directory but that we don't want to be synchronized with the directory information (doublon=redundant/duplicate)

Mailboxes have synchronization metadata that are automatically updated by the synchronizer. The metadata are:

- Last synchronization: last time the mailbox was synchronized with the directory
- Origin: the name of the directory with which the mailbox is synchronized. This field is empty in the case of an unsynchronized mailbox.
- synchronizer ID: ID that enables the synchronizer to link the mailbox to the directory entry.

# **Create a mailbox**

Only administrators can create new mailboxes.

You can create generic and personal mailboxes. However, note that the personal mailbox of a user is automatically created when the user logs in for the first time in the application.

1 1	In the Case Management navigation tree available in the tab 🧮 , click on Mailboxes.					
		ou are logged as Administrator   Dashboard   Users & groups   Vocabularles   Themes   Log ou		<b>.</b> <i>P</i>	Search Advance	
	Case Management	Mailbox a Content Edit My alerts History Manage				
Y	My Mailboxes fou don't have any mailbox	This folder contains no document. Classify Paste Delete Copy Add content to worklist			R53	
	My workList Clipboard No document in clipboard					
	Click on the Create a r					
3. F	Fill in the creation form Click on <b>Create</b> .	(see below for mailbox parameters)	t	٩	Search Advance	
3. F	Till in the creation form Click on <b>Create</b> . nuxeo • CM	(see below for mailbox parameters)      au are togged as Administrator   Databaard   Data & groups   Vocabularies   Themes   Log ob      incoming case management r      The mailbox from which users will create new cases     imbox   Service mailbox   Sert   Draft   Manage      This folder contains no document.	t	Ρ	Search Advance	
3. F 4. C	ill in the creation form Click on Create. nuxeo • CM	(see below for mailbox parameters)      au are togged as Administrator   Databaard   Data & groups   Vocabularies   Themes   Log ob      incoming case management r      The mailbox from which users will create new cases     imbox   Service mailbox   Sert   Draft   Manage      This folder contains no document.	nailbox	P		

#### **Mailbox parameters**

Field	Description
Title	The name of the mailbox
Description	Text that explains what the mailbox is about
Туре	Select if you create a personal or a generic mailbox
Owner	Select the user who will be the default delegate of the mailbox
Profile	Select if you want the mailbox to be a mailbox from which you can create incoming cases
Parent mailbox	Indicate from which mailbox the new mailbox will depend
Affiliated mailbox	Indicate the mailboxes that depend on the new one
Synchronizer state	Indicate if and how the mailboxes should be synchronized with your organization's directory
User	Select the delegates of the mailbox.
Groups	Select the groups of delegates of the mailbox

You can choose or edit the delegates of the mailbox later.  $\odot$ 

# **Delete a mailbox**

Only administrators can delete mailboxes.

Deleting a mailbox moves the mailbox into the mailbox's trash folder. From here, administrators can restore the mailbox or delete it permanently.

nuxeo • CM	fou are logged as Administrator   Dashboard   Users & groups   Vocabularies   Themes   Log out			Search
IIUXEO CIM				
🕅 🖌 📄	Mailbox 🥐			
	Content Edit My alerts History Manage			
My Mailboxes	Create a mailbox			
E <sup>®</sup> Medical incoming case management E <sup>®</sup> Solen Guitter	Title •	Modified	Author	Version State
E <sup>n</sup> admin2 E <sup>n</sup> incoming case management mailbox	- Solen Guitter 🖻	6/29/10 9:39 AM	system	Project
E <sup>n</sup> incoming case management mailbox 2	admin2 🖻	6/29/10 9:40 AM	system	Project
	incoming case management mailbox 🗈	6/29/10 9:32 AM	System Administrator	Project
My classification trees				
My classification trees	incoming case management mailbox 2 🕫	6/29/10 9:55 AM	admin2	Project
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> but In the window that pop	tton. Is up, click on the <b>OK</b> button.			
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> but In the window that pop	Classify Park Delete Copy Add content to worklist			
CI - Medical Incoming case management CI - Medical Incoming case management Click on the <b>Delete</b> but In the window that pop The parent workspace <b>box</b> folder's trash.	tton. Is up, click on the <b>OK</b> button.			s moved to th
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> buy In the window that pop The parent workspace <b>box</b> folder's trash.	the content to be the copy Add content to worklist tton. Is up, click on the OK button. 's Content tab is displayed: the deleted w		layed anymore. It i	s moved to th
CI - Medical Incoming case management CI - Medical Incoming case management Click on the <b>Delete</b> buy In the window that pop The parent workspace <b>box</b> folder's trash.	tton. s up, click on the <b>OK</b> button. 's <b>Content</b> tab is displayed: the deleted w		layed anymore. It i	s moved to t
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> buy In the window that pop The parent workspace <b>box</b> folder's trash.	the content to be the copy Add content to worklist tton. Is up, click on the OK button. 's Content tab is displayed: the deleted w		layed anymore. It i	s moved to t
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> buy In the window that pop The parent workspace <b>box</b> folder's trash.	Image: Construction of the content to worklist         tton.         sup, click on the OK button.         's Content tab is displayed: the deleted w         "to are togged as Administrator (Dashbased [Users & groups [Vecabularies ] Themes [Log out]         Mailbox 2		layed anymore. It i	s moved to t
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> buy In the window that pop The parent workspace box folder's trash. <b>nuxeo - CM</b> My Mallboxes	Construct Pourse Delete Copy Add content to worklist      tton.     s up, click on the OK button.     's Content tab is displayed: the deleted w      to at logged as Administrator (Dashbaded Users & groups (Vocabularies ) Themes (Log out      Mailbox @      Content Edit My alerts History Manage		layed anymore. It i	s moved to t
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> buy In the window that pop The parent workspace box folder's trash. <b>nuxeo • CM</b> My Mallboxes My Mallboxes Sub Mickal incoming case management Sub Mickal incoming case management	Construct Pourse Delete Copy Add content to worklist      tton.     s up, click on the OK button.     's Content tab is displayed: the deleted w      to at logged as Administrator (Dashbaded Users & groups (Vocabularies ) Themes (Log out      Mailbox @      Content Edit My alerts History Manage		layed anymore. It i	s moved to th
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> buy In the window that pop The parent workspace <b>box</b> folder's trash.	the content to be the copy Add content to worklist tton. Is up, click on the OK button. 's Content tab is displayed: the deleted w		layed anymore. It i	s moved t
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> buy In the window that pop The parent workspace box folder's trash. <b>nuxeo - CM</b> My Mallboxes	territerie in the territerie in territeri in territerie in territerie in territerie in territerie in terr	orkspace is not disp	layed anymore. It i	s moved to
CI - Medical incoming case management CI - Medical incoming case management Click on the <b>Delete</b> but In the window that pop The parent workspace box folder's trash. <b>nuxeo = CM</b> My Mailboxes My Mailboxes My Mailboxes	territerie in the territerie in territeri in territerie in territerie in territerie in territerie in terr	orkspace is not disp	layed anymore. It i	s moved to t

To restore the mailbox or remove it permanently, you can refer to the section "Managing deleted documents" of a workspace of the Nuxeo DM User Guide.

# Manage a mailbox

All users with access to a mailbox have the ability to manage it.

Managing a mailbox means being able to:

- edit the mailbox and change its properties,
- manage its delegates,
- manage the mailing list associated with the mailbox,
- manage the classification trees associated with the mailbox.

All the mailbox management actions are available in the Manage tab of the mailbox.

#### Edit the mailbox properties

The **Edit** tab is the default sub-tab of the mailbox management. This tab displays the mailbox properties in edit mode. To edit mailbox properties make the modifications needed and click **Save**. Not all properties can be edited: the mailbox type and its parent cannot be modified.

nuxeo • CM You 4	are logged as Administrator   Dashbox	rd   Users & groups   Vocabularies   Themes   Log out				
🔍 🛷 📄	incoming case management mailbox					
	The mailbox from which user					
	Inbox Service mailbox	Sent Draft Manage				
My Mailboxes	Modification Delegatio	n Classification folder				
E <sup>a</sup> Medical incoming case management						
E <sup>a</sup> Solen Guitter	Identifier	incoming-case-management				
E* incoming case management mailbox	Title*	In an all a second se				
E <sup>n</sup> incoming case management mailbox 2		incoming case management malibox				
My classification trees	Description	The mailbox from which users will create new cases				
CI - Medical incoming case management						
CI - Medical incoming case management						
	Туре	Generic				
My workList Clipboard	Owner*					
		To start the search, please type at least 3 character(s)				
No document in clipboard		to start the search, prease type at least 5 character(s)				
	Profiles	Incoming Case Item Management				
	Parent mailbox					
	Affiliated mailbox					
		To start the search, please type at least 3 character(s)				

See how to create a mailbox for all the properties of a mailbox.

#### Manage the delegates of the mailbox

Users who can access a given mailbox are called delegates. You can assign and remove users, or groups of users, as delegates of the mailbox.

#### Give access to a mailbox

tion Delegation	Classification folder			
	classification folder			
Users Sea	rch for users			
		st 3 character(s)		
Groups S				
		st 3 character(s)		
-				
	Groups S		john John Doe Groups S st 3 character(s) st 3 character(s)	john John Doe Groups S st 3 character(s) st 3 character(s)

Deny access to a mailbox

 To remove delegate on the mailbox:
<ul> <li>Click on the icon × in front of the name of the user or group you don't want to access the mailbox anymore.</li> <li>Click on Save.</li> <li>The mailbox, along with the cases it contains, is not available anymore to users selected in the above operation (the mailbox is not displayed in the list of his mailboxes in the left pane). This change is applied immediately after the save button was pressed.</li> </ul>

#### Manage the classification trees associated with a mailbox

Classification trees are folders in which users can file cases. This structured approach helps with case organization and processing. Classification trees are associated with mailboxes. This means that giving access to a mailbox gives also access to the associated classification folders.

When a mailbox is created, a default classification tree is created as well. The new classification tree is named after the mailbox with one difference - it is prefixed with "Cl - " (for +Cl+assification).

As soon as you can access a mailbox, you can create new classification trees associated to it.

Inbox       Service mailbox       Sent       Draft       Manage         Modification       Delegation       Classification folder         Create a new classification root       Modified       Author         Image       C1- incoming case management mailbox is*       6/29/10 9:32 AM       System Administrator         Cleck on the button       Create a new classification root.       Sive the new classification folder root a title, a description (optional).         Click on the button       Create.       The Content tab of the classification folder is displayed. You can now create subfolders and classify docume folder.         Urgent cases        Content       Manage		that already exist are disp	layed.		
Create a new classification root         Title •       Modified         Author         If C - incoming case management malibox b*       6/29/10 9:32 AM         System Administrator         Clearing rate       Content to worklist	Inbox Service mailbox Sent Draft I	Manage			
Title *       Modified       Author         Image: Cl-incoming case management mailbox is*       6/29/10 9:32 AM       System Administrator         Image: Cl-incoming case management mailbox is*       6/29/10 9:32 AM       System Administrator         Image: Cl-incoming case management mailbox is*       6/29/10 9:32 AM       System Administrator         Image: Cl-incoming case management mailbox is*       6/29/10 9:32 AM       System Administrator         Image: Cl-incoming case is closed on the button Create.       Click on the button Create.       Click on the button Create.         The Content tab of the classification folder is displayed. You can now create subfolders and classify docume folder.       Urgent cases is	Modification Delegation Classification	folder			
Image: Classify logical and content mailbox is*       6/29/10 9:32 AM       System Administrator         Image: Classify logical and content to worklist       Click on the button Create a new classification root.       Give the new classification folder root a title, a description (optional).         Click on the button Create.       The Content tab of the classification folder is displayed. You can now create subfolders and classify docume folder.         Urgent cases        Image: Classification content content content cases	Create a new classification root				
Click on the button Create a new classification root. Give the new classification folder root a title, a description (optional). Click on the button Create. The Content tab of the classification folder is displayed. You can now create subfolders and classify docume folder. Urgent cases ?	Title		Modified	Author	State
Click on the button <b>Create a new classification root</b> . Give the new classification folder root a title, a description (optional). Click on the button <b>Create</b> . The <b>Content</b> tab of the classification folder is displayed. You can now create subfolders and classify docume folder. <b>Urgent cases</b>	CI - incoming case manageme	nt mailbox ⊵™	6/29/10 9:32 AM	System Administrator	Project
Content Edit My alerts History Manage			on (optional).		
	Click on the button <b>Create</b> . The <b>Content</b> tab of the class folder.		,	ubfolders and classify do	ocuments in
Documents classified in current folder There are no classified documents Sub-folders	Click on the button Create. The Content tab of the class older. Urgent cases a	ification folder is displayed	,	ubfolders and classify do	ocuments in

#### Manage the mailbox mailing lists

Mailing lists are available on Nuxeo CMF 1.7.

To make distribution of cases easier, a mailbox can have mailing lists. This enables users to send cases to several mailboxes in a single operation.

#### Create a new mailing list

(i)

	To create a new mailing list:
1.	In the Manage tab of the mailbox, click on the Mailing list sub-tab.
2.	Type the title of the new mailing list and click on the <b>Create</b> button.
	The list is created and the form to add mailboxes to the list appears.
	The mailing list is now available in the <b>Distribute</b> tab of cases.
3.	In the mailbox search field, type the name of the mailbox you want to add to the list.
	As you type the mailboxes that correspond to what you typed are displayed.
4.	Now you can click inside the suggestion box on the mailbox you want to add .
5.	If you need to add more mailboxes, repeat steps 3 and 4.
6.	Click on the <b>Updated</b> button.
	The changes are saved.

Copyright © 2010-2016 Nuxeo.

#### Edit a mailing list

	To create a new mailing list:
	In the Manage tab of the mailbox, click on the Mailing list sub-tab.
	The first list is selected and its edit form is displayed.
2.	Click on the list that you want to edit.
	The edit form of the list is displayed.
3.	Edit the list. You can:
	edit its title,
	edit its description,
	<ul> <li>add mailboxes to the list, by typing their name in the search field and clicking them in the suggestions,</li> </ul>
	<ul> <li>remove mailboxes from the list by clicking the icon × of the mailbox to remove.</li> </ul>
4.	Click on the <b>Updated</b> button.
	The changes are saved.

**Delete a mailing list** 

#### To delete a mailing list:

- 1. In the **Manage** tab of the mailbox click on the **Mailing list** sub-tab. The first list is selected and its edit form is displayed.
- 2. Click on the icon  $\times$  of the mailing list to delete it.
- 3. Click on **OK** to confirm the mailing list deletion.

The list is no longer available in the **Distribute** tab of cases.

# Working with cases

A case is a container holding one or more documents, called **case items**. In a correspondence management application, a case would be an envelope with one or several mails. In human resources, an example would be employee cases managed by an HR manager and containing employee contracts, time-off requests, annual reviews, etc.

A case in Nuxeo CMF 1.0: John Doe's HR case (John Doe's contract )	John Doe's contract
Properties Distribute Relations Files History Comments Preview# new doc type	
New	
Title John Doe's contract	

A case in Nuxeo CMF 1.7:

🗟 🔍 📙 🖉	INBOX SERVICE MAILBOX SENT DRAFT MANAGE	
My Mailboxes	Human Resources	
<ul> <li>☑<sup>n</sup> Marge Jackson (Company A)</li> <li>☑<sup>n</sup> Human Resources</li> </ul>	New	
WORKLIST CLIPBOARD	-	
No document in clipboard	Title 🖗	
	🗌 📔 John Doe's HR Case	
🛓 🎬 John Doe's HR Case 🏾 😂	Permanent delete	
2010 Annual meeting report		
John Doe's contract	John Doe's HR Case (John Doe's contract )	
	John 2000 Int 2000 John 2000 Contract,	
	PROPERTIES DISTRIBUTE EDIT RELATIONS FILES HISTORY COMMENTS PREVIEW	
	Metadata	Content
	Title John Doe's contract	Main File Jdoe-contract.pdf (66 kB)
	Document type Contract	
	Participants	Associated tags
		🕆 Add tags
	Document date	-
	Receive date	Related route
	Senders	Start
	Confidentiality Level 4 - private	To start the search, please type at least 3 character(s)

After their creation, cases are distributed inside the application. A user, who a case has been distributed to, can edit the case, add new items to the case, redistribute and/or classify the case.

Some features available on cases exist in Nuxeo DM as well. You can refer to the Nuxeo DM User Guide for more information on the following

#### features:

- Relations management
- Comments
- Tags

#### In this section:

- Creating a case
- Editing a case
- Distributing a case

# Creating a case

Cases can be created in mailboxes with the profile "Case creation" (see the page Working with mailboxes). All the mailbox delegates can create cases in the mailbox.

#### Creating a case

When you create a new case, you can either create a case and the first case item at the same time, or create an empty case and add an item to it in a second step. In both situations, the case is created as a draft and needs to be distributed to become available to other users in the application.

#### Creating an empty case

# To create a new empty case: Creating an empty case is possible in CMF 1.7 only. In a mailbox with "Case creation" profile, go on the Draft tab and click on the New button. On the window Available document types, click on Case. Fill in the creation form (see below for the parameters available).

- 4. Click on the Create button.
- The case is created and is currently empty. You now need to add case items to it before you can distribute it.

#### Case creation parameters

Document date

Field	Description
Title	Title of the case.
Description	Type an optional text explaining the purpose of the case.

#### Creating a case and its first item at the same time

To create a ne	ew case and its first item at the same time:
The Availble document types window • On CMF 1.0 to 1.6, only the C • On CMF 1.7, you can choose 2. On the window Available document t 3. Fill in the case item creation form (see 4. Click on the Create button.	ase item is available. between a Case item and a Case.
Field	Description
Title	Title of the case item. If the case item is the first item of the case, the title is also the case's title.
Document type	Type of the case item

processed.

Date of the case item

Receive date	Date at which the case item was received
Senders	Information on the senders of the case item
Confidentiality	Level of confidentiality of the document.
Origin	Indication of the origin of the document (for instance the organization site)
Reference	Reference of the document (for instance a loan case ID)
Body	A summary of the document's content
Content	The digitized document

# Editing a case

You can edit a case when you are a delegate of a mailbox in which the case is available. You can edit drafts and send cases.

When you edit a case, you can:

- add new items to the case
- edit the properties of the case items
- manage relations (same feature as in Nuxeo DM)
- tag the case (same tag feature as in Nuxeo DM)

You can also add comments on the case (same comment feature as Nuxeo DM).

Add a new item in the case

A case can hold one or several items.

nuxeo • CMF	You are logged as marge   Dashboard   Users & groups   Log out	Search Advar
4	John Doe's HR case (John Doe's HR case )	John Doe's HR ( 1 document(s) in
Mar Mar III. and a	Properties Distribute Relations Files History Comments Preview 2	
My Mailboxes	New	
Image: Barbar Annual State	Title John Doe's HR case	
My classification trees	Document type Accomodation application form	
CI – Human Resources	Participants	
My workList Clipboard	Document date 6/29/10 10:59 AM Receive date	
No document in clipboard	Senders	
	Confidentiality Level 4 - private	
	Origin Human Resource Department	
	Reference	
	Body	
	Content 🛛 jdoe-contract.pdf	
	©Add tags Edit	
	ocument types, click on "Case Item".	
	form (see below) and click on the <b>Create</b> button. o of the first case item is displayed.	
	rop down to change item in the case.	
	case (John Doe's contract )	John Doe's contract John Doe's contract 2010 annual meeting repo
Properties Distribute	Relations Files History Comments Preview# new doc type	

#### Case item creation fields

Field	Description
Title	Title of the case item. If the case item is the first item of the case, the title is also the case's title.
Document type	Type of the case item
Participants	Recipients of the case. No automatic correspondence with the available mailboxes is processed.
Document date	Date of the case item
Receive date	Date at which the case item was received
Senders	Information on the senders of the case item
Confidentiality	Level of confidentiality of the document.
Origin	Indication of the origin of the document (for instance the organization site)
Reference	Reference of the document (for instance a loan case ID)
Body	A summary of the document's content
Content	The digitized document

#### Edit a case item's properties

To edit a case item:	
1. Select a case item:	
using the drop down list in the top right corner, on CMF versions prior to 1.7;	
John Dee State ( John Dee State ( John Dee State )	oe's contract e's contract inual meeting report
Properties         Distribute         Relations         Files         History         Comments         Preview# new doc type         Preview# new doc type	
New	
Title John Doe's contract	
• using the case tree in the left pane, on CMF 1.7.	
🖃 📔 John Doe's HR Case	
2010 Annual meeting report	
John Doe's contract	
2. Click on the Edit button of the Properties tab.	
3. Edit the case item's properties (see above for more information).	
4. Click on the <b>Save</b> button.	
Changes are saved. The modification is tracked in the item's <b>History</b> tab.	

# **Distributing a case**

After you created or edited a case or one if its items, you probably want to transfer the case to another user or group of users so that they can check it, complete it or just be informed of the evolution of the case.

There are two ways to transfer a case:

- using a simple distribution, that transfers the case to one or several mailboxes in a single distribution,
- using a predefined route, composed of several steps that can require approval.

#### Using simple distribution

When users want to send a case to a user or a group of users, without following a predefined workflow, they can use the simple distribution feature of Nuxeo CMF. Distribution enables users to send a case to one or several mailboxes at the same time, with a possible comment saying

to the recipient why they are sent the case.

All distributions are tracked in the History of the case:

- for versions 1.0 to 1.6 of Nuxeo CMF, in the History tab,
  for version 1.7 of Nuxeo CMF, in the Routing History tab.

When users distribute a case, it is not removed from the sender's mailbox.

			odistribute				
	ck on the case to	•					
	ck on the Distrik						
	arch and select t						
<u> </u>	pe a comment to						
Jo	ohn Doe's HR	case (John I	Doe's contra	act)		J	ohn Doe's contract 2 document(s) in the cas
							2 document(s) in the cas
Pr	roperties Distribute	Relations Files His	story Comments	Preview 🛛			
	Distribution						
	Action recipients			John Smith			
		To start the search, ple	ase type at least 3 char	racter(s)			
	Copy recipients						
		To start the search, ple	ase type at least 3 char	John Doe racter(s)			
	Comment	Please add the previou	is years meeting repor	orts			
		Send Cancel					
5. Clio	ck on the Send b	outton.					
	e case is sent to		you chose.				
The	e distribution's in	formation are tr	acked in the H	listory tab of the cas	se.		
_				notory tab of the bac	-		
	hn Doe's HR	case (John I	Doe's contra			Jo	hn Doe's contract
Jo	ohn Doe's HR	case (John I	Doe's contra		-	Jo	hn Doe's contract 2 document(s) in the case
Jo	ohn Doe's HR	case (John I	Doe's contra			Jo	hn Doe's contract 2 document(s) in the case
						ot	
Pr	roperties Distribute			act )		مل	
Pr				act )		ول	
Pr	roperties Distribute			act )		Jo Action recipients	
Pr D	operties Distribute	Relations Files His	comments	Preview 🗵			2 document(s) in the case
Pr D D	Distribution history Performed action	Relations Files His Date / Time	Comments Username	Preview @ Comment		Action recipients	2 document(s) in the case Copy recipients
Pr D D E	Distribution history Performed action Distribution	Relations Files His Date / Time	Username Marge Jackson	Preview @ Comment	eeting reports	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
Pr D D E	Distribution history Performed action Distribution	Relations Files His Date / Time	Comments Username Marge Jackson Date / Time	Preview D Comment Please add the previous years m	eeting reports Username	Action recipients John Smith	2 document(s) in the case Copy recipients
Pr D D E	Distribution history Performed action Distribution	Relations Files His Date / Time	Username Marge Jackson	Preview D Comment Please add the previous years m	eeting reports	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
Pr D D E	Distribution history Performed action Distribution Event log Performed action	Relations Files His Date / Time	Comments Username Marge Jackson Date / Time	Preview D Comment Please add the previous years m	eeting reports Username	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
Pr D D E	Distribution history Performed action Distribution Event log Performed action	Relations Files His Date / Time	Username Marge Jackson Date / Time 6/29/10 11:28 AM	Preview D Comment Please add the previous years m	eeting reports Username Marge Jackson	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
Pr D D E V	Distribution history Performed action Distribution Event log Performed action	Relations Files His Date / Time 6/29/10 11:28 AM	Username Marge Jackson Date / Time 6/29/10 11:28 AM	Preview       Image: Comment         Please add the previous years m	eeting reports Username Marge Jackson	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
Pr D P E 1. Clic	Distribution history Performed action Distribution Event log Performed action Modification	Relations Files His Date / Time 6/29/10 11:28 AM	Username Marge Jackson Date / Time 6/29/10 11:28 AM	Preview       Image: Comment         Please add the previous years m	eeting reports Username Marge Jackson	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
Pr D P E 1. Clic 2. Clic	Distribution history Performed action Distribution Event log Performed action Modification Ck on the case to	Relations Files His Date / Time 6/29/10 11:28 AM	Username Marge Jackson Date / Time 6/29/10 11:28 AM	Preview       Image: Comment         Please add the previous years m	eeting reports Username Marge Jackson	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
Pr P P P P P P P P P P P P P	Distribution history Performed action Distribution Event log Performed action Modification Ck on the case to ck on the Distrik e "Mailing list" su you want to send	Relations Files His Date / Time 6/29/10 11:28 AM 0 open it. pute tab. ub-tab is display the case to one	Username Marge Jackson Date / Time 6/29/10 11:28 AM TO distrib	Act ) Preview 2 Comment Please add the previous years m Please add the previous years m A Deute a case on C ailling lists,check the b	eeting reports Username Marge Jackson	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
Pr D P E P N N N N N N N N N N N N N N N N N	Distribution history Performed action Distribution Event log Performed action Modification Ck on the case to ck on the Distrib e "Mailing list" su you want to send (s) you want to s	Relations       Files       His         Date / Time       6/29/10 11:28 AM         6/29/10 11:28 AM         0 open it.         b.         b.	Username Marge Jackson Date / Time 6/29/10 11:28 AM TO distrib	Act ) Preview 2 Comment Please add the previous years m Please add the previous years m A Deute a case on C ailling lists,check the b	eeting reports Username Marge Jackson	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
Pr D P E P N N N N N N N N N N N N N N N N N	Distribution history Performed action Distribution Event log Performed action Modification Ck on the case to ck on the Distrib e "Mailing list" su you want to send i(s) you want to s ck on the Send b	Relations     Files     His       Date / Time     6/29/10 11:28 AM       6/29/10 11:28 AM       Do open it.       butter tab.       ub-tab is display       the case to one       send the case to opeuton.	Username Marge Jackson Date / Time 6/29/10 11:28 AM To distrib	Act ) Preview  Comment Please add the previous years m Please add the previous years m A Pute a case on C ailling lists,check the fump to step 5.	eeting reports Username Marge Jackson	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe
1. Clic 2. Clic 3. If y list 4. Clic The	Distribution history Performed action Distribution Event log Performed action Modification Ck on the case to ck on the Distrik e "Mailing list" su you want to send s(s) you want to s ck on the Send to e case is sent to	Relations Files His Date / Time 6/29/10 11:28 AM 0 open it. Dub-tab is display the case to one send the case to putton. all the mailboxe	Username Marge Jackson Date / Time 6/29/10 11:28 AM To distrib Yed. e or several ma b. Otherwise, ju	Act ) Preview D Comment Please add the previous years m A Pute a case on C ailling lists,check the fump to step 5. ng list.	eeting reports Username Marge Jackson EMF 1.7: "Action" or "Info	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe Comment Corresponding to
1. Clic 2. Clic 3. If y list 4. Clic The	Distribution history Performed action Distribution Event log Performed action Modification Ck on the case to ck on the Distribute e "Mailing list" su you want to send t(s) you want to send te case is sent to e distribution info	Relations       Files       His         Date / Time       6/29/10 11:28 AM         6/29/10 11:28 AM       6/29/10 11:28 AM         Do open it.       0         Dubta tab.       1         Jub-tab is display the case to one send the case to outton.       1         all the mailboxe prmation is track       1	Username Username Marge Jackson Date / Time 6/29/10 11:28 AM To distrib red. e or several ma b. Otherwise, ju es in the mailin ked in the "Rou	Act ) Preview D Comment Please add the previous years m A Pute a case on C ailling lists,check the fump to step 5. ng list. uting History" tab of t	eeting reports Username Marge Jackson EMF 1.7: "Action" or "Info	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe Comment Corresponding to
1. Clic 2. Clic 3. If y list 4. Clic The 5. If y	Distribution history Performed action Distribution Event log Performed action Modification Ck on the case to ck on the Distrib e "Mailing list" su you want to send (s) you want to send te case is sent to e distribution infor you want to send	Relations       Files       His         Date / Time       6/29/10 11:28 AM         6/29/10 11:28 AM       6/29/10 11:28 AM         0 open it.       0.00000000000000000000000000000000000	Username Username Marge Jackson Date / Time 6/29/10 11:28 AM To distrib red. e or several ma b. Otherwise, ju es in the mailin ked in the "Rou	Act ) Preview D Comment Please add the previous years m A Pute a case on C ailling lists,check the fump to step 5. ng list. uting History" tab of t	eeting reports Username Marge Jackson EMF 1.7: "Action" or "Info	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe Comment Corresponding to
1. Clic 2. Clic 3. If y list 4. Clic The 5. If y 6. Clic	Distribution history Performed action Distribution Event log Performed action Modification Ck on the Case to ck on the Distrib e "Mailing list" su you want to send (s) you want to send (s) you want to send te case is sent to e distribution infor you want to send ck on the "Mailbo	Relations       Files       His         Date / Time       6/29/10 11:28 AM         6/29/10 11:28 AM       6/29/10 11:28 AM         Do open it.       0.00000000000000000000000000000000000	Vsername Username Marge Jackson Date / Time 6/29/10 11:28 AM To distrib red. e or several ma b. Otherwise, ju es in the mailin ced in the "Rou ividual mailbox	Preview       Image: Comment         Please add the previous years m         A         A         Dutte a case on C         ailling lists,check the fump to step 5.         ng list.         uting History" tab of t txes:	eeting reports Username Marge Jackson EMF 1.7: "Action" or "Info	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe Comment Corresponding to
1. Clic 2. Clic 3. If y liste 4. Clic The 5. If y 6. Clic 7. Sea	Distribution history Performed action Distribution Event log Performed action Modification Ck on the case to ck on the Distrib e "Mailing list" su you want to send (s) you want to send (s) you want to send ck on the Send b e case is sent to e distribution info you want to send ck on the "Mailbo arch and select to	Relations       Files       His         Date / Time       6/29/10 11:28 AM         6/29/10 11:28 AM       6/29/10 11:28 AM         Do open it.       0.00000000000000000000000000000000000	Vsername Username Marge Jackson Date / Time 6/29/10 11:28 AM To distrib red. e or several ma b. Otherwise, ju es in the mailin ced in the "Rou ividual mailbox or action and in	Preview       Image: Comment         Please add the previous years m         M         A         Dutte a case on C         ailing lists, check the fump to step 5.         ng list.         uting History" tab of to test:         n copy.	eeting reports Username Marge Jackson EMF 1.7: "Action" or "Info	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe Comment Corresponding to
1. Clice 2. Clice 3. If y Istr 4. Clice The 5. If y 6. Clice 7. Sea 8. Typ	Distribution history Performed action Distribution Event log Performed action Modification Ck on the Case to ck on the Distrib e "Mailing list" su you want to send (s) you want to send (s) you want to send te case is sent to e distribution infor you want to send ck on the "Mailbo	Relations       Files       His         Date / Time       6/29/10 11:28 AM         6/29/10 11:28 AM       6/29/10 11:28 AM         b open it.       0.00000000000000000000000000000000000	Vsername Username Marge Jackson Date / Time 6/29/10 11:28 AM To distrib red. e or several ma b. Otherwise, ju es in the mailin ced in the "Rou ividual mailbox or action and in	Preview       Image: Comment         Please add the previous years m         M         A         Dutte a case on C         ailing lists, check the fump to step 5.         ng list.         uting History" tab of to test:         n copy.	eeting reports Username Marge Jackson EMF 1.7: "Action" or "Info	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe Comment Corresponding to
1. Clic 2. Clic 3. If y list 4. Clic 5. If y 6. Clic 7. Sea 8. Typ 9. Clic	Distribution history Performed action Distribution Event log Performed action Modification Ck on the Case to ck on the Distrib e "Mailing list" su you want to send (s) you want to send (s) you want to send (s) you want to send ck on the Send b e case is sent to e distribution infor you want to send ck on the "Mailbo arch and select to pe a comment to	Relations       Files       His         Date / Time       6/29/10 11:28 AM         6/29/10 11:28 AM       6/29/10 11:28 AM         b open it.       0.00000000000000000000000000000000000	Username Marge Jackson Date / Time 6/29/10 11:28 AM To distrib red. e or several ma b. Otherwise, ju ess in the mailin ked in the "Rou ividual mailbox or action and in bu distribute the	Preview       Image: Comment         Please add the previous years m         M         A         Dutte a case on C         ailing lists, check the fump to step 5.         ng list.         uting History" tab of to test:         n copy.	eeting reports Username Marge Jackson EMF 1.7: "Action" or "Info	Action recipients John Smith	2 document(s) in the case Copy recipients John Doe Comment Corresponding to

Using a route

When a case should follow a specific flow of steps to be completed, you can use predefined routes.

You can apply any validated route on cases. If you prepared a route, make sure it's been approved to be able to use it.

You can apply a route on a case from the case and from the route.

In the suggestion list, click on the route you want to use. John Doe's HR Case (John Doe's contract )  PROPERTIES DISTRIBUTE EDIT RELATIONS FILES HISTORY ROUTING HISTORY COMMENTS New Metadata Nature Subjects Rights Source Coverage	PREVIEW Content Main File Associated tags
New Metadata Nature Subjects Rights Source	Content Main File I jdoe-contract.pdf (66 kB
Metadata Nature Subjects Rights Source	Main File [2] jdoe-contract.pdf (66 kB
Nature Subjects Rights Source	Main File [2] jdoe-contract.pdf (66 kB
Subjects Rights Source	
Subjects Rights Source	Associated tags
Source	Associated tags
Coverage	骨 Add tags
	Related route
Created at 6/16/11 2:18 PM	Marke Start
Last modified at 6/27/11 4:42 PM	Marketing team HR cases route
Format	
Language	
Expire on	
New	
New	
New Metadata	Content
	Content Main File 2 jdoe-contract.pdf (66 kB
Metadata	Main File Jdoe-contract.pdf (66 kB
Metadata Nature	Main File Jdoe-contract.pdf (66 kB
Metadata Nature Subjects	Main File Jdoe-contract.pdf (66 kB Associated tags
Metadata Nature Subjects Rights	Main File ව jdoe-contract.pdf (66 kB Associated tags ᡥAdd tags Related route
Metadata Nature Subjects Rights Source Coverage Created at 6/16/11 2:18 PM	Main File Jdoe-contract.pdf (66 kB Associated tags
Metadata         Nature         Subjects         Rights         Source         Coverage         Created at       6/16/11 2:18 PM         Last modified at       6/27/11 4:49 PM	Main File ව jdoe-contract.pdf (66 kB Associated tags ᡥAdd tags Related route
Metadata         Nature         Subjects         Rights         Source         Coverage         Created at       6/16/11 2:18 PM         Last modified at       6/27/11 4:49 PM         Format	Main File ව jdoe-contract.pdf (66 kB Associated tags ᡥAdd tags Related route
Metadata         Nature         Subjects         Rights         Source         Coverage         Created at       6/16/11 2:18 PM         Last modified at       6/27/11 4:49 PM	Main File ව jdoe-contract.pdf (66 kB Associated tags ᡥAdd tags Related route

Description			State	validated	Version
	- e followed by HR cases of employees in the Marketing team.		This docum	ent is unlocked	
Metadata					
Title	Marketing team HR cases route		Participatin	g documents	
Descript	tion The route to be followed by HR cases of employees in the Mar	keting team.	lohn		Europeter south
Executio	n type serial			HR Case 6/27/11 4:49 Pt	Execute rout
Common m	ietadata				
Nature					
Subjects	4				
Rights					
Source Coverag	•				
Created			-	))	-
	dified at 6/27/11 4:33 PM				

# Working with routes

Routes are available on Nuxeo CMF 1.7.

Routes are user-defined workflows composed of steps and tasks, applied to cases. Every user can create a new route, that will have to be validated by "route managers" in order to be available on cases.

#### In this section:

- Creating a route
- Adding steps to a route
- Editing a route
- Validating a route

## Creating a route

A route is a user-defined workflow, that is composed of steps and tasks.

Routes are created in the personal workspace of the user. Every user of the application has access to a private workspace, in which he can create documents. In this workspace, the user has access to the Nuxeo Document Management workspaces features and document types (see the Nuxeo DM user guide for more information on the documents available and Nuxeo DM features). Beside Nuxeo DM documents, the CMF personal workspace includes a "Route" document.

There are two types of routes:

- serial routes: all the steps and tasks of the route are executed one after the other;
- parallel routes: the steps and tasks of the route are all started at the same time.

	· · · · · · · · · · · · · · · · · · ·	until a menu is displayed.		
nuxeo • (	CMF Case Managemen	t 🙎 marge		
🗟 🔍 📙 🖉	INBOX SENT	MANA Personal Workspace		
My Mailboxes	Marge Jac	kSO Log out		
Marge Jackson (Compa Human Resouces	any A) This folder contains	no document.		
The <b>Content</b> tab of # Click on the <b>New</b>		e is displayed. Your personal v	workspace name is your u	sername.
Available document types				×
Select the type of your new of				
Document	Collaborative Spaces	3		
Picture	Folder	Pictures book	Ordered Folder	
	Workspace	Blog Site		
	WebSite	t Route		
	Forum	Email folder		
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M	of your new route is display your route and then have am HR cases route	yed. For now, the route is still a it validated so it can be applie		pty. You need to
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M	te button. of your new route is display o your route and then have am HR cases route @ tarketing team employees	yed. For now, the route is still a it validated so it can be applie		pty. You need to
Click on the Creat The Content tab of steps and tasks to Marketing ter The route for HC Cases of M CONTENT EDIT RE	te button. of your new route is display o your route and then have am HR cases route @ tarketing team employees	yed. For now, the route is still a it validated so it can be applie		pty. You need to
Click on the Creat The Content tab of steps and tasks to Marketing ter The route for HC Cases of M CONTENT EDIT RE New	te button. of your new route is display your route and then have am HR cases route @ Aarketing team employees LATIONS ALERTS HISTORY ROUT	yed. For now, the route is still a it validated so it can be applie	ed to cases.	Version
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description	te button. of your new route is display your route and then have am HR cases route @ Aarketing team employees LATIONS ALERTS HISTORY ROUT	yed. For now, the route is still a it validated so it can be applie	State draft	Version
Click on the Creat The Content tab of steps and tasks to Marketing tex The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of H	te button. of your new route is display your route and then have am HR cases route @ Aarketing team employees LATIONS ALERTS HISTORY ROUT	yed. For now, the route is still a it validated so it can be applie	State draft	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata	te button. of your new route is display o your route and then have am HR cases route tarketing team employees LATIONS ALERTS HISTORY ROUT	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing ter The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title	te button. of your new route is display o your route and then have am HR cases route arketing team employees LATIONS ALERTS HISTORY ROUT Marketing team employees Marketing team HR cases route	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description	te button. of your new route is display o your route and then have am HR cases route tarketing team employees LATIONS ALERTS HISTORY ROUT Marketing team HR cases route The route for HC Cases of Marketing to	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tex The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of I Metadata Title Description Execution type	te button. of your new route is display o your route and then have am HR cases route tarketing team employees LATIONS ALERTS HISTORY ROUT Marketing team HR cases route The route for HC Cases of Marketing to	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata	te button. of your new route is display o your route and then have am HR cases route tarketing team employees LATIONS ALERTS HISTORY ROUT Marketing team HR cases route The route for HC Cases of Marketing to	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata Nature	te button. of your new route is display o your route and then have am HR cases route tarketing team employees LATIONS ALERTS HISTORY ROUT Marketing team HR cases route The route for HC Cases of Marketing to	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata Nature Subjects Rights Source	te button. of your new route is display o your route and then have am HR cases route tarketing team employees LATIONS ALERTS HISTORY ROUT Marketing team HR cases route The route for HC Cases of Marketing to	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata Nature Subjects Rights Source Coverage	te button. of your new route is display o your route and then have am HR cases route larketing team employees LATIONS ALERTS HISTORY ROUT Marketing team employees Marketing team HR cases route The route for HC Cases of Marketing to serial	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata Nature Subjects Rights Source Coverage Created at	te button. of your new route is display o your route and then have am HR cases route larketing team employees LATIONS ALERTS HISTORY ROUT Marketing team employees Marketing team HR cases route The route for HC Cases of Marketing to serial 6/27/11 3:50 PM	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata Nature Subjects Rights Source Coverage	te button. of your new route is display o your route and then have am HR cases route larketing team employees LATIONS ALERTS HISTORY ROUT Marketing team employees Marketing team HR cases route The route for HC Cases of Marketing to serial	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata Nature Subjects Rights Source Coverage Created at Last modified at	te button. of your new route is display o your route and then have am HR cases route larketing team employees LATIONS ALERTS HISTORY ROUT Marketing team employees Marketing team HR cases route The route for HC Cases of Marketing to serial 6/27/11 3:50 PM	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing tea The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata Nature Subjects Rights Source Coverage Created at Last modified at Format	te button. of your new route is display o your route and then have am HR cases route larketing team employees LATIONS ALERTS HISTORY ROUT Marketing team employees Marketing team HR cases route The route for HC Cases of Marketing to serial 6/27/11 3:50 PM	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing ter The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata Nature Subjects Rights Source Coverage Created at Last modified at Format Language	te button. of your new route is display o your route and then have am HR cases route larketing team employees LATIONS ALERTS HISTORY ROUT Marketing team employees Marketing team HR cases route The route for HC Cases of Marketing to serial 6/27/11 3:50 PM	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock
Click on the Creat The Content tab of steps and tasks to Marketing ter The route for HC Cases of M CONTENT EDIT RE New Description The route for HC Cases of M Metadata Title Description Execution type Common metadata Nature Subjects Rights Source Coverage Created at Last modified at Format Language Expire on	te button. of your new route is display o your route and then have am HR cases route tarketing team employees LATIONS ALERTS HISTORY ROUT Marketing team HR cases route The route for HC Cases of Marketing to serial 6/27/11 3:50 PM 6/27/11 3:50 PM	yed. For now, the route is still a it validated so it can be applie	State draft This document is unlocke	Version d   Lock

#### **Route parameters**

Field	Description
Title	Type the name of the route.
Description	Type an optional text that indicates what the route is planned for.

Execution type

Select if the route will be serial or a parallel route.

# Adding steps to a route

A route can be composed of:

- Distribution steps
- Distribution tasks
- Forks

**Distribution steps** 

A distribution step consists in sending the case to a selected mailbox. The distribution step can send the case to personal and generic mailboxes.

The difference between a distribution step in a route and a simple distribution outside a route is that, using a distribution step, the case is sent to only one mailbox per step. Distribution outside a route allows for distribution to multiple mailboxes at the same time.

. On the window that pops up, cl	ute, click on the <b>New</b> button. ick on <b>Distribution step</b>		
Available document types		×	
Select the type of your new document i	in the list below.		
Document	Collaborative Spaces		
Generic distribution tas	k oct Fork		
<b>Distribution step</b>			
Distribution task			
Personal distribution ta	sk		
	low for details).		
	s displayed.		
Click on the <b>Create</b> button. The <b>Summary</b> tab of the step i	s displayed. <b>box</b>		
Click on the <b>Create</b> button. The <b>Summary</b> tab of the step i <b>Distribution to HR mail</b>	s displayed. <b>box</b>	State draft V	Version
Click on the <b>Create</b> button. The <b>Summary</b> tab of the step i <b>Distribution to HR mail</b> SUMMARY EDIT RELATIONS ALERTS	s displayed. <b>box</b>	State draft M This document is unlocked   Lock	
Click on the <b>Create</b> button. The <b>Summary</b> tab of the step i <b>Distribution to HR mail</b> SUMMARY EDIT RELATIONS ALERTS Common metadata	s displayed. <b>box</b>		
Click on the <b>Create</b> button. The <b>Summary</b> tab of the step i <b>Distribution to HR mail</b> SUMMARY EDIT RELATIONS ALERTS Common metadata Nature	s displayed. <b>box</b>	This document is unlocked   Lock	
Click on the Create button. The Summary tab of the step i Distribution to HR mail SUMMARY EDIT RELATIONS ALERTS Common metadata Nature Subjects	s displayed. <b>box</b>		
Click on the Create button. The Summary tab of the step i Distribution to HR mail SUMMARY EDIT RELATIONS ALERTS Common metadata Nature Subjects Rights Source Coverage	s displayed. <b>box</b>	This document is unlocked   Lock	
Click on the Create button. The Summary tab of the step i Distribution to HR mail SUMMARY EDIT RELATIONS ALERTS Common metadata Nature Subjects Rights Source Coverage Created at 6/27/11 3:41 PM	s displayed. <b>box</b>	This document is unlocked   Lock 루 Add to worklist Associated tags	
Distribution to HR mail SUMMARY EDIT RELATIONS ALERTS Common metadata Nature Subjects Rights Source Coverage Created at 6/27/11 3:41 PM Last modified at 6/27/11 3:41 PM	s displayed. <b>box</b>	This document is unlocked   Lock	
Click on the Create button. The Summary tab of the step i Distribution to HR mail SUMMARY EDIT RELATIONS ALERTS Common metadata Nature Subjects Rights Source Coverage Created at 6/27/11 3:41 PM Last modified at 6/27/11 3:41 PM	s displayed. <b>box</b>	This document is unlocked   Lock 루 Add to worklist Associated tags	
Click on the Create button. The Summary tab of the step i Distribution to HR mail SUMMARY EDIT RELATIONS ALERTS Common metadata Nature Subjects Rights Source Coverage Created at 6/27/11 3:41 PM Last modified at 6/27/11 3:41 PM Format Language	s displayed. <b>box</b>	This document is unlocked   Lock 루 Add to worklist Associated tags	
Click on the Create button. The Summary tab of the step i Distribution to HR mail SUMMARY EDIT RELATIONS ALERTS Common metadata Nature Subjects Rights Source Coverage Created at 6/27/11 3:41 PM Last modified at 6/27/11 3:41 PM	s displayed. <b>box</b>	This document is unlocked   Lock 루 Add to worklist Associated tags	

several stages to your route, you can change the order of steps and tasks in the route.

#### **Distribution step parameters**

Field	Description
Title	Type the name of the step.
Description	Type an optional text that indicates the purpose of the step.
Distribution mailbox	Type the name of the personal or generic mailbox to which the case will be sent, and select it in the suggestion displayed as you type.

#### **Distribution tasks**

A distribution task consists of sending the case to a selected mailbox, and asking the user to approve or refuse the case so the route can continue or end. There are three types of distribution tasks:

- generic distribution task: users can only search generic mailboxes to select the target mailbox of the task;
- personal distribution task: users can search only personal mailboxes to select the target mailbox of the task;
- distribution task: users can search in both personal and generic mailboxes to select the target mailbox.

When a distribution task is executed in a route, the delegates of the mailbox to which the task is distributed have an action to accomplish on the case: approve it or reject it.

		, click on the <b>New</b> button.	a add to the route		
Available document		on the type of task that you want to			
		. Not be device			
Select the type of yo	our new document in the	e list below.			
Document		Collaborative Spaces	_		
🚓 Generic d	listribution task	Fork			
<b>→</b> ● Distribut	ion step				
Distribut	ion task				
🜲 Personal	distribution task				
Fill in the creation	form (see bolow	(for dotaile)			
Click on the Crea The Summary ta	ate button. b of the task is dis	splayed.			
Approval by	ate button. b of the task is dis Marketing tea	splayed. am manager			
Click on the Crea The Summary ta Approval by	ate button. b of the task is dis	splayed. am manager			
Click on the Crea The Summary ta Approval by	ate button. b of the task is dis Marketing tea	splayed. am manager	State	draft	Version
Click on the Crea The Summary tal Approval by SUMMARY EDIT R Common metadata	ate button. b of the task is dis Marketing tea	splayed. am manager		draft ument is unlocked   L	
Click on the <b>Crea</b> The Summary tak Approval by SUMMARY EDIT R	ate button. b of the task is dis Marketing tea	splayed. am manager			
Click on the Crea The Summary tal Approval by SUMMARY EDIT R Common metadata Nature	ate button. b of the task is dis Marketing tea	splayed. am manager	This doc	ument is unlocked   L	
Click on the Creat The Summary tal Approval by SUMMARY EDIT R Common metadata Nature Subjects	ate button. b of the task is dis Marketing tea	splayed. am manager	This doc		
Click on the Creat The Summary tal Approval by SUMMARY EDIT R Common metadata Nature Subjects Rights	ate button. b of the task is dis Marketing tea	splayed. am manager	This doc	ument is unlocked   L	
Click on the Creat The Summary tal Approval by SUMMARY EDIT R Common metadata Nature Subjects Rights Source	ate button. b of the task is dis Marketing tea	splayed. am manager	This doc	ument is unlocked   L	
Click on the Creat The Summary tal Approval by SUMMARY EDIT R Common metadata Nature Subjects Rights Source Coverage	ate button. b of the task is dis Marketing tea RELATIONS ALERTS CO	splayed. am manager	다 Add n Associate	ument is unlocked   L to worklist ed tags	
Click on the Creat The Summary tal Approval by SUMMARY EDIT R Common metadata Nature Subjects Rights Source Coverage Created at	Ate button. b of the task is dis Marketing tea RELATIONS ALERTS CO 6/27/11 3:38 PM	splayed. am manager	다is doc	ument is unlocked   L to worklist ed tags	
Click on the Creat The Summary tal Approval by SUMMARY EDIT R Common metadata Nature Subjects Rights Source Coverage Created at Last modified at	Ate button. b of the task is dis Marketing tea RELATIONS ALERTS CO 6/27/11 3:38 PM	splayed. am manager	다 Add n Associate	ument is unlocked   L to worklist ed tags	
Click on the Creat The Summary tal Approval by SUMMARY EDIT R Common metadata Nature Subjects Rights Source Coverage Created at Last modified at Format	Ate button. b of the task is dis Marketing tea RELATIONS ALERTS CO 6/27/11 3:38 PM	splayed. am manager	다 Add n Associate	ument is unlocked   L to worklist ed tags	
Click on the Creat The Summary tal Approval by SUMMARY EDIT R Common metadata Nature Subjects Rights Source Coverage Created at Last modified at Format Language	Ate button. b of the task is dis Marketing tea RELATIONS ALERTS CO 6/27/11 3:38 PM	splayed. am manager	다 Add n Associate	ument is unlocked   L to worklist ed tags	
Click on the Creat The Summary tal Approval by SUMMARY EDIT F Common metadata Nature Subjects Rights Source Created at Last modified at Format Language Expire on	6/27/11 3:38 PM	splayed. am manager	다 Add n Associate	ument is unlocked   L to worklist ed tags	

#### **Distribution tasks parameters**

Field	Description
Title	Type the name of the task.
Description	Type an optional text that indicates the purpose of the task.
Туре	Select what the task is.
Due date	Select a maximum date at which the task should be done.
Automatic validation	check this box if the task should be automatically approved when the due date is reached.
Distribution mailbox	Type the name of the personal or generic mailbox to which the case will be sent, and select it in the suggestion displayed as you type.

#### Forks

A fork enables users to include a route inside another one.

Available doc	ument types be of your new document in the	list below.	×	
Document		Collaborative Spaces		
🚓 Ger	eric distribution task	Fork		
<b>→</b> ● Dis	tribution step			
⇒ <del>∽</del> Dis	tribution task			
🚓 Per	sonal distribution task			

#### **Route parameters**

Field	Description
Title	Type the name of the route.
Description	Type an optional text that indicates what the route is planned for.
Execution type	Select if the route will be serial or a parallel route.

# **Editing a route**

Editing a route can consist in:

- Editing the properties of the route
- Changing the order of the tasks and steps

#### Editing the properties of the route

You can edit the properties of a route, such as the title, description or type. To be able to edit a route, you need to have at least "Write" permission on the route.

#### To edit the properties of a route:

1. Click on the Edit tab of the route.

The edit form is displayed. It includes the properties you filled in when you created the route, and some metadata.

- 2. Change the properties you want.
- 3. Optionally, type a comment saying why you edited the route or what you changed.
- 4. Click on the **Save** button.
- The changes are saved and the modification is tracked in the route's History tab.

#### Changing the order of the tasks and steps

When you add a task or a step to a route, it is automatically placed at the end the route. You can move each item of the route up and down on the route.

	tons displayed below the route are av	ailable.			
Last	contributor Marge Jackson			Items	/page 20 🛟 🎅 🛙
Filter					
	Title	Modified	Last contributor	Author	Version State
🗆 🦾	Approval by Marketing team manager 🖻	6/27/11 3:38 PM	Marge Jackson	Marge Jackson	draft
🗹 🐁	Approval by John Doe 🖻	6/27/11 3:39 PM	Marge Jackson	Marge Jackson	draft
	Distribution of approved HR case $\mathbb{E}^n$	6/27/11 3:39 PM	Marge Jackson	Marge Jackson	draft
Paste	Add to worklist Copy Delete				

# Validating a route

When you create a route, it is a draft and is not immediately available on cases. To be available on cases, it needs to be validated, by a specific group of users called "routeManagers". Once the route is validated, it cannot be edited anymore.

How to make the route available to route managers

Routes are created in personal workspaces. This means that, unless you shared your personal workspaces with other users, only you can access its content by default. To enable route managers to validate a route, you need to give them access rights on the route. They need to have at least "Write" permission on the route to be able to validate it.

			e are displayed.	
$\odot$	If no "routeManager	s" group is suggested, contact your	administrator and ask hi	m to create this group.
		the "routeManagers" group.		
L. In the "I		NN list, select "Write".		
	RIGHTS ALERTS TRASH			
Inherit	ed rights			
Type	Username	Granted permissions	Denied perm	issions
8	John Doe	Manage everything		
8	Everyone		Manage ever	ything
Block p	ermissions inheritance			
Local r	ghts			
No local r	ights are defined on the current	document		
Add a i	new security rule:			
	,			
	Soarc	h for users or groups		Action Grant T
	Searc	into users of groups		Grant _
	To s	tart the search, please type at least 3 character(s)	A routeManagers	Permission Write +
1 1				Add permission

#### How to inform route managers that they need to approve a route

There is no automatic alert that informs the members of the group "routeManagers" that they have a new route to validate. You need to let them know by external means, by sending an email for instance. When you notify them, don't forget to send them the URL of the route to approve. As

the route is located in your personal workspace, they won't be able to browse the application and find it easily.

How to validate a route

Only the members of the "routeManagers" group can approve routes and make them available to the Nuxeo CMF users.

of the route's "Co		played in the "Participating documents" s
CONTENT EDIT	RELATIONS ALERTS HISTORY ROUTE MANAGE	
New		
Description		State draft Version
The route to be followed	by HR cases of employees in the Marketing team.	This document is unlocked   Lock
Metadata		_
Title	Marketing team HR cases route	Participating documents
Description	The route to be followed by HR cases of employees in the Marketing team.	Validate model
Execution type	serial	
Common metadata	1	
Nature		

# Working with classification folders

**Classification folders** are folders associated to the mailboxes in which users can classify case items. It enables them to find and organize documents another way. Classifying a case doesn't duplicate the case in the classification folder: it puts a link to the case from the folder in which you classify the link.



Classification folders work the same way as folders do in Nuxeo DM. Access is determined by access rights and documents can be deleted and moved into the folder's trash.

The list of classification folders is displayed:

- below your mailboxes on Nuxeo CMF 1.0 to 1.6,
- in the tab 📕 on CMF 1.7.

# **Access rights**

Access rights are inherited from the mailbox. This means that all the mailbox delegates automatically have access to the mailbox's classification folders.

Access rights available in a classification folder are:

Right	Actions available
Read	Consult cases and sub-folders

Classify	Create folders Classify cases in the folder Unclassify cases + Read actions + Remove actions
Remove	Delete folders
Manage	Manage access rights Set alerts for other users Manage deleted documents + write and read actions

# **Classify a document**

You can classify cases as soon as:

- you can access them (i.e. when you are a delegate of a mailbox to which the case was sent),
- and you have "Classify" right in the target classification folder.

Classification is not available on drafts.  $\oslash$ 

Classifying a case doesn't remove it from the mailbox. It actually creates a link from the classification folder to the case. This means if you edit the case from the classification folder, the modifications are also available in the mailboxes to which the case was sent.

To classify a case	
1. Open the case to classify.	
2. Click on the <b>Classification</b> tab.	
3. Select the tree you want to classify your case into using the drop down list.	
John Doe's HR case (John Doe's contract )	John Doe's contract 2 document(s) in the case
	2 document(s) in the case
Properties Distribute Relations Files History Classification Comments Preview Preview	
Classification	
Classification tree	
Cl - John Smith	
Classify here	
Team member HR cases 🔶 Classify here	
4. Unfold the tree to display the classification folders. 5. Click on Classify here	
	om which you classified it.
<ul> <li>4. Unfold the tree to display the classification folders.</li> <li>5. Click on Classify here. The case is classified in the selected folder. It's not removed from the mailbox fr</li> <li>Team member HR cases </li> <li>The human resources cases of the team members</li> </ul>	om which you classified it.
<ul> <li>4. Unfold the tree to display the classification folders.</li> <li>5. Click on Classify here. The case is classified in the selected folder. It's not removed from the mailbox fr</li> <li>Team member HR cases </li> <li>The human resources cases of the team members</li> <li>Content Edit My alerts History</li> </ul>	om which you classified it.
<ul> <li>4. Unfold the tree to display the classification folders.</li> <li>5. Click on Classify here. The case is classified in the selected folder. It's not removed from the mailbox fr Team member HR cases ? The human resources cases of the team members Content Edit My alerts History Documents classified in current folder</li> </ul>	om which you classified it.
<ul> <li>4. Unfold the tree to display the classification folders.</li> <li>5. Click on Classify here. The case is classified in the selected folder. It's not removed from the mailbox fr Team member HR cases ? The human resources cases of the team members Content Edit My alerts History Documents classified in current folder Title</li> </ul>	om which you classified it.
<ul> <li>4. Unfold the tree to display the classification folders.</li> <li>5. Click on Classify here. The case is classified in the selected folder. It's not removed from the mailbox fr Team member HR cases ? The human resources cases of the team members Content Edit My alerts History Documents classified in current folder Title John Doe's HR case</li> </ul>	om which you classified it.
<ul> <li>4. Unfold the tree to display the classification folders.</li> <li>5. Click on Classify here. The case is classified in the selected folder. It's not removed from the mailbox fr</li> <li>Team member HR cases </li> <li>The human resources cases of the team members</li> <li>Content Edit My alerts History</li> <li>Documents classified in current folder</li> <li>Title</li> <li>John Doe's HR case</li> <li>Unclassify</li> </ul>	om which you classified it.
<ul> <li>4. Unfold the tree to display the classification folders.</li> <li>5. Click on Classify here. The case is classified in the selected folder. It's not removed from the mailbox fr Team member HR cases ? The human resources cases of the team members Content Edit My alerts History Documents classified in current folder Title John Doe's HR case Unclassify Sub-folders</li> </ul>	om which you classified it.

# Unclassify a document

You need to have "Classify" right in the classification folder to be able to unclassify cases from a classification folder.

To unclassify a case	
<ol> <li>Go in the classification folder from which you want to unclassify the case.</li> <li>Select the case to unclassify using the check box.</li> </ol>	
Team member HR cases          The human resources cases of the team members          Content       Edit       My alerts       History	
Documents classified in current folder	
Title	
John Doe's HR case	
Unclassify	
Sub-folders	
Create a new classification folder	
There are no subfolders.       Paste     Delete       Copy     Add content to worklist	
<ol> <li>Click on the Unclassify button.</li> <li>On the window that pops up, click OK. The case is unclassified and cannot be accessed from the classification fol however.</li> </ol>	der anymore. It's still available in the mailbox