# Nuxeo CMF 1.x

## User Guide

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# 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.

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|---|
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**In this user guide:**



# 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).

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

### Access to cases

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

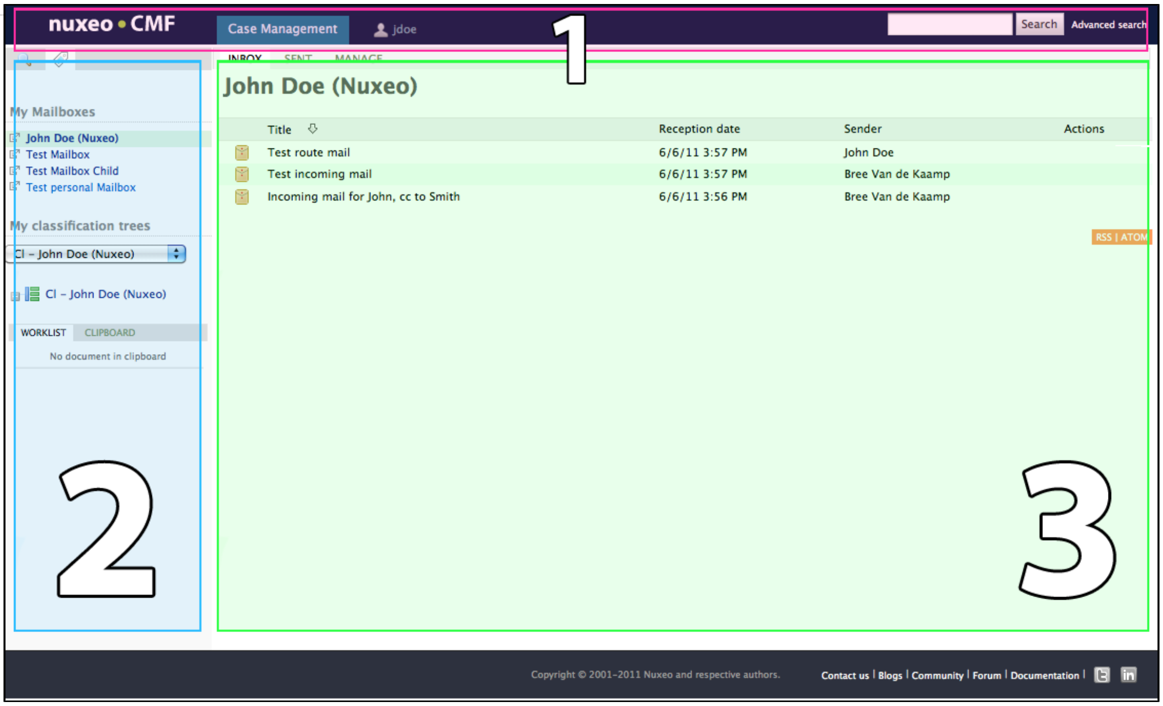
- because they have access to a mailbox in which the case is available: they can then edit, distribute and classify the cases;
- because they have access to a classification folder in which the case is classified: in this context they only have viewing rights on the case.
  In both cases, the same rights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

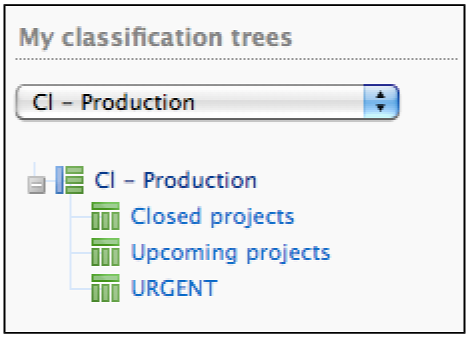
- the selected mailbox content,
- the selected case item,
- the advanced search form,
- the search results,
- the classification folders content.

## 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.


## 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.




## 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:**

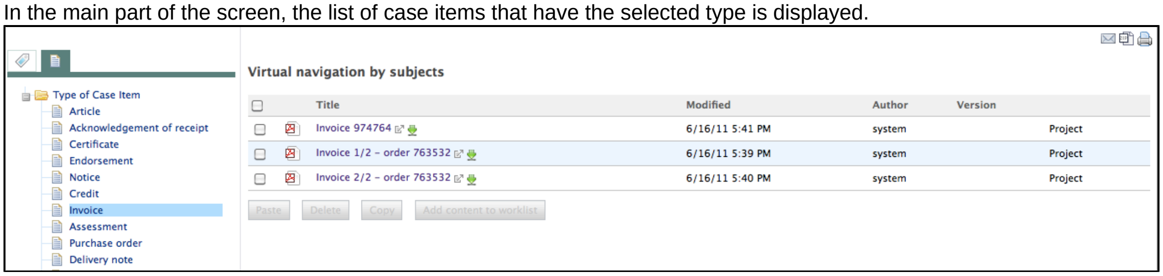
1. Click on the tab .
   The tag cloud is displayed.
2. Click on the keyword you are interested in.
   In the main part of the screen, the list of cases and case items tagged with this keyword is displayed.
3. Click on the case item that interest you to consult it.

## Browse case items by type

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 items by type:**

1. In the left pane of the screen, click on the tab .
   The **Type of case item** virtual navigation is displayed.
2. Unfold the case item type list.
3. Click on the case item type you wish.
   In the main part of the screen, the list of case items that have the selected type is displayed.
   

4. Click on the case item that interest you to consult it.

# 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:

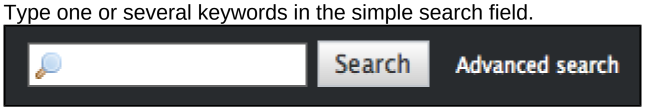
* the title of cases and case items,
* the content of case items (both textual content and main attachment),
* the description of cases and case items.

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 "*".

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*.

**To quickly search for cases and case items:**

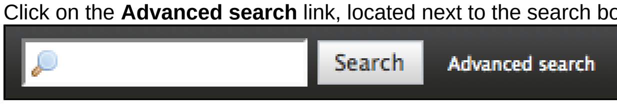
1. Type one or several keywords in the simple search field.


2. Click on the **Search button**.
   The search is done and the results are displayed in the main part of the screen.
3. Click on the case or case item you were looking for, in the search results.

## Advanced search

Advanced search allows you to search documents on specific parameters.

**To search documents using detailed criteria:**

1. Click on the **Advanced search** link, located next to the search box.


2. Type your criteria in the **Search criteria** form.
3. Possibly, change the search results columns.
4. Click on the **Search** button.
   Search results are displayed in a table. Click 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.

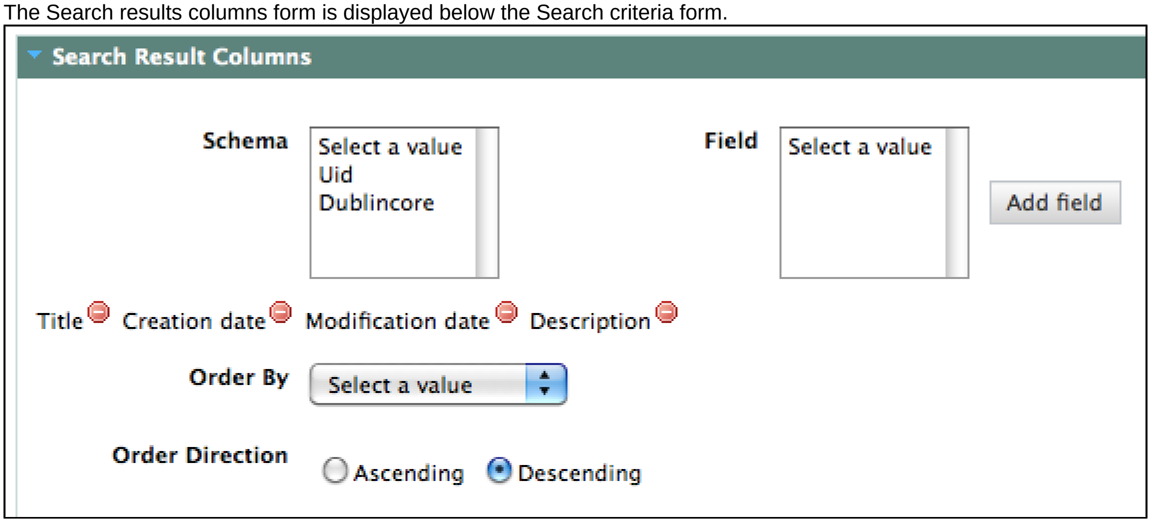
All users can customize search results columns.

#### Adding new search results columns

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

### To add a new search results column on Nuxeo CMF 1.0 to 1.6:

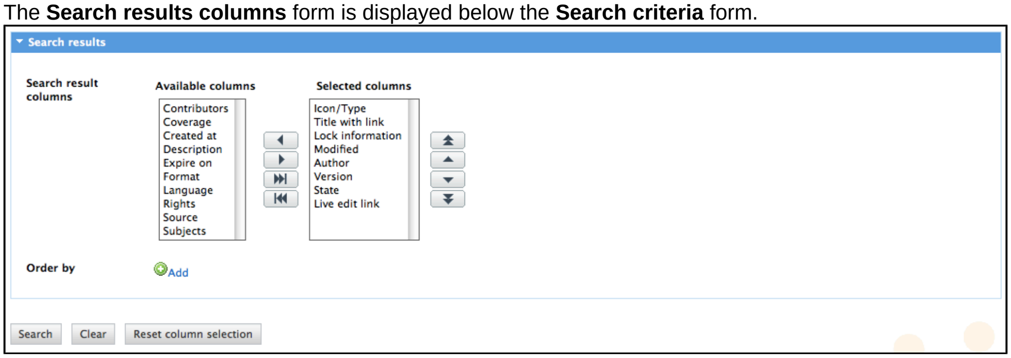
1. Click on the Advanced search link in the top rights corner of the page.
   The Search results columns form is displayed below the Search criteria form.



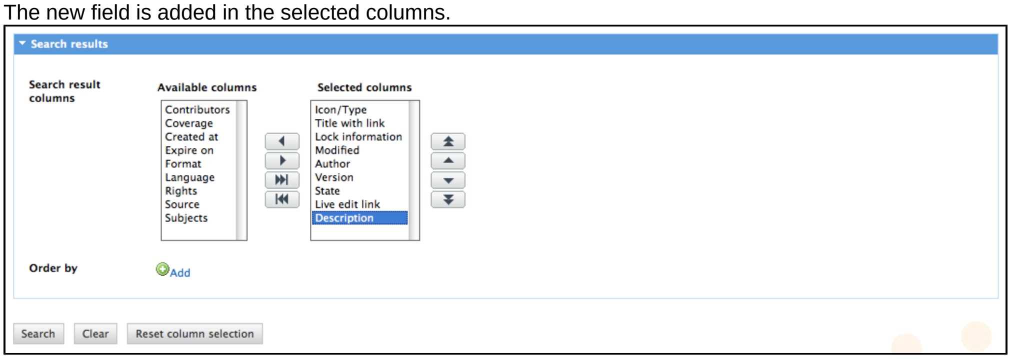

2. Select a schema.
   - The Uid schema includes versioning information.
   - The Dublincore schema includes metadata information.
     The fields corresponding to the selected schema are displayed in the Field selection list.
3. Select the field to add and click on the Add field button.
   The new field is added at the end of the result columns.

### To add a new search results column on Nuxeo CMF 1.7:

1. Click on the **Advanced search** link in the top rights corner of the page.
   The **Search results columns** form is displayed below the **Search criteria** form.




2. Select the column you want to add and click on the arrow.
   The new field is added in the selected columns.




3. Use the up and down arrows to reorder the columns.

## 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 ◀ arrow.

### Changing search result sorting

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

**To change the sort criteria of search results:**

1. On the **Search results columns** form, in the **Order by** field, select the column you want to use to sort the search results.
2. In the **Order direction** field, select if you want to order search results in an increasing or decreasing order.

You can also sort the search results directly from the search results by clicking on the column titles.

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

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

**To browse the content of the application using faceted search:**

1. 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 **Go** 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 **Go** button again.
   The list of documents matching both selected criteria is shown - the refresh happens automatically

### Save your faceted searches

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.

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.

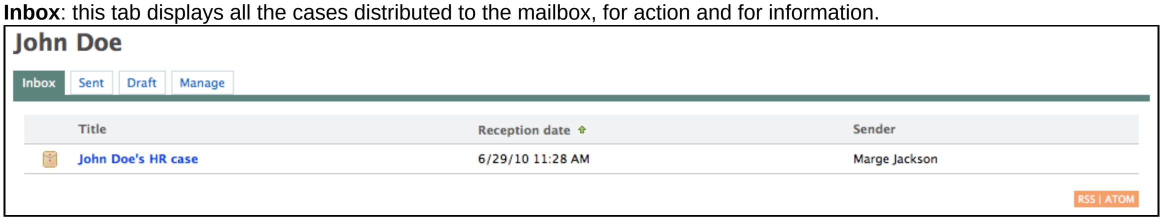
The presentation and management of mailboxes works the same for personal and generic mailboxes.

## Mailbox profile

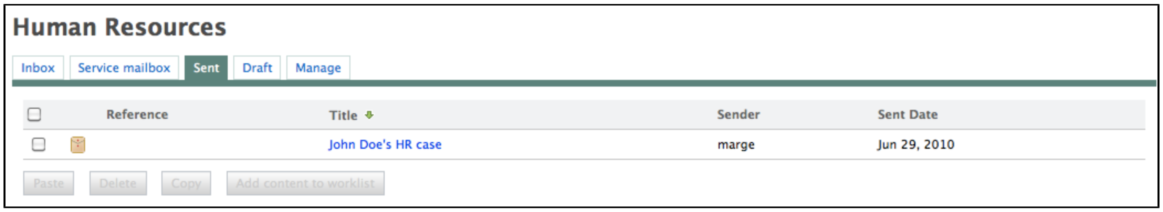
Mailboxes can also have a profile. A single profile called "Case creation" ("Incoming Case Item Management" on versions prior to 1.7) is available in the default application which enables the manual creation of cases in the mailbox. Mailboxes without this profile will receive distributed cases and users 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

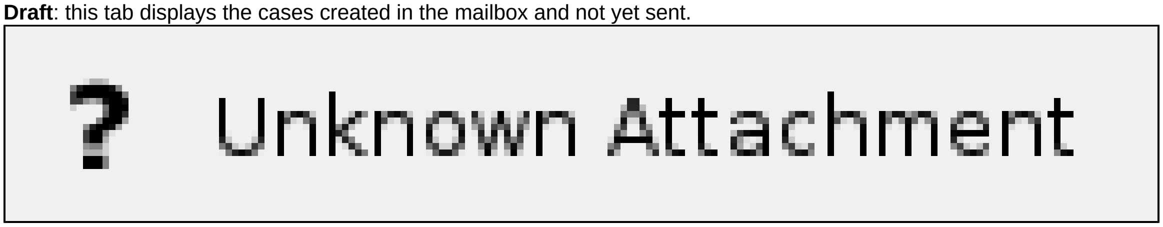
Mailboxes display several different views for cases to distinguish between draft cases, sent cases and distributed cases. The views are shown as tabs.
Below you can see the currently available views:

- **Inbox**: this tab displays all the cases distributed to the mailbox, for action and for information.
  
  
- **Sent**: this tab displays all the cases that were distributed from the mailbox.

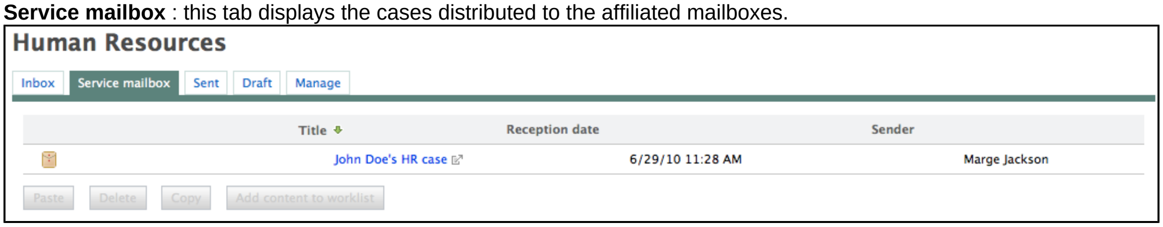
 




- **Draft**: this tab displays the cases created in the mailbox and not yet sent.




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




## 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.

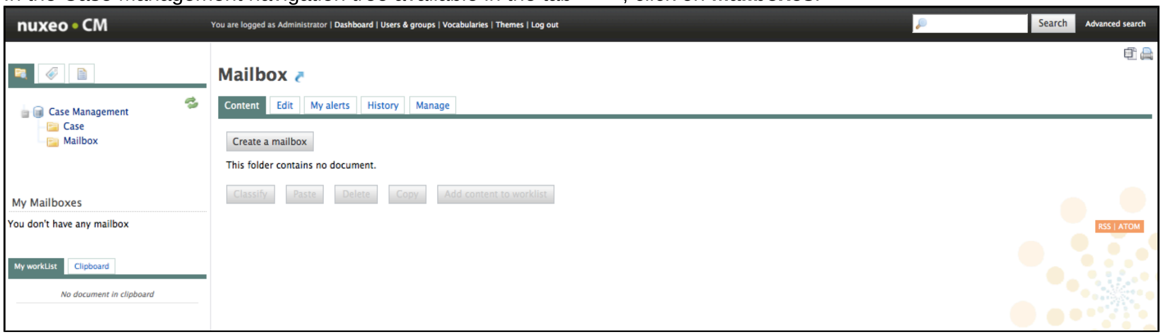
# Create a mailbox

Only administrators can create new mailboxes.

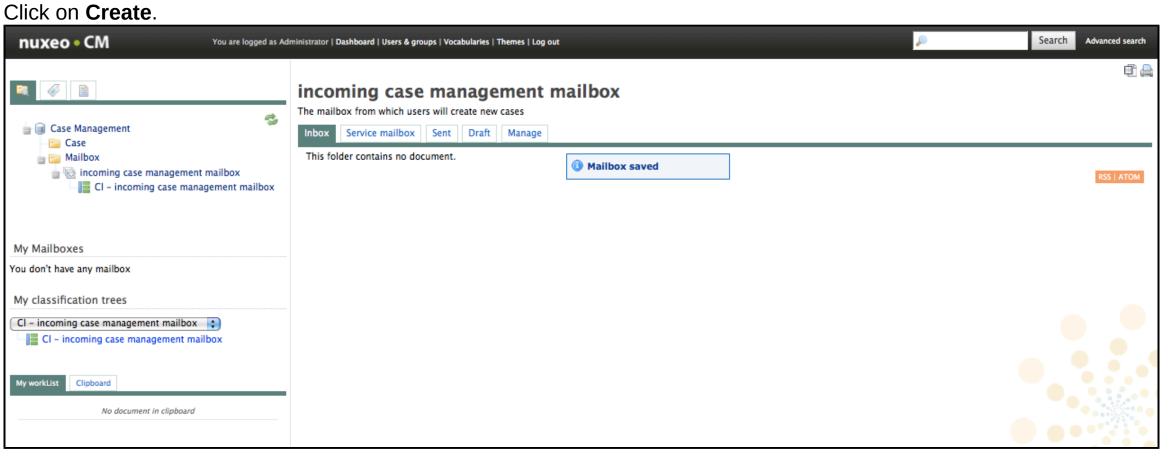
You can create generic and personal mailboxes. However, note that the personal mailbox of a user is automatically created when the user logs in for the first time in the application.

**To create a mailbox:**

1. In the Case Management navigation tree available in the tab , click on **Mailboxes**.




2. Click on the **Create a mailbox** button.
3. Fill in the creation form (see below for mailbox parameters).
4. Click on **Create**.




**Mailbox parameters**

| Field | Description |
|---|---|
| Title | The name of the mailbox |
| Description | Text that explains what the mailbox is about |
| Type | 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.

# Delete a mailbox

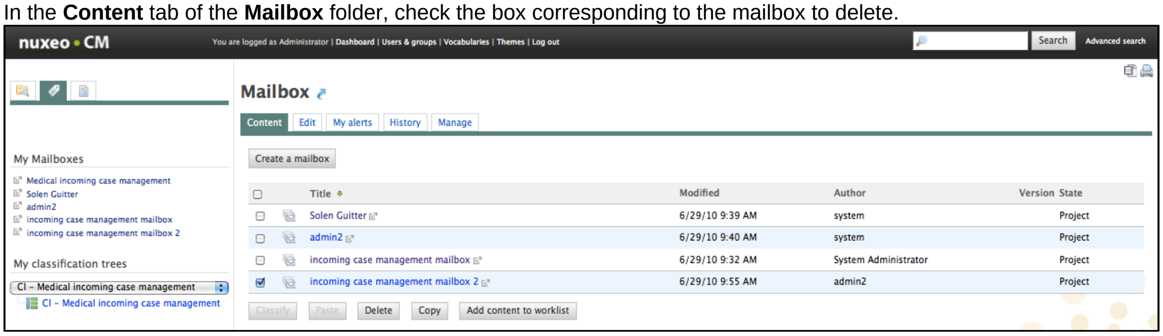
Only administrators can delete mailboxes.

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

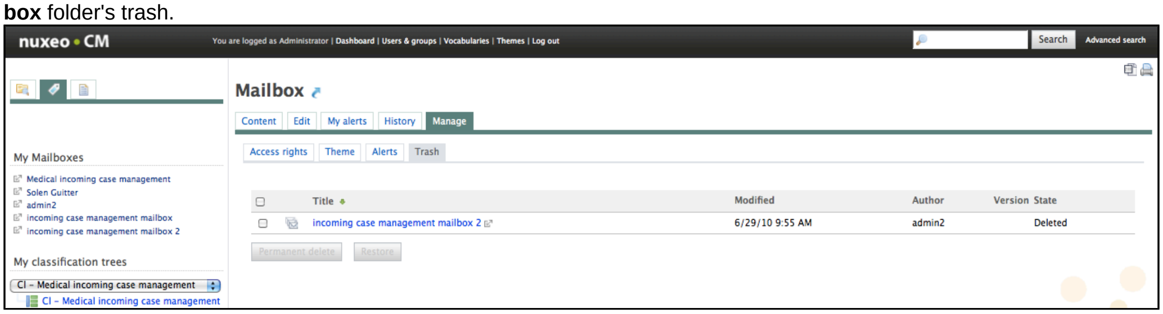
 

**To delete a workspace:**

1. In the **Content** tab of the **Mailbox** folder, check the box corresponding to the mailbox to delete.




2. Click on the **Delete** button.
3. In the window that pops up, click on the **OK** button.
   The parent workspace's **Content** tab is displayed: the deleted workspace is not displayed anymore. It is moved to the **Mail box** folder's trash.




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.

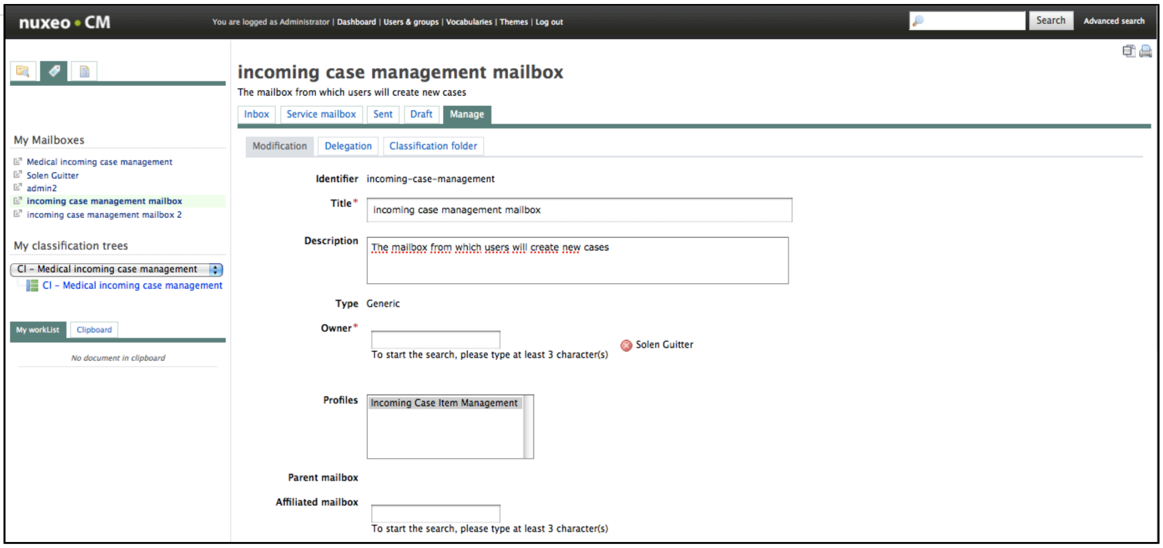
Managing a mailbox means being able to:

- 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.




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

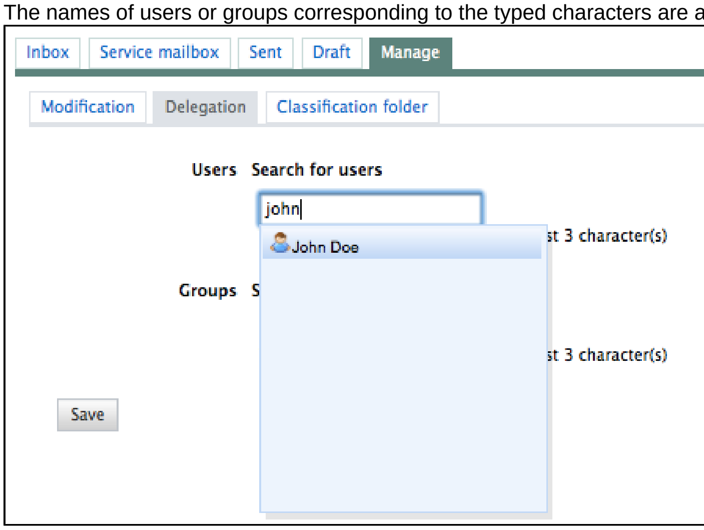
## Manage the delegates of the mailbox

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

**To add delegates to the mailbox:**

1. In the **Manage** tab of the mailbox, click on the **Delegation** sub-tab.
2. Type the first characters of the name of the user or group you want to add as delegate of the mailbox.
   The names of users or groups corresponding to the typed characters are automatically displayed as you type.




3. Click on the user or group.
4. Click on **Save**.
   The users immediately have access to the mailbox and the cases contained inside the mailbox.
   The mailbox is now visible in the left pane of the screen of everyone assigned the delegate role.

### Deny access to a mailbox

### To remove delegate on the mailbox:

1. Click on the icon in front of the name of the user or group you don't want to access the mailbox anymore.
2. Click on **Save**.
   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.

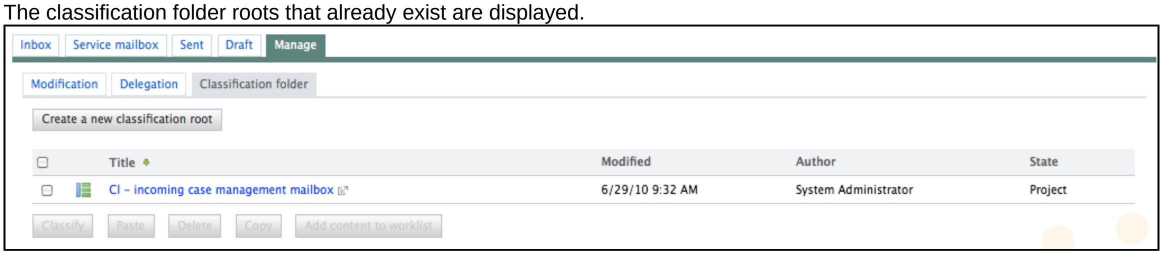
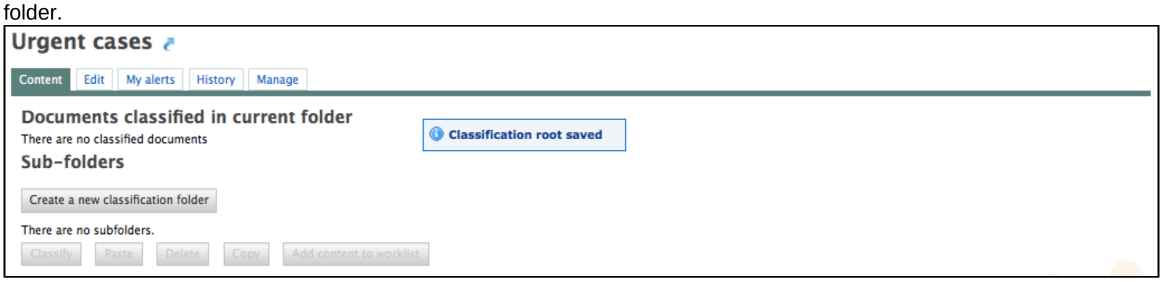
## Manage the classification trees associated with a mailbox

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.

### To create a classification tree:

1. In the **Manage** tab of the mailbox, click on the **Classification folder** sub-tab.
   The classification folder roots that already exist are displayed.
   
   
2. Click on the button **Create a new classification root**.
3. Give the new classification folder root a title, a description (optional).
4. Click on the button **Create**.
   The **Content** tab of the classification folder is displayed. You can now create subfolders and classify documents in the folder.
   
   

## 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

### 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 **Create** button.
   The list is created and the form to add mailboxes to the list appears.
   The mailing list is now available in the **Distribute** 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 **Updated** button.
   The changes are saved.

### Edit a mailing list

**To create a new 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 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,
   - add mailboxes to the list, by typing their name in the search field and clicking them in the suggestions,
   - remove mailboxes from the list by clicking the icon ✖ of the mailbox to remove.
4. Click on the **Updated** button.
   The changes are saved.

### Delete a mailing list

**To delete a mailing list:**

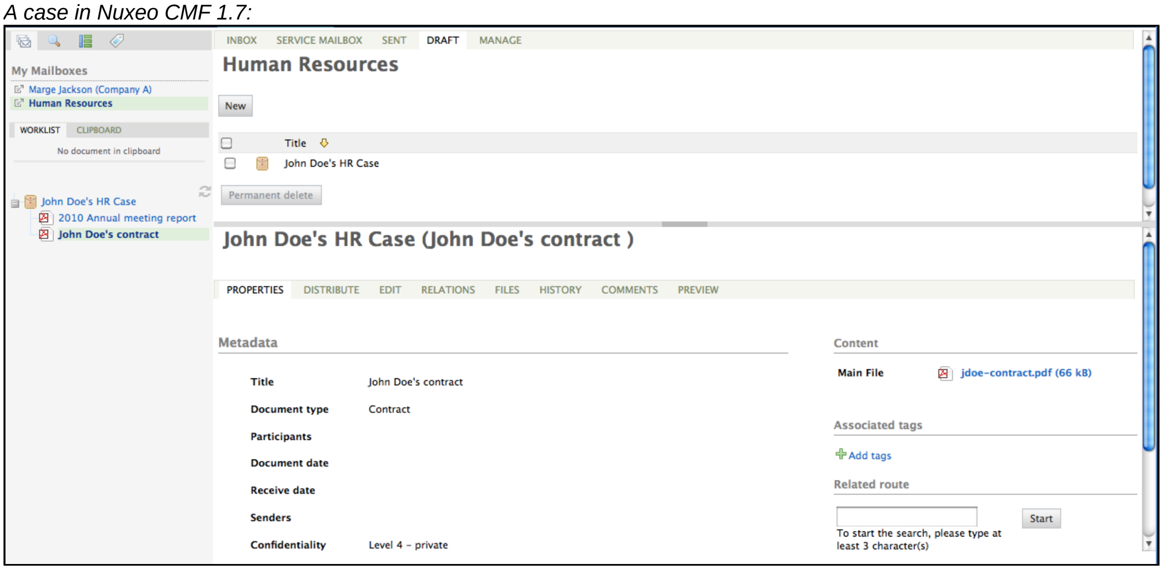
1. In the **Manage** tab of the mailbox click on the **Mailing list** sub-tab.
   The first list is selected and its edit form is displayed.
2. Click on the icon ✖ of the mailing list to delete it.
3. Click on **OK** to confirm the mailing list deletion.
   The list is no longer available in the **Distribute** 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:*


*A case in Nuxeo CMF 1.7:*




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.

1. In a mailbox with "Case creation" profile, go on the **Draft** tab and click on the **New** button.
2. On the window **Available document types**, click on **Case**.
3. 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**

| 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 new case and its first item at the same time:**

1. In a mailbox with "Case creation" profile, go on the **Draft** tab and click on the **New** button.
   The **Availble document types** window pops up:
   - On CMF 1.0 to 1.6, only the Case item is available.
   - On CMF 1.7, you can choose between a Case item and a Case.
2. On the window **Available document types**, click on **Case Item**.
3. Fill in the case item creation form (see the Case item creation section for details).
4. Click on the **Create** button.
   The case and its first item are created and have the same title. The case is a draft for now and can be edited from the mailbox **Draft** tab or distributed.

| Field | Description |
|---|---|
| Title | Title of the case item.<br>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.<br>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 |

# 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)

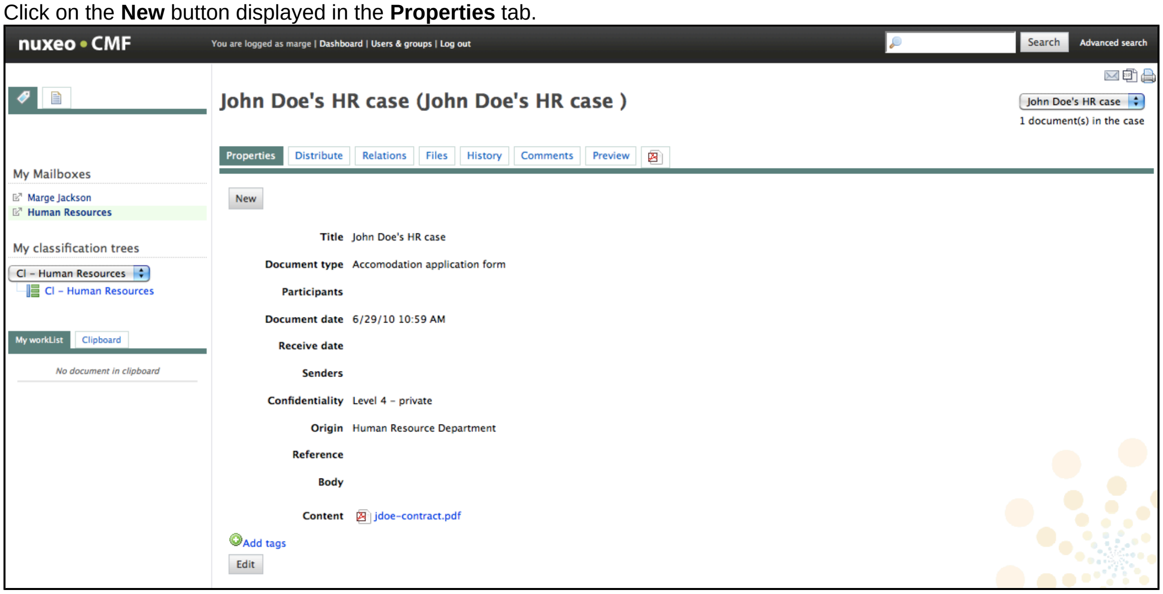
You can also add comments on the case (same comment feature as Nuxeo DM).

## Add a new item in the case

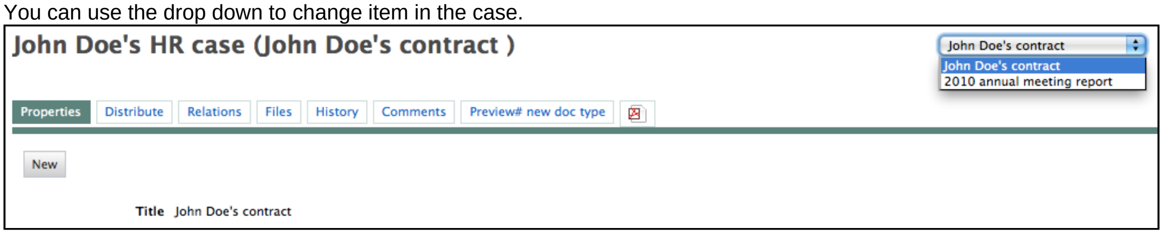
A case can hold one or several items.

**To add a item to a case:**

1. Click on the case to open it.
2. Click on the **New** button displayed in the **Properties** tab.




3. In the **Available document types**, click on "Case Item".
4. Fill in the creation form (see below) and click on the **Create** button.
   The **Properties** tab of the first case item is displayed.
   You can use the drop down to change item in the case.



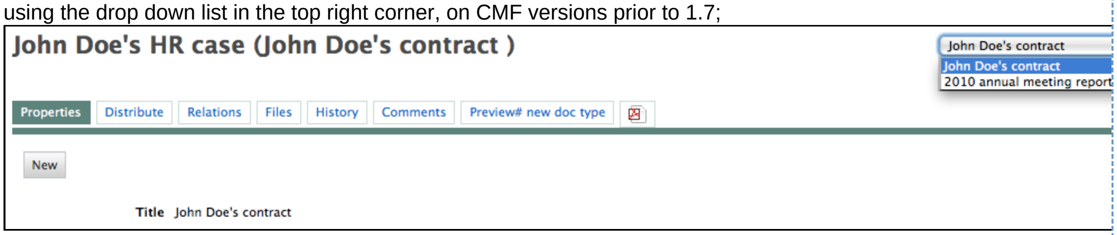
**Case item creation fields**

| Field | Description |
|---|---|
| Title | Title of the case item.<br>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.<br>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 |

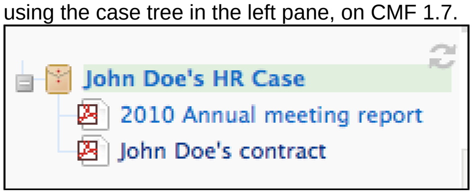
### Edit a case item's properties

**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;




    - using the case tree in the left pane, on CMF 1.7.




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 **Save** button.
   Changes are saved. The modification is tracked in the item's **History** 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.

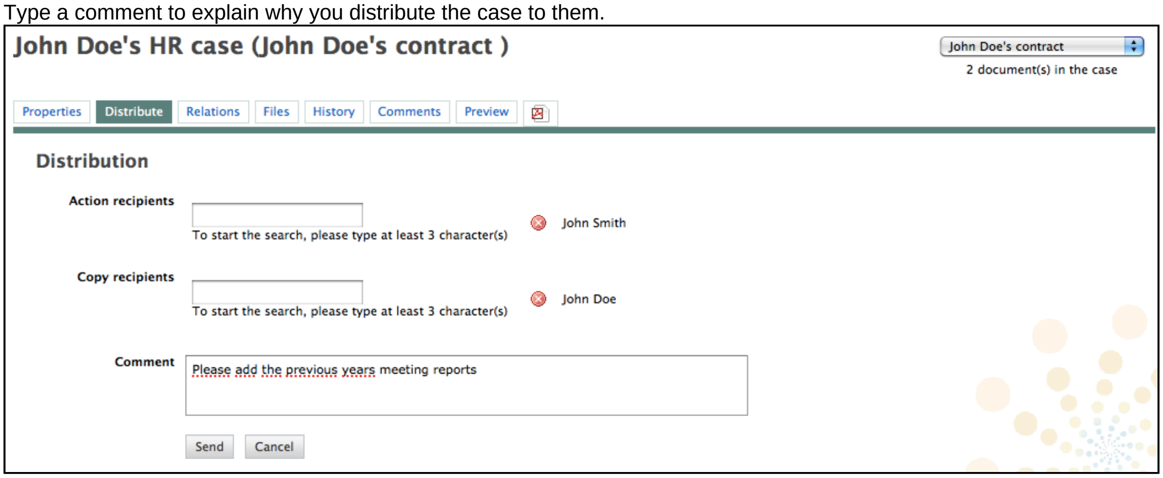
All distributions are tracked in the History of the case:

- 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.

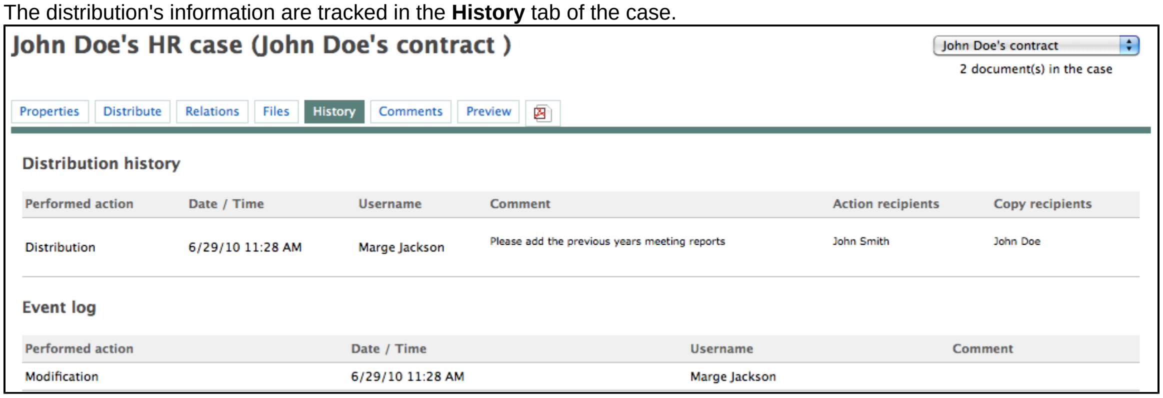
When users distribute a case, it is not removed from the sender's mailbox.

## To distribute a case on CMF 1.0 to 1.6:

1. Click on the case to open it.
2. Click on the **Distribute** tab.
3. Search and select the recipients for action and in copy.
4. Type a comment to explain why you distribute the case to them.




5. Click on the **Send** button.
   The case is sent to the mailboxes you chose.
   The distribution's information are tracked in the **History** tab of the case.




## To distribute a case on CMF 1.7:

1. Click on the case to open it.
2. Click on the **Distribute** tab.
   The "Mailing list" sub-tab is displayed.
3. If you want to send the case to one or several mailing lists,check the "Action" or "Information" button corresponding to the list(s) you want to send the case to. Otherwise, jump to step 5.
4. Click on the **Send** button.
   The case is sent to all the mailboxes in the mailing list.
   The distribution information is tracked in the "Routing History" tab of the case, in the Distribution section.
5. If you want to send the case to individual mailboxes:
6. Click on the "Mailboxes" sub-tab.
7. Search and select the recipients for action and in copy.
8. Type a comment to explain why you distribute the case to them.
9. Click on the **Send** button.
   The case is sent to the mailboxes you chose.
   The distribution's information are tracked in the "Routing History" tab of the case, in the Distribution section.

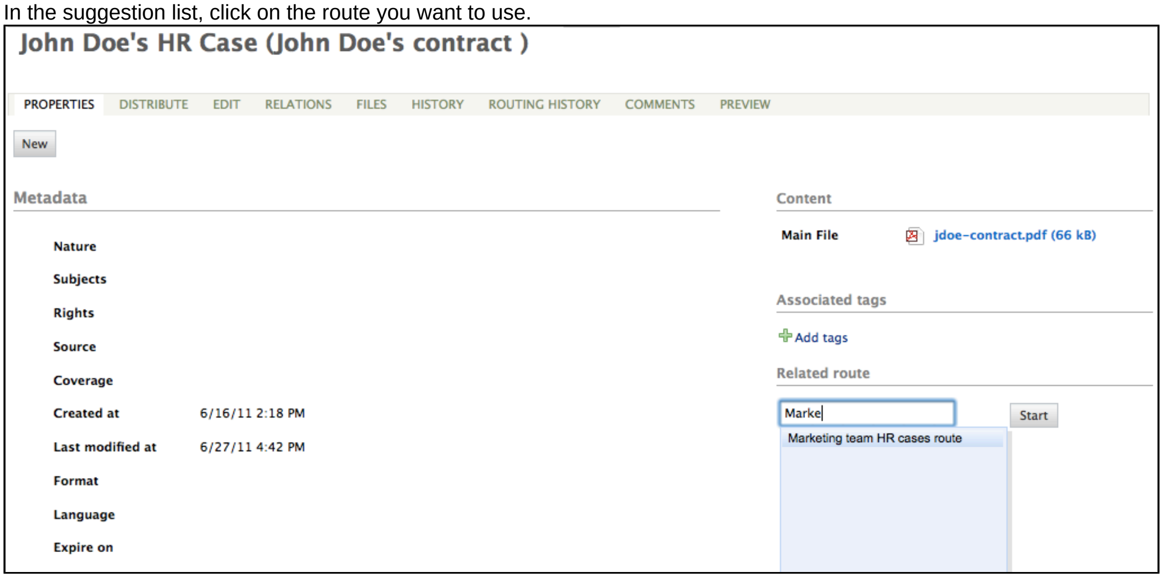
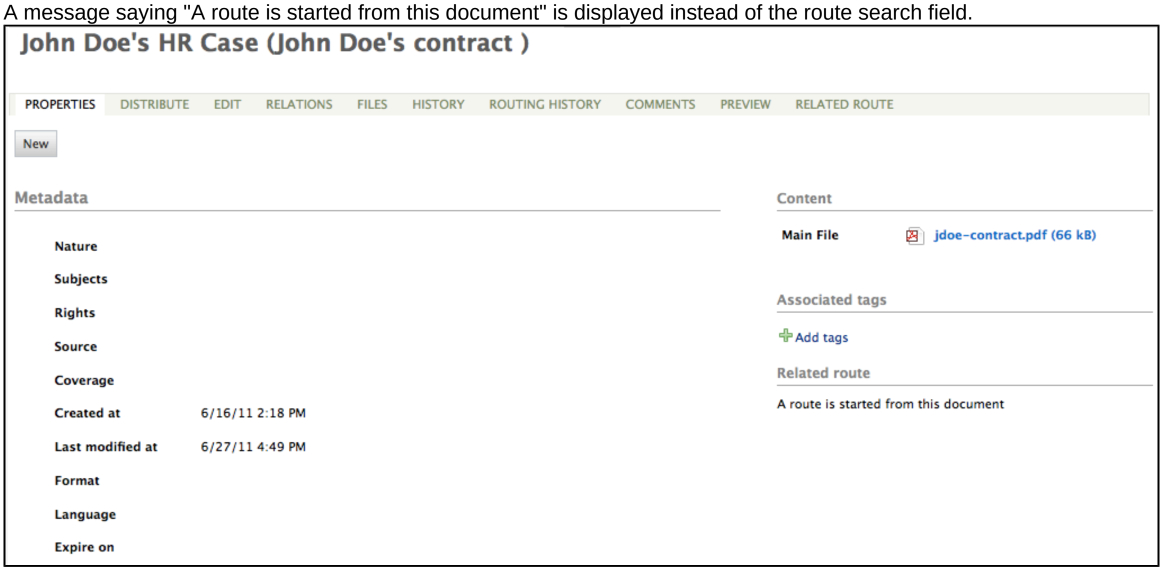
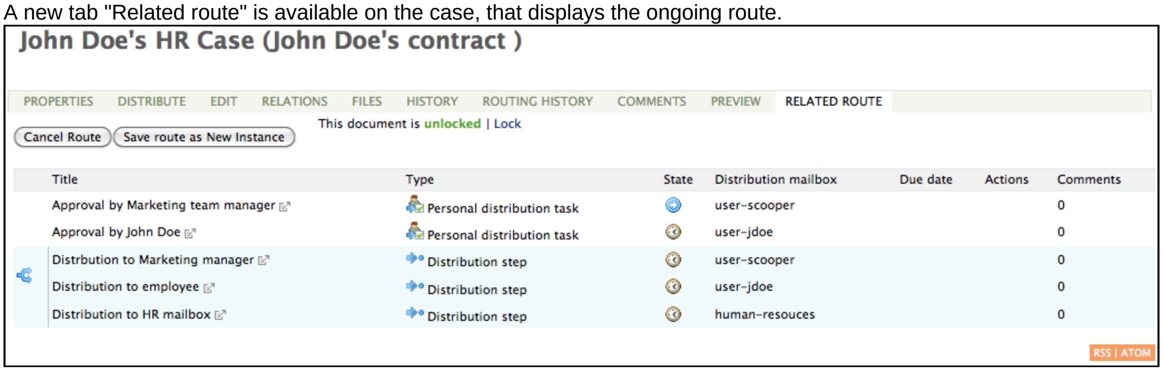
## Using a route

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

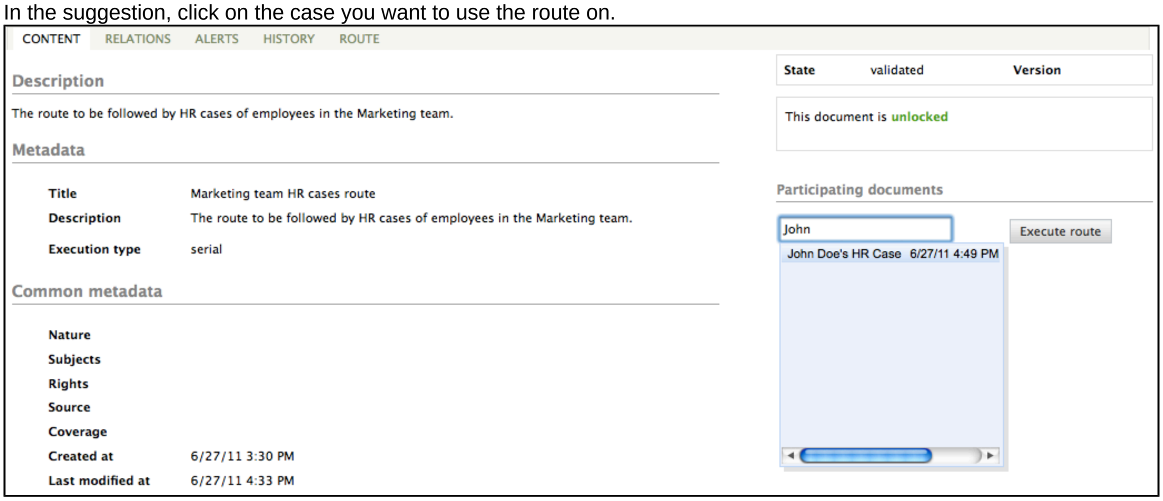
You can apply any validated route on cases. If you prepared a route, make sure it's been approved to be able to use it.

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

## To apply a route on a case from the case:

1. On the case's Content tab, start typing the route's title in the "Related route" search field.
   The routes whose title correspond to the typed characters are proposed.
2. In the suggestion list, click on the route you want to use.
   
   
   The route's title is displayed under the search field.
3. Click on the **Start** button.
   The first distribution stage of the route is done.
   A message saying "A route is started from this document" is displayed instead of the route search field.
   
   
   A new tab "Related route" is available on the case, that displays the ongoing route.
   
   
   The route is listed in the **Routing History** tab of the case.

**To apply a route on a case from the route:**

1. On the route's Content tab, start typing the case's title in the "Participating documents" search field.
   The cases whose title correspond to the typed characters are proposed.
2. In the suggestion, click on the case you want to use the route on.
   
   
   The route's title is displayed under the search field.
3. Possibly, search for other cases and add them to the list of cases.
4. Click on the **Execute route** button.
   The first distribution stage of the route is done on the selected documents.
   A message saying "A route is started from this document" is displayed in the "Related route" section of the cases Content tab.
   A new tab "Related route" is available on the cases, that displays the ongoing route.
   The route is listed in the **Routing History** tab of the cases.

# 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

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

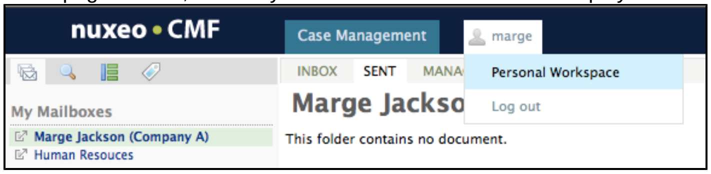
Routes are created in the personal workspace of the user. Every user of the application has access to a private workspace, in which he can create documents. In this workspace, the user has access to the Nuxeo Document Management workspaces features and document types (see the Nuxeo DM user guide for 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.

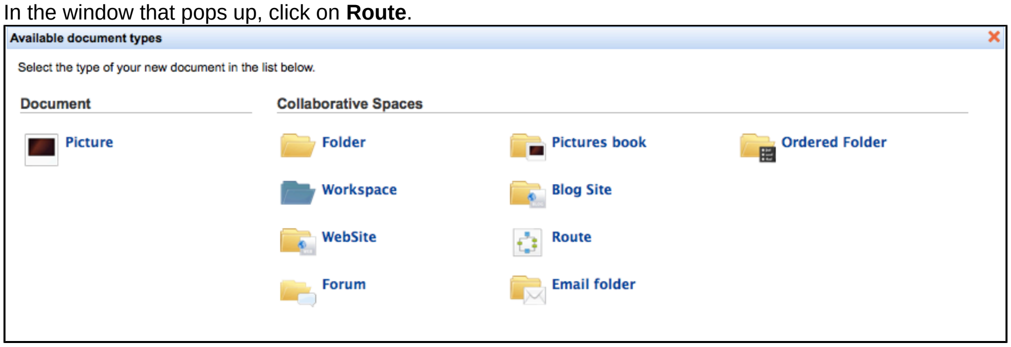
## To create a route:

1. In the page header,roll over your username until a menu is displayed.

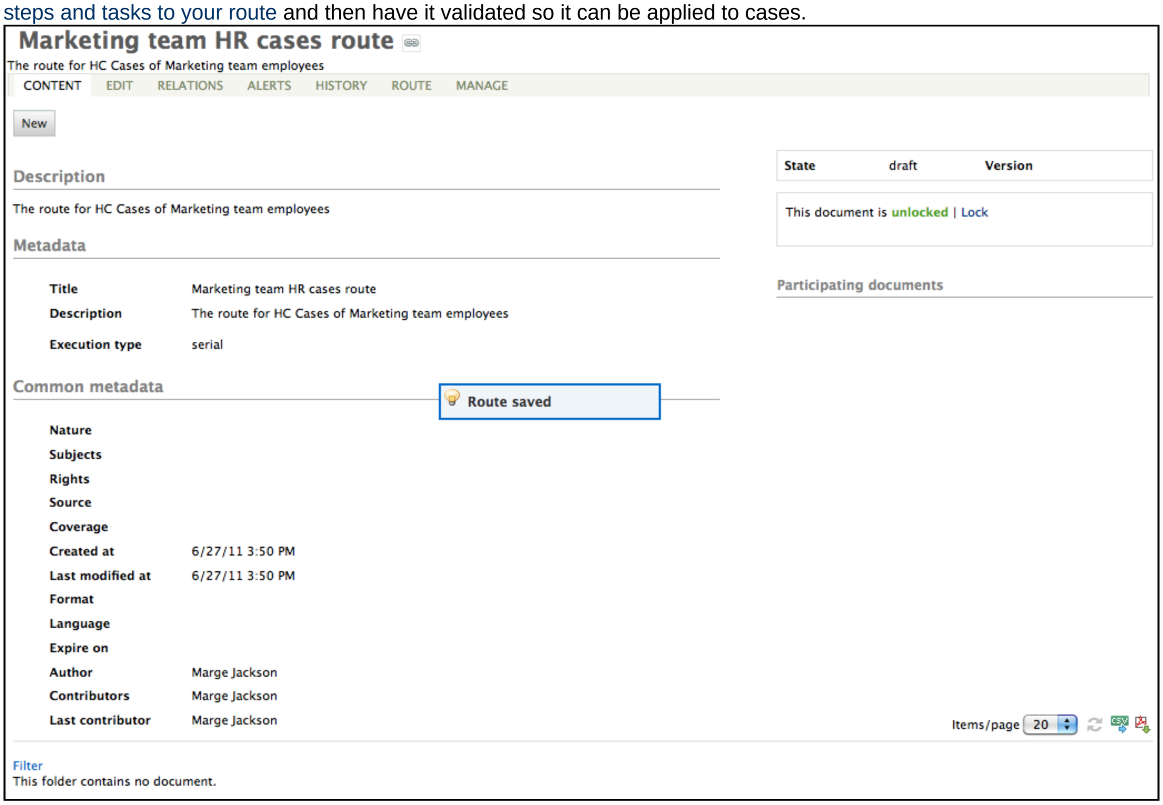



2. In the menu, click on **Personal workspace**.
   The **Content** tab of your personal workspace is displayed. Your personal workspace name is your username.

   # Click on the **New** button.
3. In the window that pops up, click on **Route**.




4. Fill in the creation form displayed (see below).
5. Click on the **Create** button.
   The **Content** tab of your new route is displayed. For now, the route is still a draft and is currently empty. You need to add steps and tasks to your route and then have it validated so it can be applied to cases.




### 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

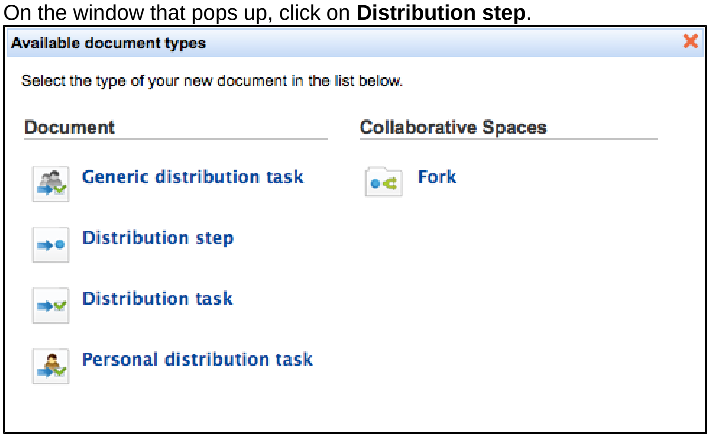
## Distribution steps

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

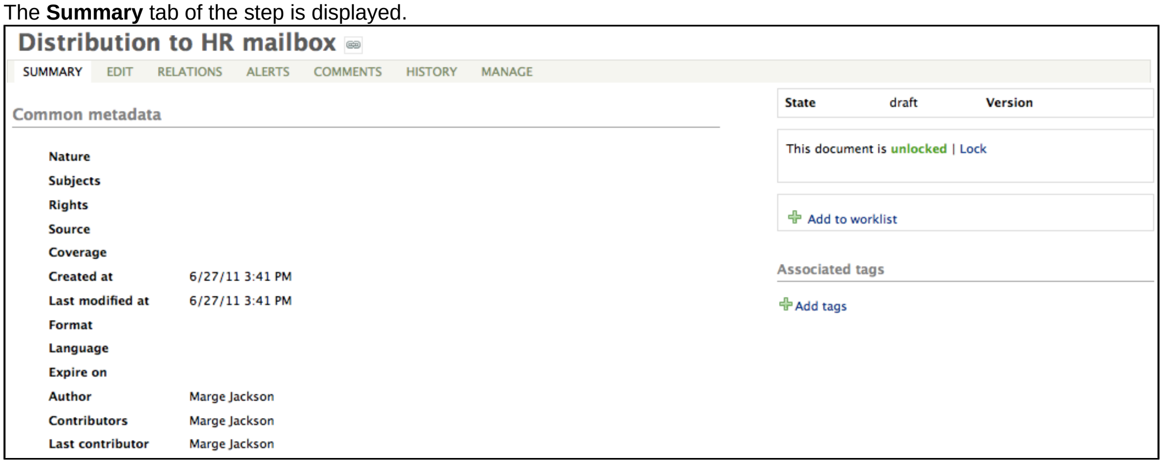
The difference between a distribution step in a route and a simple distribution outside a route is that, using a distribution step, the case is sent to only one mailbox per step. Distribution outside a route allows for distribution to multiple mailboxes at the same time.

### To add a distribution step in a route:

1. From the **Content** tab of the route, click on the **New** button.
2. On the window that pops up, click on **Distribution step**.




3. Fill in the creation form (see below for details).
4. Click on the **Create** button.
The **Summary** tab of the step is displayed.




On the **Content** tab of the route, the step is added at the end of the route, below the route's metadata. If you have added 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. |

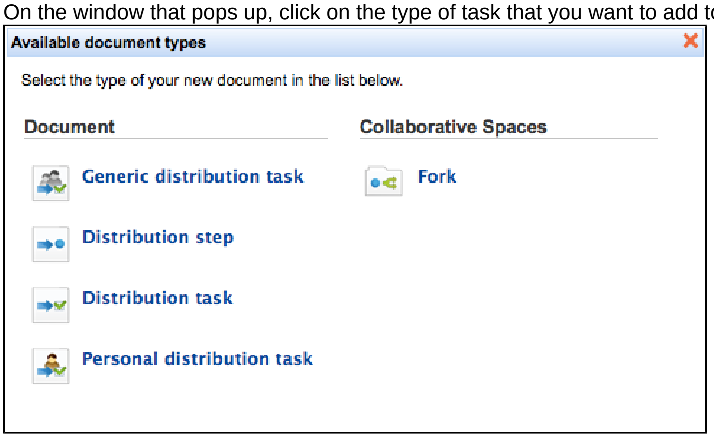
## Distribution tasks

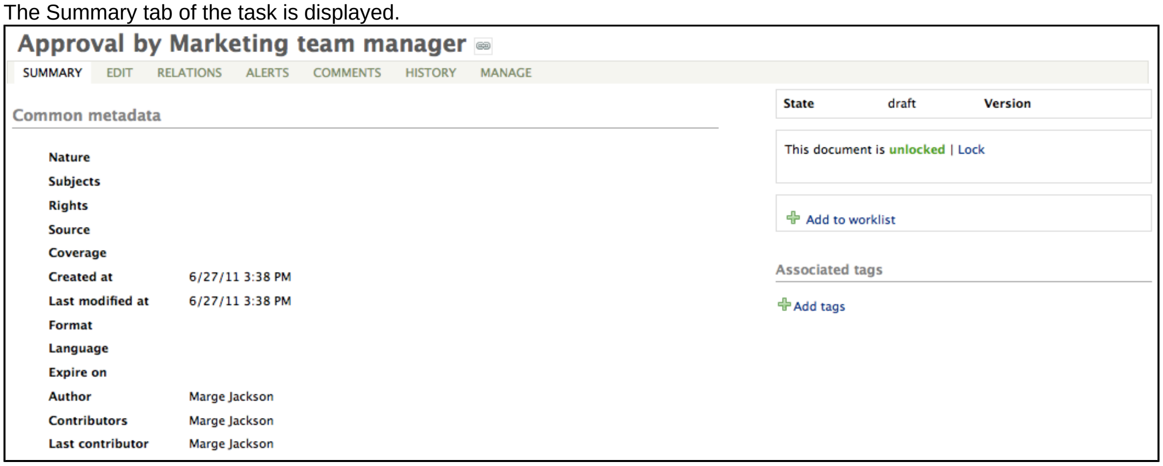
A distribution task consists of sending the case to a selected mailbox, and asking the user to approve or refuse the case so the route can continue or end. There are three types of distribution tasks:

- 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.

### To add a distribution task in a route:

1. From the **Content** tab of the route, click on the **New** button.
2. On the window that pops up, click on the type of task that you want to add to the route.


3. Fill in the creation form (see below for details).
4. Click on the **Create** button.
The Summary tab of the task is displayed.


On the **Content** tab of the route, the task is added at the end of the route, below the route's metadata. If you have added several stages to your route, you can change the order of steps and tasks in the route.

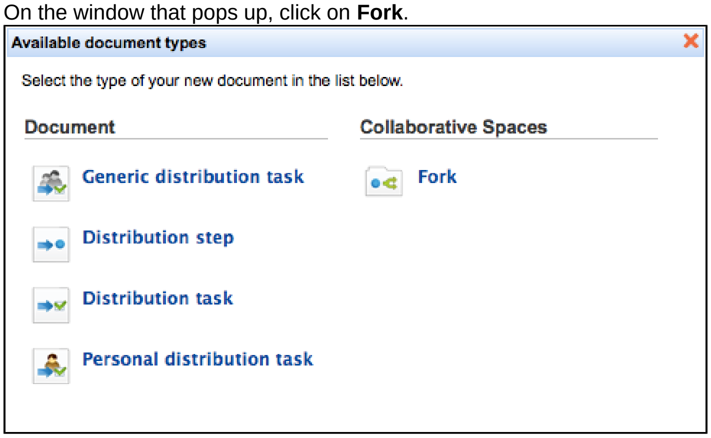
**Distribution tasks parameters**

| Field | Description |
|---|---|
| Title | Type the name of the task. |
| Description | Type an optional text that indicates the purpose of the task. |
| Type | 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.

**To add a fork in a route:**

1. From the **Content** tab of the route, click on the **New** button.
2. On the window that pops up, click on **Fork**.


3. Fill in the creation form (see below for details).
4. Click on the **Create** button.
The **Content** tab of the fork is displayed. It is currently empty, so you need to add steps and tasks to your fork.
On the **Content** tab of the route, the fork is added at the end of the route, below the route's metadata. If you have added several stages to your route, you can change the order of steps and tasks in the route

**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.

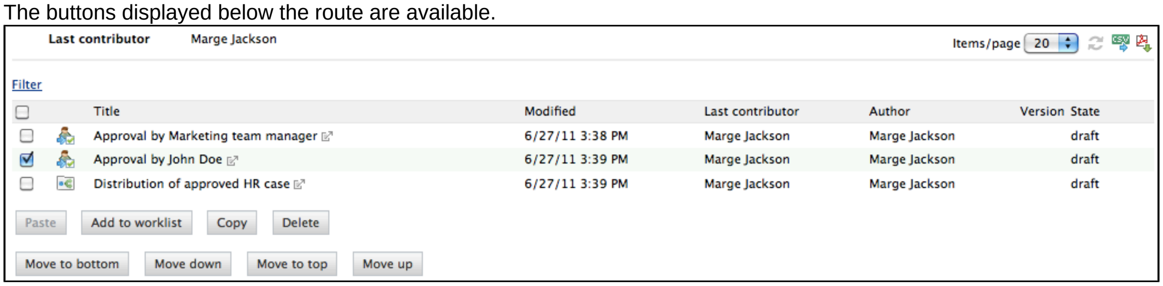
**To edit the properties of a route:**

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.

### To move steps and tasks in the route:

1. On the route's **Content** tab, check the box corresponding to the step or task you want to move.
   The buttons displayed below the route are available.
   
   
2. Click on the button that correspond to the move you want to do.
   The step or task is immediately moved in the route.

# 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.

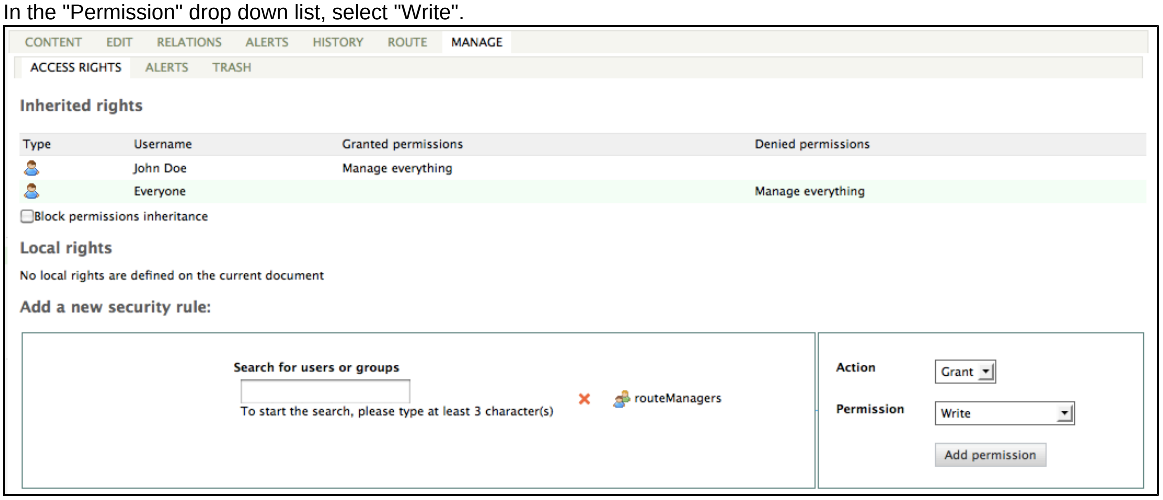
## How to make the route available to route managers

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.

### To give access rights to route managers to a route:

1. On the route, click on the **Manage** tab.
   The **Access Rights** sub-tab is displayed.
2. In the "Add a new security rule" form, start typing "routeManagers".
   The users and groups that correspond to the characters you type are displayed.

   > If no "routeManagers" group is suggested, contact your administrator and ask him to create this group.

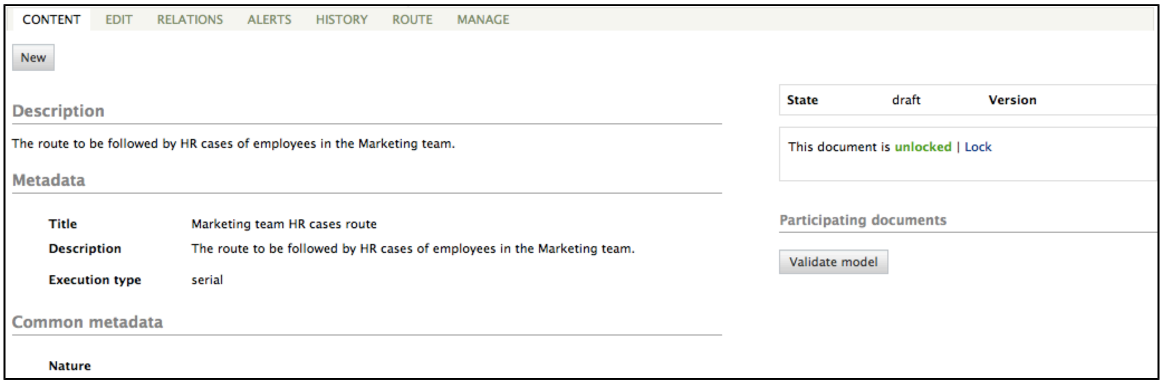
3. In the suggestions, click on the "routeManagers" group.
4. In the "Permission" drop down list, select "Write".
   
   
5. Click on the **Add permission** button.
   The "routeManagers" group and its right are displayed in the "Local Rights" part of the screen.
6. Save local rights modification by clicking on the **Save local rights** button.
   Local rights are saved and applied.
   You now need to inform route managers that they need to approve a route.

## 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.

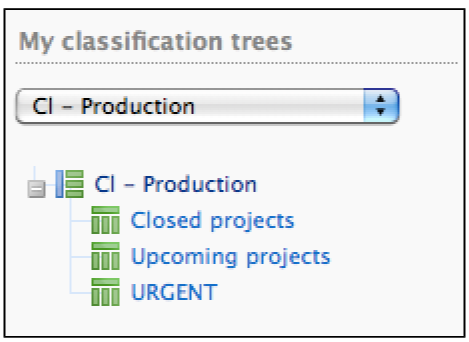
### How to validate a route

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

1. Open the route by clicking on the URL that you were provided.
   You are displayed the route, with all its content. The route's state is currently "draft".
2. When you have reviewed the route, click on the **Validate model** button displayed in the "Participating documents" section of the route's "Content" tab.
   
   
   The route's state goes to "Validated". All users can now apply this route on cases.
   The route can no longer be edited.

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

## Classify a document

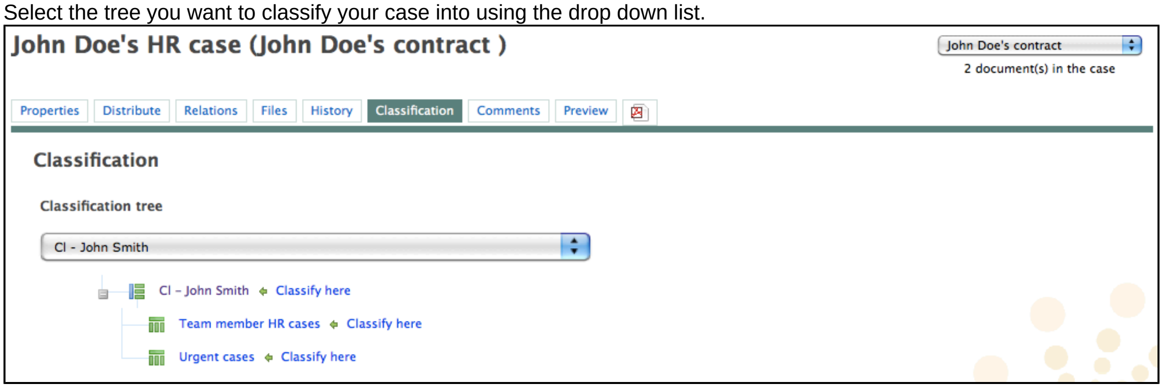
You can classify cases as soon as:

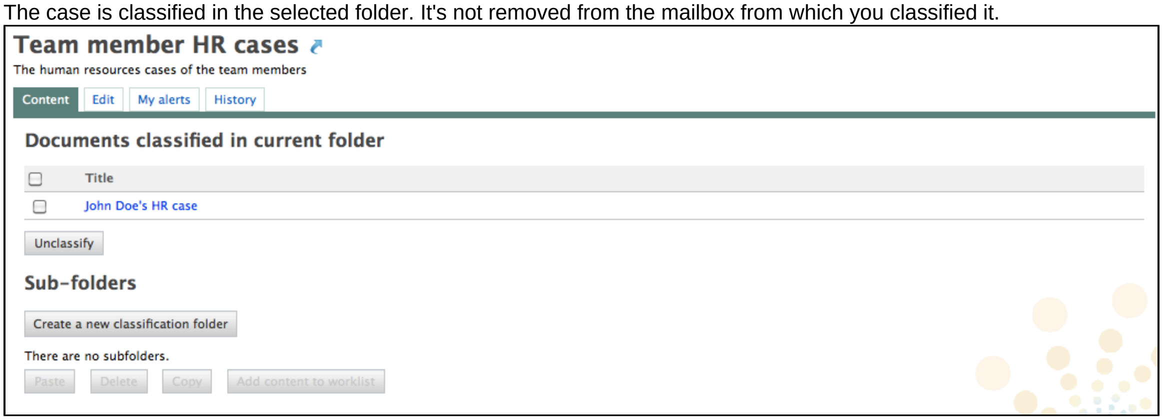
- you can access them (i.e. when you are a delegate of a mailbox to which the case was sent),
- and you have "Classify" right in the target classification folder.

Classification is not available on drafts.

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 **Classification** tab.
3. Select the tree you want to classify your case into using the drop down list.


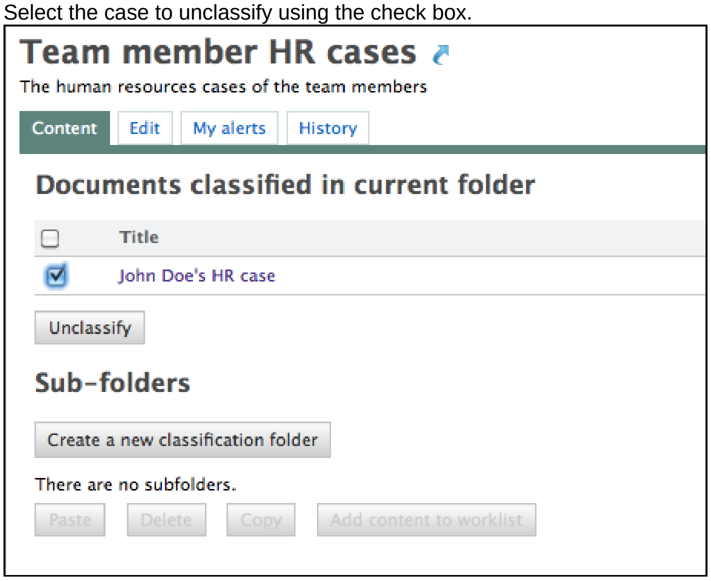
4. Unfold the tree to display the classification folders.
5. Click on **Classify here**.
The case is classified in the selected folder. It's not removed from the mailbox from which you classified it.



## 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

1. Go in the classification folder from which you want to unclassify the case.
2. Select the case to unclassify using the check box.




3. Click on the **Unclassify** button.
4. On the window that pops up, click **OK**.
   The case is unclassified and cannot be accessed from the classification folder anymore. It's still available in the mailbox however.