Creatio Academy

Case Designer workflows

Version 7.17

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Case Designer

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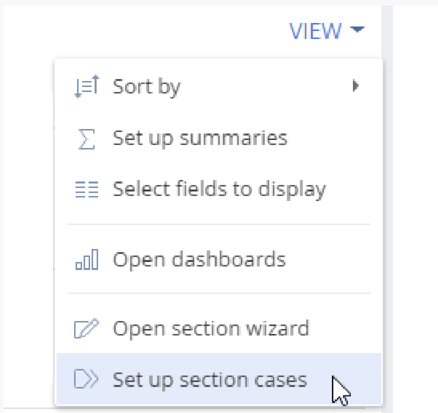
The purpose of the Case Designer is to automate, build, and customize the stages of your company's non-linear business processes, otherwise known as “cases”. The concept of case management is aimed at ease of use and ease of design.

The Case Designer does not require knowledge of the complex process and provides simpler case management. Use case management if there are several ways to reach the goal of a business case and none of them can be predicted. You can set the order and parameters of case stages, and specify the steps and tasks for each stage.

The Case Designer is accessed via the section wizard from the [*View*] section menu (Fig. 1).

Fig. 1 Starting the Case Designer



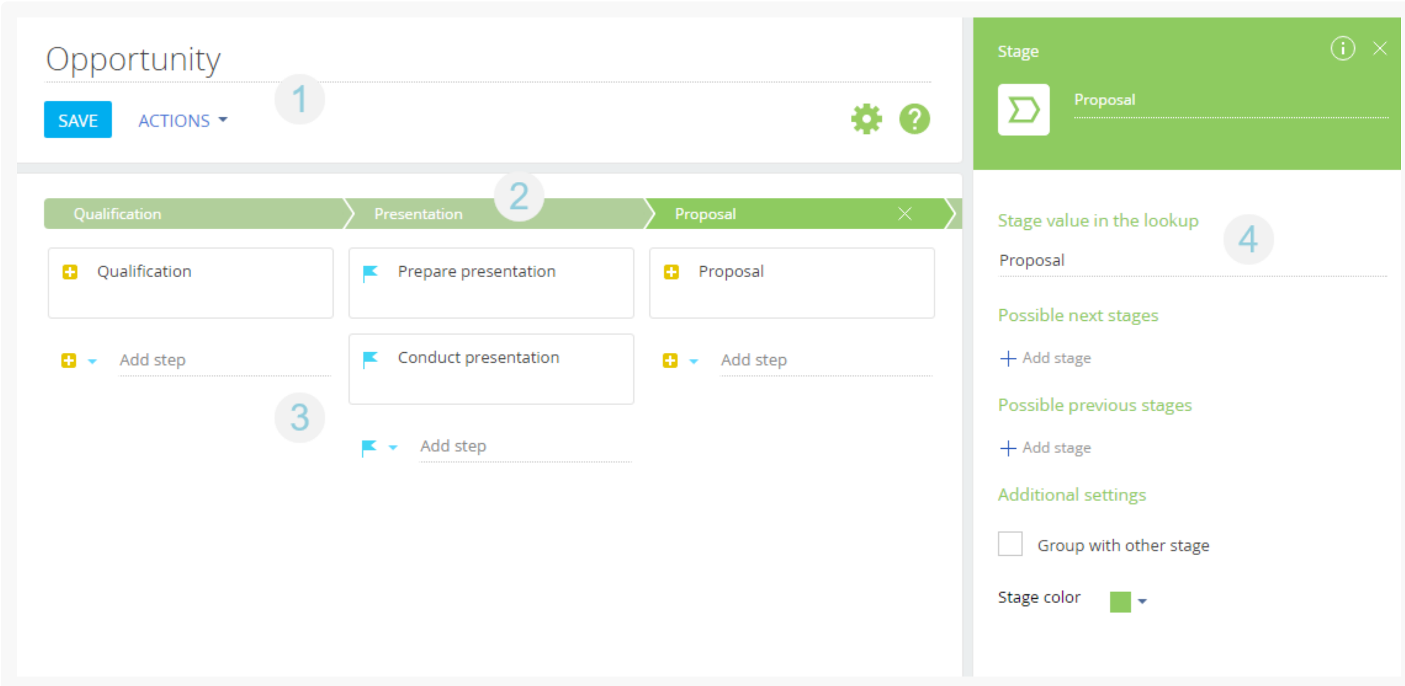
The case diagram consists of steps and case elements.

The case is a workflow with a business value to a customer, partner, or stakeholder. The case consists of several tasks and steps that lead to the needed business result. The set of tasks and processes are coordinated within the case. For example, the creation of a bank account, application for insurance payment, etc.

Case Designer UI

Use the Case Designer to configure case steps and their sequence. To configure a case, select it in the list of cases and click [*Open*]. Setting up and editing case steps and stages are performed in the Case Designer UI, which consists of the toolbar, the stage panel, the working area, and the element setup area (Fig. 2).

Fig. 2 Case Designer workspace



Toolbar

The toolbar (1) contains the following buttons:

- [*Save*] – saves changes made to the case in the Case Designer. All changes will immediately become available on the workflow bar of the new records in the corresponding section.
- – opens the case parameter page or parameter page of the currently selected case element.
- – opens the DCM help on the academy.creatio.com.

The [*Actions*] menu contains the following commands:

- [*Metadata*] – opens the metadata of the case.
- [*Metadata export*] – exports metadata to an MD (Markdown) lightweight markup language file.

Stages panel

Use the stages panel (2) to map and manage the workflow stages for the case. With the help of the stages panel, you can add, remove, and connect stages displayed on the workflow bar of the corresponding section.

Working area

The working area (3) of the Case Designer is used to manage case elements. Here you can add case elements as “steps” of the case stages and configure their parameters.

Setup area

Use the setup area (4) to set up process and process element parameters. The list of available settings depends on the type of the currently selected Case Designer element.

Case Designer hotkeys

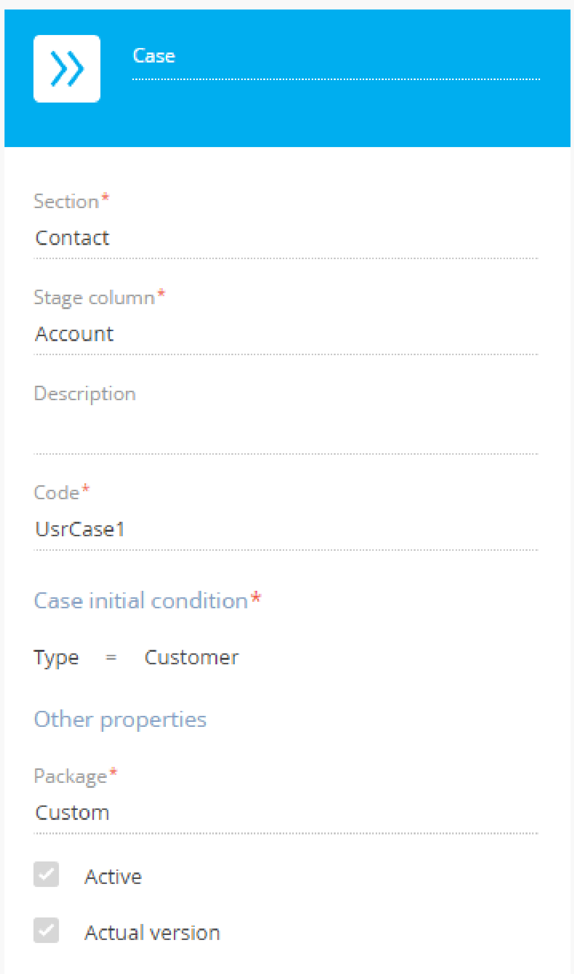
Use the hotkeys to easily trigger certain operations in the Case Designer.

Hotkeys	Notes
Ctrl + S	Save the case.
F1	Open help
Ctrl + M	Show metadata
Delete	Delete the currently selected task or sub-process.

Case properties

Case settings are available in the case setup area (Fig. 3). To open the case setup area, click the button or double-click the Case Designer toolbar.

Fig. 3 Case setup area



[*Title*] – enter the case name in the upper part of the setup area or in the field above the Case Designer toolbar. This is a required field.

[*Section*] – Creatio section where the current case is used. The [*Section*] value cannot be changed once the new case is saved. This is a required field.

[*Stage column*] – the column that contains the current stage of the section record. Select any of the section's lookup columns here. This is a required field.

[*Description*] – optional notes and supplementary information for the case.

[*Code*] – the internal name of the case, used by the system to identify it in the system. The default code is generated automatically, but you can edit it. The code can only contain Latin characters and numbers and cannot contain any special characters. This is a required field.

[*Case initial condition*] – a field that determined which case can be run for the section record. Corresponds with the [*Which column to build the stages by?*] field on the section case page.

[*Package*] – the package that contains the dynamic case schema.

[*Active*] – uneditable. The field is filled in automatically and indicates that the case is enabled in the corresponding section. Additionally, you can activate this checkbox by clicking [*Activate case*] on the section case page.

Set up case stages

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The [*Stage*] case element denotes a general progression milestone within the case workflow. A stage can contain several required and optional steps. The stages of a case are displayed on the workflow bar in the order of their completion. To modify the sequence of stages, drag a stage.

> **Note.** A list of case stages is available in the [*Opportunity stages*], [*Lead stages*] and [*Case stages*] lookups, or any other lookup, created while setting up a section. Each new stage added in the Case Designer will be saved in the corresponding lookup.

Add a case stage

To add a stage, click the + button on the stage panel. The button is displayed next to the last stage on the workflow bar, and when hovering the mouse over the spaces between stages. That enables you to add stages both sequentially and in random order. (Fig. 1).

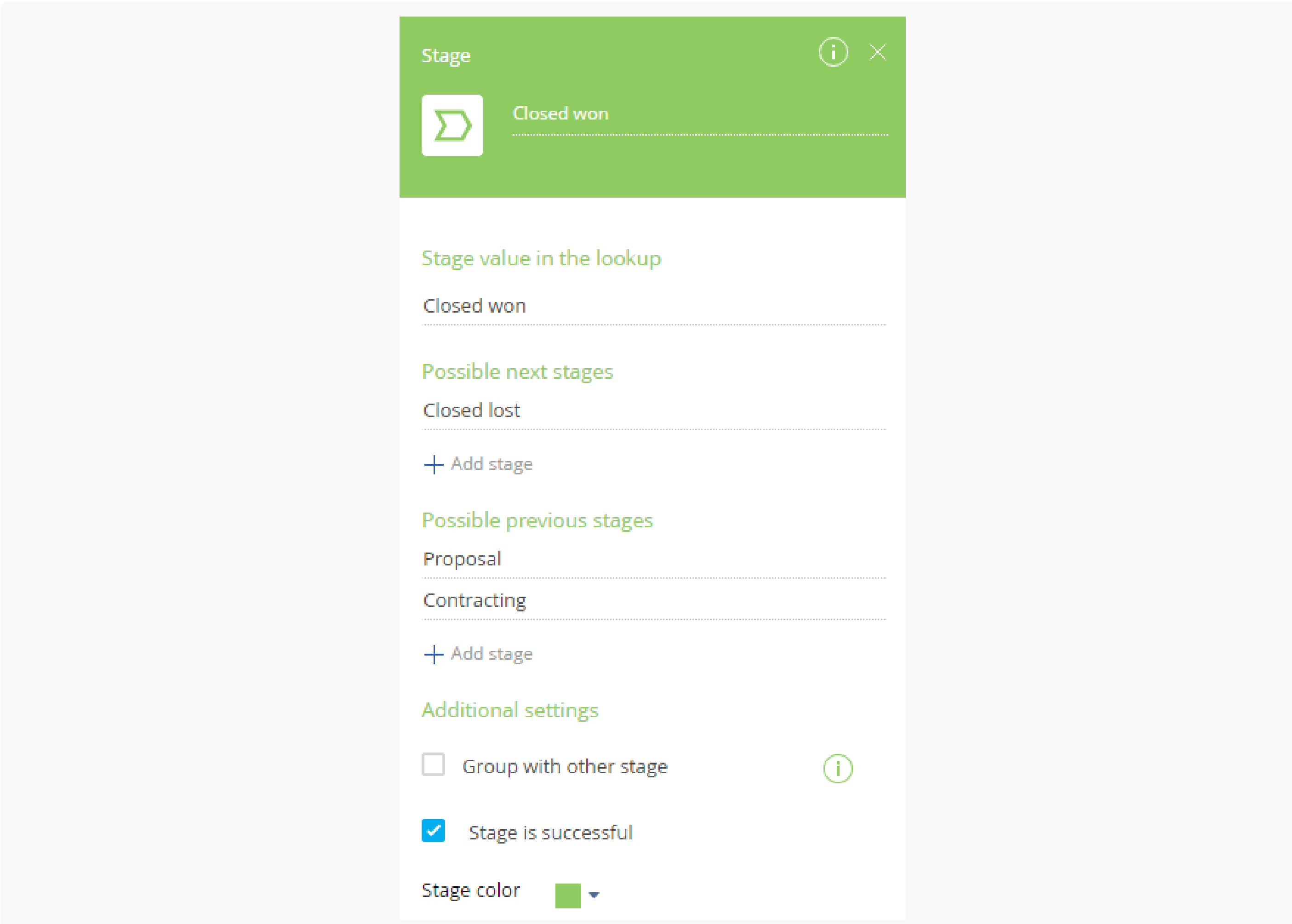
Fig. 1 Add a stage

The setup area will be displayed once you add a stage.

Set up stage properties

Specify stage parameters in the setup area (Fig. 2).

Fig. 2 The stage setup area



The name of the element is indicated at the top of the parameters panel. If you rename an element, the corresponding record in the lookup will be modified as well. If you rename an element, the corresponding record in the lookup will be modified as well.

[*Stage value in lookup*] – the lookup record that corresponds to the current case stage. Map case stages to lookup values here. If the lookup does not have the required stage, you can create it directly from the setup area. To do this, enter the name of the stage in the [*Stage value in the lookup*] field. Each new stage added in the Case Designer will be saved in the corresponding lookup. This is a required field.

[*Possible next stages*] – select case stages to which you can transition from the current stage. By default, all case stages are available.

[*Possible previous stages*] – select case stages from which you can transition to the current stage. By default, all case stages are available.

[*Automatic transition to next case stage*] – used to configure an automatic transition to the next case stage. The current stage can automatically transition to any stage specified in the [*Possible next stages*] list.

- "Only manually (no automatic transition)" – the transition to the next case stage is performed only when the user clicks the next stage on the workflow bar.

- “If required steps are completed” – the transition to the next case stage occurs automatically when all required case steps of the current stage are completed. Required steps are case elements with the "Required step" type.
- “If all steps are completed” –the transition to the next case stage occurs automatically once both required and optional stage steps are completed.

> **Note.** If an automatic transition is enabled for the stage, it will occur after the transition condition is met. In this case, regardless of the automatic transition settings, you can go to the required stage of the case manually.

[*Group with other stage*] – select stages from the lookup to group with the current stage. Grouping stages enables them to occupy the same slot on the workflow bar. The workflow bar displays grouped stages as a drop-down list. The stage specified in this field becomes primary and is placed before the current stage on the stage panel. The [*Group with other stage*] checkbox becomes uneditable if the stage is already grouped.

The [*Stage is successful*] checkbox determines the stage at which the case is considered successful. The checkbox is displayed only for the final stages.

[*Stage color*] – the color of the workflow bar on this case stage.

Delete a case stage

You can always delete unnecessary case stages and steps. To do this, select the stage and click .

> **Note.** If a case stage is deleted, all its steps will be deleted as well. The stage will not be deleted from the corresponding lookup.

Execute a case

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You can add a case to most Creatio sections. Some sections, e. g., [*Opportunities*], [*Leads*], [*Cases*], come with pre-configured cases out of the box. Learn more: Set up cases in sections.

> **Note.** We recommend disabling the section's business process before running the section case. Otherwise, the case and the process will run in parallel.

The section case launches automatically when a new record that matches the launch conditions is created. The case also creates activities and launches sub-processes included in the first stage automatically.

By default, cases execute the stage elements immediately upon transitioning to the stage. If you set the [*When is the setup performed?*] field in the element settings to “After the previous step is complete,” the case will execute the element only after the step specified in the [*Perform after step*] field.

Use the workflow bar on the action panel to advance through the case stages. Creatio displays all activities created as part of the case on the action panel.

You can set the case to transition to a specific stage depending on the results of the task or the conditions of the subprocess at the current stage.

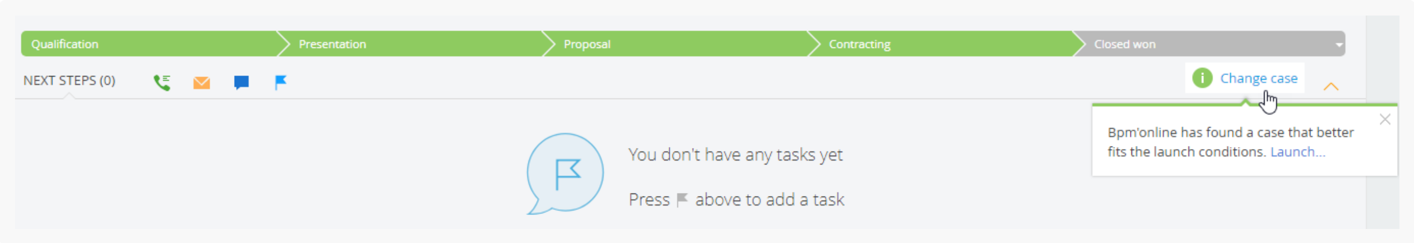
The case owner will see case steps on the action panel. Complete tasks and advance through the stages to achieve the goal of the case. Completing all the steps on a stage is not required. Users must complete only the required steps to advance through the case.

Note. Users can advance to the final “unsuccessful” stage from any stage without completing the required steps.

Change case

If the record page's field value that triggered the case changes, and there is a more suitable case for the new value, the action panel will display the [*Change case*] button (Fig. 1).

Fig. 1 The [*Change case*] button



To launch a new case:

1. Click the [*Change case*] button.
2. Select the “Launch” command.
3. Click [*Proceed*] in the dialog box to confirm the case change.

As a result, the record page will display the stages and activities of the new case.

Set up cases in sections

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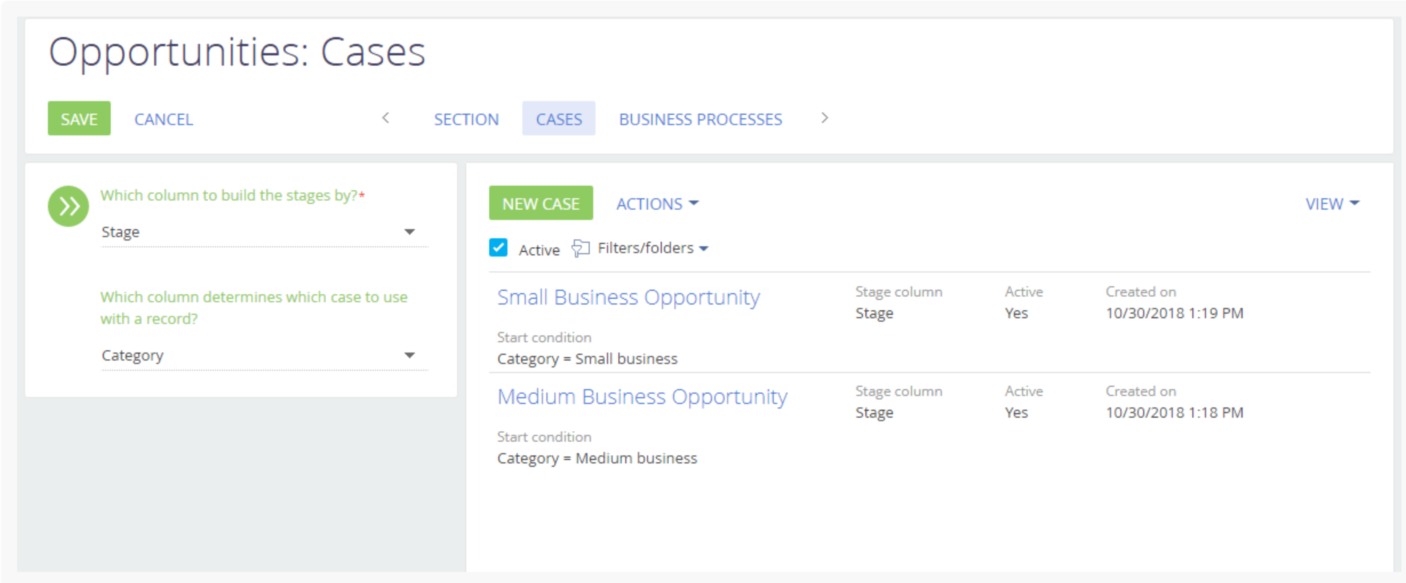
You can configure cases in any Creatio section. Several cases can be used simultaneously in each section. However, a section record will use only one of the cases, depending on a specific column value. For example, for the “Medium business” and “Small business” opportunity categories, you can configure different cases.

There are several ways to access the Case Designer:

- The [*Cases*] tab in the section wizard
- The [*Set up section cases*] button in the [*View*] section menu.

The case setup page displays a list of all cases configured for a section (Fig. 1).

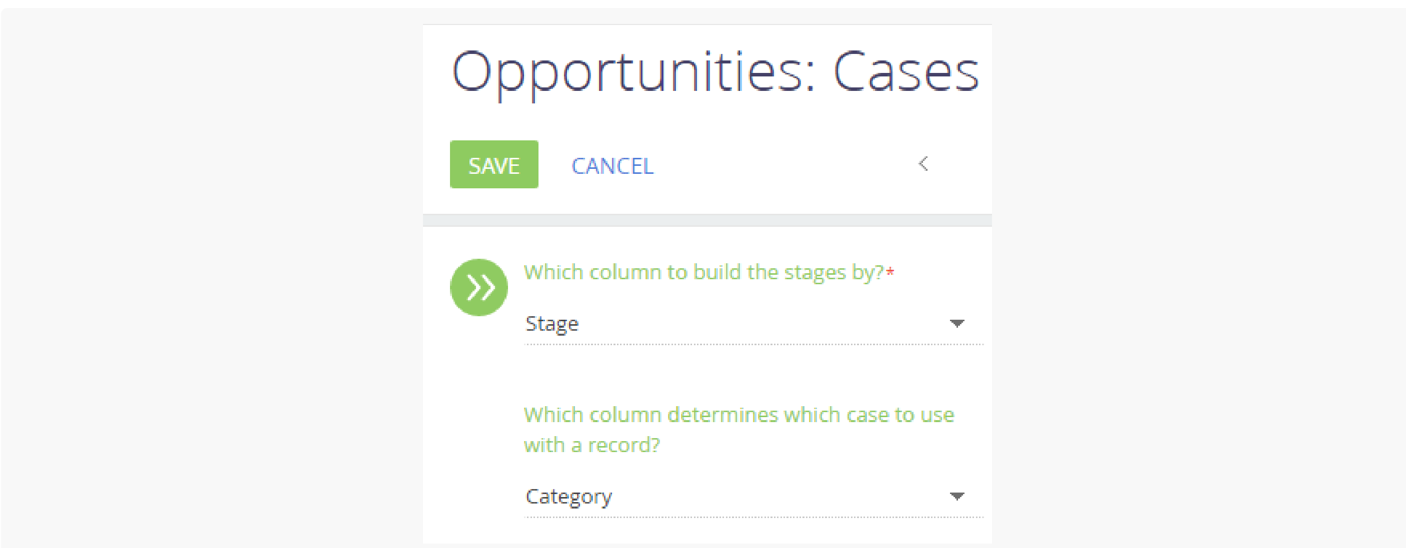
Fig. 1 Section case setup page



The [*Which column to build the stages by?*] and [*Which column to set initial case condition by?*] fields determine the basic case properties (Fig. 2):

1. [*Which column to build the stages by?*] – the values of the column specified in this field will be used to determine case steps.
2. [*Which column to set initial case condition by?*] – Creatio will use the column specified in this field to determine which case to run for which record. Populate this field if the section has several cases.

Fig. 2 Configuring section case columns



Create a case

Click [*New case*] to add a section case. The Case Designer will open. In the designer, configure the sequence of steps (case elements) that are performed at each case stage. A new case will appear in the list of section cases after you save changes in the Case Designer.

Note for implementation specialists. In the pre-production environment, if you configure the case for the section with the default case disabled, then before transferring the created case to the production environment, bind the data of the disconnected case.

Activate a case

Cases that are not currently in use can be deactivated by selecting the case record and clicking the [*Deactivate case*] button in the [*Actions*] drop-down menu. The case will continue running for all records created before its deactivation. Several cases can be activated simultaneously in each section.

Note. You can run only those cases that correspond to the columns specified in the [*Which column to build the stages by?*] and [*Which column to set initial case condition by?*] fields. If the values of the [*Which column to build the stages by?*] and [*Which column to set initial case condition by?*] fields are changed, all cases that have incompatible column values will be deactivated.

Add case elements

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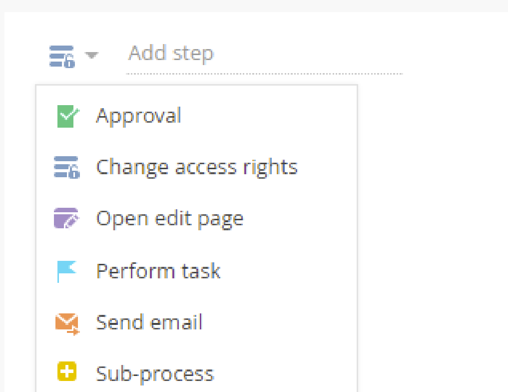
Case elements are steps that constitute a case stage. Each element is some form of action in Creatio, very similar to actions in a BPMS business process.

Some elements require some form of user activity, while others are executed by the system. Select the element on the case diagram to display its properties in the setup area. You can configure each element in either the "primary" or "advanced" mode. By default, the setup area opens in the primary mode and features all user settings. Click the ⋮ button to view advanced properties. In this mode, the setup area will contain the list of all parameters of the task element.

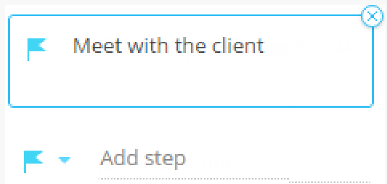
To add an element to a stage, click the icon below the corresponding stage in the designer working area. Select the type of the case element in the drop-down list (Fig. 1).

Fig. 1 Selecting an element in the menu



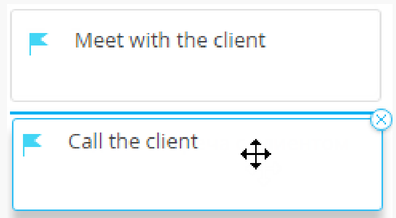
Enter the name of a new case element and press Enter. The new element will appear in the working area. The setup area for the newly added element will display. The [*Add step*] field will be displayed below the last element of the stage (Fig. 2).

Fig. 2 New element on the case diagram



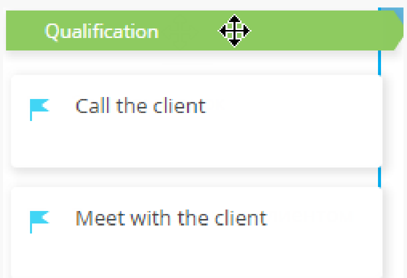
You can rearrange case stages and elements at any time. To move an element, drag & drop it to the new location (Fig. 3). You can drag & drop case elements within a stage or between stages.

Fig. 3 Moving a [*Perform task*] case element



You can also drag & drop case stages to change their order. All stage steps will be moved along with their stage (Fig. 4).

Fig. 4 Moving a case stage



Note. Grouped stages are moved simultaneously if any of the stages in the group is moved.

You can always delete unnecessary case stages and steps. To delete an element, select it and click the button or press the “Delete” key on the keyboard.

Note. If a case stage is deleted, all its steps will be deleted as well.

Case version control

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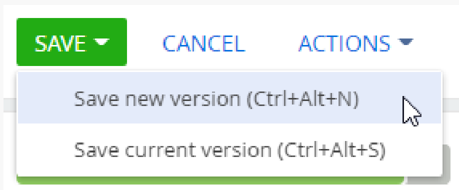
Case version control enables you to track the history of changes and eliminate possible disruptions in launched case instances when editing the case schema.

Changes made in the case schema can be saved as a separate version. All case versions are saved in Creatio and can be viewed on the case properties page. The case version that is launched in the section according to the set conditions is considered as actual. Usually, this is the last saved case version. You can switch to any other saved case version as actual. Only one actual case version can exist at a time.

Save a new case version

When saving the case select whether to save the changes as a new version or update the current version (Fig. 1).

Fig. 1. Selecting the case saving method



If you click [*Save*] without selecting any options, Creatio will check the following:

- whether there are case instances in progress
- whether the package that stores the original case version is open for modification.

If there are **no case instances in progress** and the **case package is open for modification**, all changes will be saved to the current case version.

If there are **case instances in progress**, Creatio will suggest creating a new version. If you choose not to, Creatio will attempt to save the changes to the current version. However, this may trigger errors in the case instances that are in progress.

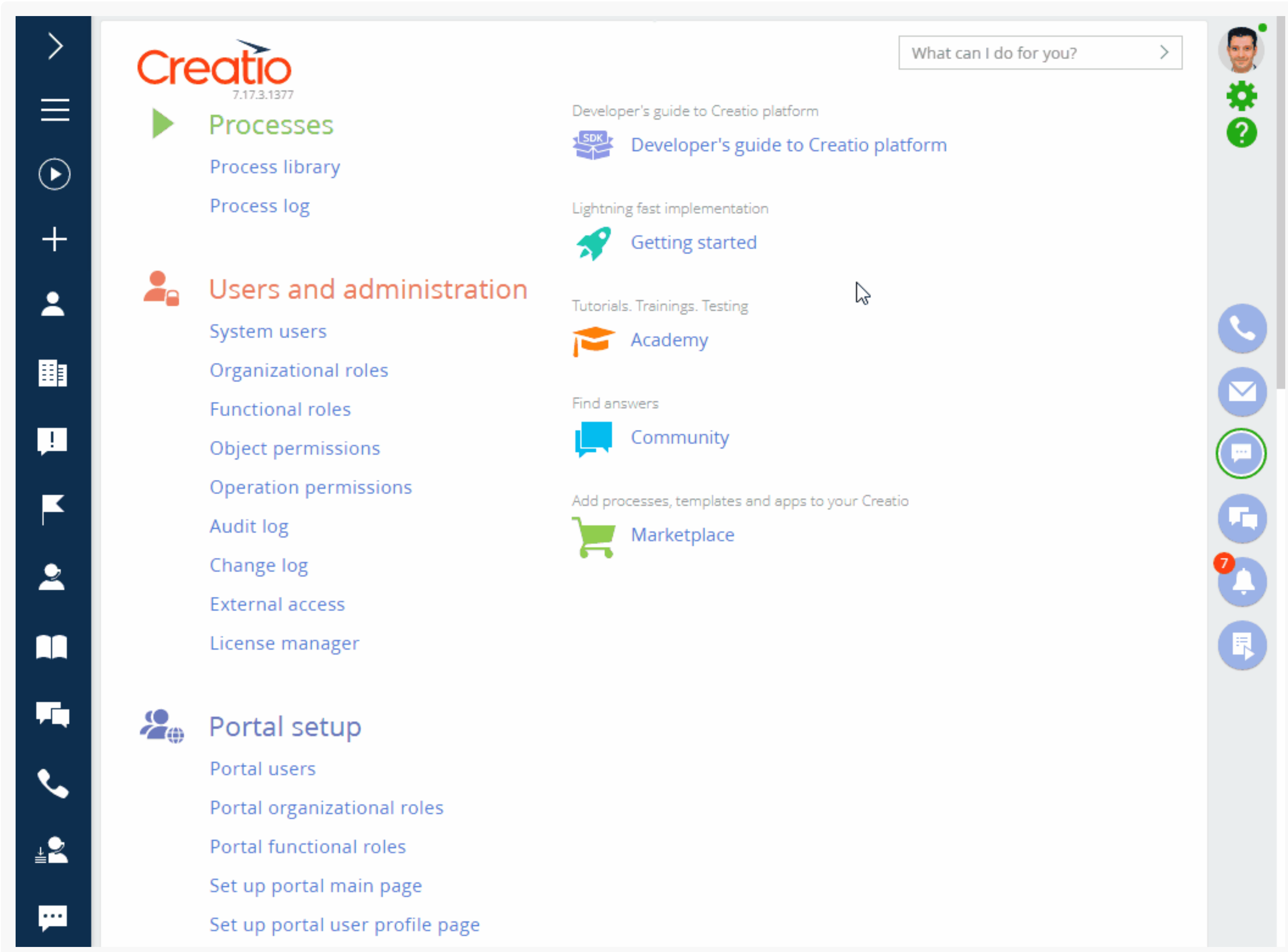
If the **case package is closed for modification**, Creatio will suggest saving a new version of the case. After confirmation, the new version will be saved in the package specified in the “Current package” system setting.

Note. If you save the case package as an archive, and install the package in a different environment, the actual version of the case will be transferred with the package. Creatio will always determine the final current version of the case based on which package is higher in the hierarchy.

View the case version

The case versions are available on the case properties page on the [*Case versions*] tab (Fig. 2).

Fig. 2. Viewing the list of case versions

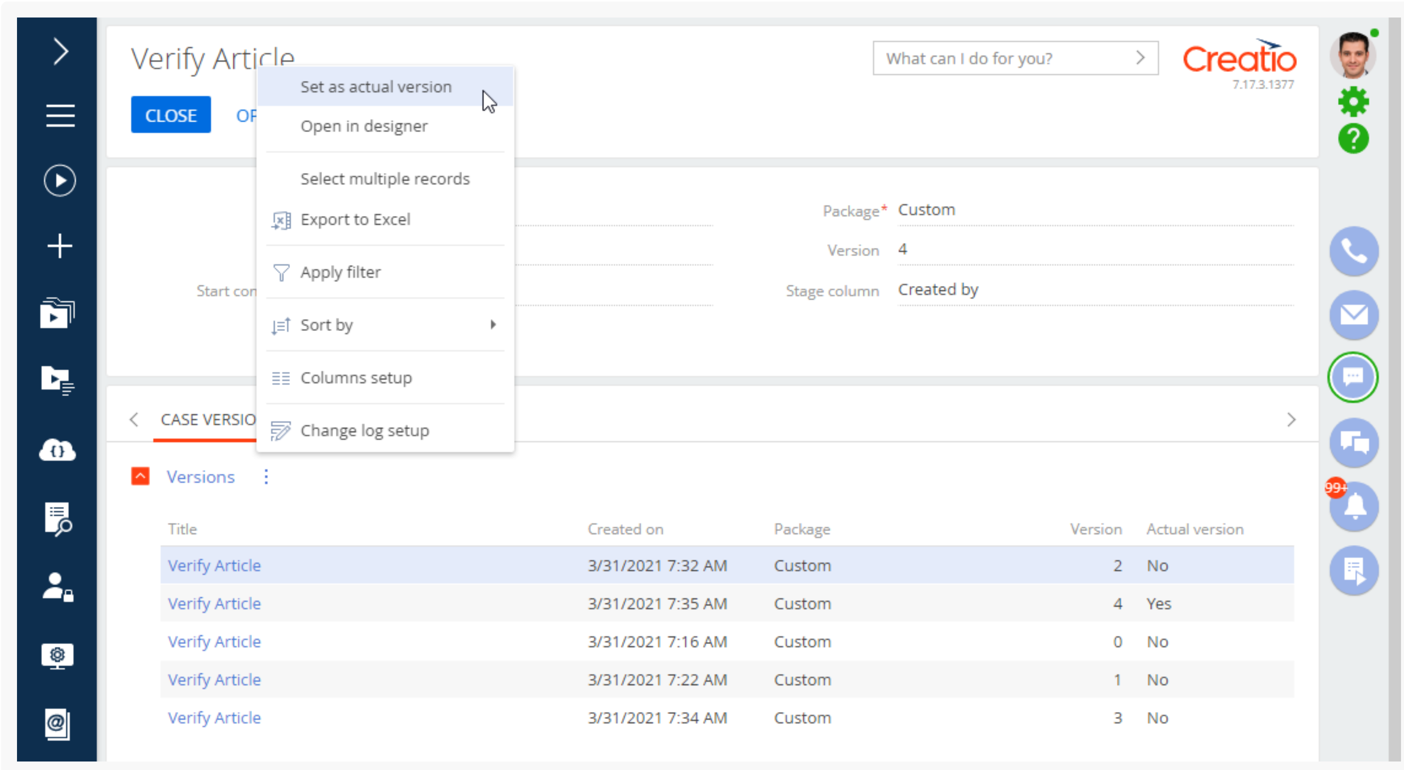


Click the case title to open the current case version in the case designer.

Set the actual case version

You can change the actual case version on the case properties page on the [*Case versions*] tab. To do this, select the needed version and select “Set as actual version” in the ⋮ button menu (Fig. 3).

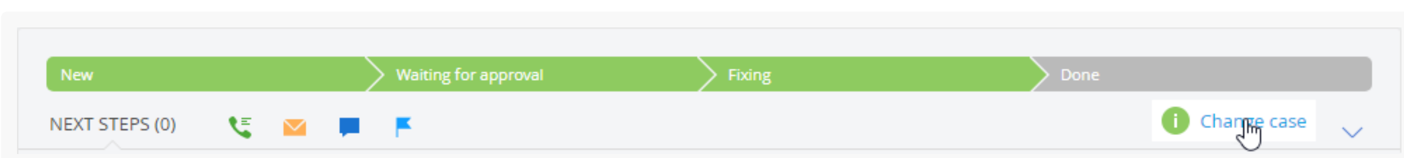
Fig. 3. Changing the actual case version



Run the new case version

After saving a new version, all new case instances will run using that version. However, all unfinished case instances will proceed using their original case version. You can switch such an instance to the new version using the [*Change case*] button on the record page (Fig. 4). After confirmation, the current case instance will be canceled. A new case instance will run using the actual case version.

Fig. 4. Switching a running case to the new version.



Set up an approval case

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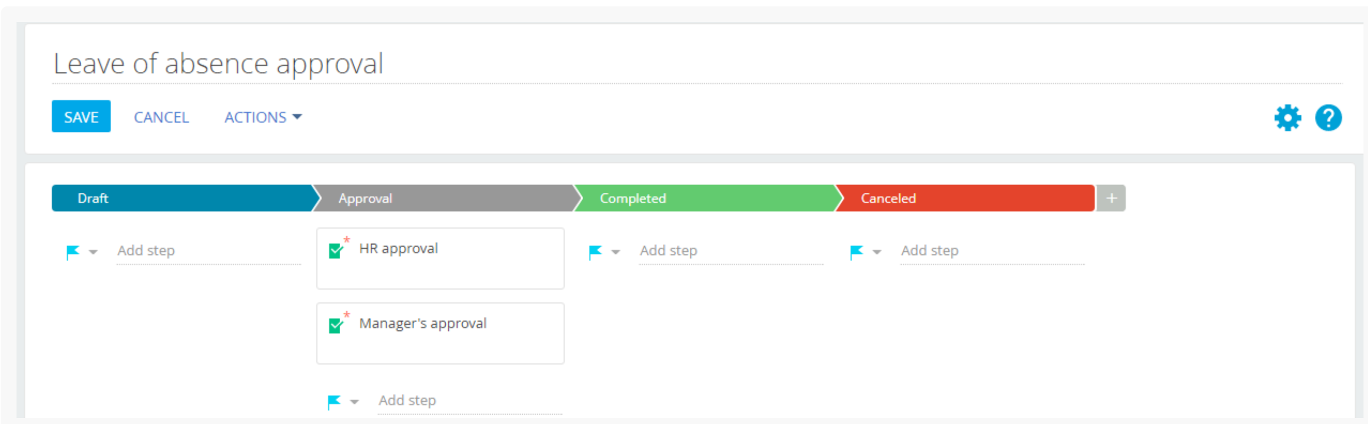
This chapter covers a step-by-step procedure of setting up a typical approval case: a leave request in the [*Documents*] section.

1. Each record with the “Approval” type is submitted for approval automatically, right after a new record is saved.
2. First, an HR employee must approve the request.

3. Once approved by the HR, the request is submitted for approval by the corresponding department manager.
4. Approvers will receive email notifications that a new record awaits their approval. The employees who submit requests for approval will receive email notifications about approval results.
5. If the approval has been denied by HR, the case transitions to the [*Preparation*] stage, at which the employee must revise the request. If the approval has been denied by the department manager, the case transitions to the [*Canceled*] stage.
6. If the request is approved by the department manager, the case transitions to the [*Completed*] stage.
7. The [*Completed*] and [*Canceled*] stages are final.
   Set up the approval case as shown in Fig. 1.

> Attention. Please note that the example below refers to a custom case. Not all fields and values used are available in the base Creatio configuration. You can set up additional section fields in the Section wizard. Before creating and configuring an approval business process, make sure that the [*Enable approval in section*] checkbox is selected for that section in the section wizard. Read more>>>

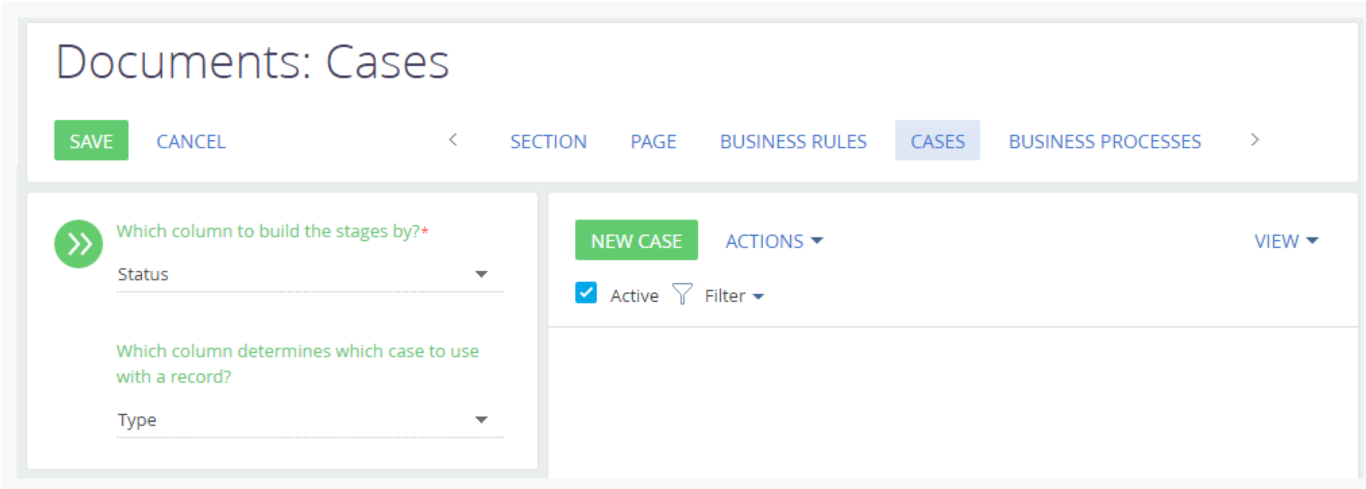
Fig. 1 – Case for leave request approval



Set up the leave request approval case

1. Click Click [*View*] → [*Set up section cases*] in the [*Documents*] section. The Case Designer will open (Fig. 2).
2. In the case list, select “Status” in the [*Which column to build the stages by?*] field. As a result, the case stages will be defined by the document status.
3. Select “Type” in the [*Which column determines which case to use with a record?*] field. As a result, the case will apply only to documents of a specific type (i.e., “Request”).

Fig. 2 Case list of the [*Documents*] section



4. Click the [*New case*] button to open the Case Designer. Here you will need to set up:

- Case parameters.
- Case sequence.
- Activities on each case stage.

Set up case parameters.

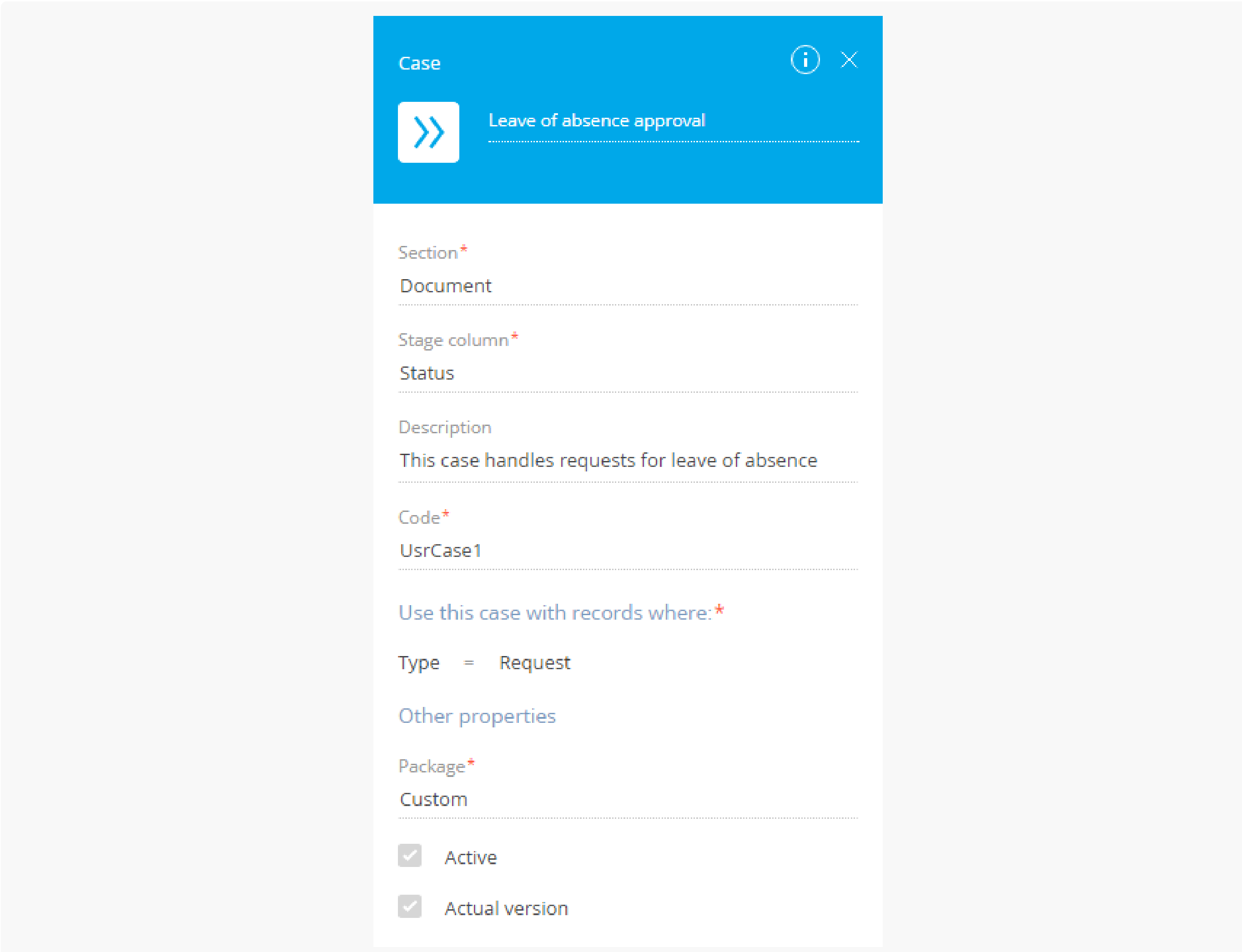
The case parameters are set up in the case setup area (Fig. 3).

1. Click to open case properties.
2. Specify the case title (i.e., “Request processing”).
3. Optionally, populate the [*Description*] field with additional information for anyone who may edit this case.
4. In the [*Use this case with records where:*] area, click and select “Request.” As a result, the case will apply to all documents of the “Request” type.

> Attention. Please note that the example below refers to a custom case. Not all fields and values used are available in the base Creatio configuration. You can add document types to the [*Document types*] lookup. Learn more about working with lookups in the “Manage lookup values” article.

5. The [*Section*], [*Stage column*], [*Code*], [*Package*], [*Active,*] and [*Actual version*] fields will be populated automatically.

Fig. 3 Case setup area



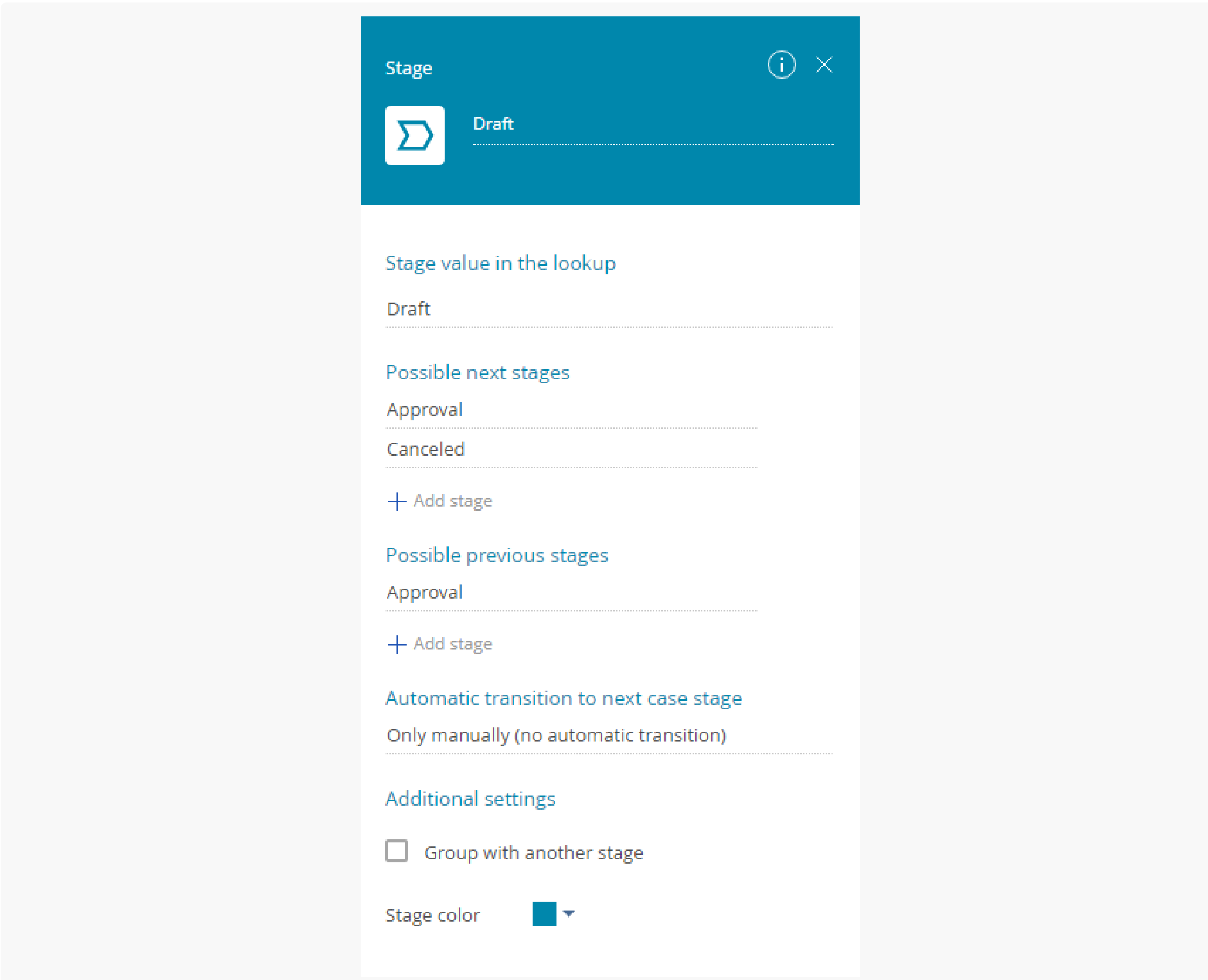
Set up case stages

Use the stages panel to set up the case workflow. The leave request approval case will have 5 stages that correspond to the values in the [*Status*] field in the [*Documents*] section. Use the + button to add case stages: [*Draft*], [*Approval*], [*Completed*], [*Canceled*], and [*Archive*]. Set up stage properties and steps to complete at each stage. We will use the first stage as an example.

1. Click the first stage to open its setup area (Fig. 4).
2. Enter the name of the stage.
3. Select the corresponding document stage in the [*Stage value in the lookup*] field. You can add document stages directly from the Case Designer by typing in the new stage name. Make sure to save the case each time you add a new lookup value this way.
4. All other case stages will be automatically added to the [*Possible next stages*] area. Remove all stages from the list, except for the [*Approval*] and [*Canceled*] stages.
5. All other case stages will be automatically added to the [*Possible previous stages*] area. Remove all stages, except for [*Approval*] from the list. If the approval is denied, the case will transition back to the [*Draft*] stage.
6. In the [*Automatic transition to the next case stage*] field, select “If required steps are completed.”

7. In the [*Additional settings*] area, select a color for this stage.
8. Leave the [*Group with another stage*] checkbox cleared. Grouped stages will display as one for the case user. Clicking a grouped stage will open a menu with all stages in the group. Note that this checkbox must be selected for the [*Canceled*] stage, which must be grouped with the [*Completed*] stage.

Fig. 4 The [*Draft*] stage parameters



Set up other stage properties in a similar way: “Approval” (Fig. 5), “Completed” (Fig. 6), “Canceled” (Fig. 7), and “Archive” (Fig. 8).

Fig. 5 The [*Approval*] stage parameters

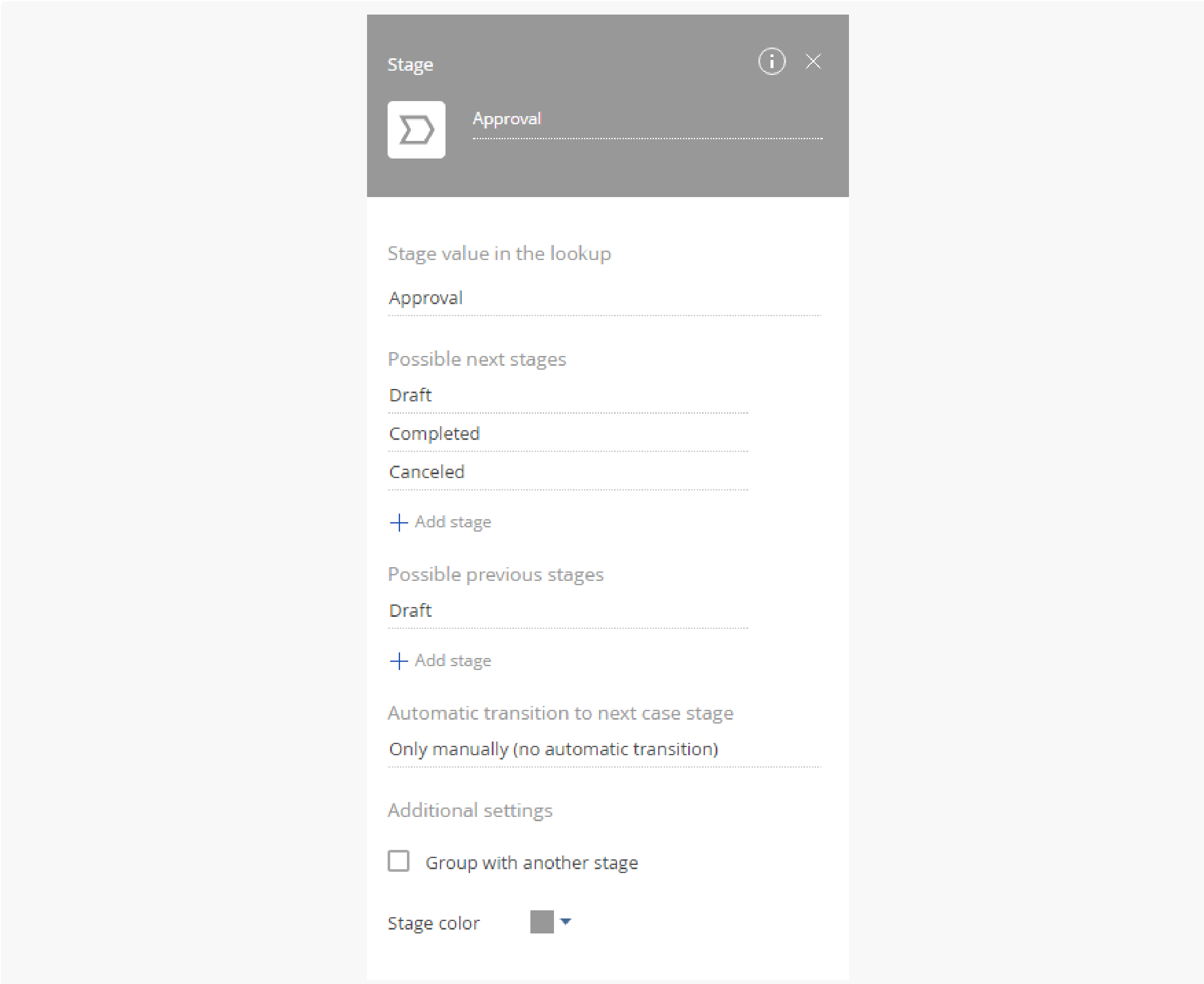
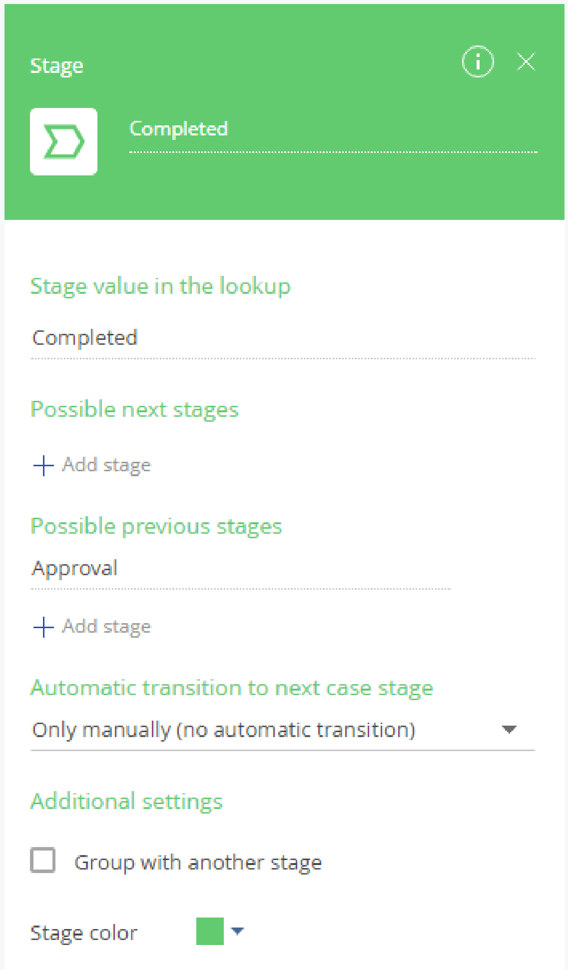


Fig. 6 The [*Completed*] stage parameters



Note. The [*Completed*] and [*Canceled*] stages are mutually exclusive and are therefore grouped. The grouping is configured in the properties of the [*Canceled*] stage. In the setup area of the [*Completed*] stage, a icon is displayed next to the [*Group with another stage*] checkbox. If you hover the cursor over the icon, a tooltip will appear, indicating that the stage is already grouped.

Fig. 7 The [*Canceled*] stage parameters

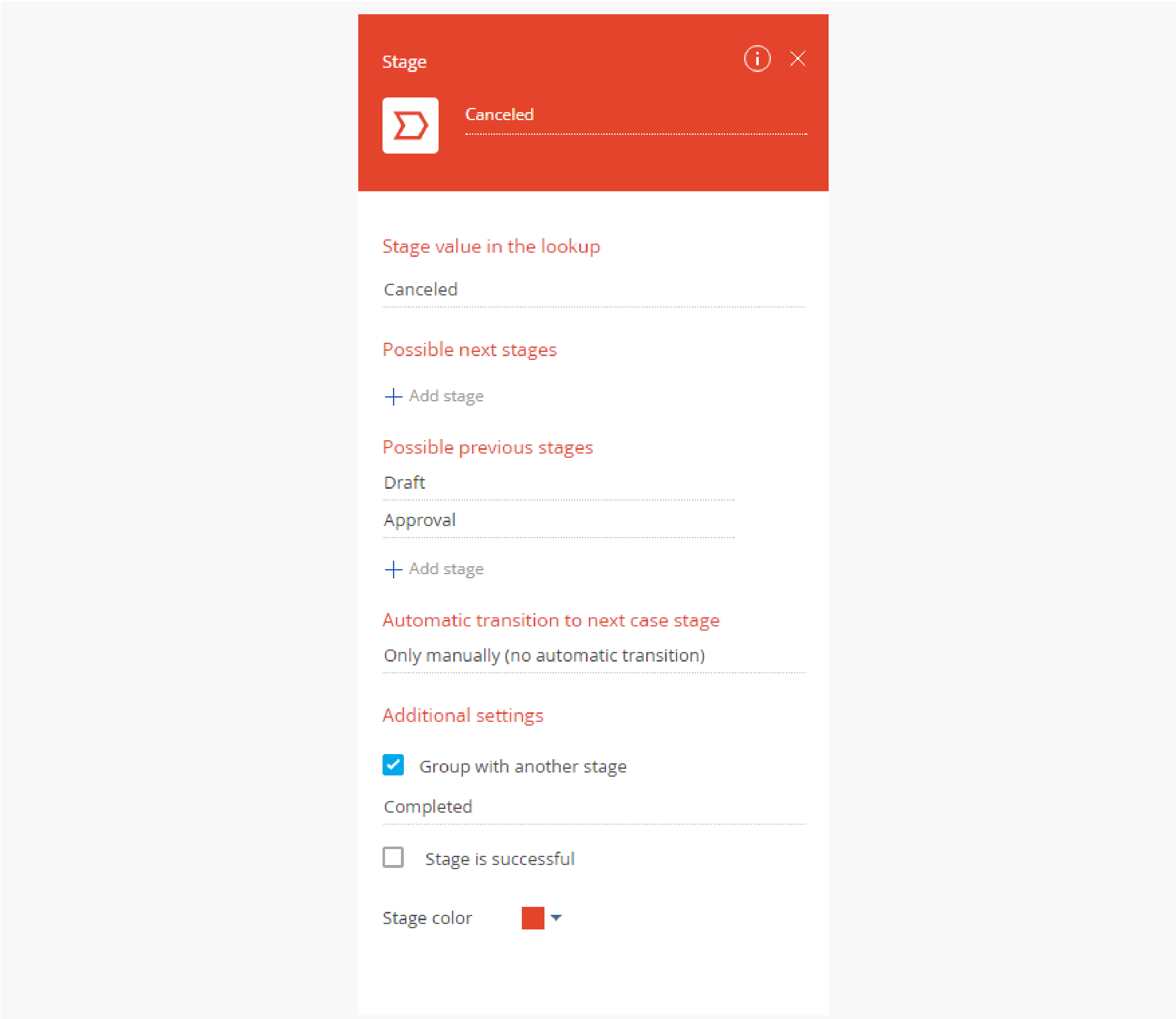
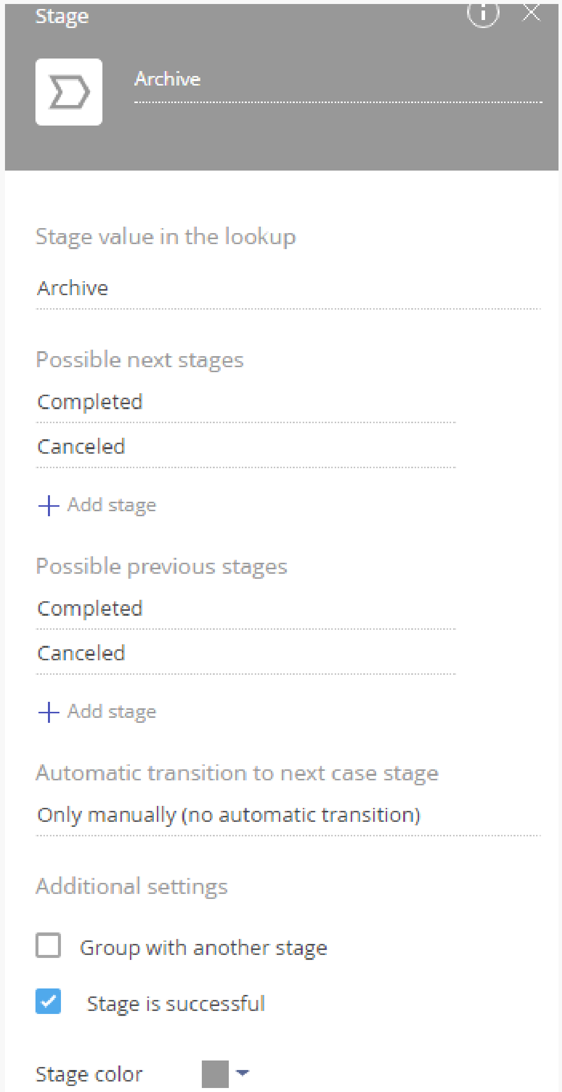


Fig. 8 The [*Archive*] stage parameters



Set up case stage steps

Set up the steps of the [*Draft*] stage. To do this:

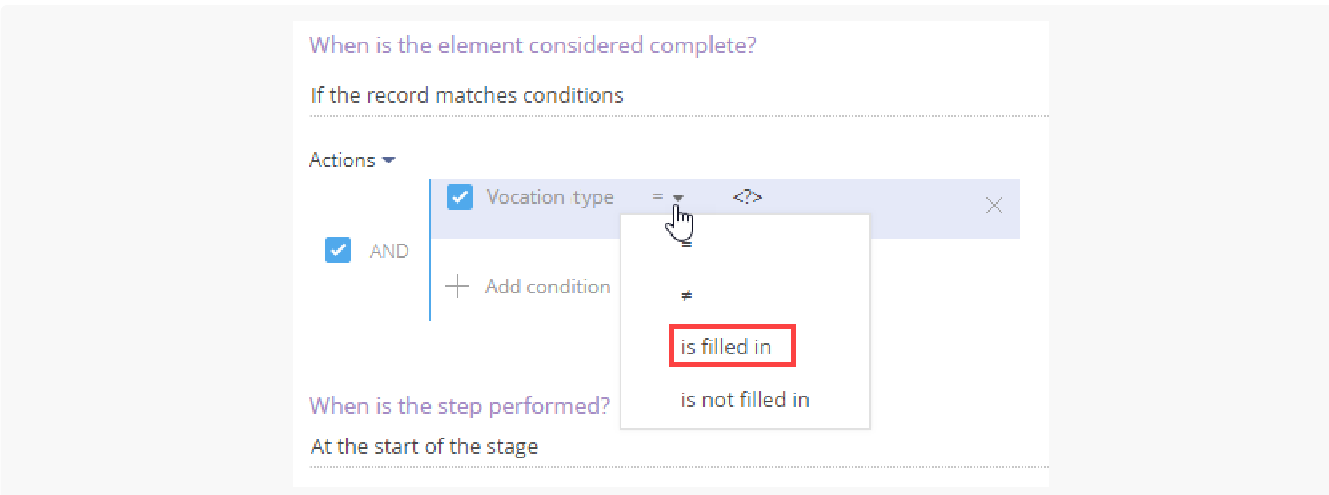
1. Click below the [*Draft*] stage in the Case Designer working area. Select the [*Open edit page*] element. As a result, the document page will open on the [*Draft*] stage.
2. Enter the name of the new case element and press Enter. Click the added element to view its setup area.
3. In the [*Which page to open?*] field, select "Document."
4. In the [*Editing mode*] field, select "Edit existing record." [*Record Id*] field will display below.
5. In the [*Record Id*] field, click and select "Main record column." Choose the [*Id*] column. As a result, the case will open the document record for which the case instance is run.
6. In the [*Who fills in the page?*] field, the current user contact is specified by default. Click to change this value, if needed.
7. In the [*Recommendation for filling in the page*] field, list the actions that the user must perform on the opened document page, such as "Specify type of leave and exact dates." This text will be displayed on the new document page.

8. In the [*Hint for user*] field, enter additional information for the user. For example, you can use this field to specify the maximum number of available vacation days or add a reminder to adjust the vacation with the head of the department before filling in the request.
9. [*When is the element considered complete?*] – you can optionally select “If the record matches conditions” to consider the case element complete when the record matches required conditions (certain fields are filled, etc.).
10. Otherwise, leave “Immediately after saving the record” in the [*When is the element considered complete?*] field (Fig. 9). To do this:

    a. Click the [*Add condition*] button and select the [*Vocation type*] column as required.

    b. Select the [*Number of vacation days*] column as required.

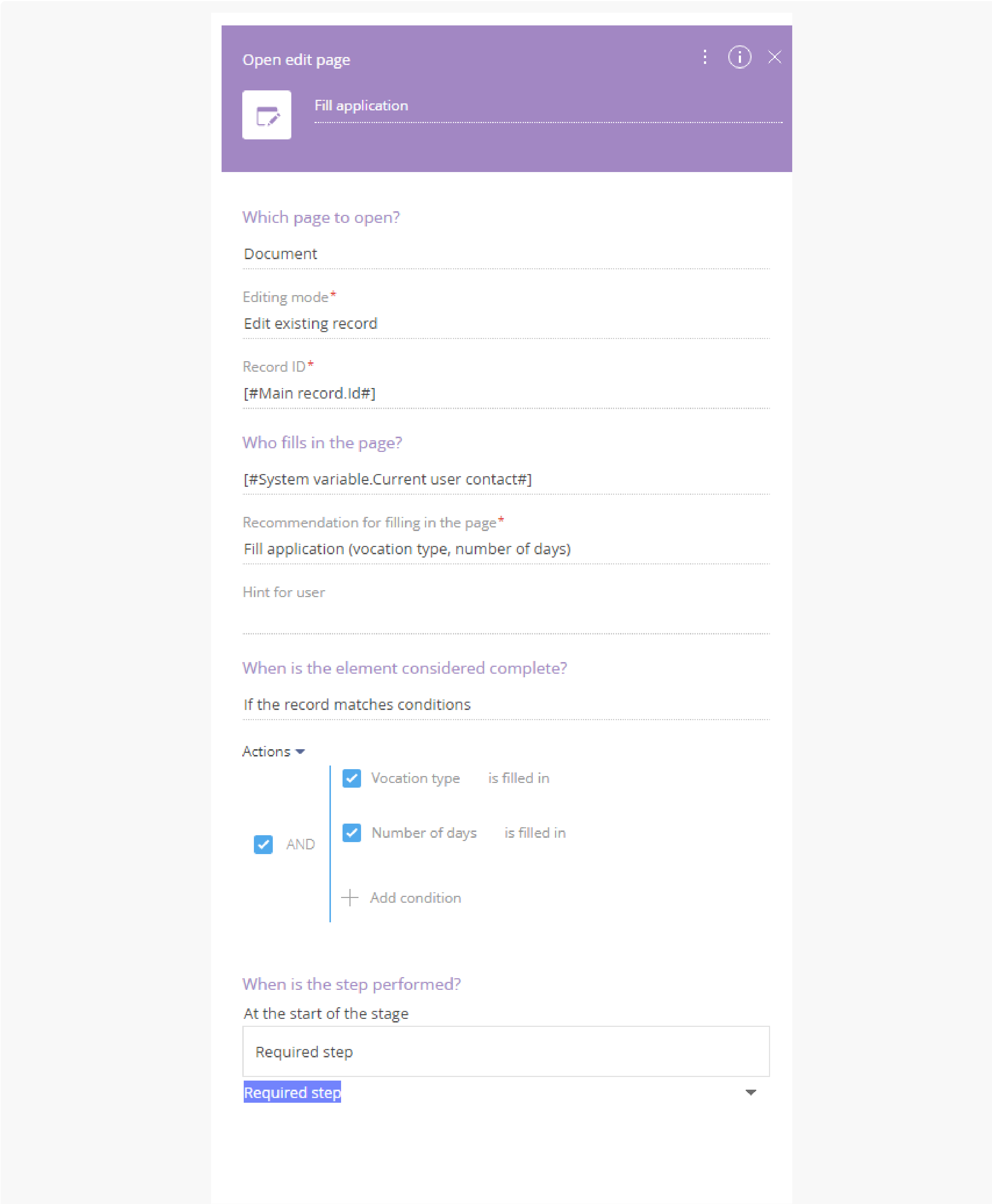
Fig. 9 Setting up filter conditions



11. The “At the start of the stage” value will be displayed by default in the [*When is the step performed?*] field. After the case transition to the [*Draft*] stage, the task for filling the application will be created. The task will be displayed on the application page which is processed by the case.
12. In the [*Step type*] field, specify the step as required.

    As a result, the settings for the case element will look like this (Fig. 10):

Fig. 10 Properties of the “Fill application” element



Set up the sequence of stages

Set up the steps of the [*Approval*] stage.

1. Add a new [*Approval*] case element on the Case Designer working area. Enter the name of the new case element (i.e., "HR approval") and press Enter. Populate the case element parameters.
2. In the [*When is the step performed?*] field the "At the start of the stage" value will be displayed by default.
3. In the [*Step type*] field, specify the step as required.
4. The "Approval required" value will automatically display In the [*Approval purpose*] field. If needed, modify the value in the [*Approval purpose*] field.
5. The value in the [*Approval section*] field should be "Documents" (the section, for which the case is being set up). This will be set by default if approvals are enabled in the [*Documents*] section.

> **Note.** If you cannot find the [*Document*] object in the list, the approval procedure might be disabled for the [*Documents*] section in the Section wizard. More information about approvals is available in the "Set up approvals in a section" article.

6. The [*Record Id*] field will be set to the record for which the case is run.
7. In the [*Approver*] field, select "Role."
8. In the [*Role*] field, select the "Lookup value" option and choose the value that corresponds to the HR department from the "Roles (view)" lookup. All employees in the selected role will be able to process this approval.
9. In the [*Send email notification*] area, configure automatic email notifications for the approvers and the document owner.
   a. Select the [*Notify that approval is required*] checkbox.
   b. In the [*Email template*] field, click and select an email template from the [*Email message template*] lookup.
   c. Select the [*Notify about the approval result*] checkbox.
   d. In the [*Recipient*] field, click the button and select the "Main record column" option. In the opened [*Select column*] window, click [+] and select the [*Owner*] column. In the appeared [*Column*] field, select the [*Email*] column of the document owner's contact record and click [*Select*]. The value in the [*Recipient*] field should now be "[*#Main record.Owner.Email#*]."
   e. In the [*Email template*] field, click and select an email template from the [*Email message template*] lookup.

   > **Attention.** Set up the mailbox for email notifications in the [*Mailbox for sending email with information on approval*] system setting. Access the system setting in the Process Designer by clicking the button in the [*Send email notification*] area.

   > **Note.** Create email templates in the content designer, using the [*Approvals in the Documents section*] object. The approval objects are created automatically when you select the [*Enable approval in section*] checkbox in the section wizard. For example, if you select the [*Enable approval in section*] checkbox in the [*Documents*] section wizard, a new object "Approvals in section Document" will be created. If the lookup of the [*Enable approval in section*] does not contain the template you need, click + in the right part of the field to add a new email template. Learn more about creating an

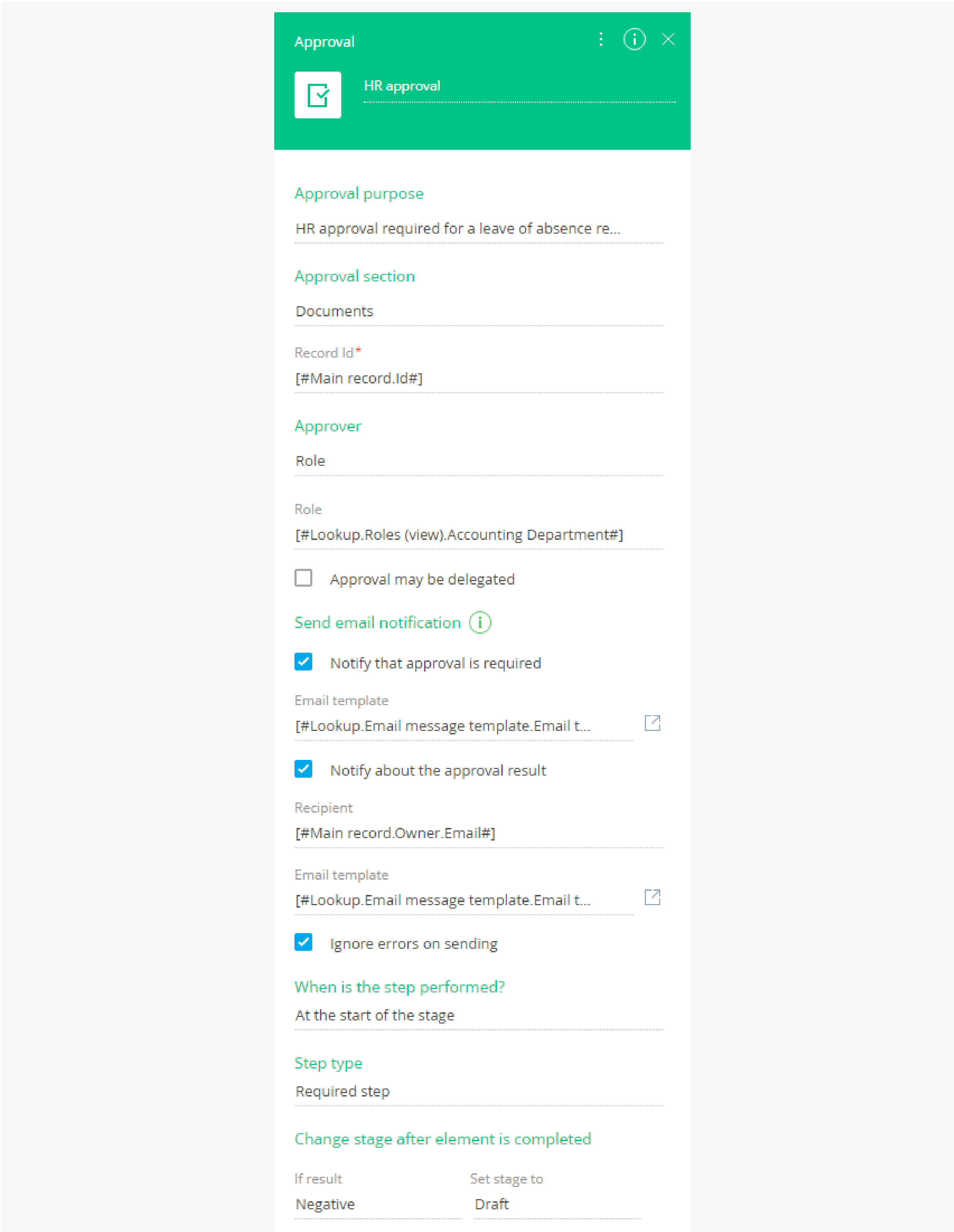
email template in the "Create an email template" article.

10. Select the [*Ignore errors on sending*] checkbox.
11. In the [*Change stage after element is completed*] area, set the following condition: [*If result*] – "Negative"; [*Set stage to*] – "Draft."

Note. There is no need to set stage transition for a positive approval result in this case, as the case will need to proceed to the next step within the same stage.

As a result, the settings for the case element will look like this (Fig. 11):

Fig. 11 – "HR approval" case element setup area



12. Add another [*Approval*] element to the [*Approval*] stage. Enter the name of the new case element (i.e., “Manager’s approval”) and press Enter. The properties of this case element will be the same as the ones of

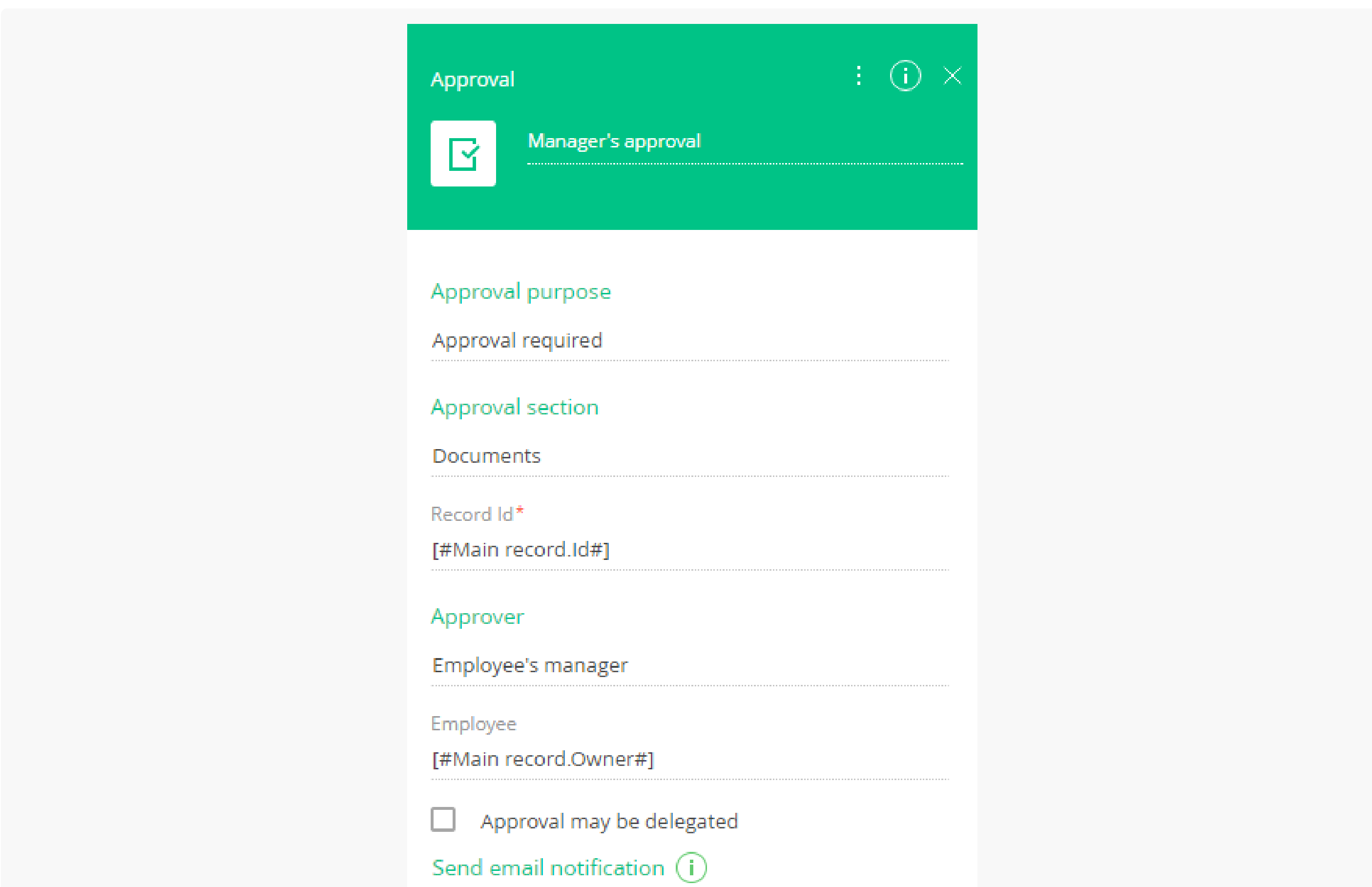
the “HR approval” element, except for the values in the [*When is the step performed?*], [*Approver*] and [*Change stage after element is completed*] properties.

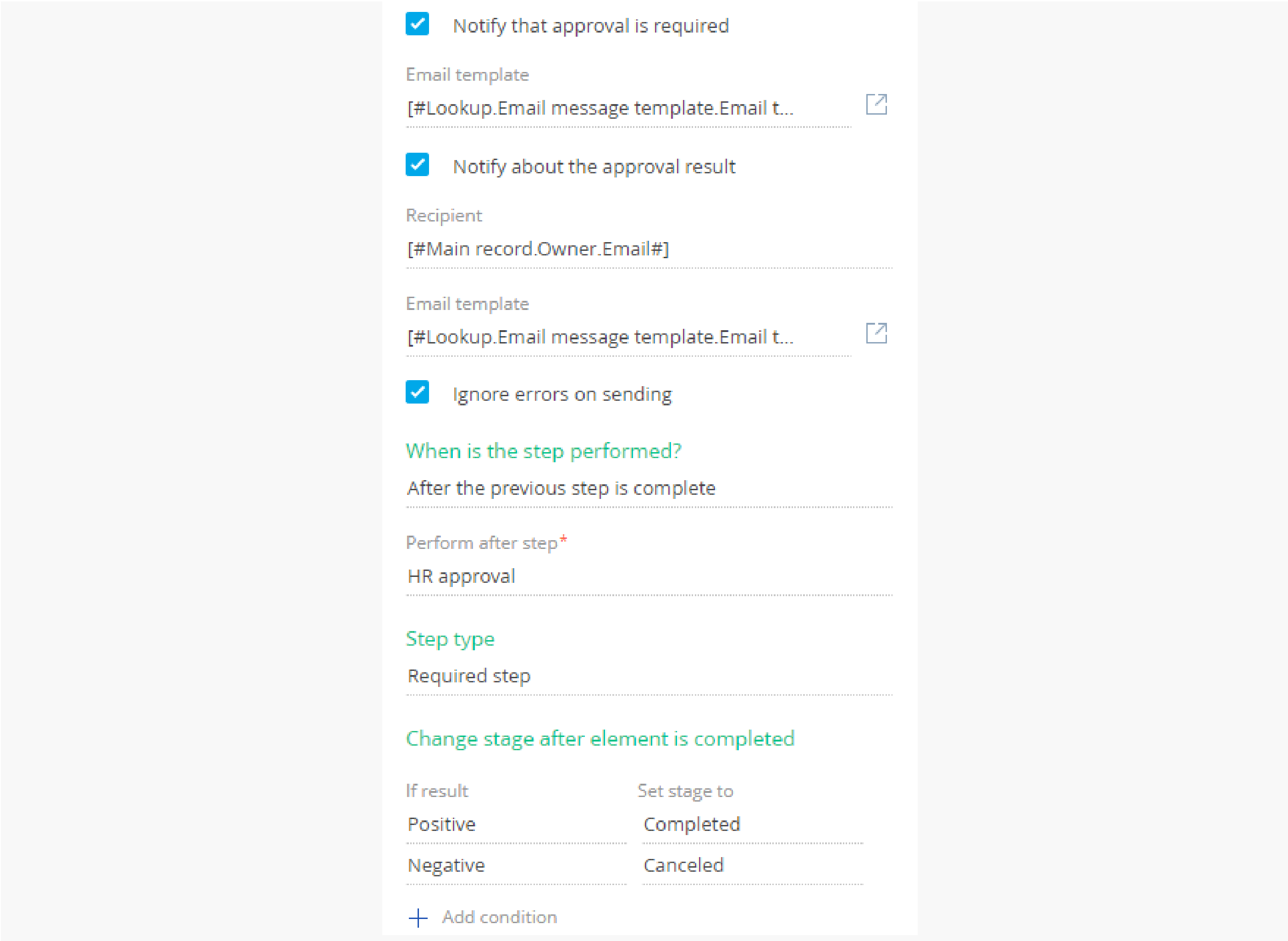
a. In the [*When is the step performed?*] field, select “After the previous step is complete.”
b. In the [*Perform after step*] field, select “HR approval” (if the “HR approval” is the only preceding element, it will be selected by default).
c. In the [*Approver*] field, select “Employee's manager.”
d. In the [*Employee*] field, click and select “Main record column.” In the opened window, select the needed column of the Creatio object, specified in the [*Macro source*] field. As a result, whoever is specified as the manager of the employee submitting a leave request, will have to approve it.

> Attention. Please note that not all mentioned objects, fields, and values may be available by default in your Creatio configuration. You can set up additional section fields in the Section wizard.

e. In the [*Change stage after element is completed*] area, set up the following stage transitions:
    a. [*If result*] – “Positive”; [*Set stage to*] – “Completed.” As a result, if the request is denied by the employee’s manager, the case transitions to the [*Canceled*] stage.
    b. Click and add another condition: [*If result*] – “Positive”; [*Set stage to*] – “Completed.” As a result, if the request is approved by the employee’s manager, the case transitions to the [*Completed*] stage. The remaining properties of the “Manager’s approval” case element match those of the “HR approval” element. As a result, the settings for the case element will look like this (Fig. 12):

Fig. 12 – “Manager’s approval” case element setup area





At the [*Completed*] case stage, set up a timer before the document status is changed to “Archive.”

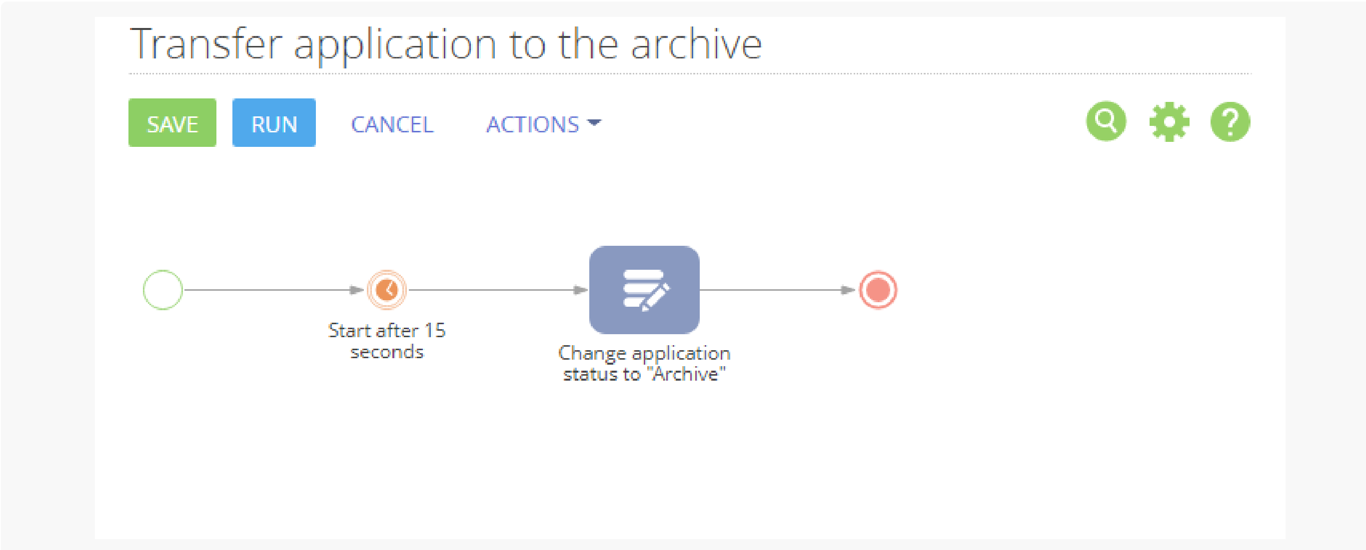
1. Add a new [*Subprocess*] case element on the Case Designer working area on the [*Completed*] stage. Enter the name as “Term of the application relevance” (Fig. 13).
2. In the [*Which process to run?*] field, click and select the application activation business process. If the business process is disabled in the list, click the + button to add it.

   A Diagram of the business process of transfer application to the archive is provided in Fig. 14.

   The [*Simple start event*] and [*Wait for timer*] process elements – the process will start after 15 seconds after transitioning the case to the [*Completed*] stage.

   The [*Modify data*] element will change the status of the completed to “Archive.”

   Fig. 13 – Business process diagram



To transfer the application by which the case is running, you should set up the transfer of the main record parameter from the case to the process. In our case, the main record is a document and the parameter which getting is to be configured is the document ID. Perform configuration in the Process Designer if the pass of the parameter is not set up. To do this:

a. Open the designer of the process of transfer the application to the archive by clicking the button at the [*Which process to run*] field.

b. Double click on the designer workspace to display the edit page of the process parameters.

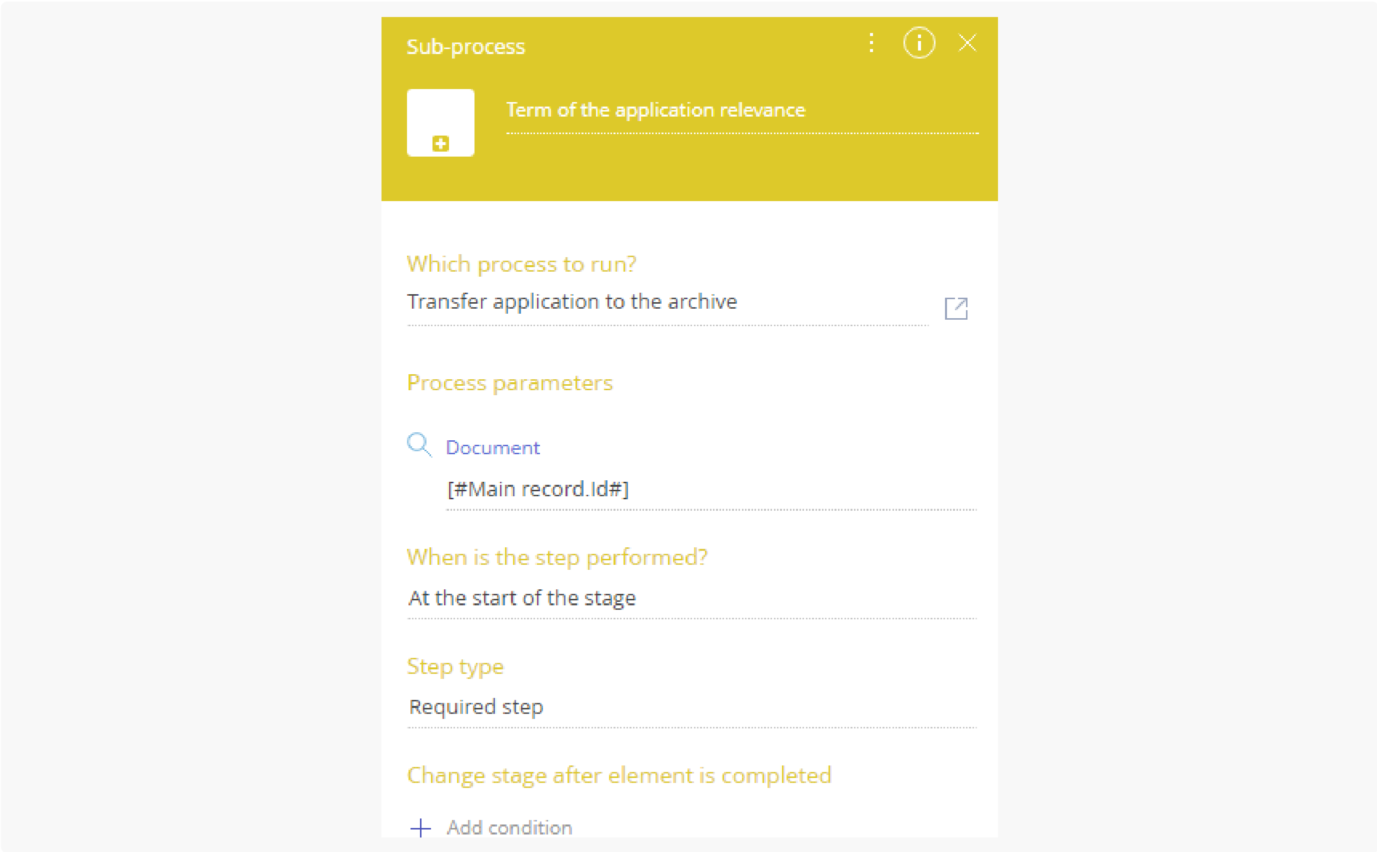
c. Click the [*Add parameter*] button on the [*Parameters*] tab.

d. Select the “Lookup” in the list of the parameter types and specify the “Document” value in the [*Lookup*] field.

e. Save the changes.

3. Return to the Case Designer to the configuration of the “The term of the application relevance” element properties. After you specify the process in the [*Which process to run*] field the parameter described above will be displayed in the [*Process parameters*] area.
4. The “At the start of the stage” value will be displayed by default in the [*When is the step performed?*] field.
5. The “Optional step” will be displayed in the [*Step type*] field. You can make it required, if necessary.

Fig. 14 – “The term of the application relevance” element properties

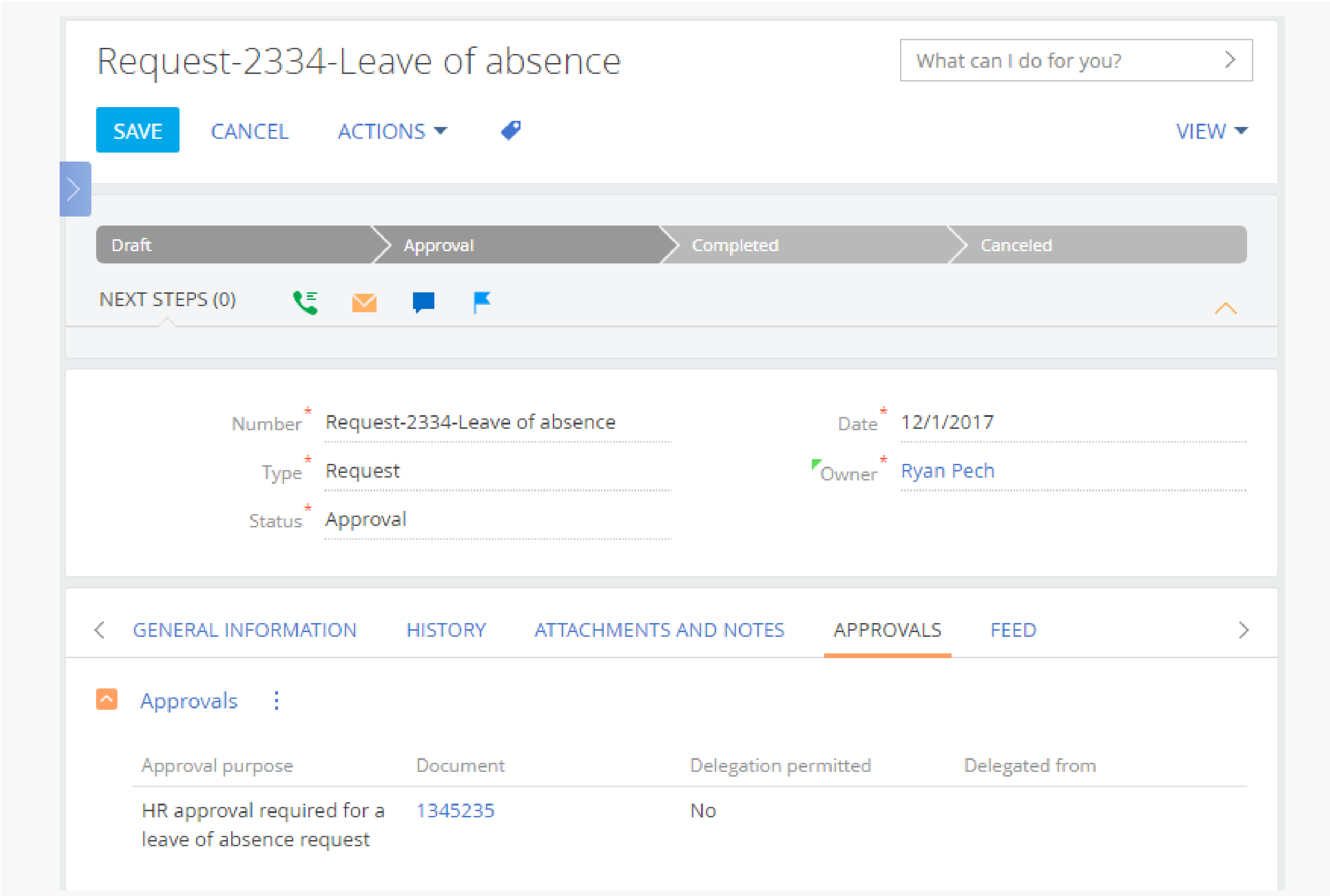


6. Save all changes made in the Case Designer.

Configuration results

As a result, all documents of the “Request” type will be processed according to the “Leave of absence approval” case (Fig. 15). As soon as an employee who created a request clicks the [*Approval*] stage, the document is submitted for approval to HR. If HR denies the approval, the document status is set back to “Draft.” If HR approves the document, it is submitted for the employee's manager's approval. If the manager denies the approval, the document status is set to “Canceled.” If the manager approves the request, the document status is set to “Completed.”

Fig. 15 – Case for leave request approval


Request-2334-Leave of absence
What can I do for you?
SAVE
CANCEL
ACTIONS
VIEW
Draft
Approval
Completed
Canceled
NEXT STEPS (0)
Number
Request-2334-Leave of absence
Date
12/1/2017
Type
Request
Owner
Ryan Pech
Status
Approval
GENERAL INFORMATION
HISTORY
ATTACHMENTS AND NOTES
APPROVALS
FEED
Approvals
Approval purpose
Document
Delegation permitted
Delegated from
HR approval required for a leave of absence request
1345235
No