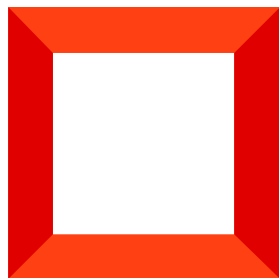
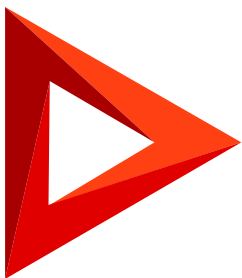


Process administration

Version 7.17



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Table of Contents

Run a process or a process step	4
Run a business process from the Process library section	4
Resume a process from the Process library section	4
Deactivate a process	5
Cancel a process	6
Activate a process	8
Find a process	9
View the process list	9
Find a process using organizational trees	10
View process execution data	11
View process history	12
Archive the process log records	13
Set up the permissions to run a process	14
View process properties	15
View the process version	16
View the ways to start a process	17
View sub-processes	17
View process logs	17
Trace process parameters	18
View process statistics	19

Run a process or a process step

PRODUCTS: ALL CREATIO PRODUCTS

System administrators can run a configured process from the process library and process log. Learn more about launching business processes using methods, available to all Creatio users, in the “[Run a business process](#)” article.

Run a business process from the [*Process library*] section


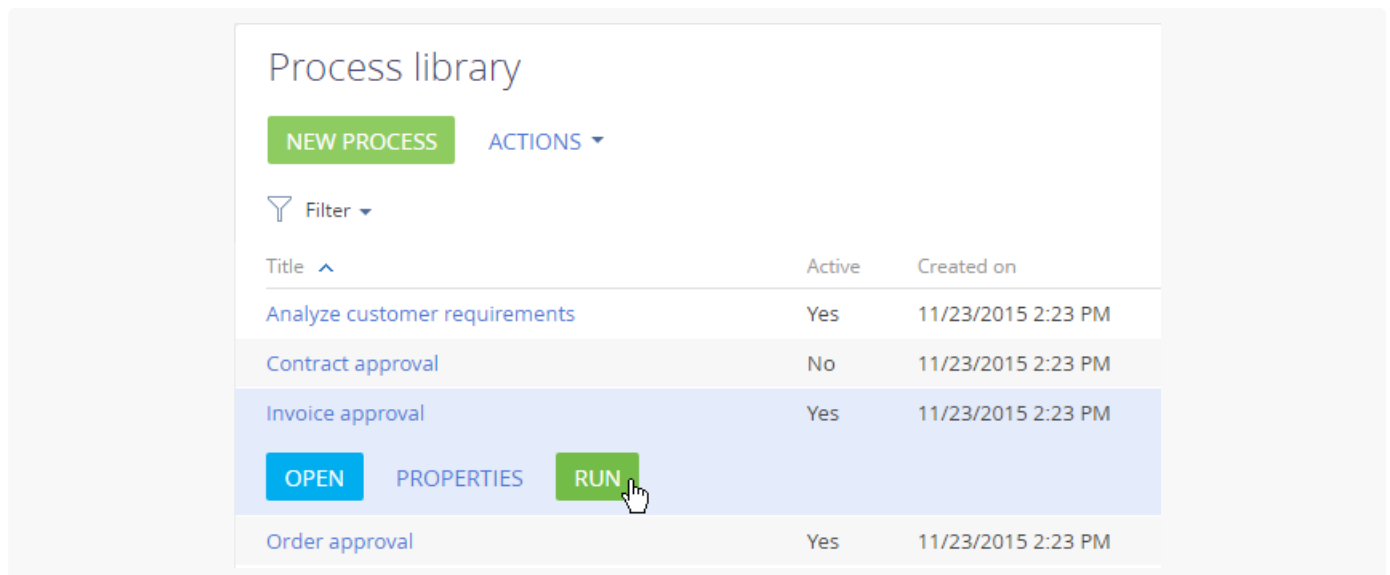
1. Click  to open the System Designer.
2. Click [*Process library*].
3. Select a business process and click [*Run*] (Fig. 1).

Fig. 1 Running a process from the [*Process library*] section




Note. The [*Run process*] button is displayed for active processes only

This action will trigger the selected process.

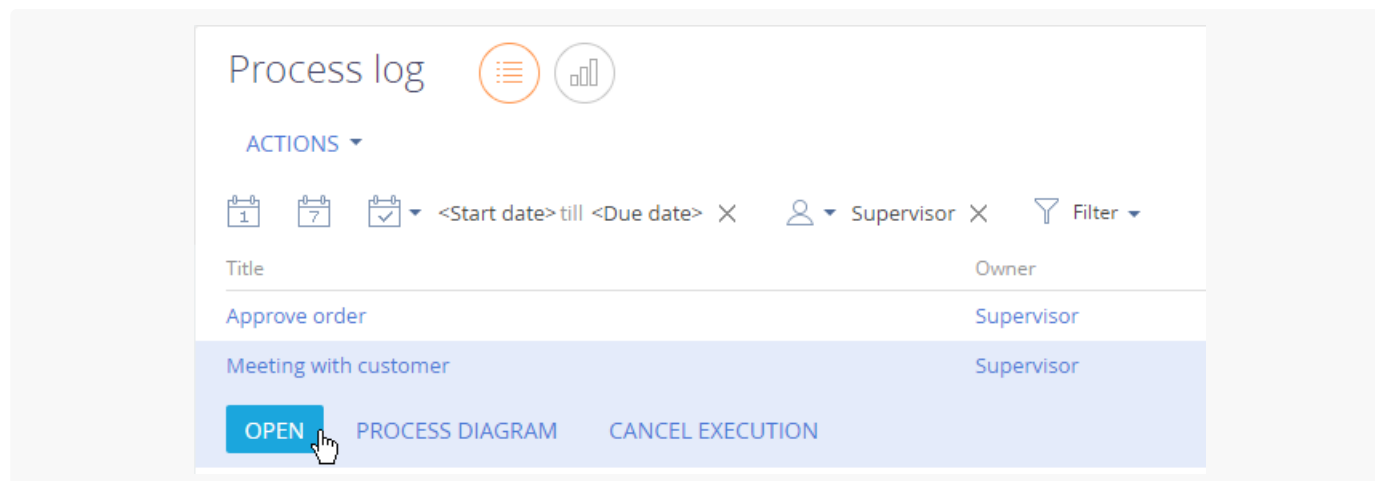
Resume a process from the [*Process library*] section

You can resume any step in a process in the [*Process log*] section regardless of the process type.

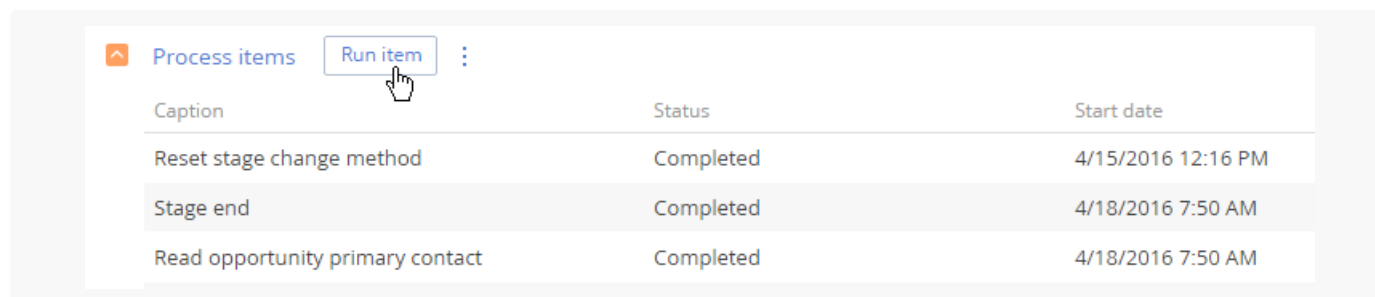
To do this:

1. Open the system designer by clicking the  button.

2. Under [*Processes*], click [*Process log*].
3. Open a running business process (Fig. 2).

Fig. 2 - Selecting a running process from the [*Process log*] section

4. On the [*Process elements*] detail, select a step that must be resumed and click the [*Run item*] button (Fig. 3).

Fig. 3 - Resuming a process from the [*Process log*] section

The page of the selected process step will open.

Deactivate a process

PRODUCTS: **ALL CREATIO PRODUCTS**

Deactivate a business process to disable it from running in Creatio.

To disable a business process:


1. Click  to open the System Designer.
2. Click [*Process library*] under [*Processes*].
3. Select a process that must be disabled and click [*Deactivate*] (Fig. 1)

Fig. 1 Disable a business process

Process library

What can I do for you? >

Creatio 7.17.0.2164

VIEW

NEW PROCESS ACTIONS PROCESS LOG

Active Filters/folders

	Active	Created on	Modified on
Application update notification	Yes	10/27/2020 8:13 PM	10/20/2020 3:48 PM
Add marketplace notification	Yes	10/27/2020 8:13 PM	9/9/2020 3:25 PM

OPEN PROPERTIES COPY DEACTIVATE RUN

Note. If you are deactivating a process that has uncompleted instances, the system will warn you. If you choose to deactivate such a process, all running instances of the process will be canceled.

The [*Active*] checkbox on the process settings page will also be cleared. Deactivated processes are not displayed in the menu and cannot be run from the command line. If the deactivated business process is used as a sub-process in other processes, the [*Active*] checkbox value will be ignored.

Select the needed record in the process library list and run the [*Deactivate process*] action to deactivate a business process.

Cancel a process

PRODUCTS: ALL CREATIO PRODUCTS

If you need to stop a process, you can cancel it.

To **cancel a process instance**:


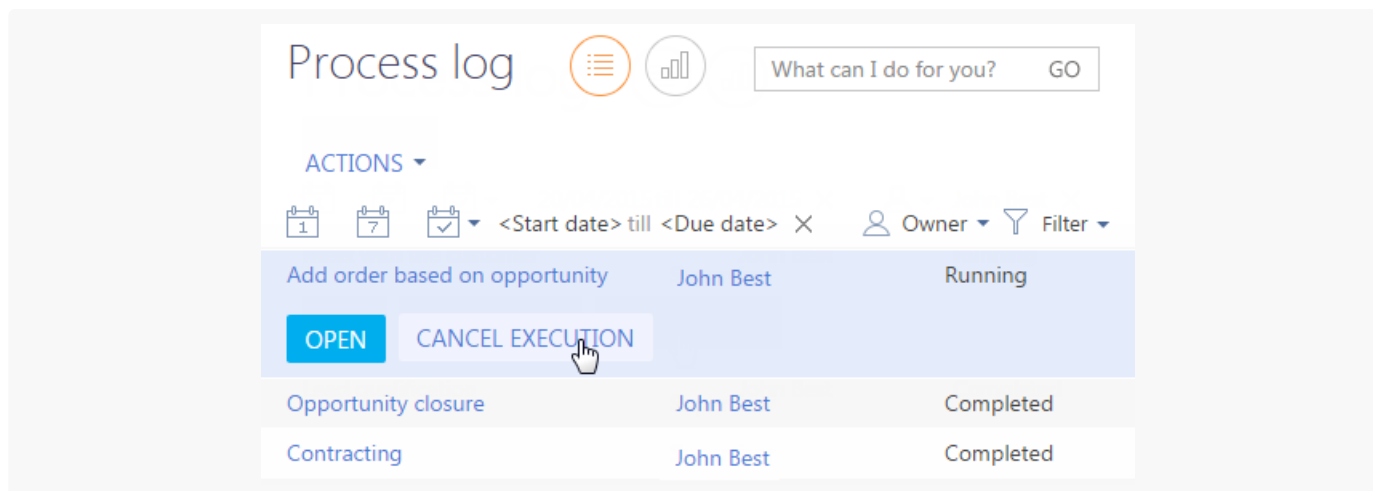
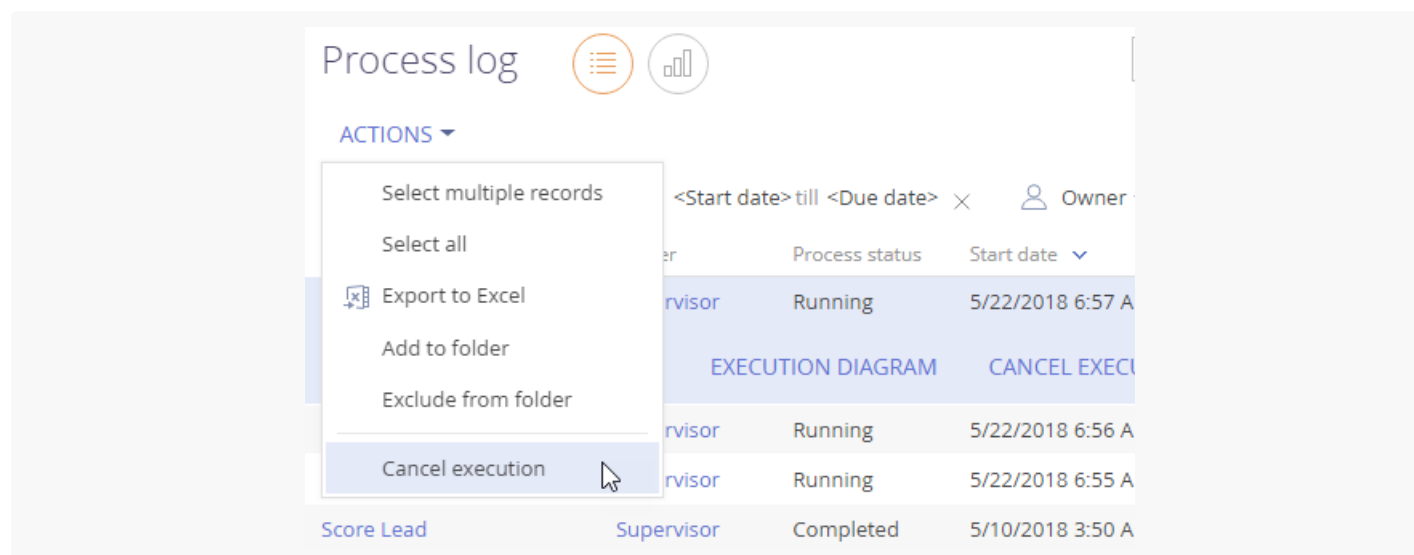
1. Click  to open the System Designer.
2. Under [*Processes*], click [*Process log*].
3. In the list of the process log, select a process instance that is in progress, and click the [*Cancel process*] button (Fig. 1).

Fig. 1 - Cancel running processes





This will terminate the process forcibly. The state of the selected process instance changes to “Canceled.” Select the needed record in the process log list and run the [*Cancel execution*] action (Fig. 2) to cancel a business process instance.

Fig. 2 - [*Cancel Execution*] action on the process list toolbar








Use the [*Select multiple records*] command in the [*Actions*] menu **to cancel more than one record**. Select processes to cancel and perform the [*Cancel Execution*] action in the [*Actions*] menu (Fig. 3).

Fig. 3 - Canceling multiple business processes

Process log  

What can I do f

ACTIONS (7) ▾

Archived    <Start date> till <Due date> ×  Supervisor ×  Filters/folders ▾

Title	Package	Version	Owner	Process status ▾	Start date
<input checked="" type="checkbox"/> Predict field values for Case	MLCaseClassification	0	Supervisor	Running	4/27/2018 3:53 PM
<input checked="" type="checkbox"/> Reevaluate case level request process	CaseService	0	Supervisor	Running	4/27/2018 3:53 PM
<input checked="" type="checkbox"/> Send email to case assignee	CaseService	0	Supervisor	Running	4/27/2018 3:53 PM
<input checked="" type="checkbox"/> Contracting v7.8.0	OpportunityManagement	0	Supervisor	Running	4/27/2018 3:53 PM
<input checked="" type="checkbox"/> Predict field values for Case	MLCaseClassification	0	Supervisor	Running	4/27/2018 3:53 PM
<input checked="" type="checkbox"/> Set access rights when opportunity owner changed	OpportunityManagement	0	Supervisor	Running	4/27/2018 3:54 PM
<input checked="" type="checkbox"/> Reevaluate case level request process	CaseService	0	Supervisor	Running	4/27/2018 3:54 PM

Note. The [*Cancel Execution*] action is available to the users who have access to the “Cancel running processes” (“CanCancelProcess”) system operation to access.

Multiple process instances are canceled one by one. Upon running the [*Cancel Execution*] command, Creatio changes the status of all selected process instances to “Canceling.” As soon as a process instance is actually canceled, its status will change to “Canceled.”

Activate a process

PRODUCTS: **ALL CREATIO PRODUCTS**

Activate a business process to enable it to run in Creatio.

To activate a business process:


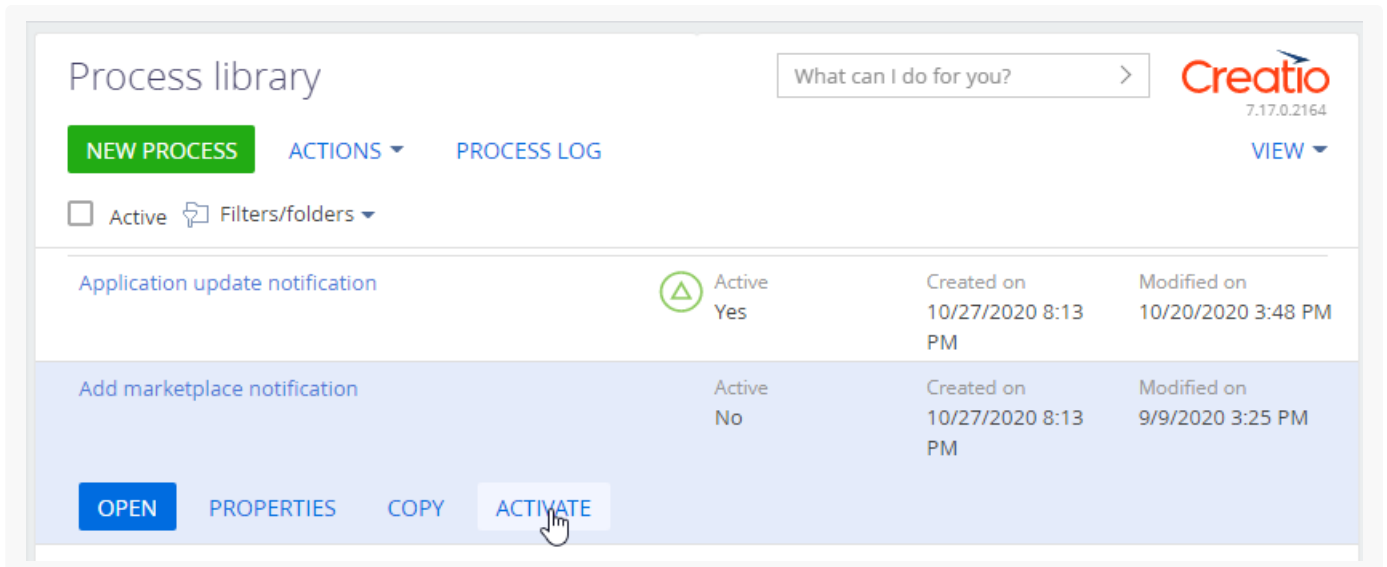
1. Click  to open the System Designer.
2. Click [*Process library*] under [*Processes*].
3. Select a process that must be enabled and click [*Activate*] ([Fig. 1](#))

Fig. 1 - Process activation



As a result, the [*Active*] checkbox on the process settings page will be selected. The process will become available for running.

Select the needed record in the process library list and run the [*Activate process*] action to activate a business process.

Find a process

PRODUCTS: [ALL CREATIO PRODUCTS](#)


The diagrams of the business processes configured in Creatio are saved to the [*Process library*] section.

Note. The process library displays the list of BPMN processes whose [*Tag*] parameter value is “Business Process.” By default, the “Business Process” tag is set for all processes that the users configure in the process designer. You can view and modify the process tag text on the business process properties areas in the process designer.

The [*Process library*] section contains the “Active” filter for displaying only business processes with the [*Active*] checkbox selected.

View the process list

To view the process list:

1. Click  to open the System Designer.
2. Click [*Process library*] under [*Processes*].

Note. Business processes whose diagrams contain a [start timer](#) or a [signal](#) event are indicated with the corresponding icons in the list (Fig. 1). These icons match the process element icons for the start timer and start signal events, respectively. If a business process uses different types of start events, the

corresponding record will contain several icons.

Fig. 1 – Business processes initiated with starting signal events

<input checked="" type="checkbox"/> Active Filter				
ESN notification		Active Yes	Created on 1/23/2015 1:07 PM	Modified on 8/1/2017 10:05 AM

Find a process using organizational trees

The folder tree is displayed in the [*Process library*] section by default (Fig. 2). In addition to standard folders, the tree contains folders that are generated automatically, based on the processes currently available in the library.

Fig. 2 – Folders in the [*Process library*] section

Process library

What can I do for you? >

NEW FOLDER ACTIONS VIEW

- Run by object signal
 - Case
 - FinishedSyncSession
 - Social like
 - Activity
 - User mention
 - Contact
 - Opportunity
 - Message/comment
 - Lead
- Run by timer
 - Day
- Favorites
- All
 - Approval processes

<input checked="" type="checkbox"/> Active Filter				
Change country		Active Yes	Created on 1/23/2018 4:42 PM	Modified on 1/23/2018 4:55 PM
ProcessNotificationsUpdateScenario		Active Yes	Created on 9/20/2017 8:31 PM	Modified on 9/10/2017 3:25 PM
Send push notification		Active Yes	Created on 9/20/2017 8:31 PM	Modified on 8/31/2017 6:30 PM
Predict field values for Case		Active Yes	Created on 9/20/2017 8:31 PM	Modified on 10/18/2017 1:35 PM
Send email to case contact		Active Yes	Created on 7/9/2017 8:13 PM	Modified on 6/29/2017 3:55 PM
Reevaluate case level request process		Active Yes	Created on 7/9/2017 8:13 PM	Modified on 7/27/2017 10:22 AM
Send email to case contact after adding a portal message		Active Yes	Created on 7/9/2017 8:13 PM	Modified on 10/4/2017 5:03 PM
Hash Updater Process		Active Yes	Created on 5/31/2017 9:15 PM	Modified on 6/8/2017 1:40 PM
Actualize calculation terms after status change		Active Yes	Created on 12/1/2016 12:04 AM	Modified on 10/20/2017 5:44 PM

All standard folder functions are available in the [*Process library*] section.

Note. More information about working with folders is available in the “[Folders](#)” article.

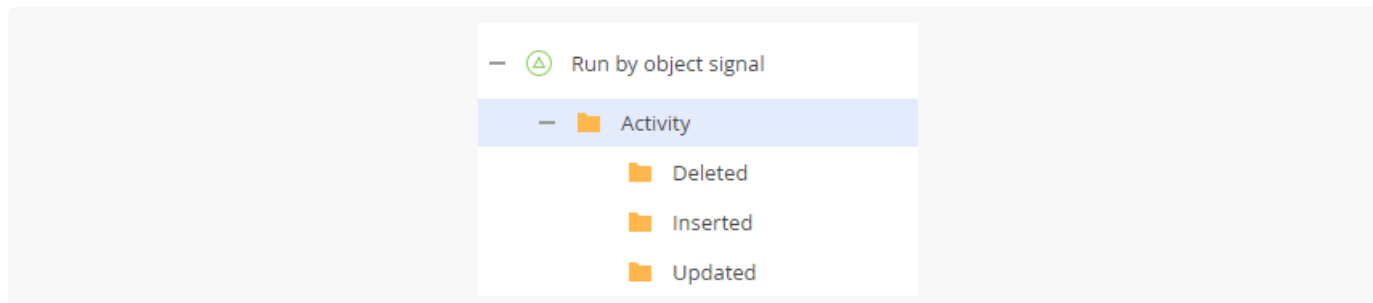
By default, the folders in the [*Process library*] section contain folders that group the processes by the type of their starting event. These folders have unique icons to visually distinguish them from regular folders. These folders cannot be edited.

The folders that group business processes by the type of their starting events are displayed only if corresponding processes exist in the library.

These folders also have automatically generated subordinate folders that further group the processes by their starting event parameters:

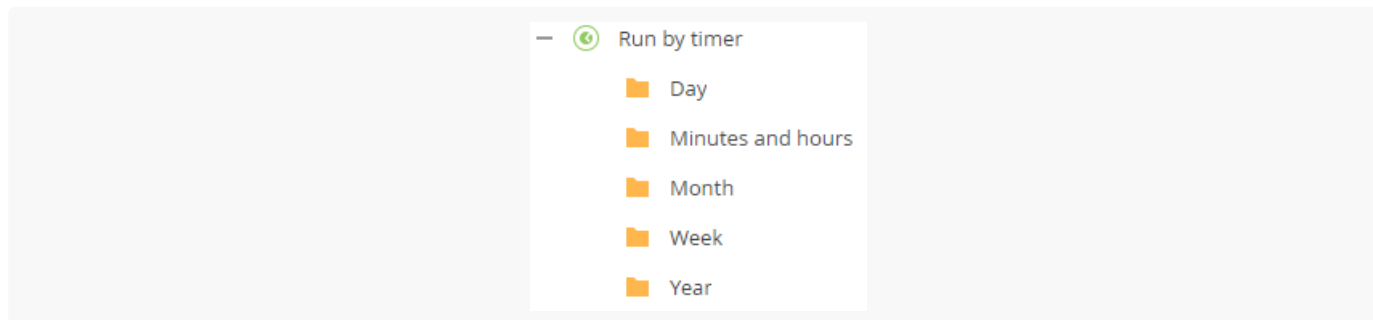
- In the “Run by object signal” folder, the further grouping is done by objects that trigger processes (Fig. 3).

Fig. 3 – Grouping of processes by objects in the “Run by object signal” folder



- In the “Run by timer” folder, the further grouping is done by the timer settings (Fig. 4).

Fig. 4 – Grouping of processes by timer settings in the “Run by timer” folder



View process execution data

PRODUCTS: **ALL CREATIO PRODUCTS**

Regular process monitoring allows you to analyze employee productivity and to track “bottlenecks” in diagrams for optimization.

All history of business processes is kept in the [*Process log*] section. The section is designed for managing the business processes that have been initiated (process instances).

A business process can be started several times by different users at different times. A new “process instance” is created on each launch of the process. Each instance of the process corresponds to a record in the [*Process log*] section. Records appear in the section automatically, each time a business process starts. Information about each instance displays as a separate log record. The process log records cannot be edited.

Note. To access the [*Process log*], a user requires permission for the following system operation: “Access to “Process log” section” (“CanManageProcessLogSection” code). Learn more about using system operations: in a separate article: [System operation permissions](#).

View process history

Once a business process is initiated, information about the process instance is saved in the [*Process log*] section. The log record page contains the name of the employee who initiated the process, the status of the process instance (“Running” or “Completed”), and a list of the activated process steps.

To view process history:


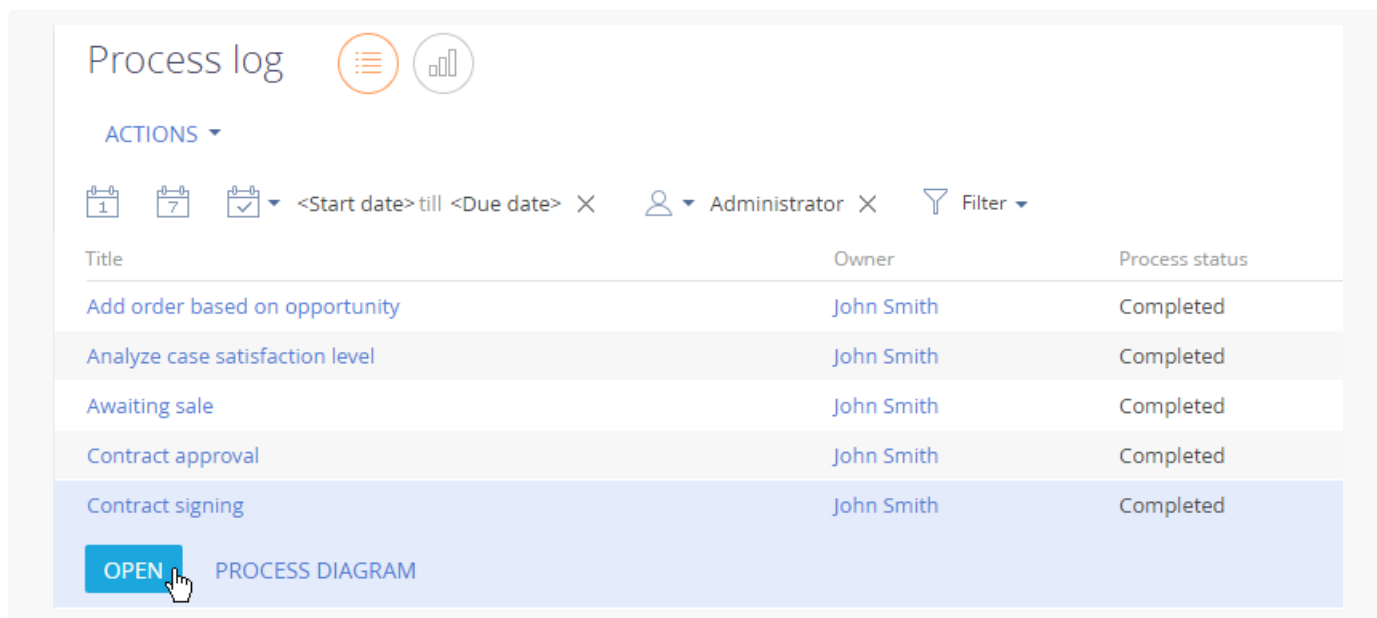
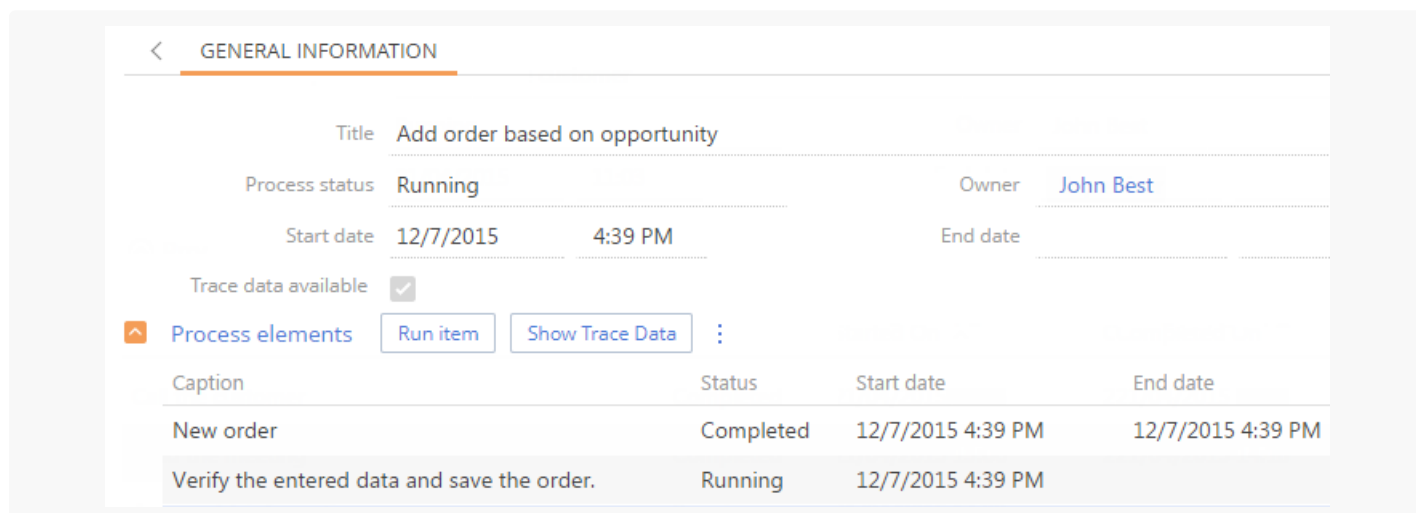
1. Click  to open the System Designer.
2. Click [*Process log*] under [*Processes*].
3. Select a business process and click [*Open*] (Fig. 1).

Fig. 1 Select a process



As a result, Creatio will open the process log page that contains the process execution history (Fig. 2).

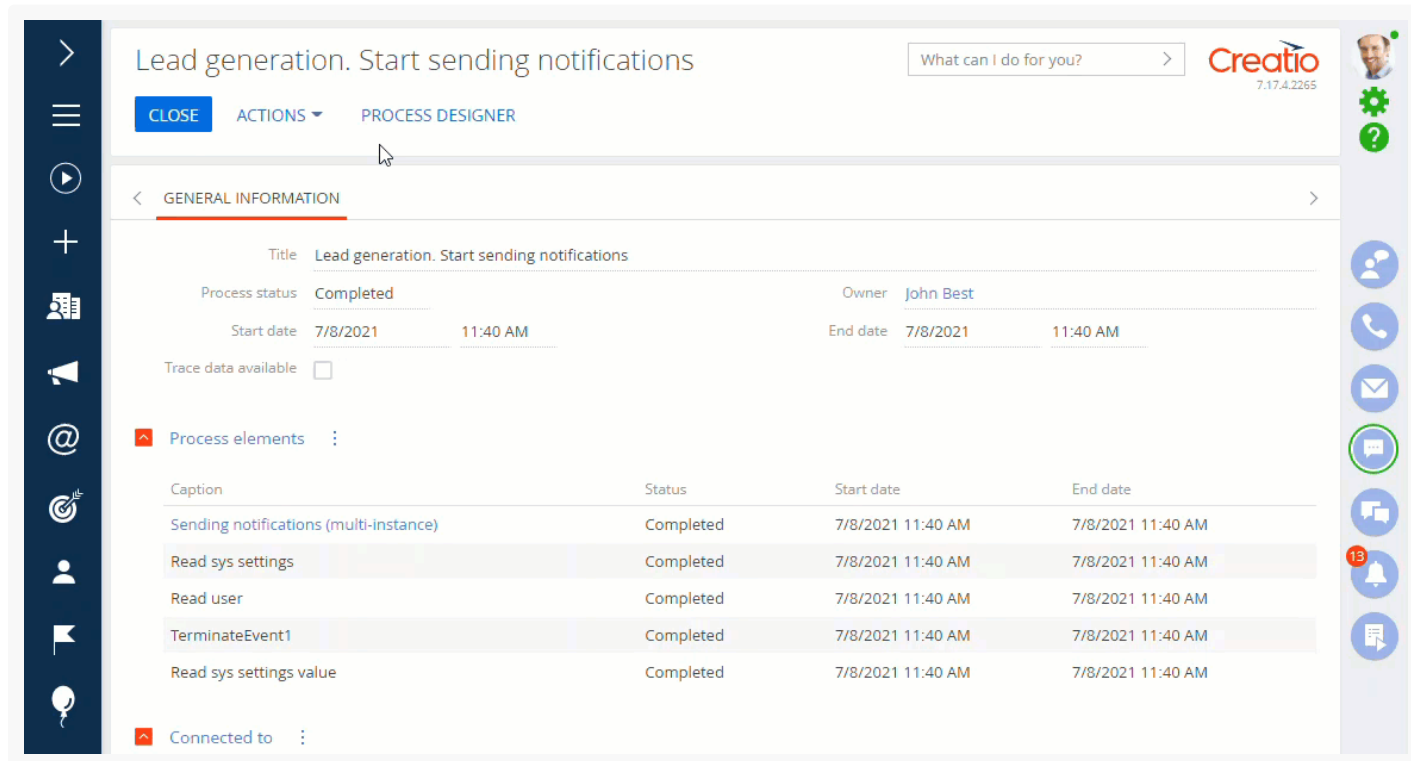
Fig. 2 Process execution history



If this is a sub-process, you can run the [*Parent process*] action to open the parent process page quickly

(Fig. 3).

Fig. 3 Opening the parent process page



Archive the process log records

To speed up the process log, Creatio automatically archives completed and canceled processes that remain in the [*Process log*] section list for more than a set period. The default archiving period is 30 days.

Note. Use the “Process log archiving period (days)” (“ProcessLogArchivingPeriod” code) [system setting](#) to change the period for the process records to display in the [*Process log*] section before they are automatically archived.

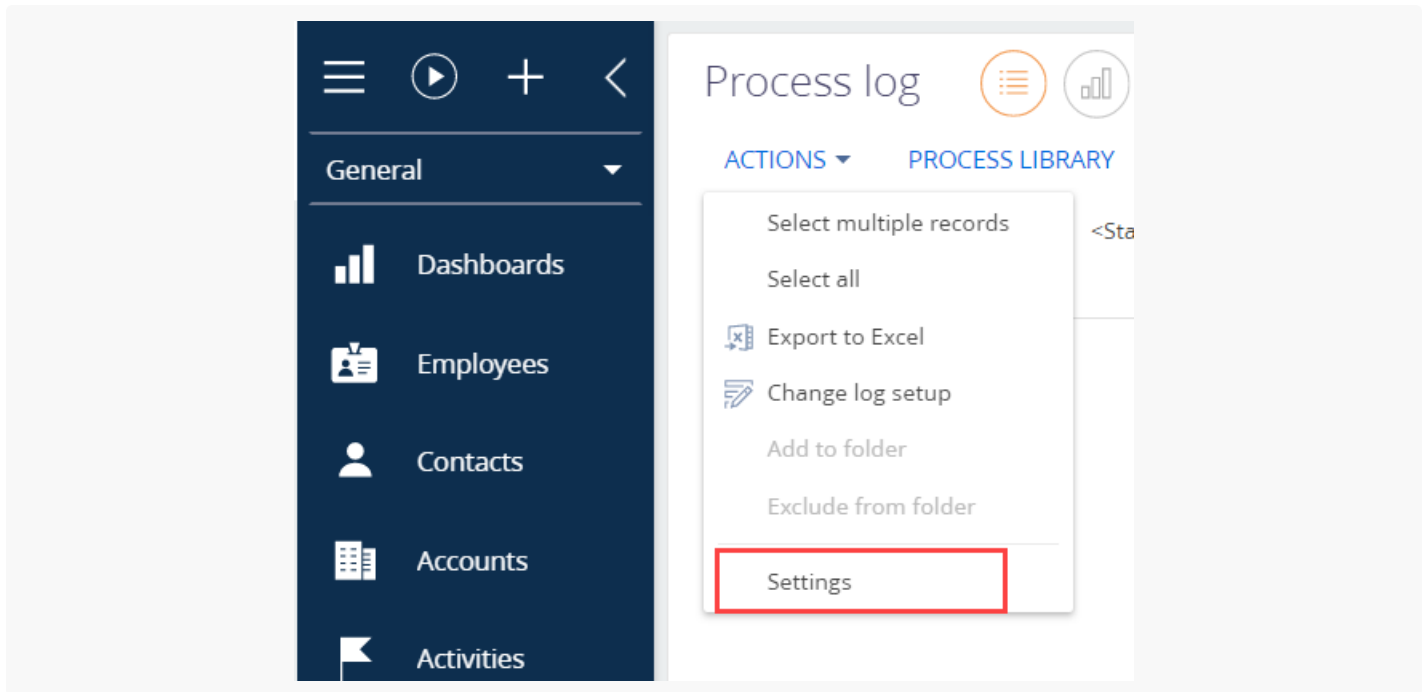
The data of the archived process instances remain available in the archive, including record history and connections to other system objects.

To view the data, select the “Archived” checkbox in the filter area of the [*Process log*] section.

To avoid increasing the amount of data in the database tables and overloading the system, Creatio automatically clears the archived records that users do not need anymore.

You can manage the archive operations using the [*Settings*] action (Fig. 4).

Fig. 4 [*Settings*] option in the [*Process log*] section



The [*Settings*] action opens the list of system settings that manage the process log maintenance (the settings located in the [*Process log*] folder of the [*System settings*] section). These system settings let you manage:

- How long the process instances in the “Error” state stay active in the process log.
- How often to archive the log records for completed and canceled processes.
- How long to store the archived records.

Learn more in a separate article: [Manage system settings](#).

Set up the permissions to run a process

PRODUCTS: **ALL CREATIO PRODUCTS**

By default, all Creatio users have permission to run business processes. This is managed by the “Can run all business processes” operation permission (“CanRunBusinessProcesses” code).

You can also set up permissions to run a specific business process to allow a user or user role to run only the business processes necessary for their duties. You can only configure the permissions to run a business process if it is launched manually. These permissions are effective for **all versions** of the process.

To do this:



1. Open the [*Process library*] section from the [*Studio*] workplace.
2. Select the desired process and click the [*Properties*] button.
3. Open the [*Permissions to run*] tab on the page that opens.
4. Click the + button. In the pop-up box, select the users or user roles to grant them permission to run this process (Fig. 1).

Fig. 1 Setting up the permissions to run a process

The screenshot shows the 'Process library' interface. On the left, there is a navigation pane with a tree view of process categories. The main area is titled 'PROCESS LOG' and contains a table of active processes. The table has columns for process name, status, and dates. A search bar at the top right says 'What can I do for you?'. The Creatio logo and version '7.17.4.2265' are in the top right corner.

Process Name	Status	Created on	Modified on
Fill active users statistics	Active Yes	5/13/2021 6:38 PM	4/23/2021 8:07 AM
Lead generation. Deleting archive data	Active Yes	4/5/2021 12:24 PM	3/23/2021 5:45 AM
Lead generation. Consistency check	Active Yes	4/5/2021 12:24 PM	3/23/2021 7:59 AM
Lead generation. Webhook processing	Active Yes	3/1/2021 7:07 AM	4/26/2021 3:05 AM
Lead generation. Start sending notifications	Active Yes	3/1/2021 7:07 AM	3/17/2021 3:27 AM
Lead generation. Sending notifications	Active Yes	3/1/2021 7:07 AM	3/23/2021 6:17 AM
Lead generation. Lead creation	Active Yes	3/1/2021 7:07 AM	4/26/2021 3:05 AM

As a result, the specified users and user roles will be able to run this process even if you did not specify them in the “Can run all business processes” operation permission (“CanRunBusinessProcesses” code).

Use the [*Position*] column to set up the permission priority. The higher the rule in the list, the higher its priority. The “0” value in the [*Priority*] field corresponds to the top-priority rule. Change a rule’s position using the  and  buttons.


Note. When installing a business process from a package, Creatio will apply the process permissions automatically as well.

View process properties

PRODUCTS: [ALL CREATIO PRODUCTS](#)

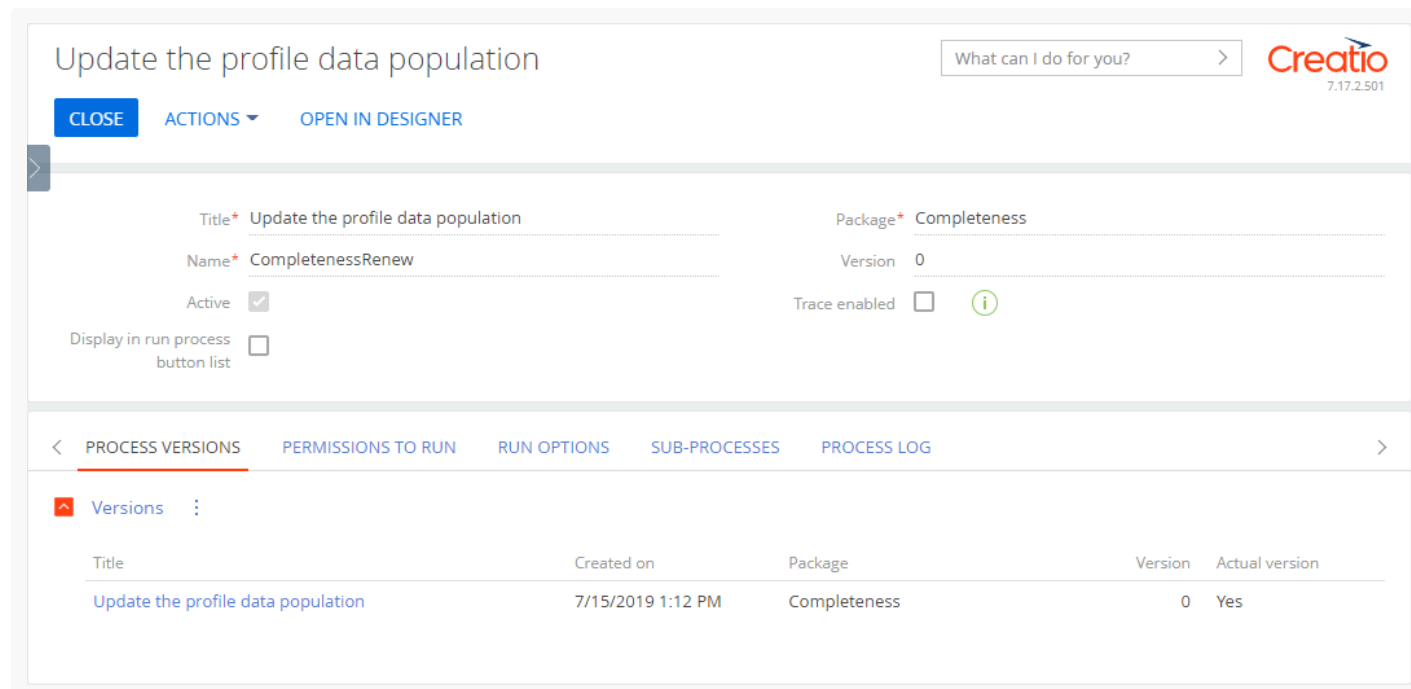
The process properties page contains complete information on the business process structure, starting conditions, execution, and use, as well as links to other processes.

To display the process properties page:

1. Click  to open the System Designer.
2. Click [*Process library*] under [*Processes*].
3. Select the needed process from the section list and click [*Properties*].

A process properties page will open in a separate window (Fig. 1).

Fig. 1 – Process properties page




View the general process information on the page that opens:

- Process name displayed in the [*Run process*] menu and used in the command line when running processes.
- Name – a unique identifier of the process in Creatio.
- Package name where the process is saved.
- The number of the current business process version.
- A checkbox that identifies process status.
Learn more about activating and disabling business processes in the [Activate process](#) and [Disable \(deactivate\) process](#) articles respectively.

The same values are available as process properties in the process designer.

Select the [*Trace enabled*] checkbox in process properties to trace the parameter values during the process execution. Learn more about tracing in the [Trace process parameter values](#) article.

You can also select the [*Display in run process button list*] checkbox to display the process in the quick launch list (opened by clicking  on the side panel).


View the process version

The [*Process versions*] tab displays information about process versions. The data cannot be edited and are added to the detail automatically, each time a new process version is saved.

The following data are available:

- Title – the process version number.
- Date when the process version was saved.

- The package where the process version was saved.
- The process version number.
- Indicates if the process version is the one currently used. All new instances of this business process will be run using the actual version.

To set a process version as actual, select it in the list and click [*Set as actual version*] in the  button menu. Only one of the versions of the same process can be set as actual. Any version can be used as a sub-process.

Note. Creatio saves the actual version of the process directly to the package. If you save the package as an archive and [install the package in a different environment](#), the most actual version of the process will be transferred with the package. Creatio will always determine the final current version of the process based on which package is higher in the hierarchy.

View the ways to start a process

The [*Run options*] tab contains information about all options for launching the business process, both manual and automatic. All information on this tab is added automatically and is unavailable for editing.

The following data are available:

- The [*Launch from sections*] detail contains a list of sections in which you can run this business process. If a section is in the list of the [*Launch from sections*] detail, then this business process will be available in the menu of the [*Run process*] button in the section's list and record page.
- The [*Launch from details*] detail contains a list of details in which you can run this business process.
- The [*Used as sub-process in processes*] detail contains the list of processes where the current process is used as sub-process.
- The [*Scheduled launch*] detail contains information about [start timer events](#) used in the process. The data is added to the detail automatically and cannot be edited.
- The [*Launch by signals*] detail contains information about [start signal events](#) used in the process. The records are added to the detail automatically if a [*Start signal*] element exists on the process diagram.

View sub-processes

The [*Sub-processes*] tab contains the list of processes used by the current process as sub-processes. The records are added to the detail automatically if a [*Sub-process*] element exists on the process diagram.

The following information is available on the [*Sub-processes*] tab:

- Process name - the title of the process used a sub-process. Clicking the title will open the sub-process properties page.
- Date when the used version of the sub-process was created.
- Date when the used version of the sub-process was modified.
- A checkbox that identifies the sub-process status.

View process logs

The [*Process log*] tab contains information about all instances of the current process and its current status. The records are added automatically, each time the process is run.

The following information is available on the [*Process log*] tab:

- Title - the process version name.
- The version number used in the process instance.
- Owner - the user on behalf of which the process has been launched.
- Status of the launched process, for example, “Completed” or “Running.”
- Start date and time of the process instance.
- End date and time of the process instance.

Trace process parameters

PRODUCTS: ALL CREATIO PRODUCTS

Process element [parameters](#) determine the behavior of the element in each particular process instance. Tracing the actual parameter values that were used in a specific process instance is a great way to test and debug business processes in Creatio.

You can enable tracing for a particular process by selecting the [*Trace enabled*] checkbox on the process properties page of the [*Process library*] section. Trace data becomes available on the [*Process elements*] detail of the process log page for all process instances that have been run while the checkbox is selected.

Attention. Parameter data can be traced for the following process elements: all elements in the “User actions” group, as well as the [*Read data*], [*Add data*], [*Modify data*], [*Delete data*], [*Change access rights*], [*Call web service*], and [*Subprocess elements*].

Attention. Process tracing should only be enabled for a short period of time to avoid negative impact to performance.

To trace process parameter values:

1. Enable parameter value tracing for that process:
 - a. Open the [*Process library*] section.
 - b. Select the needed process and click [*Properties*].
 - c. Select the [*Trace enabled*] checkbox on the process properties page.
 - d. Save changes made to the process properties page.
2. Run the process.
3. Go to the [*Process log*] section.
4. Open the process log entry for the process instance that you just run.
5. On the [*Process elements*] detail, select a process element whose parameter values you need to check.
6. Click the [*Show trace data*] button (Fig. 1).

Fig. 1 – Viewing parameter information of a process element

The screenshot displays a process element titled "Add account" with a status of "Running" and an owner of "Supervisor". The start date is 4/25/2018 at 9:17 AM. A checkbox for "Trace data available" is checked. Below this, there are buttons for "Process elements", "Run item", and "Show Trace Data", with a mouse cursor hovering over the last one. A table below shows a list of process elements:

Caption	Status	Start date	End date
Schedule meeting	Running	4/25/2018 9:18 AM	
Add new account	Completed	4/25/2018 9:17 AM	4/25/2018 9:18 AM

As a result, a parameter trace dialog will open, showing values for all parameters of the process element, before and after element execution (Fig. 2). The trace data are shown in the JSON format. The trace log displays both the element parameters and the process parameters before and after element execution.

Fig. 2 – Parameter trace data of a process element

The screenshot shows a dialog box with a close button (X) in the top right corner. The main content is a JSON object representing parameter trace data:

```

{
  "Element parameters": [
    {
      "Parameter": "IsRunning",
      "Value": {
        "Before execution": "False",
        "After execution": "True"
      }
    },
    {
      "Parameter": "Approver",
      "Value": {
        "Before execution": "00000000-0000-0000-0000-000000000000",
        "After execution": "4be9c4bb-8e79-4539-9173-17c8a766b671"
      }
    },
    {
      "Parameter": "Approval objective",
      "Value": {
        "Before execution": "",
        "After execution": "Approve contract specification"
      }
    },
    {
      "Parameter": "Delegation permitted",
      "Value": {
        "Before execution": "False",
        "After execution": "True"
      }
    }
  ]
}

```

For example, according to the text on the figure, the value of the "Approval objective" parameter has changed from empty to "Approve contract specification," the value of the "Delegation permitted" parameter changed from "False" to "True," etc.

View process statistics

PRODUCTS: **ALL CREATIO PRODUCTS**

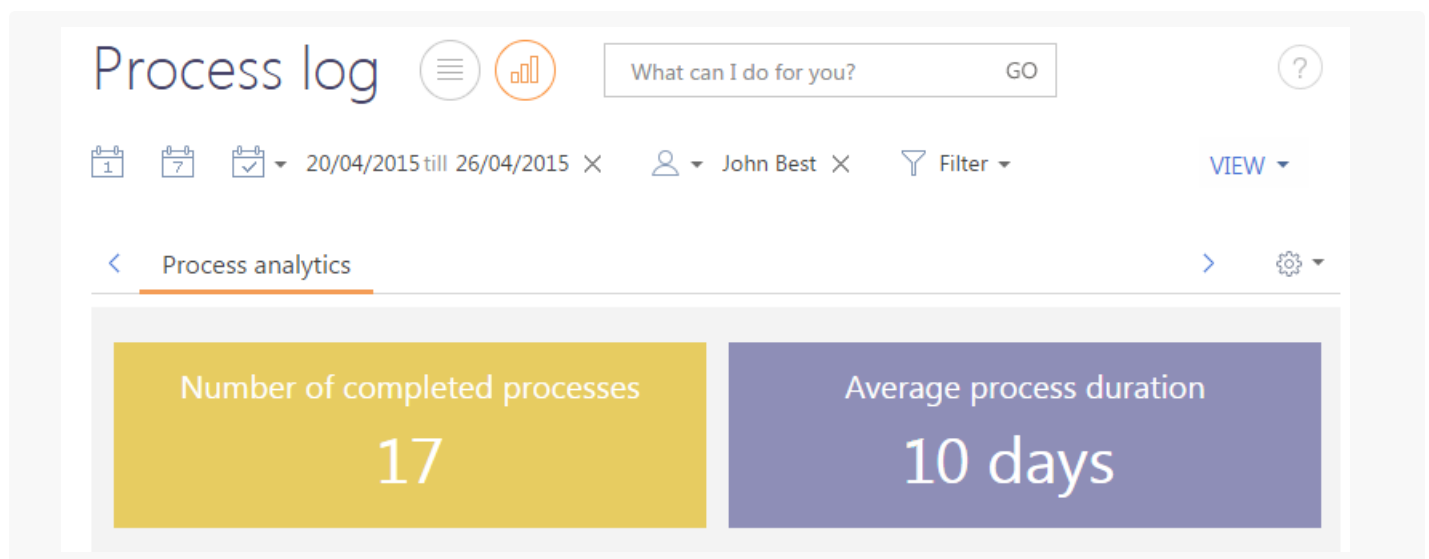
Use the analytic view of the [*Process log*] section to analyze statistics collected and calculated during process execution.

For example, you can analyze the number and duration of processes and their items using pre-configured metrics. If you need to customize the source data of the statistics, just use the standard filters in the section.

To view process statistics:

1. Click on the main Creatio application.
2. In the [*Processes*] group, click [*Process log*].
3. Open the section analytics view. Process dashboard will open ([Fig. 1](#)).

Fig. 1 How to view process statistics



Note. How to work with dashboards and standard filters is described in the documentation of the Creatio application.