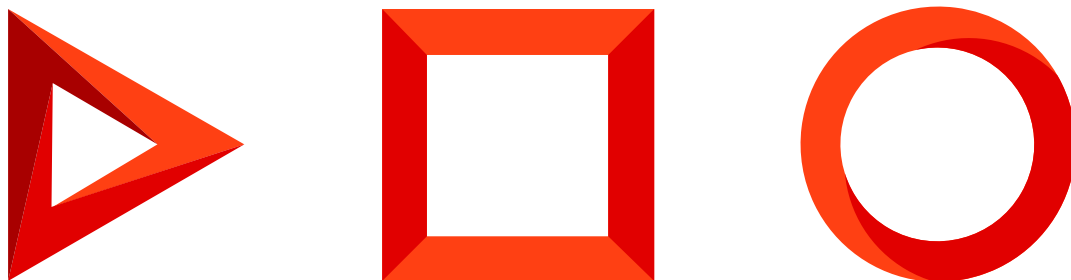


# User management

Version 8.0



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# Table of Contents

<b>Organizational roles</b>	<b>4</b>
Add an organizational role	4
Add a management role	5
Add users to an organizational role	7
<b>Functional roles</b>	<b>9</b>
Add a functional role	9
Connect functional and organizational roles	10
Add users to a functional role	11
<b>Add users</b>	<b>12</b>
Add a system administrator user	13
Add a regular employee user	15
Add a new contact	15
Create a user	16
<b>Change the “system” user (Supervisor)</b>	<b>18</b>
<b>Import users from Excel</b>	<b>18</b>
Prepare an Excel file for importing users	19
Run the import process	21
Set password, role, and grant licenses to the imported users	23
<b>Assign a user role</b>	<b>24</b>
Method 1. Assign roles to a user from the user page	24
Method 2. Assign roles to a user from the role page	25
<b>Issue a license to a user</b>	<b>26</b>
<b>Unblock a user</b>	<b>27</b>
User account blocking principles	27
Specify the user account blocking conditions	29
Unblock a user account	29

# Organizational roles

PRODUCTS: ALL CREATIO PRODUCTS


**Organizational roles** are user groups that represent company units, departments or subdivisions in the organizational structure, for example, the “Boston Office Sales Department” or the “Washington Office HR Department.” Each organizational role can be assigned access permissions that apply to all of its users. Organizational roles also automatically inherit access permissions from their parent organizational roles.

To manage organizational roles, click  → [ *Organizational roles* ].

The [ *Organizational roles* ] section contains the company’s organizational structure (represented in the form of a folder tree) and the information about individual organizational roles.

**Note.** By default, only system administrators have access to this section. Users need to have permission to the “Manage user list” (“CanManageUsers” code) system operation to work with this section.

## Add an organizational role

1. Click  → [ *Organizational roles* ].
2. In the list of organizational roles, **select the corresponding parent role**. For example, an organizational role for the regional office.
3. Click [ *Add* ] and **select the role type**: “Organization” or “Division.” For example, create a “Marketing department” division for the regional office.
4. Enter the **name** of the role. The name of each organizational role must be unique.
5. Open the [ *Functional roles* ] tab and add functional roles. For example, “Marketing Manager,” “Copywriter,” etc. All users in these functional roles will obtain all permissions of the organizational role.

This step is optional.

**Note.** Alternatively, you can connect a functional role to an organizational role on the functional role page. Read more: [Connect functional and organizational roles](#).


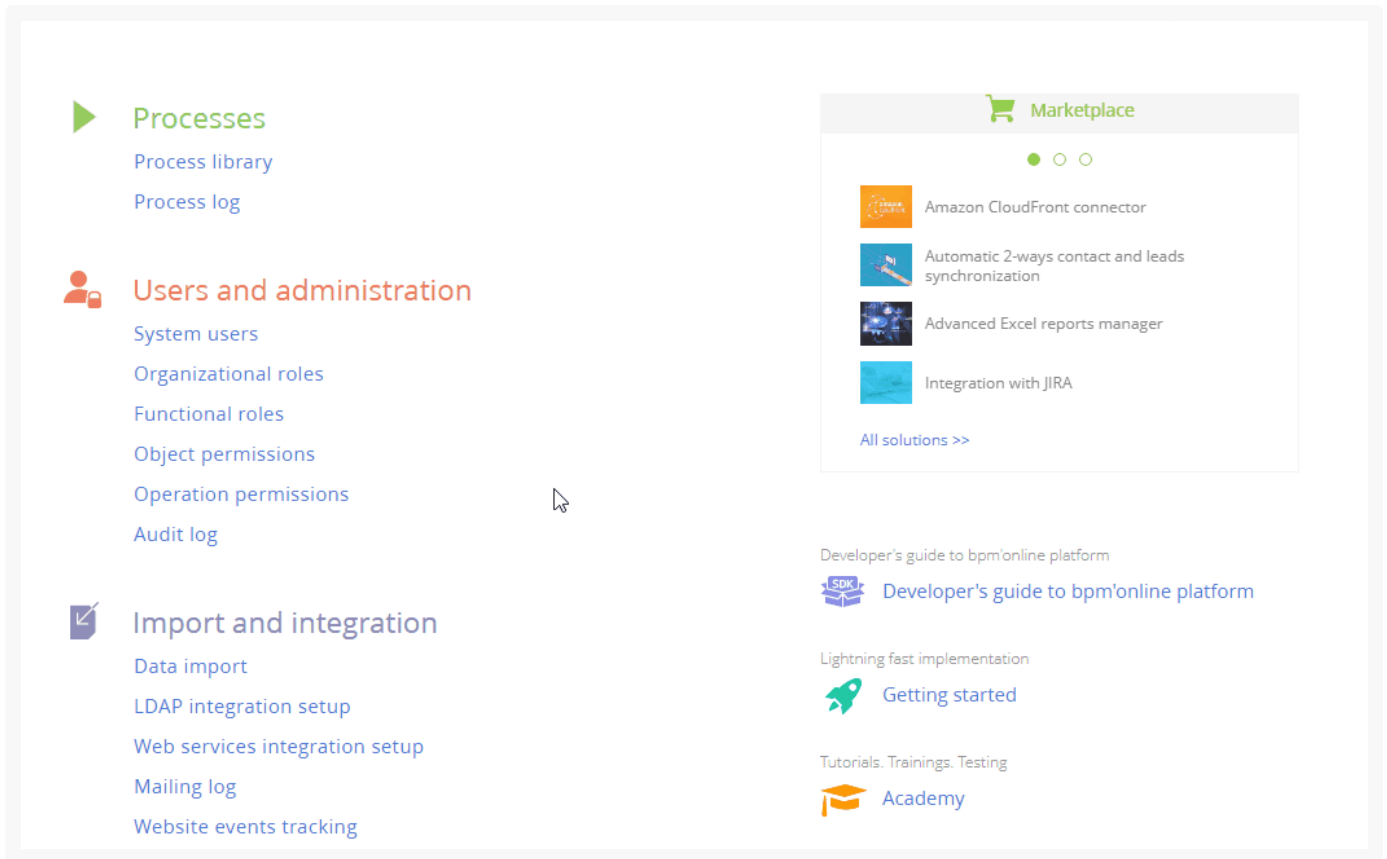
6. Click  → [ *Update roles* ] for changes to take effect (Fig. 1).

Fig. 1 Adding an organizational role



As a result, a new organizational role will be added to Creatio. It will automatically obtain the same access permissions as its parent organizational role.

## Add a management role

Set up special access permissions for management staff by adding a **management role** to an organizational role. The management role exists as a standalone organizational role in Creatio and may have its own access permissions, but it is not visible in the list of organizational roles.

Management role inherits the subordinate role's access permissions automatically.

To add a management role:


1. Click  → [ *Organizational roles* ].
2. Select the corresponding organization and/or division to assign a management role in the list of organizational roles. For example, to assign a manager to the HR Department, select the “HR Department” role.
3. Select the [ *Management role exists* ] checkbox on the [ *Managers* ] tab.
4. Specify the name of the management role (Fig. 2) in the [ *Management role* ] field.

Fig. 2 Creating a management role for the “HR Department” organizational role

The screenshot displays the 'Organizational roles' management interface. On the left, a sidebar lists various roles, including 'All employees', '1st-line support', '2nd-line support', '3rd-line support', 'Accounting Department', 'CC agents', 'Finance', 'HR Department', 'Quick Books synchronization', 'Sales Department', 'System administrators', 'All portal users', and 'Alpha Business'. The 'All employees' role is currently selected. On the right, the 'All employees' role details are shown, including a search bar for 'Name\*' with the value 'All employees'. Below this, there are tabs for 'USERS', 'MANAGERS', 'FUNCTIONAL ROLES', and 'ACCESS'. The 'USERS' tab is active, showing a 'Synchronize with LDAP' checkbox and an 'LDAP element' search field. A table lists users, with 'John Best' shown as a 'Supervisor' with the 'Job title' 'Head of department'.

5. Take the following steps on the [ *Managers* ] tab:

- Click **+** and select [ *Add existing* ] to **add an existing user**. Select the corresponding user in the pop-up box (Fig. 3).
- Click **+** and select [ *Add new* ] to **add a new user** assigned to this role. You will need to fill out the new user page.

Fig. 3 Adding users to the “HR Department” management role

As a result, the management role will be added to the organizational role. The users that have the management role will obtain all access permissions of the role, including permissions inherited from the subordinate role (e. g., “HR Department”).

Sometimes, managers can inherit unnecessary permissions. For example, if an employee was granted extended permissions to accomplish tasks. You can restrict the automatic delegation of permissions for specific roles to ensure the managers do not inherit unneeded permissions.

To do this, add the needed organizational or functional roles to the “User roles not inherited by managers” [lookup](#). By default, the lookup includes the “System administrators” role.

Learn more in separate articles: [Object operation permissions](#), [Record permissions](#), [Column permissions](#), [System operation permissions](#).

## Add users to an organizational role

You can create a list of users in an organizational role in any of the following ways:

- add an existing user (selecting a user from the list)
- add a new user via a new user page
- import LDAP users

**Attention.** You can import LDAP users only if the LDAP user integration has been set up. Learn more: [Set up LDAP synchronization](#).

All users added to the organizational role will inherit any access permissions configured for it.

To add users to an organizational role:


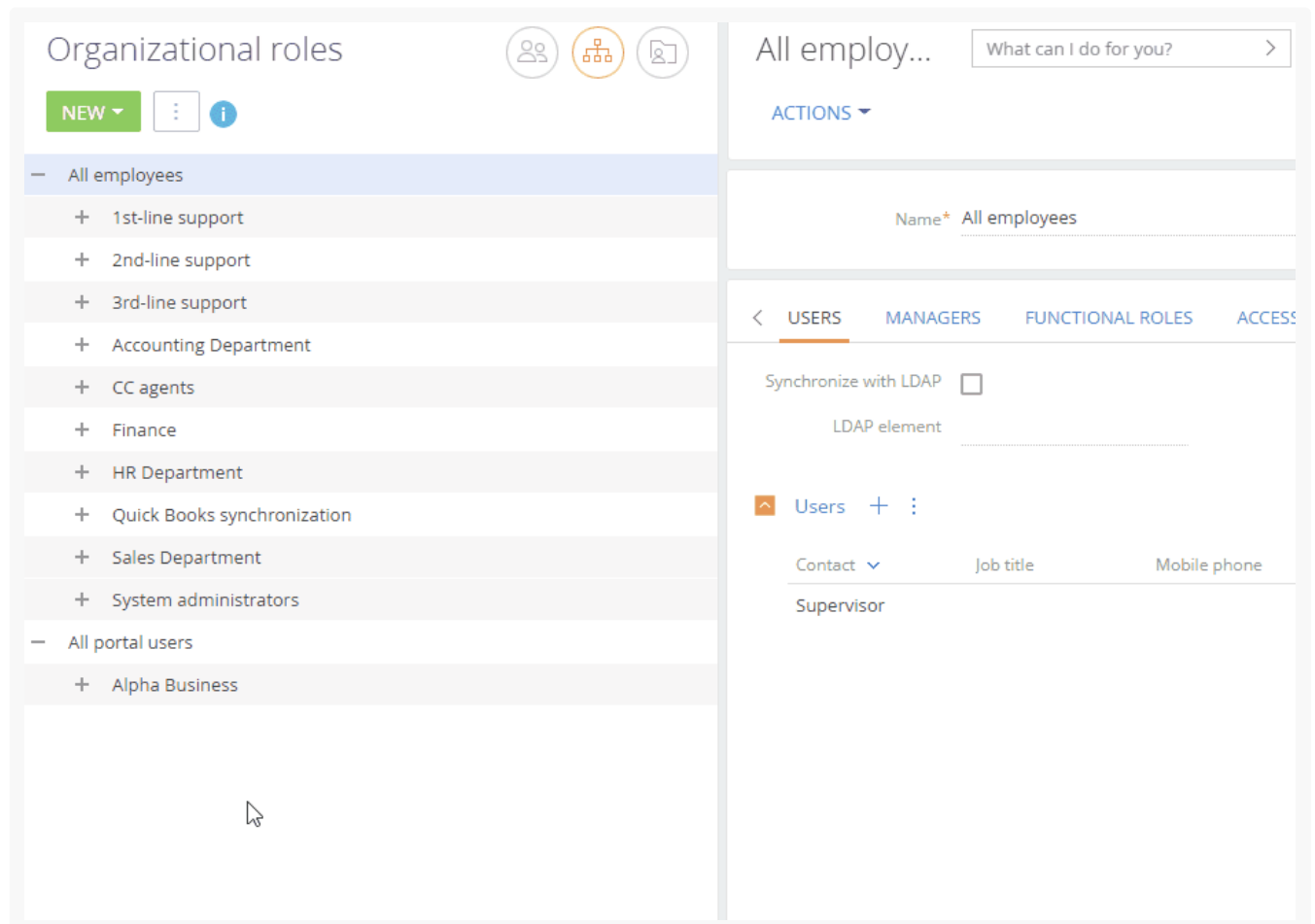
1. Click  → [ *Organizational roles* ].
2. **Select the corresponding organization and/or division** in the list of functional roles represented as a folder tree.
3. Take the following steps on the [ *Users* ] tab:
  - a. Click **+** and select [ *Add existing* ] to **add an existing user**. Select the corresponding user in the pop-up box (Fig. 4).
  - b. Click **+** and select [ *Add new* ] to **add a new user** assigned to this role (you will need to populate the new user page).

Fig. 4 Adding existing users to an organizational role



As a result, selected users will be added to the organizational role. The users will inherit any access permissions configured for the organizational role.

**Note.** Learn more about access permissions in separate articles: [Object operation permissions](#), [Record permissions](#), [Column permissions](#), [System operation permissions](#).



# Functional roles

PRODUCTS: **ALL CREATIO PRODUCTS**

**Functional roles** reflect employee job titles, e.g., “Sales Managers”.

To manage functional roles, click  → [ **Functional roles** ].

The [ *Functional roles* ] section contains the structure of functional roles (represented in the form of a folder tree) and the information about each functional role.


**Note.** By default, only system administrators have access to this section. Users need to have permission to the “Manage user list” (CanManageUsers) system operation to work with this section.

Use functional roles to set up identical access permissions for all employees with certain job positions, regardless of the company division. For example, you can create a functional role for managers in both main and regional offices. To do this:

1. **Create** a functional role. Learn more in the “[Add a functional role](#)” article.
2. **Add organizational roles** to a functional role. Learn more in the “[Connect functional and organizational roles](#)” article.
3. **Configure access permissions** for a functional role. Learn more about access permissions in the “[Object operation permissions](#),” “[Record permissions](#),” “[Column permissions](#),” and “[System operation permissions](#)” articles.

## Add a functional role

To create a functional role:

1. Click  → [ **Functional roles** ].
2. Click [ **Add** ]. Specify the name of the role in the opened window.

**Note.** The name of a functional role must be unique.


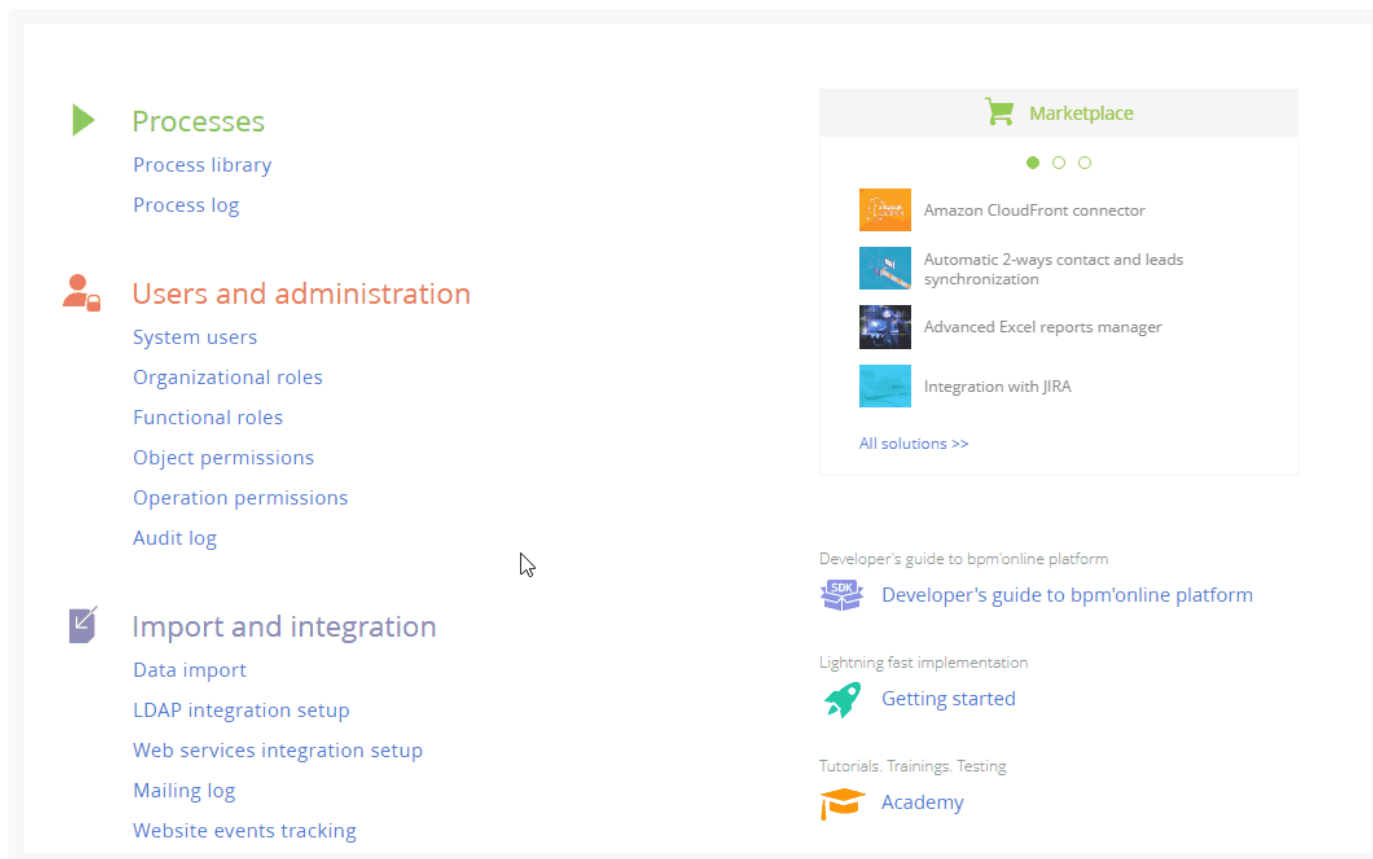
3. Click [ **Save** ].
4. Click  → [ **Update roles** ] for changes to take effect (Fig. 1).

Fig. 1 Adding a functional role



As a result, a new functional role will be added.

## Connect functional and organizational roles

A functional role can be linked to one or more organizational roles. For example, you can link the “Managers” functional role with the “Main office. Managers group” and “Regional office. Managers group” organizational roles.

To connect a functional role to an organizational role:



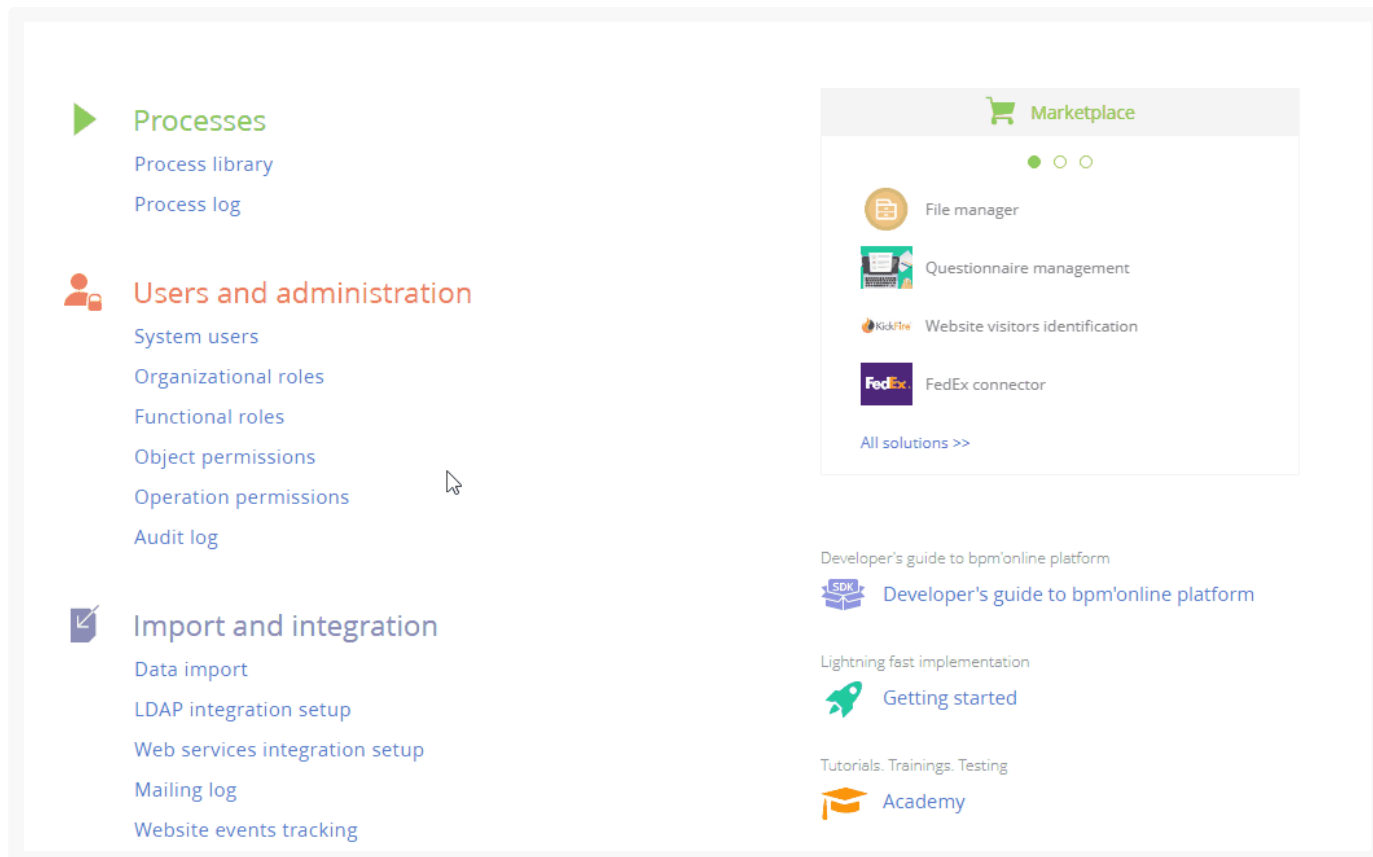
1. Click  → [ **Functional roles** ].
2. In the list of functional roles, **select the corresponding functional role**. The functional role page will open on the right-hand side.
3. On the [ **Organizational roles** ] tab, click + and **add organizational roles** to a functional role. For example, add the “Main office. Managers group” and “Regional office. Managers group” organizational roles to the “Managers” functional role.
4. Click  → [ **Update roles** ] for changes to take effect (Fig. 1).

Fig. 1 Connecting functional and organizational roles



As a result, the “Managers” functional role will be linked to the “Main office. Managers group” and “Regional office. Managers group” organizational roles. This will grant all permissions from the linked organizational roles to the users with the “Managers” functional role.


## Add users to a functional role

You can add users to the functional role in any of the following ways:

- add an existing user (selecting a user from the list)
- add a new user via a new user page
- import LDAP users [Read more >>>](#)

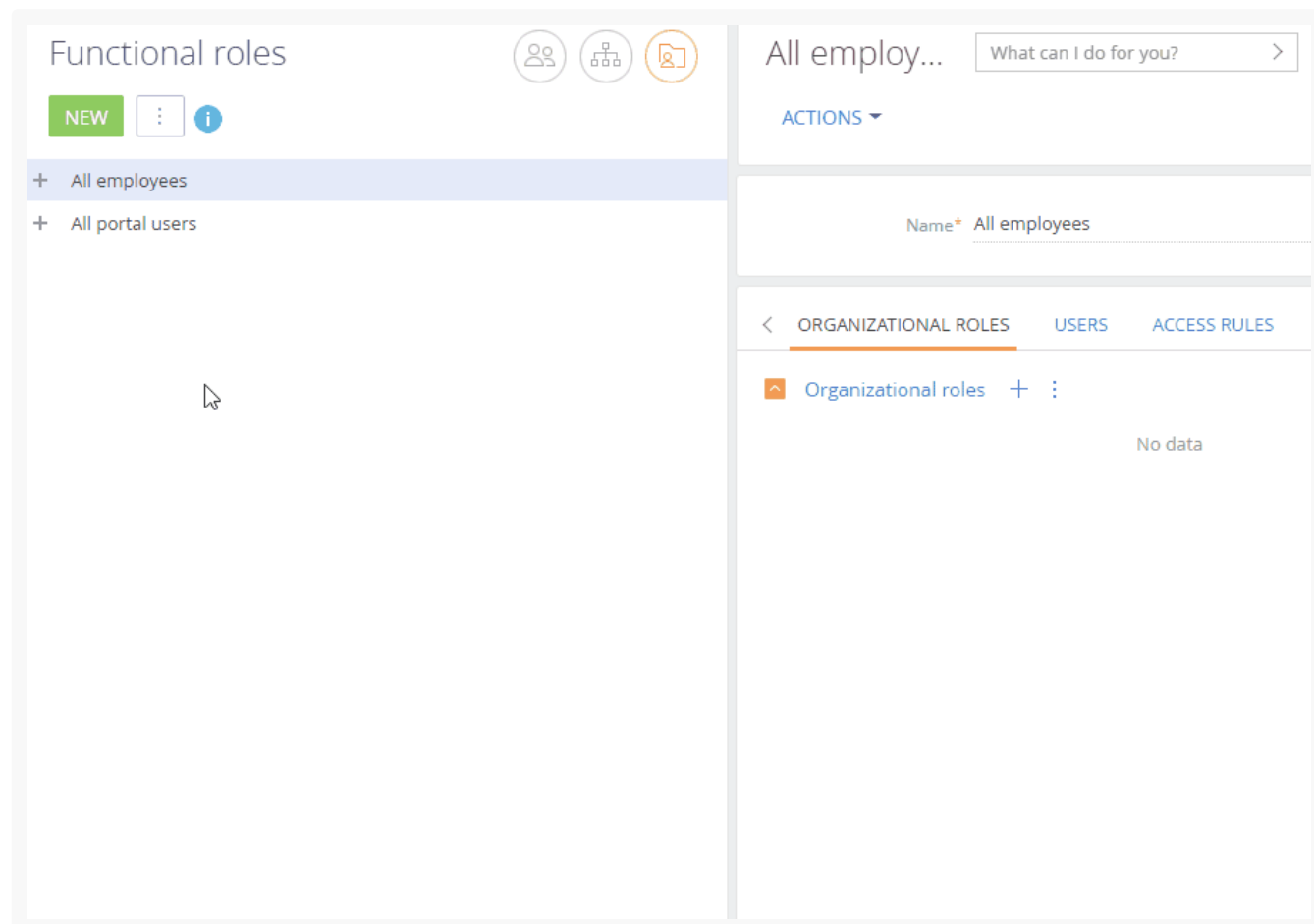
**Attention.** You can import LDAP users only if the LDAP user integration has been set up. Learn more in the [“Setting up LDAP integration”](#) article.

To add users to a functional role:

1. Click  → [ **Functional roles** ].
2. In the list of functional roles, **select the corresponding organization and/or division.**
3. On the [ **Users** ] tab:
  - a. Click **+** and select [ **Add existing** ] to **add an existing user**. Select the corresponding user in the pop-up window (Fig. 1).

- b. Click **+** and select [ **Add new** ] to **add a new user** assigned to this role (you will need to populate the new user page).

Fig. 1 Adding existing users to a functional role



As a result, new or existing users will be added to a functional role. Additionally, they will inherit any access permissions configured for this role.

**Note.** Learn more about access permissions in the [“Object operation permissions,”](#) [“Record permissions,”](#) [“Column permissions,”](#) and [“System operation permissions”](#) articles.

## Add users

PRODUCTS: **ALL CREATIO PRODUCTS**

Manage Creatio users in the [ *System users* ] section. User settings determine what operations users can perform, what data they can see and how they can work with this data.

**Note.** By default, only system administrators have access to the [ *System users* ] section.

Click  → [ *System users* ] to access the [ *System users* ] section.

## Add a system administrator user

By default, Creatio has a “**System administrators**” organizational role whose members have full access to all data in Creatio. This is achieved through access to the following system operations:

- “Add any data” (“CanInsertEverything” code)
- “Delete any data” (“CanDeleteEverything” code)
- “Edit any data” (“CanUpdateEverything” code)
- “View any data” (“CanSelectEverything” code)

Learn more: [Description of system settings](#).

To add a new system administrator user in Creatio:

1. In the [ *Contacts* ] section, **create a contact** for the new user or make sure that the relevant contact already exists. Learn more: [Add a new contact](#).
2. In the [ *System users* ] section, **create a new user**, specifying the contact in the user profile. Learn more: [Create a user](#).
3. Add the user to the “System administrators” role.

**Attention.** Access to these operations overrides any object permissions a user may have. For example, a user with permission to the “View any data” system operation can view all records in objects, even if you try to deny the “Read” permission for that user in the object permissions UI.

There are several ways to assign a system administrator role to a user:

- From the user page
- From the role page

### Method 1. Assign a system administrator role to a user from the user’s page



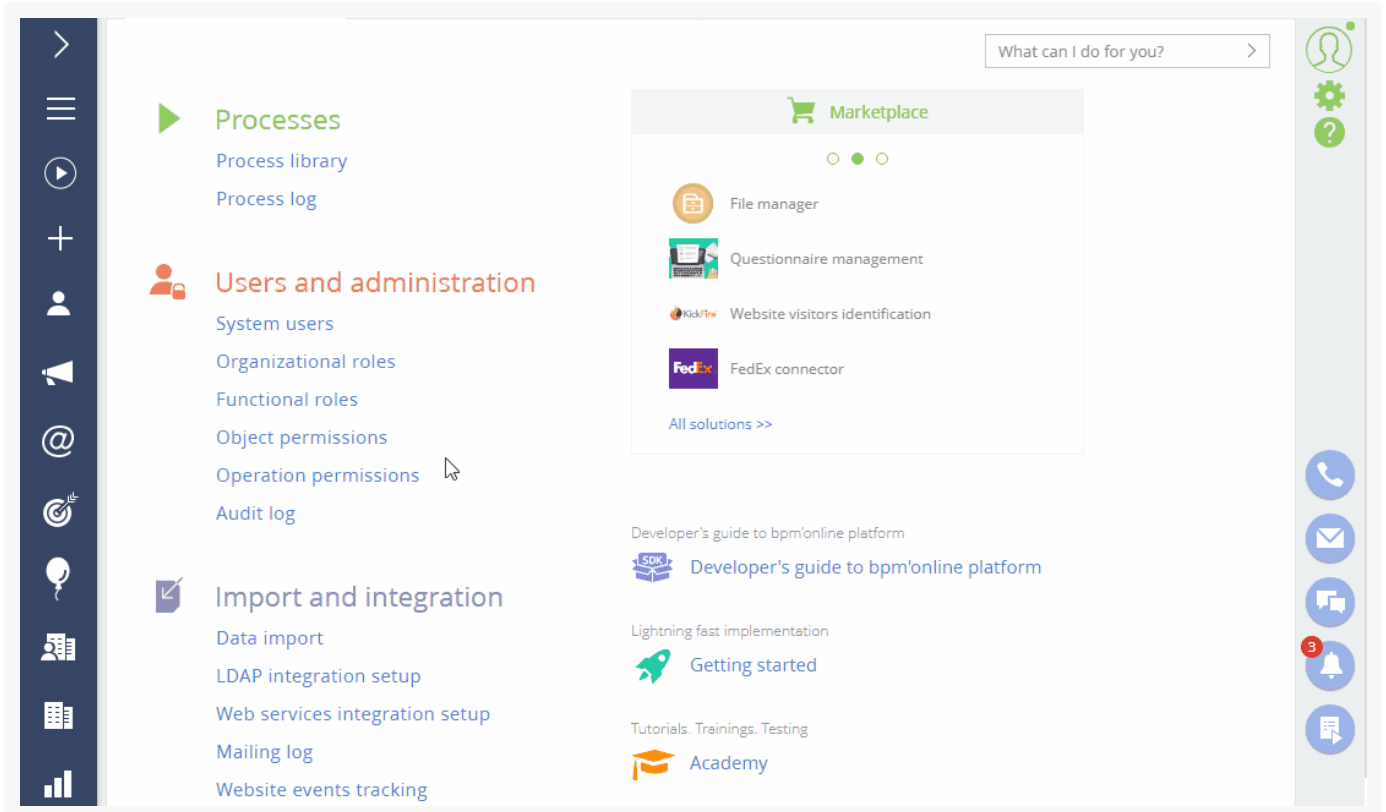
1. Click  → System Designer → [ *System users* ].
2. Open the user page → the [ *Roles* ] tab.
3. Click  in the [ *Organizational roles* ] detail and specify the “**System administrators**” role (Fig. 1).

Fig. 1 Assigning a system administrator role to a user from the user’s page



As a result, the user will be added to the “System administrators” role and will receive full access to all Creatio data.

## Method 2. Assign a system administrator role to a user from the role page




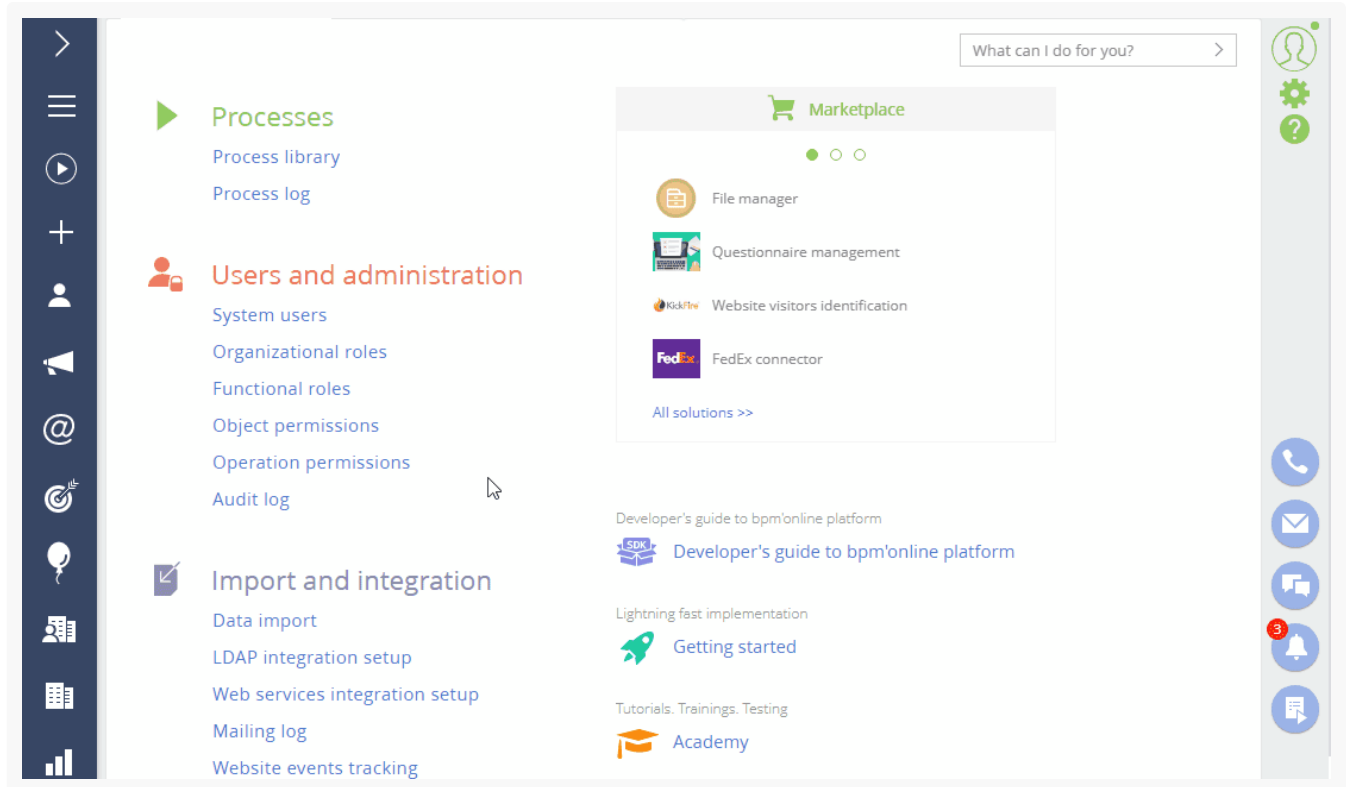
1. Click  → [ *Organizational roles* ].
2. In the list of organizational roles represented in the form of a folder tree, select the “System administrators” role. The area to the right of the roles tree will show the page of the selected role.
3. On the [ *Users* ] tab:
  - a. Click  and select [ *Add existing* ] to **add an existing user**. In the pop-up box, select the corresponding user (Fig. 2).
  - b. Click  and select [ *Add new* ] to **add a new user** assigned to this role. You will need to fill out the new user page.

Fig. 2 Assigning a system administrator role to a user via the [ *Organizational roles* ] section



As a result, the user will be added to the “System administrators” role and will receive full access to all data in Creatio.

## Add a regular employee user

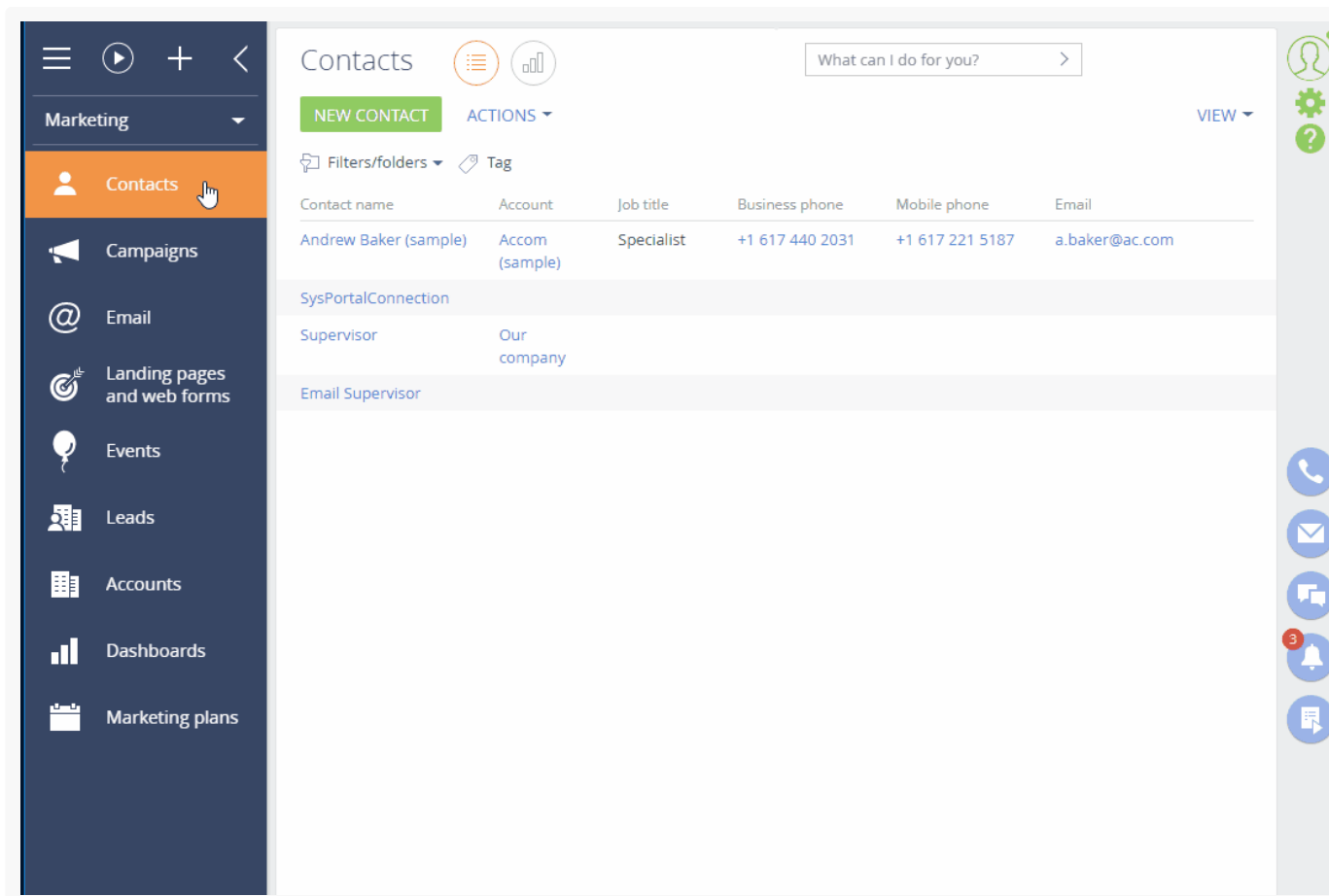
To create a new user account for a regular employee:

1. In the [ *Contacts* ] section, **create a contact** for the new user or make sure that the relevant contact already exists. Learn more: [Add a new contact](#).
2. In the [ *System users* ] section, **create a new user**, specifying the contact in the user profile. Learn more: [Create a user](#).
3. **Assign the user a role**, if applicable. Learn more: [Assign a user role](#).
4. **Distribute licenses** to the user. Learn more: [Issue a license to a user](#).


## Add a new contact

1. Go to the [ *Contacts* ] section → [ *Create contact* ].
2. Fill out the required fields on the contact mini-page and click [ *Save* ] (Fig. 3).

Fig. 3 Adding a new contact



As a result, a new contact will be added to Creatio, and you will be able to create a user for this contact.

**Note.** You can also add a new contact directly from the contact lookup page when filling out the [ *Contact* ] field on the user page. Click  in the [ *Contact* ] field, then click [ *New* ] in the lookup box that pops up. Fill out the contact page that opens. After you save the contact page, you will return to the new user page, with the [ *Contact* ] field populated with the newly-created contact.

## Create a user


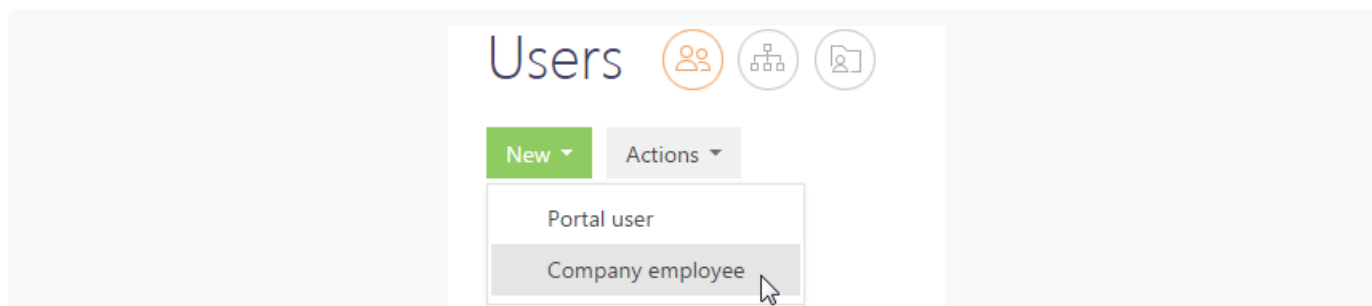
1. Click  → [ *System users* ].
2. Click [ *New* ] → [ *Company employee* ] (Fig. 4).

Fig. 4 Select a user type





**Note.** You can change the type of the user (“Company employee” or “Portal user”) after saving the new user record and reopening the user page.

3. Fill out the fields on the page that opens:
  - a. [ *Contact* ] - select the user’s contact in the [ *Contacts* ] section.
  - b. [ *Type* ] - Creatio populates the field automatically when you select the user type at step 2. The possible field values are “Portal user” or “Company employee”.
  - c. [ *Active* ] - a status checkbox selected automatically for active users. Clear the checkbox to deactivate a user.
  - d. [ *Culture* ] - the interface language for the current user. Creatio populates the value automatically, the user can change the interface language in the user’s profile.

**Note.** The [ *Culture* ] field displays active languages. To select other languages, activate them in the [ *Languages* ] section of the System designer. Learn more about Creatio cultures: [Manage UI languages](#).

- e. [ *Home page* ] - select a section page that will open by default when the user logs in to Creatio. If you leave the field empty, the user will be redirected to the Main Menu, and upon subsequent logins - to the last opened page during the previous session.
  - f. [ *Date and time format* ] - specify the format that will be used to display dates for the user. You can leave the field blank, the user will be able to specify the format later in the user profile.
4. Fill out the fields on the [ *Authentication* ] detail:
    - a. [ *Username* ] - enter the Creatio user's login. This is a required field.
    - b. [ *Email* ] - enter the Creatio user's login email. If you fill out this field, the user will be able to log in with either the username or the email.
    - c. [ *Password* ], [ *Password confirmation* ] - enter the password the user will use to log in to Creatio. These are required fields.
    - d. [ *Password expiration date* ] - the field is non-editable and displays the date when the password expires. The date is calculated based on the [ *Default value* ] field of the “Password validity term, days” (“MaxPasswordAge” code) system setting. The value is set to “0” by default, in which case the password has no expiration date, and the [ *Password expiration date* ] field on the user’s page remains blank and locked.
    - e. [ *Reset password* ] - select this checkbox if you want to force the user to change their password when logging in for the next time. If the checkbox is selected on the user’s page, Creatio will notify the user that their password has expired and request changing it at the next login attempt.

**Note.** If you use the LDAP authentication, select the [ *LDAP authentication* ] checkbox and specify the username from the LDAP lookup in the [ *Username* ] field. The lookup in this field contains the list of LDAP users that have not been synchronized with Creatio yet. Learn more: [Set up LDAP synchronization](#).

5. Save the page.

As a result, a new user will be added to Creatio.

## Change the “system” user (Supervisor)

PRODUCTS: ALL CREATIO PRODUCTS

A dedicated user account called “System user” is required for the correct operation of Creatio. The system user must have the following permissions:

- System administrator (full access) permissions.
- Full license package.
- The user must be specified in the [ *System operations user* ] system setting.

By default, each configuration of Creatio has the “Supervisor” user account that is set as the system user.

**Note.** If you do not have a “Supervisor” user in the system, make sure that the user specified in the [ *System operations user* ] system setting has a full license package and all access permissions.

Unlike system administrators, there can be only one system user in Creatio.

**Attention.** You can rename or change the system user, but you can not delete the system user account altogether – this may lead to degradation of system performance.

A system user account is needed for both system administration/configuration and to ensure the correct operation of the entire system. For example, a system user account is used to index global search data, save changes in section and detail wizards, sending newsletters. Creatio may not function properly if a system user is deleted or their access rights or licenses have been removed.

1. Transfer the **maximum number of licenses** from the previous user to the new one.
2. Assign the role with **maximum access permissions** to the new system user, e.g. “System administrators”.
3. Specify the new system user in the [ ***System operations user*** ] system setting.

## Import users from Excel

PRODUCTS: ALL CREATIO PRODUCTS

You can quickly add multiple users to Creatio by importing them from Excel. Learn more: [Excel data import](#).

Import data into the “System administration object” that corresponds to the “SysAdminUnit” table in the database. This object contains the company's organizational structure: users, organizational and functional roles.

To import users from Excel:

1. **Prepare the file for import** and fill out the needed columns. Learn more: [Prepare an Excel file for importing users](#).
2. Download the file and **import users** to the system. Learn more: [Run the import process](#).
3. **Set up user records**: assign roles, specify passwords and available licenses. Learn more: [Set password, role, and grant licenses to the imported users](#).

## Prepare an Excel file for importing users

Create an \*.xlsx document. The document should contain the “Name” and “Type” fields, where you specify the login and type values. You can optionally populate the rest of the columns.

Column name	Column value in the imported Excel file
Name	<p>User’s login name.</p> <p>This column is required.</p>
Type	<p>Specify “4” to import records as users.</p> <p>This column determines the type of administration unit that is imported – either a role or a user. These types are stored in the “Object Permission Types (SysAdminUnitType)” object. You can find the possible values of this table below.</p> <p>This column is required.</p>
Contact	<p>Specify the name of the user’s contact. The names that you specify in the “Contact” column of your user import file must match the names of corresponding contacts in Creatio, otherwise Creatio will create new contacts.</p> <p>This column is optional. If you do not populate it, Creatio create new contacts using username as the contact’s name.</p>
Active	<p>The following values can be used:</p> <ul style="list-style-type: none"> <li>• “0” for deactivated users</li> <li>• “1” for active users</li> </ul> <p>This column is optional. By default, all users are active.</p>
Culture	<p>Specify the user language code (e. g., the “en-US” for English UI). Learn more about Creatio cultures: <a href="#">Manage UI languages</a>.</p> <p>This column is optional. By default, the users will use English localization.</p>
Connection type	<p>The connection type determines the access permissions inherited by the user.</p> <ul style="list-style-type: none"> <li>• “0” for company employees</li> <li>• “1” for portal users</li> </ul> <p>This column is optional. By default, all users are imported as employees.</p>

View the values of “Object Permission Types” (SysAdminUnitType) object in the table below.

System administration unit type	“Type” column value	“Connection type” column value
Organization	0	0
Organizational unit	1	0
Manager	2	0
User	4	0
Portal user	4	1
Functional role	6	0

Learn more about general requirements for the imported Excel file: [Prepare a file](#).

## Run the import process

To import users from Excel:


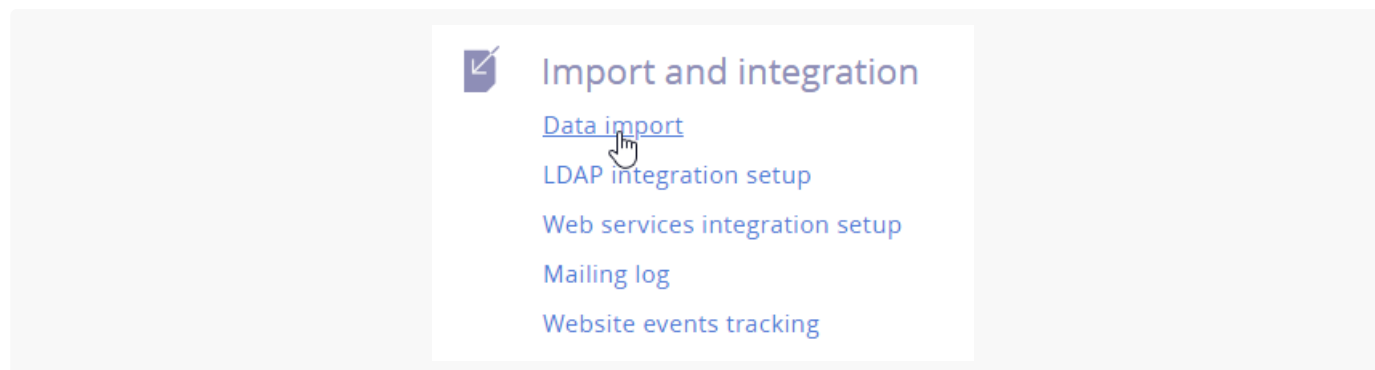
1. Click  System Designer → [ *Data import* ] (Fig. 1).

Fig. 1 The link to the [ *Data import* ] functionality in the “Import and integration” block




2. **Add your user import Excel file:** drag it to the Data Import page that opens, or click [ *Select file* ] and locate your Excel file.
3. Click [ *Other* ] and select “**System administration object**” as the object for importing file records (Fig. 2). Click [ *Next* ].

Fig. 2 Select an object for the import on the Data Import page

## Data import: Upload file


CLOSE BACK NEXT


Selected file




importing\_users.xlsx X

Where do you want the data imported to?

 CONTACT

 ACCOUNT

 SYSTEM  
ADMINISTRATION  
OBJECT

[NEXT](#)



- Specify the **column mapping** by connecting the columns from the Excel file to the fields in the Creatio import object (Fig. 3). Click [ *Next* ].

Fig. 3 Map the columns

## Data import: Map columns

CLOSE BACK NEXT

Specify column mapping between Excel file and bpm'online

 Excel
 

Name	<input checked="" type="checkbox"/>	Name
Type	<input checked="" type="checkbox"/>	Type
Contact	<input checked="" type="checkbox"/>	Contact
Active	<input checked="" type="checkbox"/>	Active
Culture	<input checked="" type="checkbox"/>	Culture

[NEXT](#)

- Specify the conditions to identify duplicate records.** The data of these columns must be unique for each of the imported records (Fig. 4).

If the value of a column in the imported file coincides with the database value, Creatio will update the existing

record. If the value is not available in the database, Creatio will create a new record.

For example, when importing users, use the “Contact” column to determine whether the imported record already exists. If contact with such a name does not exist, Creatio creates a new record.

Fig. 4 Manage duplicates

**Data import: Duplicate management**

CLOSE BACK NEXT

Specify the duplicates search rule for data import to bpm'online

Records are considered duplicates if following columns match

- Name
- Type
- Contact
- Active
- Culture

START DATA IMPORT

6. Click [ *Start data import* ].

**Note.** Learn more about how to set up columns and duplicate parameters: [Import a customer database](#).

When the import process completes, Creatio will inform you accordingly.

As a result, the imported records will be displayed in Creatio user record list. Note that the imported users will not have roles, licenses or passwords. You will need to assign those manually.

## Set password, role, and grant licenses to the imported users

After you complete the import, you need to perform the following steps manually for each imported user:

1. On the [ *General information* ] tab of the user page, **set a password** to enable the user to log in to Creatio.

**Note.** Users can change their password when logging in to Creatio for the first time. Learn more: [Create a user](#).

2. **Select the necessary role** (e. g., “All employees”) on the [ *Roles* ] tab. Learn more: [Assign a user role](#).

3. **Distribute licenses** on the [ *Licenses* ] tab. Learn more: [Issue a license to a user](#).

# Assign a user role

PRODUCTS: ALL CREATIO PRODUCTS

User groups in Creatio are called “**roles**”. You can assign organizational and functional roles to users in Creatio. Read more in “[User and role management, access permissions](#)”.

The assigned roles provide users with access to corresponding Creatio [data objects](#) and general [system-wide functions](#). You can specify several roles for a user.

**NOTE.** By default, Creatio assigns the “All employees” organizational role to the newly added users of the “Employee” type.

There are two ways you can assign roles to a user:

- From the user page
- From the role page

## Method 1. Assign roles to a user from the user page


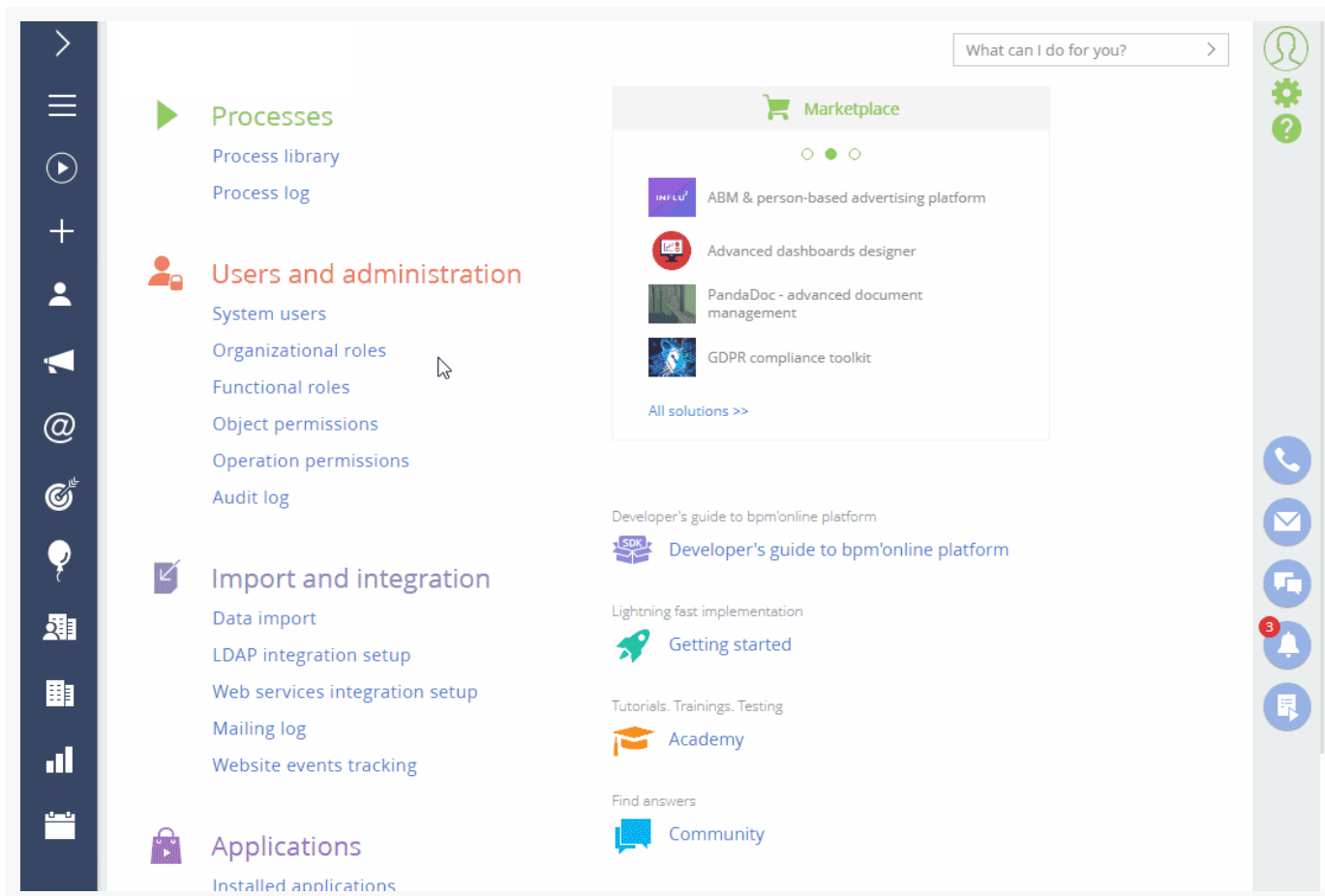
1. Click  → System Designer → [ **System users** ].
2. Open the user page → the [ **Roles** ] tab.
3. On the [ **Organizational roles** ] detail, click + and specify the roles from the company's organizational structure.
4. On the [ **Functional roles** ] detail, click + and specify the user's functional role. Functional roles are usually based on the user's job title ([Fig. 1](#)).

Fig. 1 Assigning roles to a user from the user page





As a result, the user will be granted all permissions relevant to the assigned roles.

## Method 2. Assign roles to a user from the role page



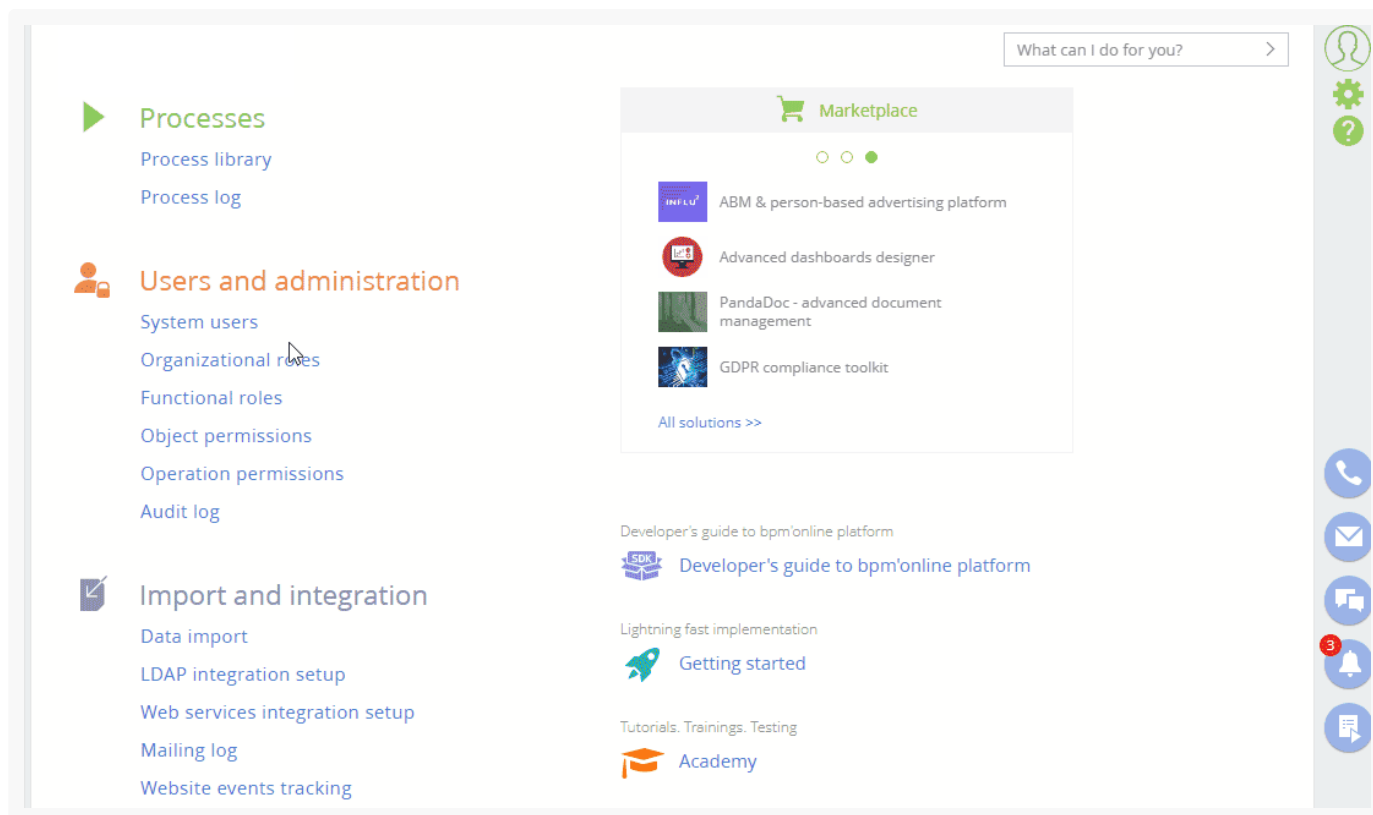
1. Click  → [ **Organizational roles** ].
2. In the list of organizational roles (represented in the form of a folder tree), **select the corresponding organization and/or division**. This will bring up the selected role page to the right.
3. On the [ **Users** ] tab:
  - a. Click **+** and select [ **Add existing** ] to **add an existing user**. In the pop-up window, select the corresponding user ([Fig. 1](#)).
  - b. Click **+** and select [ **Add new** ] to **add a new user** assigned to this role (you will need to populate the new user page).
4. To assign a functional role to the user, switch to the [ **Functional roles** ] view by clicking , then **select the corresponding functional role**.
5. Repeat step 4 ([Fig. 1](#)).

Fig. 1 Assigning roles to a user from pages of the corresponding roles



As a result, the user will be added to the corresponding roles and granted relevant permissions.

## Issue a license to a user

PRODUCTS: **ALL CREATIO PRODUCTS**

You need to issue licenses to each new Creatio user. Only licensed users can log in to Creatio application and access the corresponding functionality. For example, users who have not been issued a “Creatio marketing” license, will not be able to use functions that are specific to Creatio marketing, such as the [ *Email* ] and the [ *Campaigns* ] sections. By default, Creatio system administrators have permission to distribute licenses to user accounts.

**Attention.** To enable licensing a user account, Creatio must have available licenses that have not been distributed among other users.

To license a user:


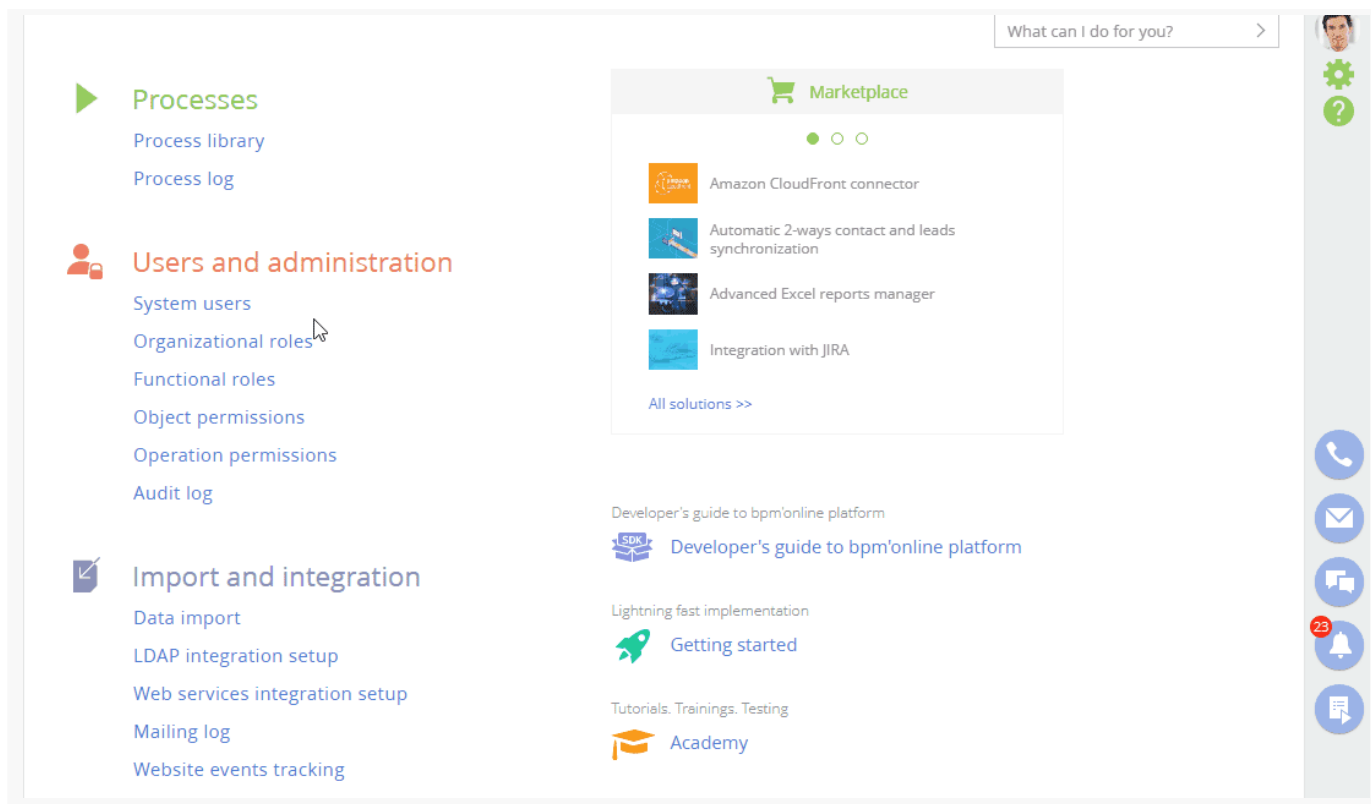
1. Click  → [ **System users** ].
2. Open the user page → the [ **Licenses** ] tab.
3. In the license list, select the licenses to be distributed for the user account ([Fig. 1](#)).

Fig. 1 Distributing licenses to a user



As a result, the user will be granted licenses for the selected products and functionalities.

**Note.** If your application does not have available licenses, request them from support and upload them. Read more in the “[Software licensing](#)” article.

# Unblock a user

PRODUCTS: **ALL CREATIO PRODUCTS**

If the user [mistypes their credentials](#) several times in a row, their account will be blocked for some time.

The system administrator can [set up the blocking conditions](#):

- the number of attempts after which the user account is blocked
- the period after which the user account is unblocked.

## User account blocking principles

Several [system settings](#) are considered when blocking a user account:

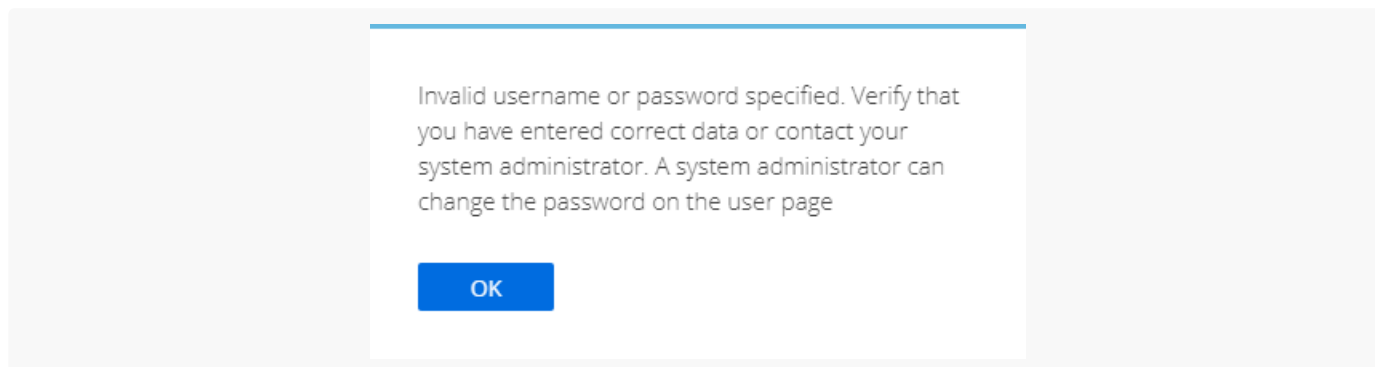
- “Number of logon attempts” (“LoginAttemptCount” code).
- “Quantity of login attempts for warning message” (“LoginAttemptBeforeWarningCount” code).

- “User locking time” (“UserLockoutDuration” code).

The user account blocking **mechanism** is as follows:

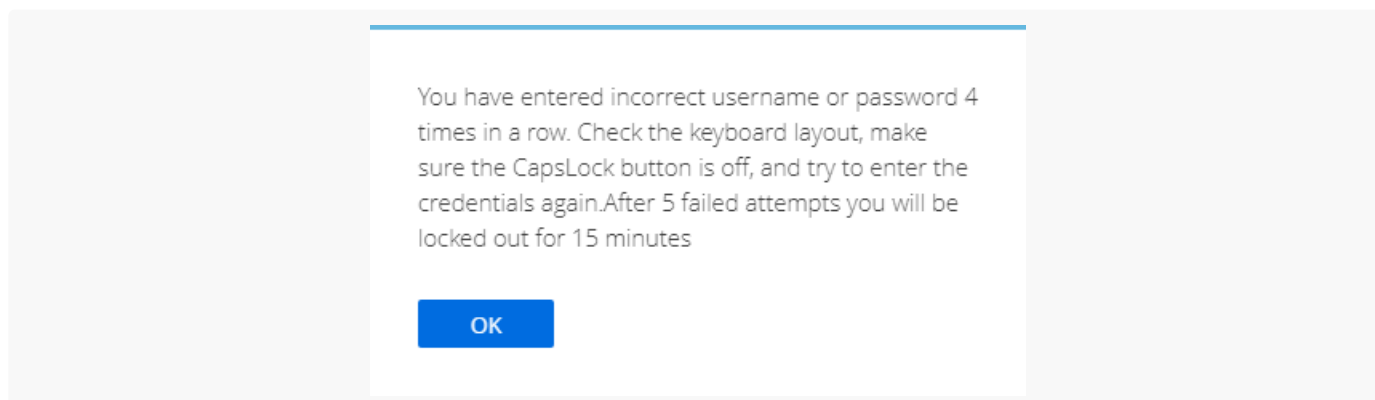
- If the number of failed login attempts does not exceed the value of the “**Number of logon attempts**” (“LoginAttemptCount” code) system setting, Creatio displays a failed login attempt message (Fig. 1).

Fig. 1 A failed login attempt message



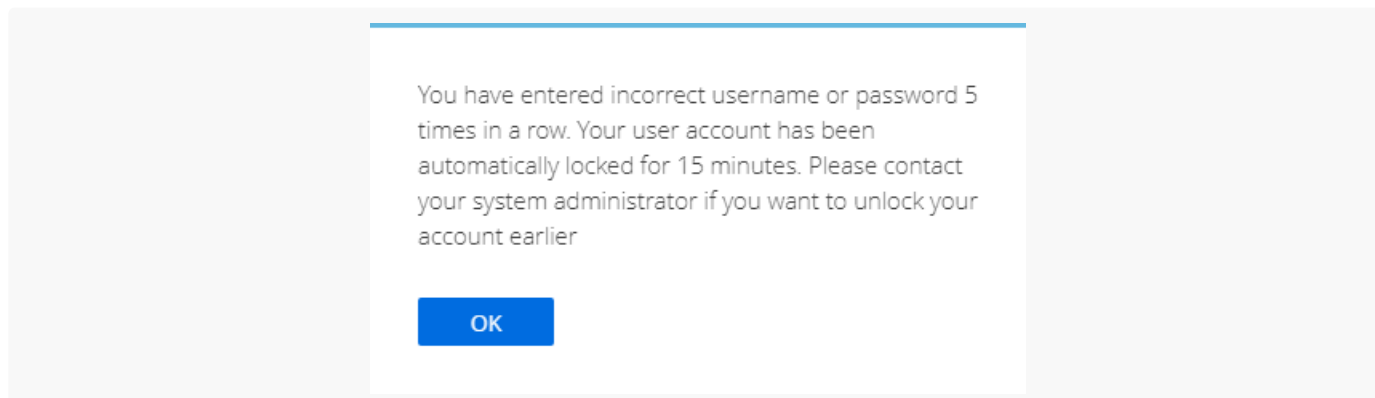
- If the number of failed login attempts exceeds the value of the “**Number of logon attempts**” (“LoginAttemptCount” code) system setting, Creatio displays a lockout warning message (Fig. 2).

Fig. 2 A lockout warning message



- If the number of failed login attempts equals the value of the “**Quantity of login attempts for warning message**” (“LoginAttemptBeforeWarningCount” code) system setting, Creatio displays a lockout message (Fig. 3).


Fig. 3 A lockout message



As a result, the user will be blocked for the period specified in the **“User locking time”** (“UserLockoutDuration” code) system setting. The user account will be unblocked after the specified period. To unblock a user account earlier, use the following instruction: [Unblock a user account](#).


## Specify the user account blocking conditions

### Set the number of login attempts

1. Click  to open the System Designer.
2. Click **“System settings”** in the “System setup” block.
3. Open the **“Number of logon attempts”** system setting (“LoginAttemptCount” code).  
Specify the acceptable number of failed login attempts in the [ *Default value* ] field. The recommended system setting value is 5.
4. Open the **“Quantity of login attempts for warning message”** system setting (“LoginAttemptBeforeWarningCount” code).  
Specify the number of failed login attempts after which Creatio displays the lockout warning message in the [ *Default value* ] field. The user will be blocked after the next failed login attempt. The recommended system setting value is 3.

**Note.** The value of the “Number of logon attempts” system setting (“LoginAttemptCount” code) must not exceed that of the “Quantity of login attempts for warning message” system setting (“LoginAttemptBeforeWarningCount” code).

### Set up the user lockout period


1. Click  to open the System Designer.
2. Click **“System settings”** in the “System setup” block.
3. Open the **“User locking time”** system setting (“UserLockoutDuration” code).  
Specify the user account blocking time (in minutes) after a number of failed login attempts in the [ *Default value* ] field. The recommended system setting value is 15.

As a result, Creatio will set the account blocking conditions for all system users.

## Unblock a user account

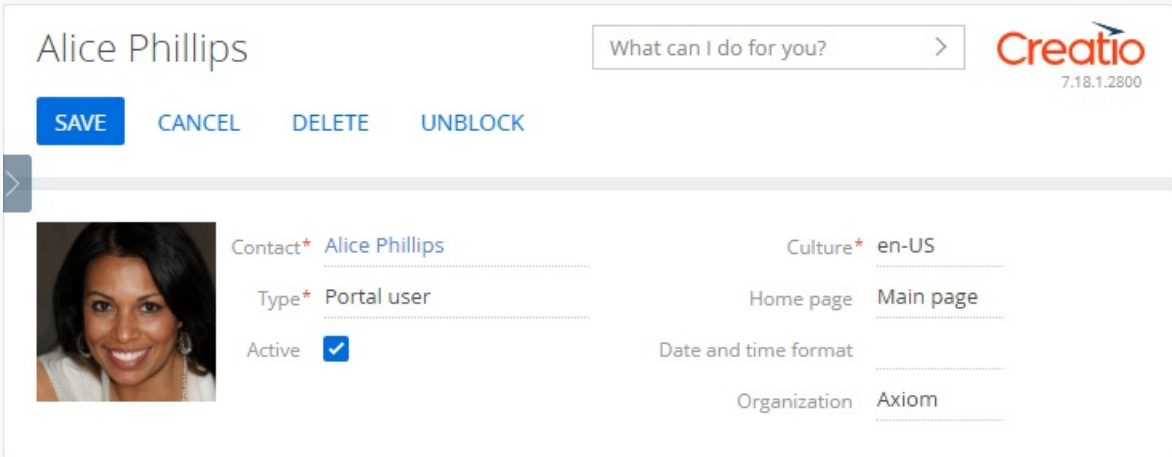
You can unblock a user account in Creatio version 7.17.3 and later.

To **unblock a user account** before the lockout period expires, do the following:

1. Click  to open the System Designer.

2. Click **“System users”** in the “Users and administration” block.
3. Open the user page.
4. Click [ *Unblock* ] (Fig. 4).

Fig. 4 Unblock a user



Alice Phillips

What can I do for you? >

Creatio  
7.18.1.2800

SAVE CANCEL DELETE UNBLOCK

Contact\* Alice Phillips

Type\* Portal user

Active

Culture\* en-US

Home page Main page

Date and time format

Organization Axiom

As a result, the user account will be unblocked.