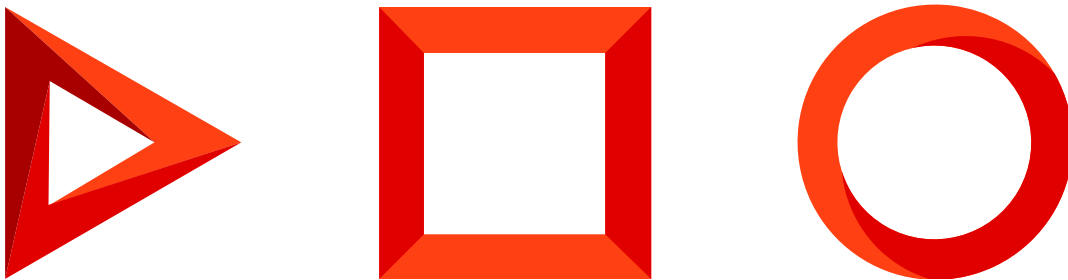


Running business processes

Version 8.0



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Run a business process

PRODUCTS: ALL CREATIO PRODUCTS

Use the following tools to run a Creatio process manually:

- Command line. [Read more >>>](#)
- Side panel. [Read more >>>](#)
- Any section that has processes associated with it. [Read more >>>](#)
- Section record page. [Read more >>>](#)

Learn more about how system administrators can run business processes in a separate article: [Run a process or a process step](#).

Note. Regardless of the tool, you can only run business processes that can be launched manually, provided you have the corresponding permissions. Learn more in a separate article: [Set up the permissions to run a process](#).

Once a business process is run, Creatio adds a new **process instance** that starts executing process steps. These steps can include opening record pages, creating activities, etc.

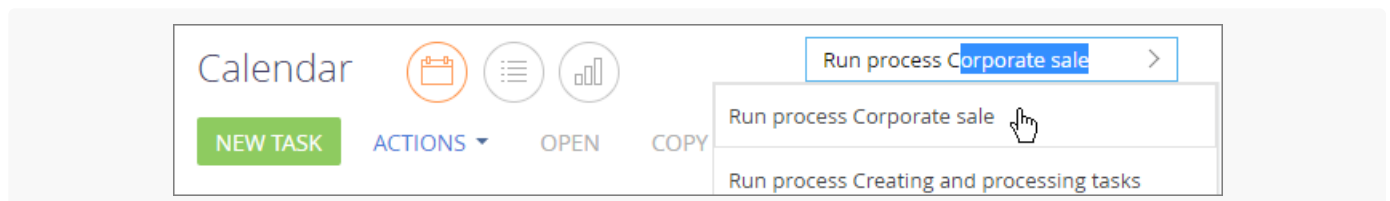
Creatio terminates the business process instance when the end event is triggered on the process diagram. You can start and stop business processes manually or have them start automatically.

Attention. You can run only active published processes with the “Business Process” tag manually. Processes of other types cannot be run manually. If you try to run an unpublished or inactive process, Creatio displays an error message.

Run a process from the command line

1. Enter [*Run process*] followed by the process name in the command line (Fig. 1).

Fig. 1 Run a process from the command line



2. Click the  button.

Note. Learn more about the command line functionality in a separate article: [Search records and run](#)

[commands](#).

Run a process from the side panel


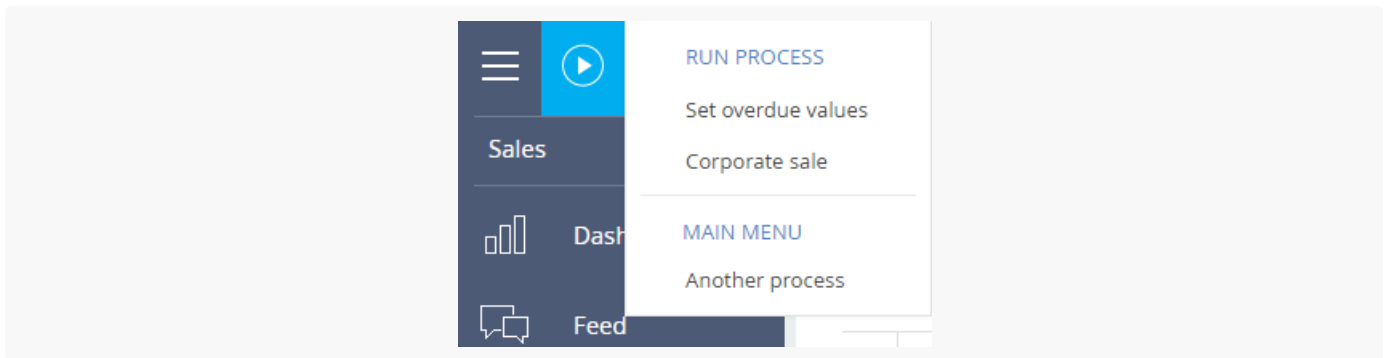


1. Click the  button on the side panel.
2. Select a process to run (Fig. 2).

Fig. 2 Run a process from the side panel using the run process button

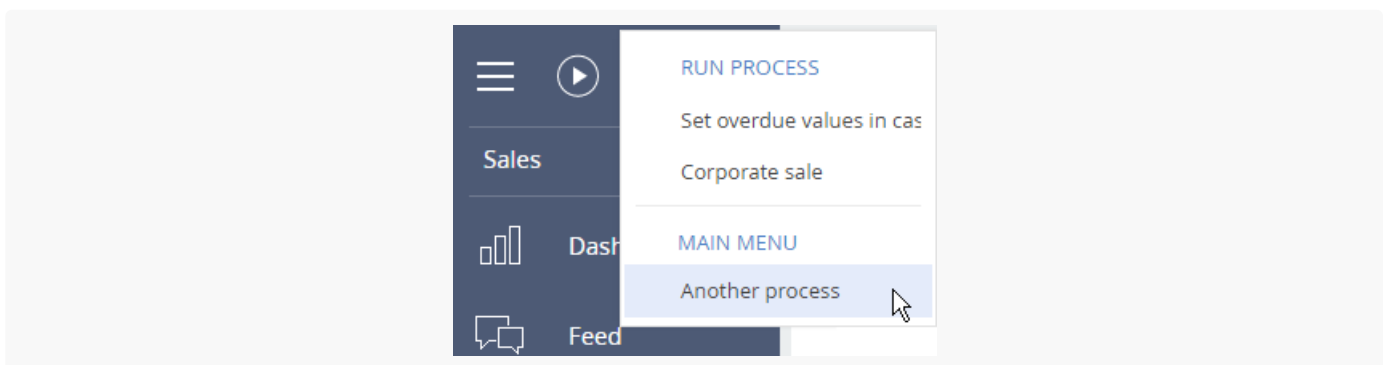


Note. Specify whether you can run the process using the  button on the [process properties page](#) of the [*Process library*] section.

To run a process that is unavailable in the  button index:

1. Select [*Another process*] (Fig. 3). This opens a box.

Fig. 3 Select the command that runs a process



2. Select a process in the box that opens and click [*Run*].

Note. The same box opens when you click the  button in the side panel and select [*Run process*].

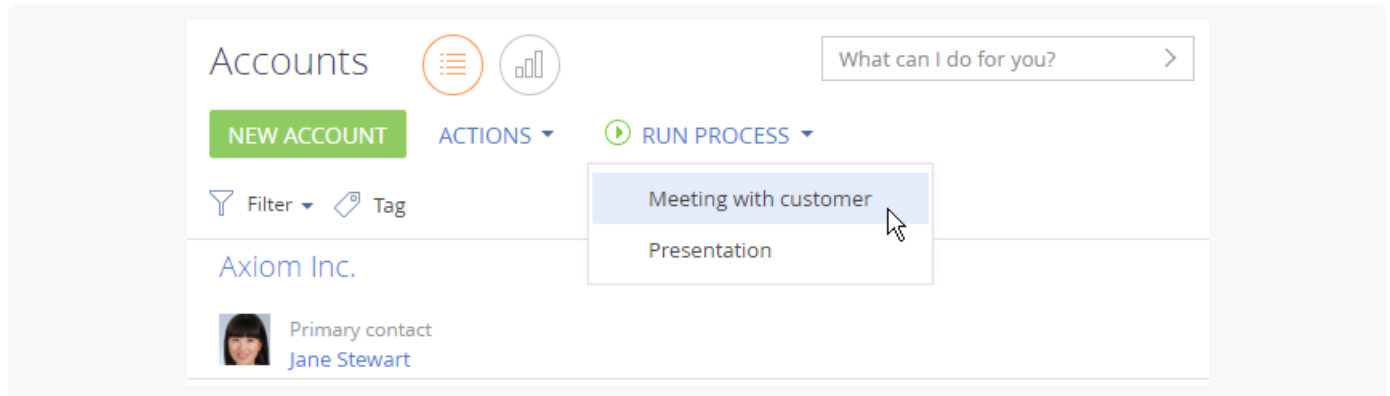
Run a process from a section or record page

If a section has an index of processes you can run from the section set up, Creatio displays the [*Run process*] button in the section toolbar.

To run a process from a section:

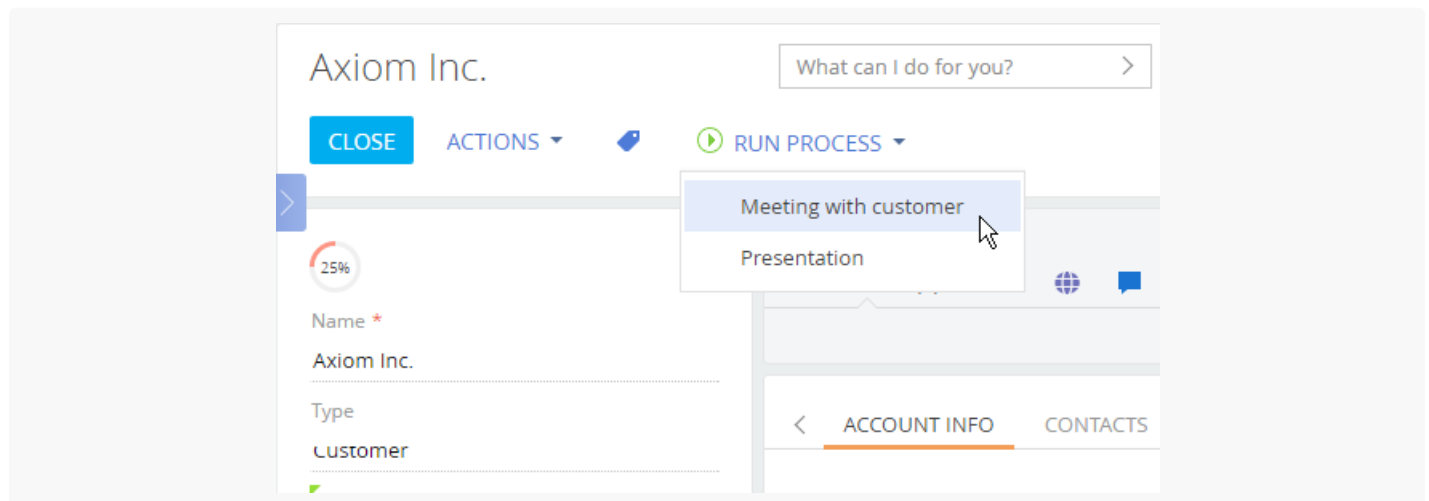
1. Click [*New process*].
2. Select a process to run (Fig. 4).

Fig. 4 Run a process from a section



Creatio displays the same process index on the record page when you click [*Process*] on the toolbar (Fig. 5).

Fig. 5 Run a process from a record page



Run a process for multiple records in a section

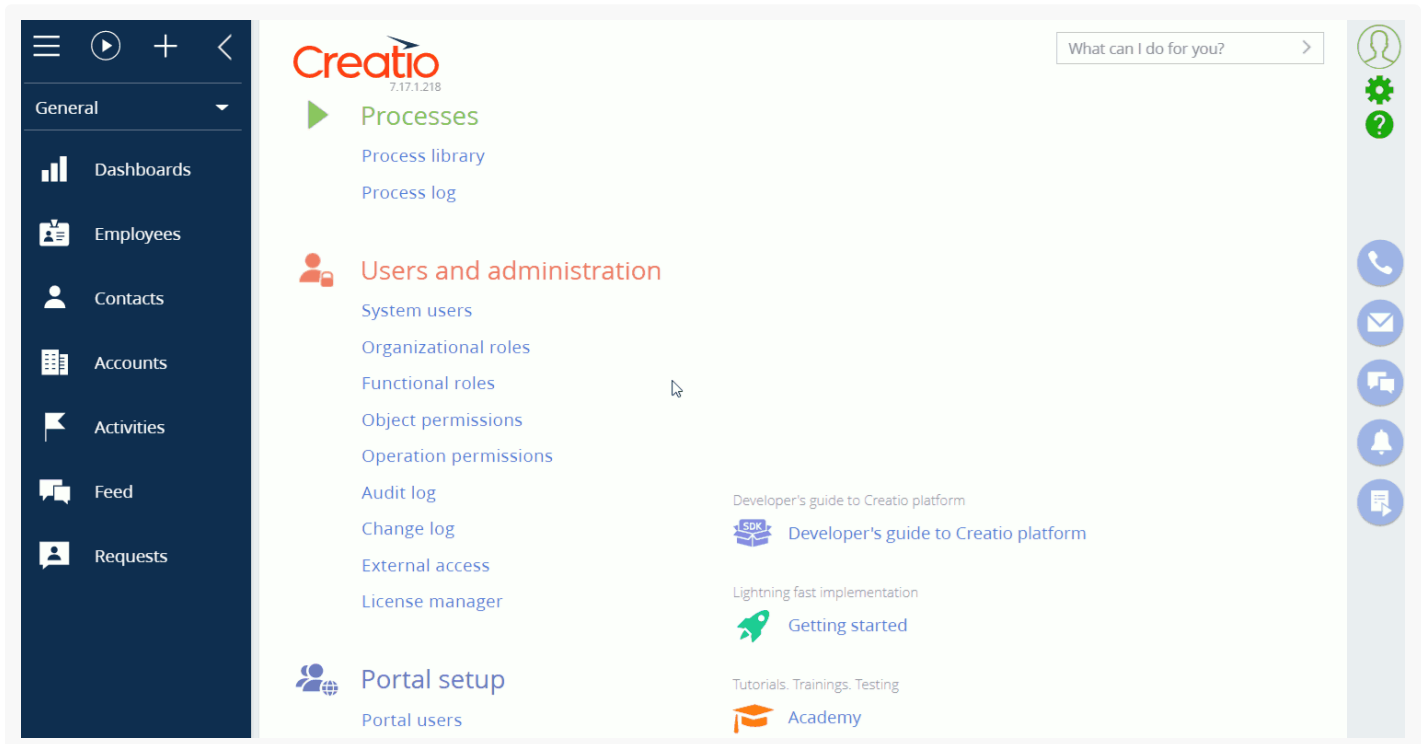
You can run a [section business process](#) for multiple records at once. To do this:

1. Open the section where you want to run a process for multiple records, e. g., [*Contacts*].
2. Click [*Actions*] → [*Select multiple records*].
3. Select the needed records.
4. Click [*Run process*] on the section toolbar and select the needed process.

Note. The [*Run process*] button menu displays all processes you can run from the section. The

processes in the menu are grouped by start type: from the section and from a record.

Fig. 6 Run a process for multiple section records



As a result, Creatio will run a separate process instance for every selected record. If one of the instances fails, other instances will continue running.

Run a process automatically

Processes can be run automatically when certain events occur. These events include adding, modifying and deleting records. In this case, you do not need to run the process manually.

Set up the automatic process start after an event in the [Process Designer](#).

Execute process steps

PRODUCTS: **ALL CREATIO PRODUCTS**

When a business process is started, Creatio performs the sequence of steps (process actions). As part of the process, Creatio may prompt you to enter required data, e. g., the results of actions performed outside of Creatio, or to select how a process should continue.


The process can perform the steps in the following ways:

- Automatically. For example, when deleting records that meet the set conditions.
- With user input. For example, the process opens a record page for you to fill out. In this case, the process will resume when you complete the required actions: filling out and saving the page.

If the action that requires your input runs in the background, the process will not perform any logic until you open the corresponding page from the [*Business process tasks*] tab of the communication panel. In this case, Creatio will perform all system operations of the process in the background without displaying the loading mask.

If such an action does not run in the background, Creatio will open the corresponding page and perform other logic the moment the process starts this action. The page will interrupt any Creatio activities you may be performing at the moment.

If you are responsible for completing a business process step or have the role to which the corresponding task was assigned, Creatio will display the task on the [*Business process tasks*] tab of your communication panel.

Use hints the process author can add to learn more about each step of the process. Click the  button to view the hint.

This article covers different user activities performed as part of a business process.

Complete process activities

If the process creates an activity, the next step will be activated only after you complete the activity with a result. You can limit the list of available results to the values available in the process element.

You can assign the activity to another user or role on the activity page.

If you cannot complete the activity immediately after its activation, enter the new date and time in the [*Start*] and [*Due*] fields of the activity page and save the record. You can come back to this step later.

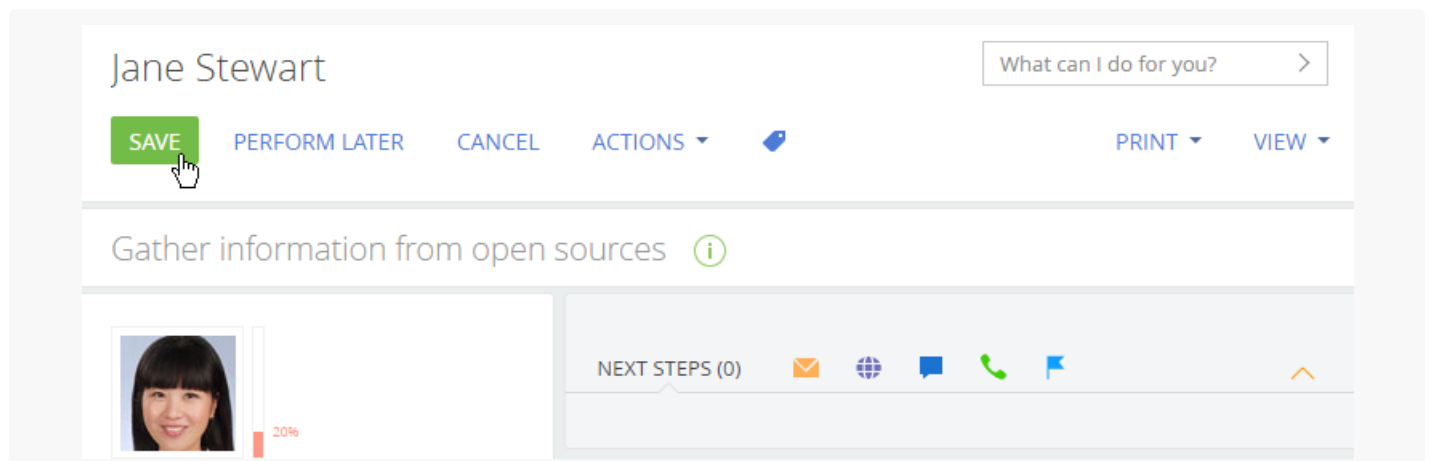
Note. The process activities are available in the [*Activities section*], similarly to manually created records.

The process may also create activities when executing other process elements of the “User action” type if the process author toggles on the corresponding setting. Learn more in the corresponding element descriptions: [User actions](#). The activity completion procedure described above applies to all the elements.

Fill out the record pages

Creatio may ask you to fill out the page of a new or an existing record as part of a business process. For example, to enter information about a new contact or to specify the status of the existing document (Fig. 1).

Fig. 1 Fill out the record page as part of the process



The process moves to the next step after you save the record. However, the process author may specify additional completion conditions for a particular action. For example, specific fields are required.

If the process creates a corresponding activity, the process will move to the next step only after you complete the activity with a result. Learn more: [Complete process activities](#).

If you cannot complete a process action immediately after the activation, postpone it. To do this, click the [*Perform later*] button. Creatio will display additional fields. Enter the new step date and time in them (Fig. 2).

Fig. 2 Postpone the process step

SAVE PERFORM LATER CANCEL ACTIONS ▾

Gather information from open sources ⓘ

Start * 4/18/2016 7:52 AM Owner * Marcus Morgan

Duration * 1 hour Subject * Gather information from open sources

Reminder * in 10 minutes

Show in calendar

RESCHEDULE CANCEL

Answer a question

The process can display a page with a question (user dialog). Depending on the process configuration, you can select one or several answers (Fig. 3), which will affect the further process flow.

Fig. 3 A question displayed as part of a process

Question

SAVE PERFORM LATER CLOSE

Do you wish to schedule another meeting?

Yes

No

If the process creates an activity when the step is completed, the process will move to the next step only after

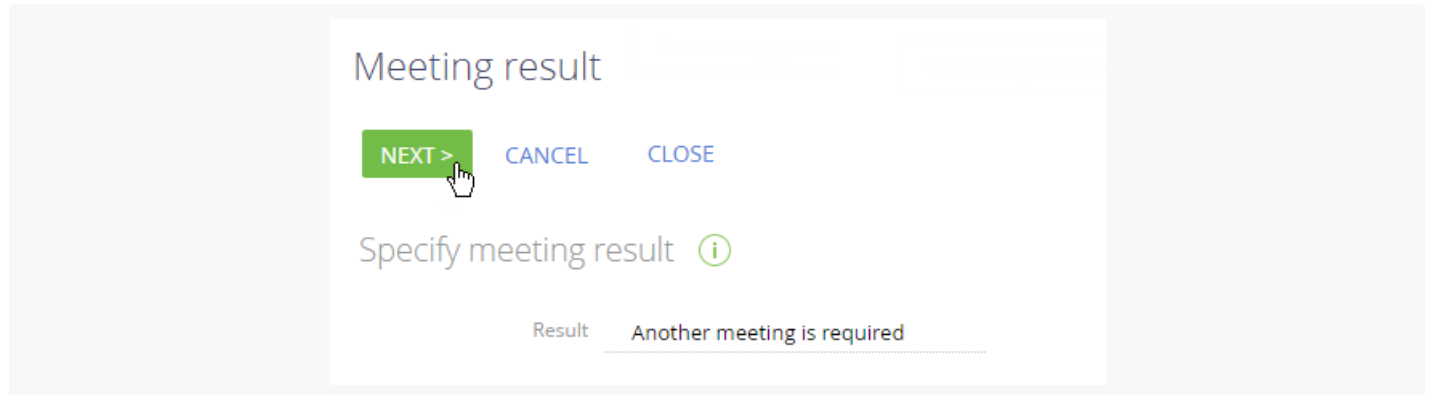
you complete the activity with a result. Learn more: [Complete process activities](#).

If you cannot answer the question immediately, click the [*Perform later*] button to postpone it.

Work with custom pages

The process may open a custom page for you to fill out. Custom pages can contain fields and buttons unavailable outside of the business process. For example, a process can display step-by-step forms with custom buttons, comment fields, lookup fields, etc. (Fig. 4).

Fig. 4 A custom page opened as part of the process



The process will move to the next step only after you complete the required actions on the page.

If the process creates a corresponding activity, the process will move to the next step only after you complete the activity with a result. Learn more: [Complete process activities](#).

If you cannot complete the step immediately, click the [*Close*] button to postpone it.

Note. The process displays [\[Pre-configured page \]](#) and [\[Auto-generated page \]](#) elements as custom pages.

Resume a business process

PRODUCTS: [ALL CREATIO PRODUCTS](#)

If a process step was postponed or a step was activated without opening any pages, you can resume the process in the following ways:

- In the [*Activities*] section. [Read more >>>](#)
- From a record connected to the postponed process step. [Read more >>>](#)

Learn more about resuming business processes by a system administrator in the "[Run a process or a process step](#)" article.

Resume a process in the [*Activities*] section

Processes often create activities for users to complete. A list of activities is displayed in the [*Activities*] section and on the [*History*] tab in other sections.

To resume a process, open a connected activity in the list of the [*Activities*] section.

When the [*User dialog*] and [*Open edit page*] elements are activated, a process creates activities of the "Task" type in the [*Activities*] section. If you open such an activity, the dialog page opens instead of the default activity page.

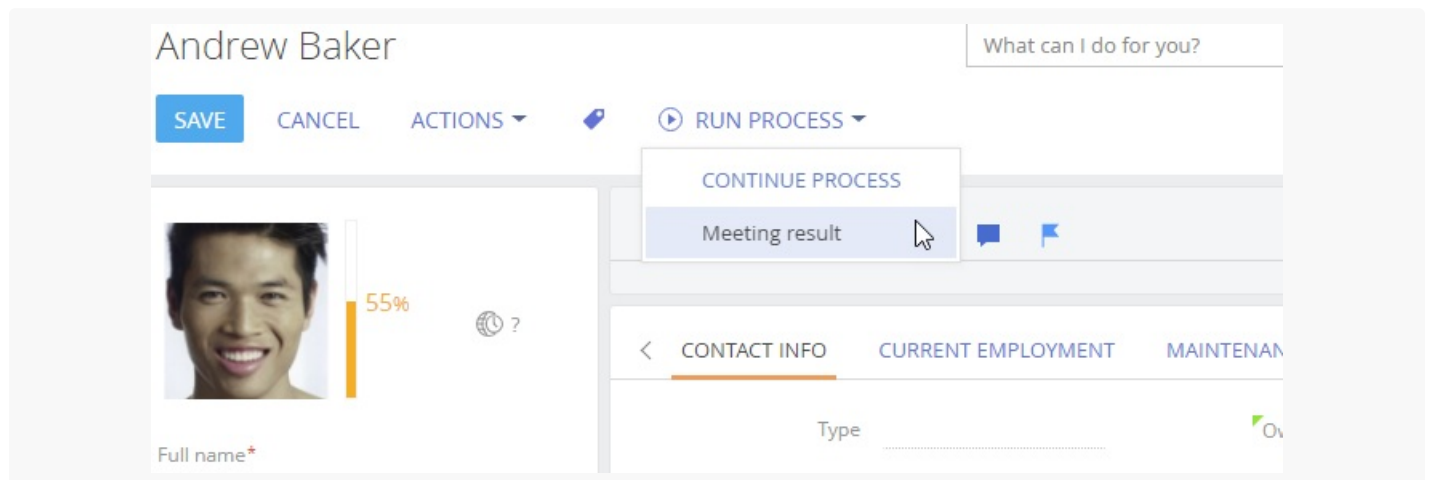
Note. Custom pages open only for incomplete activities. After the process element is completed, the default task page will open for this activity.

Resume a process from a connected record

A process can perform steps that do not include any activities, for example, when a page must be activated during a process, or the action is connected with a specific record in the system.

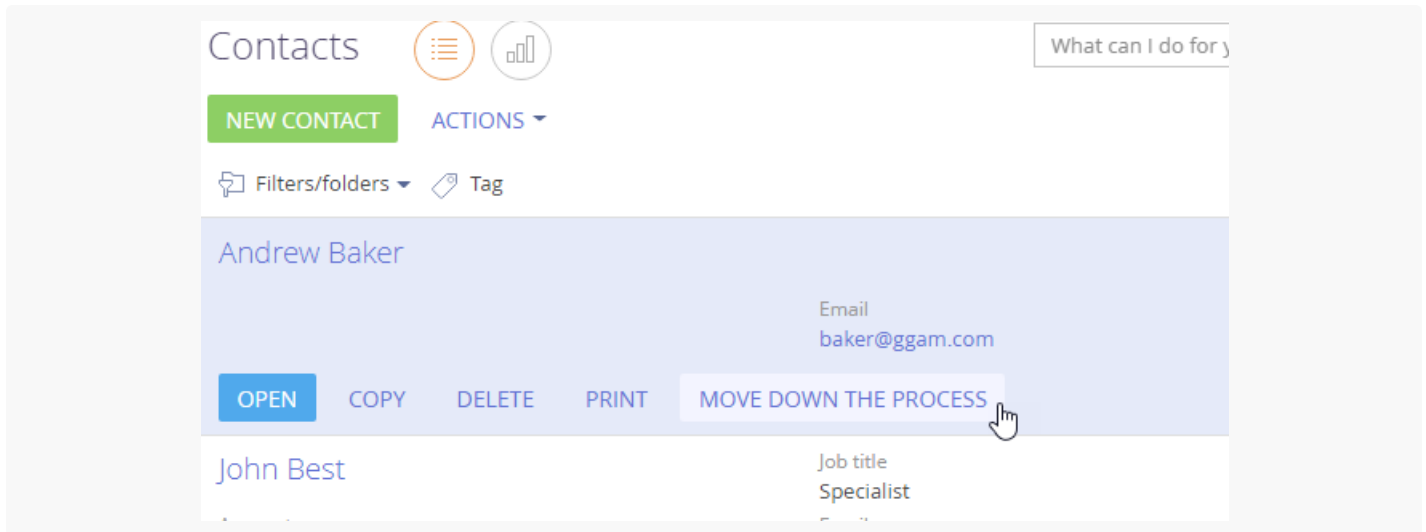
If such a step is postponed, you can return to it by using the [*Process*] button on the page of the record that is connected to the step (Fig. 1). If the record is connected to multiple tasks, you can select the required task from the list.

Fig. 1 Resuming a process from a connected record page



If this record is selected from a list, system also displays [*Move down the process*] button (Fig. 2).

Fig. 2 Resuming a process from a list



If you click the [*Move down the process*] button and the record is connected to one incomplete process step, the corresponding page will be opened. If there are several steps for the record, an additional window will open where you will have the possibility to select the required step.

Resume a process from the communication panel

The notifications display case and process steps (also known as “user actions”) that require some form of activity from you. These process-related actions may include completing Creatio activities, sending emails, editing records, filling out pre-configured pages, etc. The tab displays process tasks where:

- You are specified as the owner.
- The process task status is “Running”.


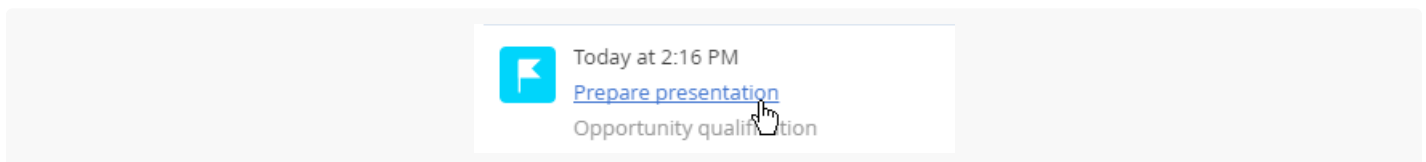

All notifications on the  tab in the notification center are active until they are processed. Click the process task title to open the page where you can complete this process task ([Fig. 3](#)).

Fig. 3 Executing a business process task



Perform the process task on the opened page: complete the opened activity, send the email, save the record, etc. If the process task is canceled or postponed to a later time, the corresponding notification will be updated automatically.

After completing the process task, the notification will no longer display on the communication panel. Once all process steps have been completed, the counter on the  button disappears.

Complete a process

A process ends automatically when the end event is activated or when all active process steps are completed.

When a process instance is completed, the system calculates the duration.

Note. Only completed processes are taken into account when calculating statistics.

If you need to terminate a business process, you can [cancel the process instance](#) or [disable the process](#) itself.