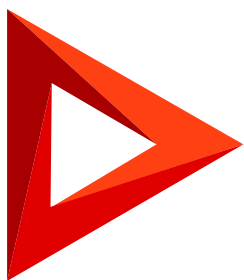


Delivery

Delivery in Creatio IDE

Version 8.0



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Delivery in Creatio IDE



Creatio provides various functionality delivery tools.

The **delivery management tools** are as follows:

- Creatio IDE
- WorkspaceConsole utility

This article covers the feature delivery using Creatio IDE.

The functionality transfer options in Creatio IDE depend on the stage of the delivery process.

In general, the ways to transfer solutions using Creatio IDE are as follows:

- Transfer packages as archives if you need to transfer complete functionality between the environments.
- Transfer packages using the SVN version control system if you need to transfer functionality that is incomplete or under development.
- Transfer configuration element schemas if you need to transfer functionality that is incomplete or being refined.

Transfer the package

To **transfer a custom package**, export the functionality as a package from a development environment and import the package into another development environment. You can also transfer the package between development environments in multi-user development mode.

Export packages in the [*Configuration*] section of the System Designer. The package is downloaded as a *.zip archive that contains the *.gz package archive.

Import packages in the [*Installed applications*] section of the System Designer. The import procedure is similar to installing [Transfer your first application](#).

Attention. You cannot transfer the **Custom** package between Creatio instances.

You can also download the *.gz package archive from [the database](#) or [SVN repository](#) using the [WorkspaceConsole utility](#).

Do not create packages in a production environment, then create a development environment based on the production environment, refine the functionality of the packages in the new environment, and transfer them back to the production environment.

Transfer a package using SVN

The version control system is an optional Creatio component. Use a version control system if you need to develop custom configuration in parallel with running Creatio normally. Version control system is required for

multi-user development.

Creatio IDE supports the [SVN version control system](#). SVN lets you transfer changes between development environments.

The **special aspects** of using SVN to transfer changes are as follows:

- You can transfer both packages and configuration element schemas between development environments.
- You can transfer the bound package data. For example, the lookup content, new system settings, demo section records, etc.
- You do not need to install the dependent packages manually. Creatio will install them automatically from SVN.
- You do not need to contact support when transferring changes in Creatio on-site.

Attention. Use the SVN version control system only to transfer changes between [development environments](#). Do not use SVN in a [preproduction](#) or [production](#) environment. This may negatively affect Creatio performance or render the application inoperable. Learn more: [Version control in Subversion](#).

Back up the database before updating Creatio from SVN. If you use Creatio in the cloud, contact support and ask them to back up the database for you.

Transfer the configuration element schema

To **transfer schemas**, export a schema from a development environment and import it into a pre-production environment. You can also transfer schemas between development environments in multi-user development mode.

You can transfer configuration element schemas:

- To pass an incomplete schema from between developers since committing unfinished functionality to the version control system is not practical.
- To save intermediate development results when a version control system is not used or has a malfunction.
- To transfer the schema between development environments quickly.

The **special aspects** of transferring configuration element schemas are as follows:

- You can replace the contents of a single schema.
- You can only export and import schemas. Follow this procedure to transfer packages: [Transfer packages](#).
- You must have Creatio administrator permissions.
- You can only upload one schema at a time.

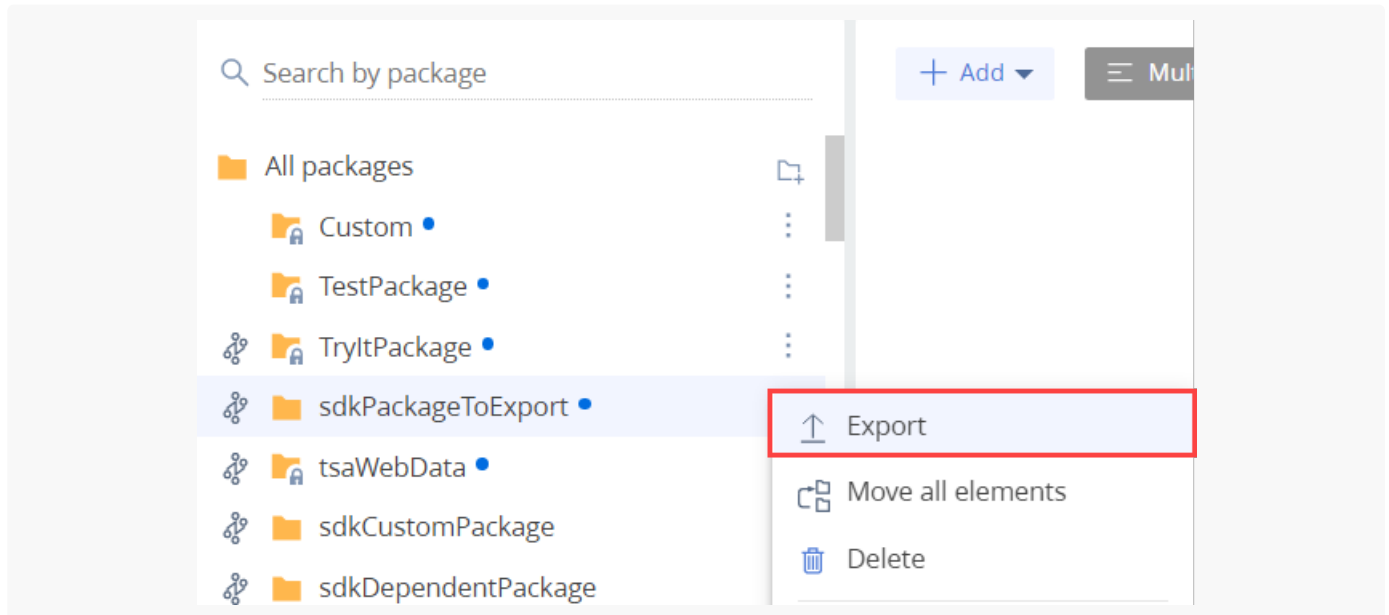
Transfer packages



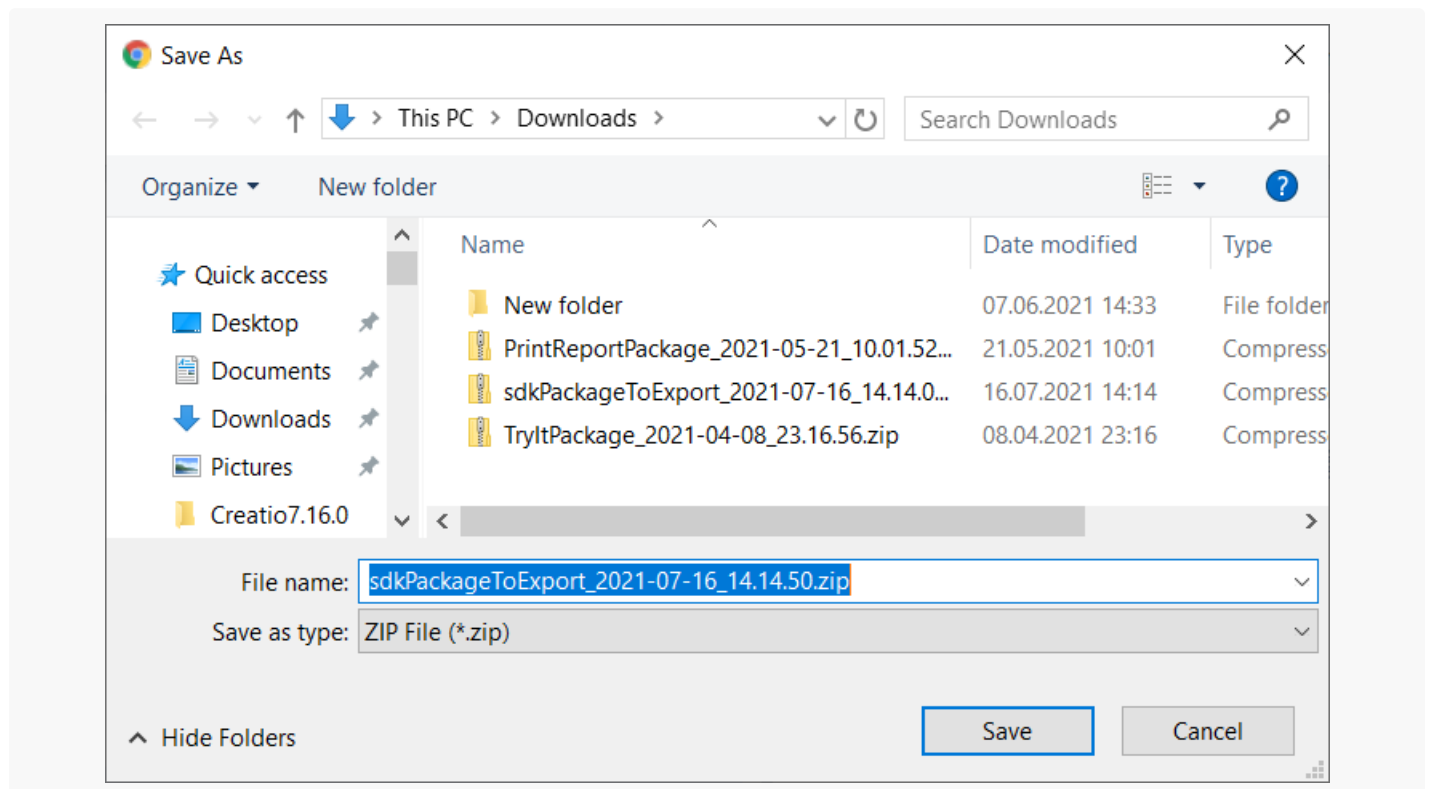
Export a package

1. [Go to the \[Configuration \] section](#) and select a custom [package](#) to export.

2. Select [*Export*] in the package properties menu.




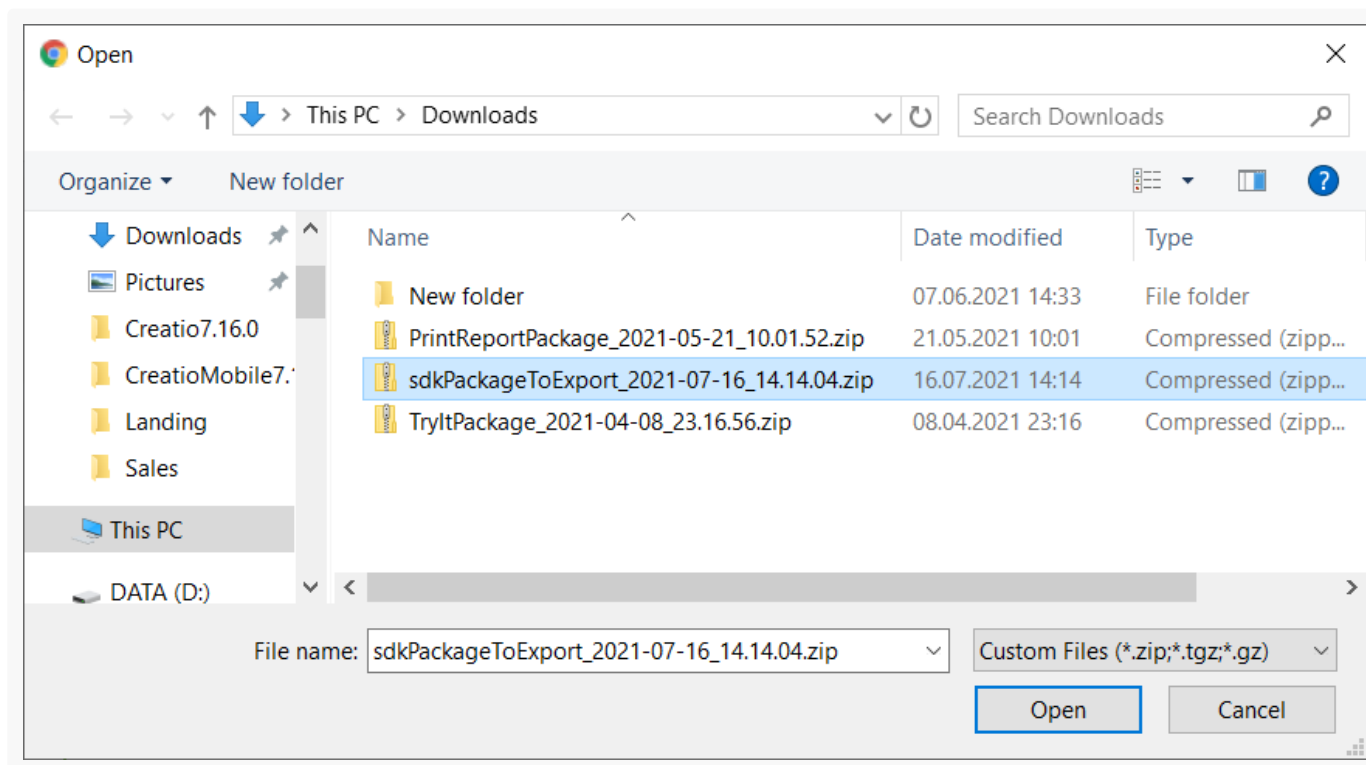
Depending on the browser settings, the browser will either save the *.zip archive that contains the *.gz package archive to the default downloads folder or ask you to select a folder to save the archive.



You will be able to import the downloaded package into another development environment afterwards.

Import a package


1. Click the  button to open the System Designer.
2. Go to the [*Applications*] block → [*Installed applications*]. This will open the Install Wizard for Marketplace applications.
3. Click [*Add application*] → [*Install from file*].
4. Click [*Select file*] and specify the path to the *.zip archive that contains the *.gz package archive.




Creatio will back up the database afterwards. The process may take several minutes.

If the installation succeeds, Creatio will display the corresponding message.

Application installation

[CLOSE](#)



Application installed successfully.
You can close the page and continue working with the Creatio.

[DOWNLOAD INSTALLATION LOG](#)

Attention!

Ensure that the application you are installing is compatible with your version of Creatio. Description of the Marketplace application contains a list of compatible Creatio products.


The vendor guarantees the compatibility of these products. Do not install an application if your Creatio version is not present in the list.

If you install a Marketplace application to become familiar with its capabilities, it is better to install it on your sandbox version of the system (support service can provide it) or install it on 14-days trial version which is available on Creatio website.

Only after that, we recommend to install the product on your Creatio production environment.

If the installation fails, Creatio will display the corresponding message as well.

Application installation



[CLOSE](#)

Application installation failed.
Restore configuration from backup?

You can close this page and continue with the Creatio.

[RESTORE PACKAGES FROM BACKUP](#) [DOWNLOAD INSTALLATION LOG](#)

Attention!

Ensure that the application you are installing is compatible with your version of Creatio. Description of the Marketplace application contains a list of compatible Creatio products.


The vendor guarantees the compatibility of these products. Do not install an application if your Creatio version is not present in the list.

If you install a Marketplace application to become familiar with its capabilities, it is better to install it on your sandbox version of the system (support service can provide it) or install it on 14-days trial version which is available on Creatio website.

Only after that, we recommend to install the product on your Creatio production environment.

Click [*Download installation log*] to view the reason for failure.

Click [*Restore packages from backup*] to roll the configuration back to its previous state. After the configuration is restored, Creatio will display the corresponding message.

Application installation


CLOSE

The configuration has been successfully restored from backup.
You can close this page and continue with the Creatio.

DOWNLOAD INSTALLATION LOG

Attention!

Ensure that the application you are installing is compatible with your version of Creatio. Description of the Marketplace application contains a list of compatible Creatio products.

The vendor guarantees the compatibility of these products. Do not install an application if your Creatio version is not present in the list.

If you install a Marketplace application to become familiar with its capabilities, it is better to install it on your sandbox version of the system (support service can provide it) or install it on 14-days trial version which is available on Creatio website.

Only after that, we recommend to install the product on your Creatio production environment.

Transfer packages using SVN



Easy

Note. If you enable the [file system development mode](#), Creatio will disable the SVN integration mechanism.

1. Connect the repository of the SVN version control system

If you have already connected the repository of the SVN version control system to Creatio, proceed to step [2. Ensure Creatio applies changes automatically.](#)

To **connect the repository of the SVN version control system** to Creatio:

1. [Go to the \[Configuration \] section.](#)
2. Select [*Open list of repositories*] in the [*SVN repositories*] group of the action menu.
3. Click [*Add*] and fill out the **repository properties**:
 - [*Name*] is the repository name. Required.
 - [*SVN storage address*] is the SVN repository address. Required.
 - [*Login*] is the login of the SVN repository user.
 - [*Password*] is the password of the SVN repository user.

SVN storage

Name *
SDKPackages

SVN storage address *
http://[redacted]/SDKPackages

Login

Password

Active

CANCEL
AUTHENTICATE
ADD

4. Click [*Authenticate*] and authorize in the SVN repository.

This will connect the repository of the SVN version control system to Creatio. Learn more about how to manage SVN using the built-in Creatio tools in a separate article: [Version control in Creatio IDE](#).

2. Ensure Creatio applies changes automatically

Creatio can apply changes automatically after the transfer.

To **ensure Creatio applies changes automatically**, set the `<appSettings>` element keys to `true` in the `..\Terrasoft.WebApp\Web.config` file:

- `AutoUpdateOnCommit` key enables the package update from the SVN repository on package commitment. If you set the key to `false` and modify the package schemas, then try to commit the package to the repository, Creatio will warn you that an update is required.
- `AutoUpdateDBStructure` key enables the database structure update.
- `AutoInstallSqlScript` key enables the SQL scenario installation.
- `AutoInstallPackageData` key enables the installation of bound data.

```
..\Terrasoft.WebApp\Web.config
```

```
<appSettings>
  ...
  <add key="AutoUpdateOnCommit" value="true" />
  <add key="AutoUpdateDBStructure" value="true" />
  <add key="AutoInstallSqlScript" value="true" />
  <add key="AutoInstallPackageData" value="true" />
</appSettings>
```

3. Check the data binding

Before you transfer the package, make sure you bound data that must be transferred to the package. If you create a section in the Section Wizard, Creatio will bind data the section requires to get registered and operate correctly to the package automatically.

Learn more about how to bind data to a package in a separate article: [Packages basics](#).

4. Check if you can transfer the package dependencies

You can add the dependencies on other packages to a custom package. If the package dependencies were developed by third parties, make sure you have already installed them to the Creatio instance to which to transfer the custom package. If you store the package dependencies in an available SVN repository, Creatio will install them automatically.

Learn more about the package dependencies in a separate article: [Packages basics](#).


5. Install a package from the SVN repository

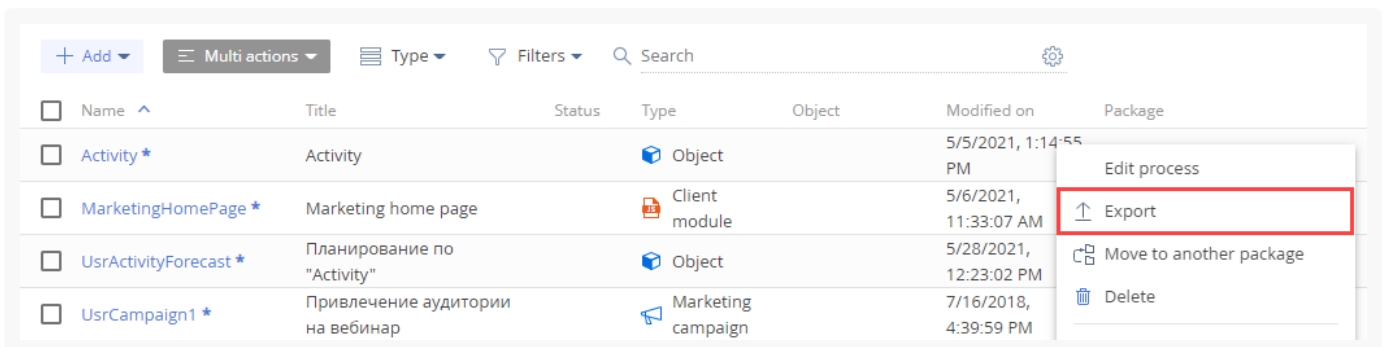
Learn more about how to install a package from the SVN repository in a separate article: [Version control in Creatio IDE](#).

Transfer configuration element schemas

 Easy

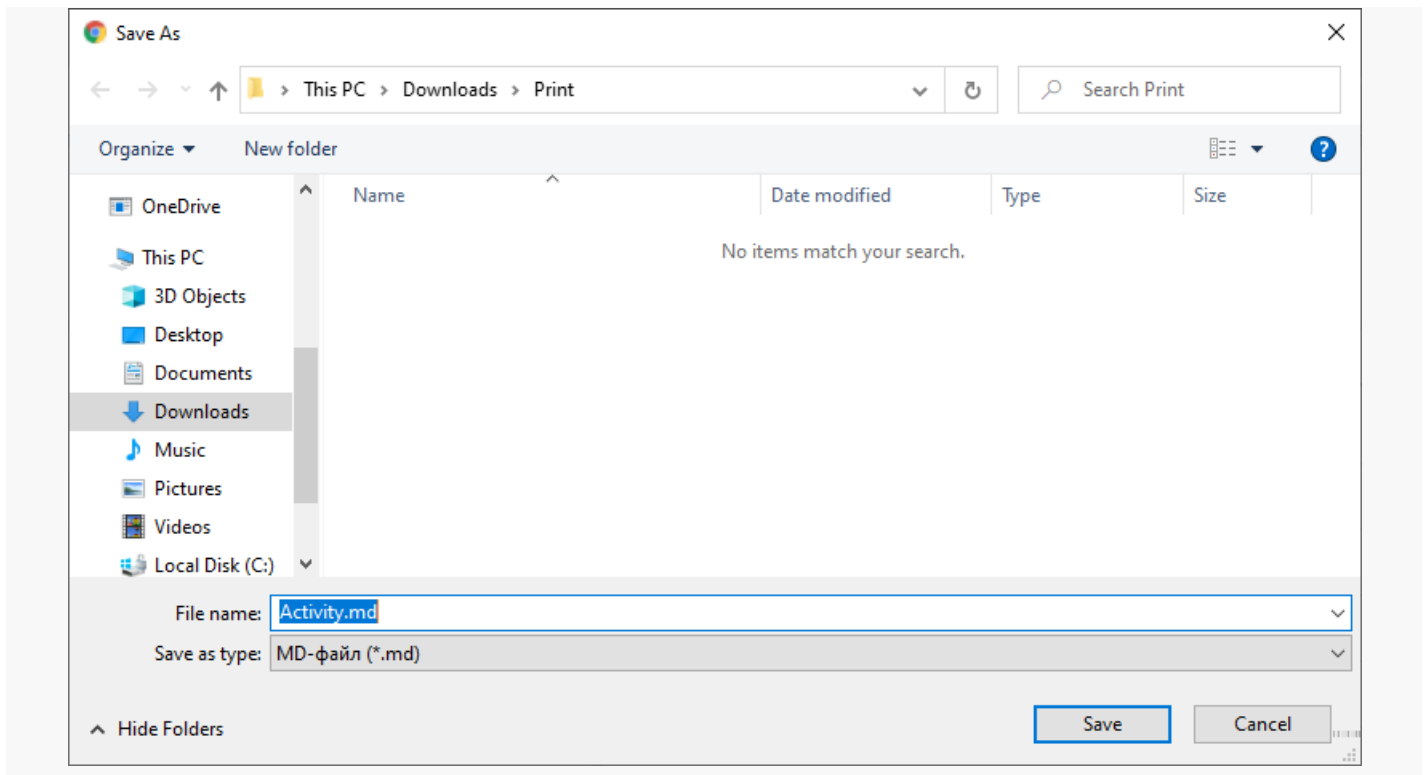
Export configuration element schemas

1. [Go to the \[Configuration \] section](#) and select a configuration element schema to export in the custom [package](#).
2. Click  → [*Export*] in the configuration element properties menu.



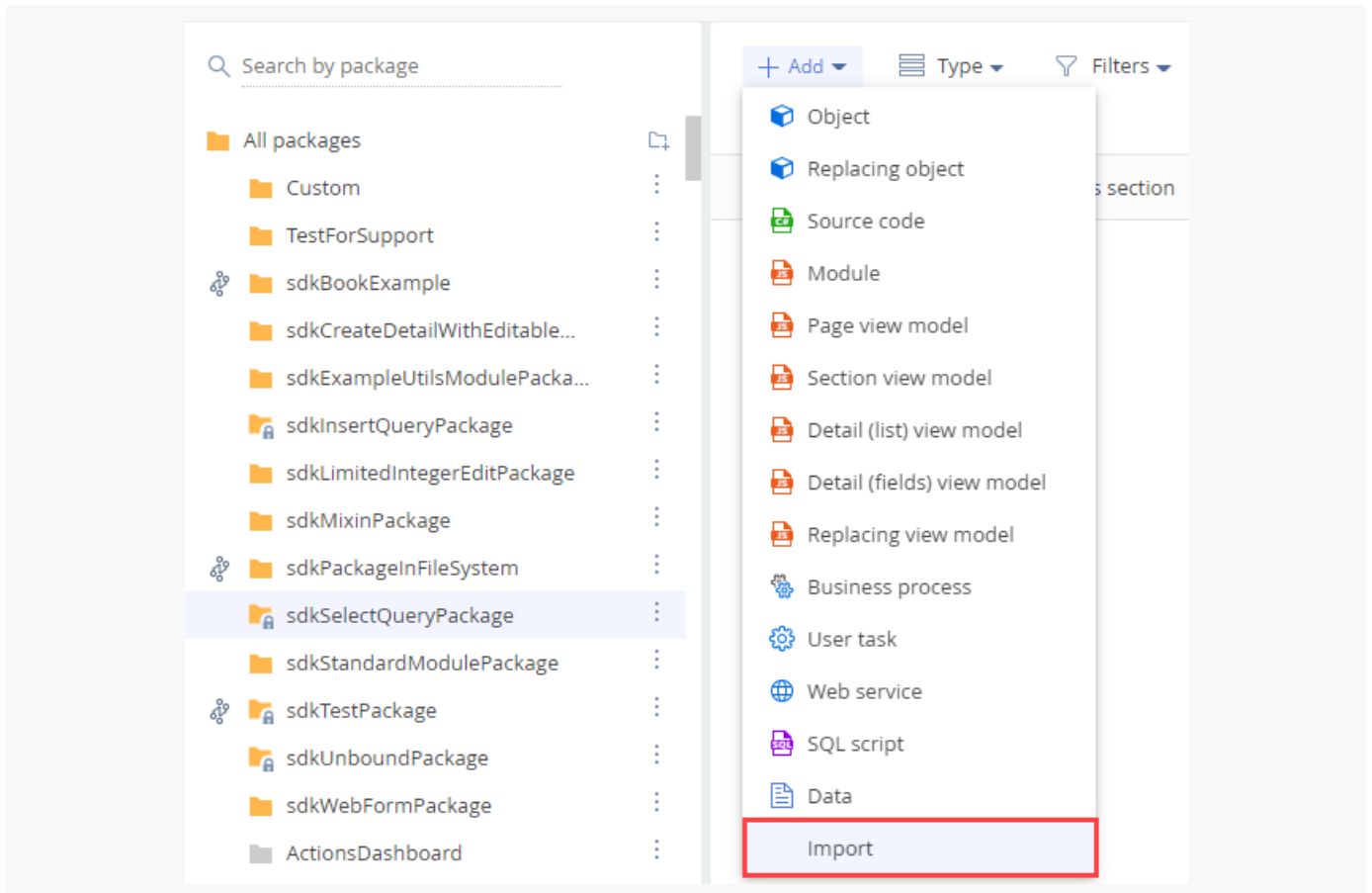
<input type="checkbox"/>	Name ^	Title	Status	Type	Object	Modified on	Package
<input type="checkbox"/>	Activity *	Activity		Object		5/5/2021, 1:14:55 PM	
<input type="checkbox"/>	MarketingHomePage *	Marketing home page		Client module		5/6/2021, 11:33:07 AM	
<input type="checkbox"/>	UsrActivityForecast *	Планирование по "Activity"		Object		5/28/2021, 12:23:02 PM	
<input type="checkbox"/>	UsrCampaign1 *	Привлечение аудитории на вебинар		Marketing campaign		7/16/2018, 4:39:59 PM	

Depending on the browser settings, the browser will either save the *.md file of the configuration element schema to the default downloads folder or ask you to select a folder to save the file.



Import configuration element schemas

1. [Go to the \[Configuration \] section](#) and select a custom [package](#) to import the configuration element schema.
2. Click [Add] → [Import] in the section list toolbar.



3. Select the *.md file of the configuration element schema that you exported.
4. Click [*Compile*] → [*Compile all*] in the toolbar to compile the configuration.

Attention. If you import several schemas, consider their mutual dependencies. Import all schema dependencies first, then import the schema that depends on them. For example, import the object schema first, then import the page view model schema that depends on the object.