

Create a section

Create a new section

Version 8.0



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

Create a new section

4

Create a new section

PRODUCTS: ALL CREATIO PRODUCTS

Each Creatio application contains a set of out-of-the-box sections. The pre-configured sections depend on the Creatio product and the installed Marketplace add-ons. You can add new custom sections to your application.

Example. Add a custom [*Requests*] section to manage employee internal requests in Creatio.

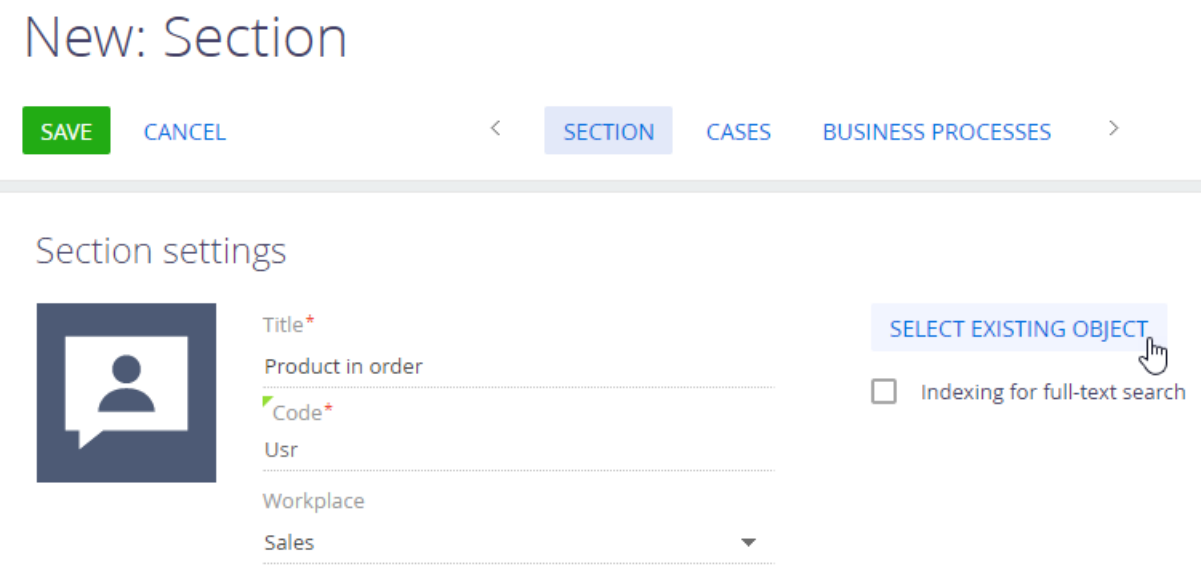
To add a new section:

1. Click  → “System Designer” → “Section Wizard”.

Attention. You can open the Section Wizard only if you have permissions to the [*Access to “Configuration” section*] system operation.

2. You can create a section based on a new or an existing Creatio object. Click [*Select existing object*] and select the relevant object to create a section based on an existing object (Fig. 1).

Fig. 1 Creating a section based on an existing object



For this example, create a [*Requests*] section based on an existing object.

The further setup is similar for both cases.

3. Fill out the primary properties of the new section (Fig. 2).
 - a. In the [*Title*] field, enter the name for the new section, e. g., “Requests.”
 - b. In the [*Code*] field, enter the unique name that Creatio will use to generate section objects. For example,

for a custom section named [*Requests*], the section code can be "UsrRequests." The code can only contain integers and Latin characters. After saving the changes or switching to the edit mode, the field becomes locked.


Note. The section code must contain a prefix, which identifies the author of the configuration changes. The prefix is specified in the "Prefix for object name" system setting. The default prefix is "Usr."

Attention. Make sure that you do not use any of the following prefixes or suffixes:

Prefixes: "Base," "Sys," "Vw."

Suffixes: "InFolder," "Lcz," "Settings."

Otherwise, you will not be able to import the section records from Excel.

- c. Select the [*Indexing for full-text search*] checkbox, if you want to display the section data in the global search results.
- d. Replace the default **section icon** displayed in the side panel: hover over it and click  → [*Upload a new image*].

Note. We recommend using a white icon on a transparent background. Image format: PNG or SVG, size: 38x38 px. You can use the [Marketplace icon library](#) to search for section icons.

- e. In the [*Workplace*] field, select a workplace from the drop-down list of available workplaces. A section can later be included in other workplaces. One section can belong to several workplaces.

Note. Learn more about configuring workplaces in the [Workplace setup](#) article.

- f. After you add the new section, customize the primary section page. [Read more >>>](#)
- g. To use mini pages in the section, select the corresponding checkboxes. You can set up mini pages for adding, editing and viewing section records. [Read more >>>](#)
- h. Select the [*Enable approval in section*] checkbox to enable approval functions in the section.

Note. Learn more about working with approvals in Creatio in the [Approvals](#) article.


4. Click [*Save*] to apply the changes.

Fig. 2 Setting up the section properties

Requests: Section

SAVE CANCEL < SECTION CASES BUSINESS PROCESSES >

Section settings




Title*
Requests

Code*
UsrRequests

Workplace
Common

Indexing for full-text search

Section pages



There are no pages in this section yet.
Learn more in the [Academy](#).

[SET UP PAGE](#)

Mini page

When to use mini page?

Add record Edit record View record

[EDIT MINI PAGE](#)

Approval

Enable approval in section

As a result, the new [*Request*] section will be created and added to the workplace you specified in step 4. In the back-end, the corresponding [objects](#) will be added for the new section automatically:

- `<Code>` - e. g., `UsrRequests` - the section object that will contain the section data structure.
- `<Code>File` - e. g., `UsrRequestsFile` - the object for storing section attachments.
- `<Code>Folder` - e. g., `UsrRequestsFolder` - the object for storing the [folder](#) structure of the section.
- `<Code>InFolder` - e. g., `UsrRequestsInFolder` - the object for storing information on which section record is placed in which folder.

- `<Code>Tag` - the object for storing section tags.
- `<Code>InTag` - the object for storing information on which section record is tagged with which tags.
- `<Code>RequestsVisa` - the object for storing information on section approvals.

To see the section in the application workplace, update the page and clear the cache. Alternatively, you can log out of the application and log back in, which will make Creatio clear the cache and apply the changes.

Developers can use the Section Wizard to quickly access the section page source code if they need to view or modify it.

Creatio saves the configuration changes made in the Section Wizard to the package specified in the “Current package” (the “CurrentPackageld” code) system setting. By default, it is the “Custom” package that is designed to store the revisions made in the Section Wizard locally without transferring them to other Creatio instances.

If you need to transfer the revisions made in the Section Wizard from the development to the production environment, create a new package to store the changes and specify it in the “Current package” (the “CurrentPackageld” code) system setting. Learn more: [Packages basics](#) (developer documentation).

If value of the “Current package” (the “CurrentPackageld” code) system setting is empty or the specified package is unavailable for the user, Creatio will ask you to select one of the available packages when you open the Section Wizard.

Manage packages in the [\[Configuration \] section](#), and manage system settings in the [\[System settings \] section](#).