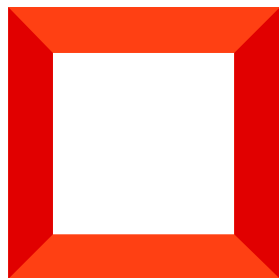
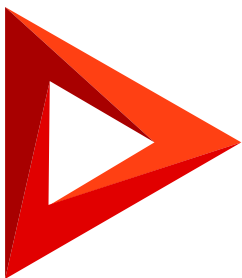


Creatio IDE

Operations in Creatio IDE

Version 8.0



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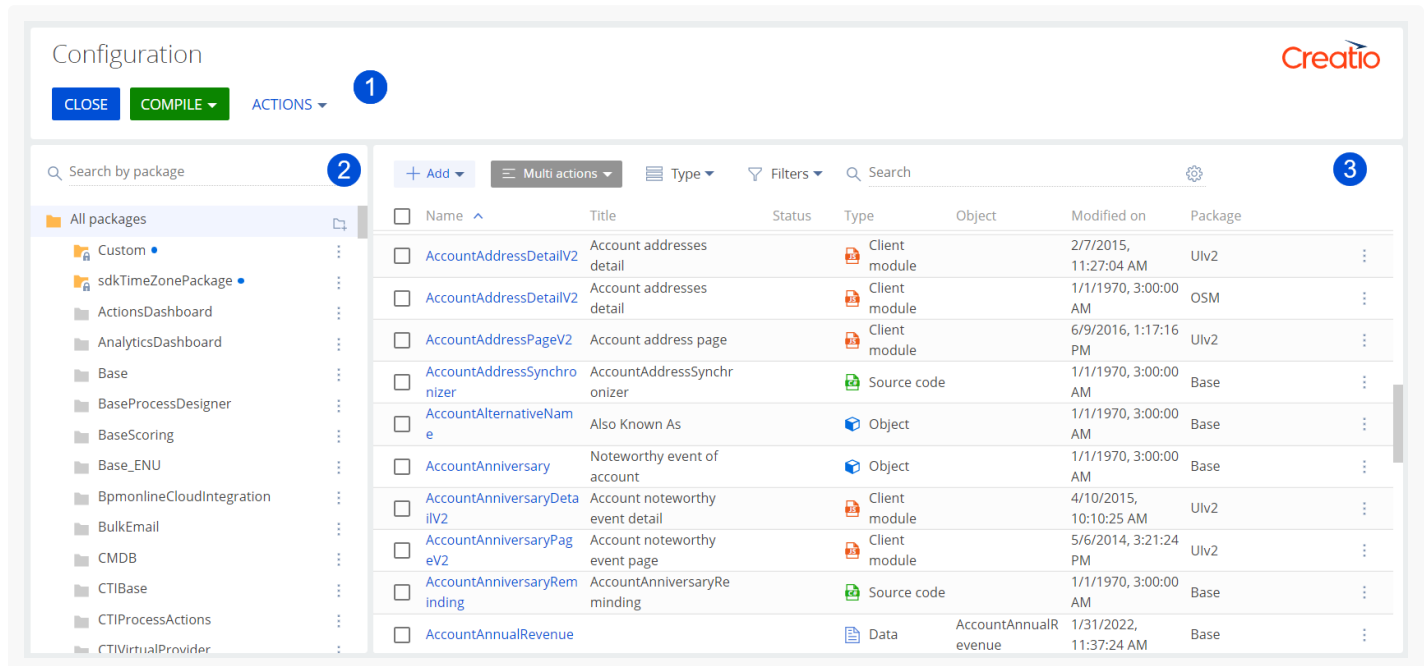
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Operations in Creatio IDE

Beginner

The [*Configuration*] section lets you perform operations with structural items. View the section UI in the figure below.



Name	Title	Status	Type	Object	Modified on	Package
AccountAddressDetailV2	Account addresses detail		Client module		2/7/2015, 11:27:04 AM	Ulv2
AccountAddressDetailV2	Account addresses detail		Client module		1/1/1970, 3:00:00 AM	OSM
AccountAddressPageV2	Account address page		Client module		6/9/2016, 1:17:16 PM	Ulv2
AccountAddressSynchro nizer	AccountAddressSynch ronizer		Source code		1/1/1970, 3:00:00 AM	Base
AccountAlternativeNam e	Also Known As		Object		1/1/1970, 3:00:00 AM	Base
AccountAnniversary	Noteworthy event of account		Object		1/1/1970, 3:00:00 AM	Base
AccountAnniversaryDeta ilV2	Account noteworthy event detail		Client module		4/10/2015, 10:10:25 AM	Ulv2
AccountAnniversaryPag eV2	Account noteworthy event page		Client module		5/6/2014, 3:21:24 PM	Ulv2
AccountAnniversaryRem inding	AccountAnniversaryRe minding		Source code		1/1/1970, 3:00:00 AM	Base
AccountAnnualRevenue			Data	AccountAnnualR evenue	1/31/2022, 11:37:24 AM	Base

The [*Configuration*] section UI includes the following **functional areas**:

- Toolbar (1)
- Package workspace (2)
- Main workspace (3)

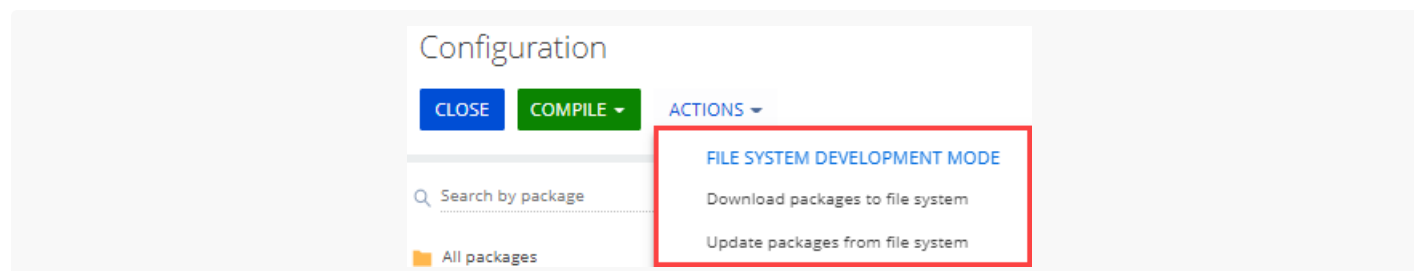
Learn more about the [*Configuration*] section UI in a separate article: [Creatio IDE](#).

Creatio IDE lets you execute operations with the following **structural items**:

- File system
- Packages
- SVN repositories
- Configuration elements
- Source code
- Configuration

Manage the file system

Use the [*File system development mode*] group (4) in the [*Actions*] drop-down list of the toolbar (1) to manage the file system.



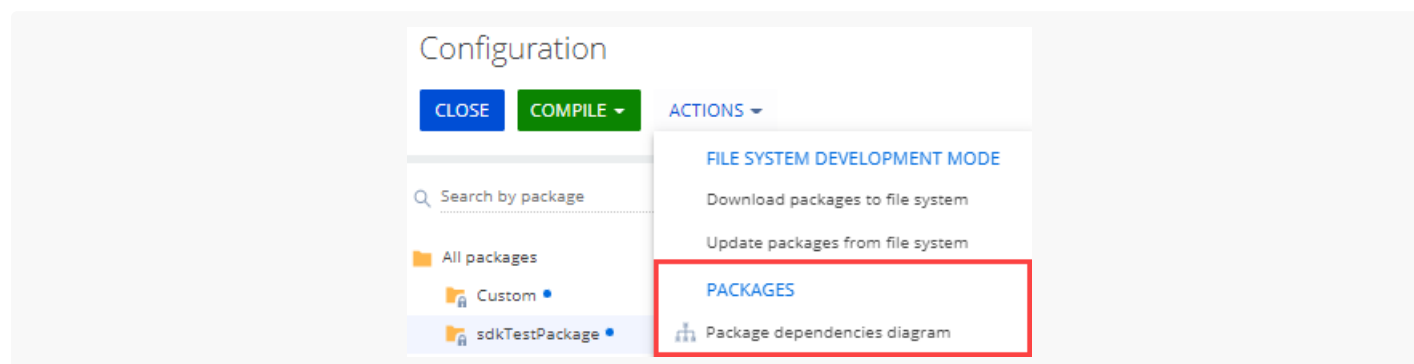
The [*File system development mode*] **action group** lets you:

- Download packages from the Creatio database to the `...\Terrasoft.WebApp\Terrasoft.Configuration\Pkg` directory ([*Download packages to file system*] item).
- Upload packages from the `...\Terrasoft.WebApp\Terrasoft.Configuration\Pkg` directory to the Creatio database ([*Update packages from file system*] item).

To access the items in the [*File system development mode*] action group (4), enable the [file system development mode](#). Hover over an item in the action group to display a hint to enable the mode. To **set up Creatio for file system development**, follow the instruction in a separate article: [External IDEs](#).

Manage packages

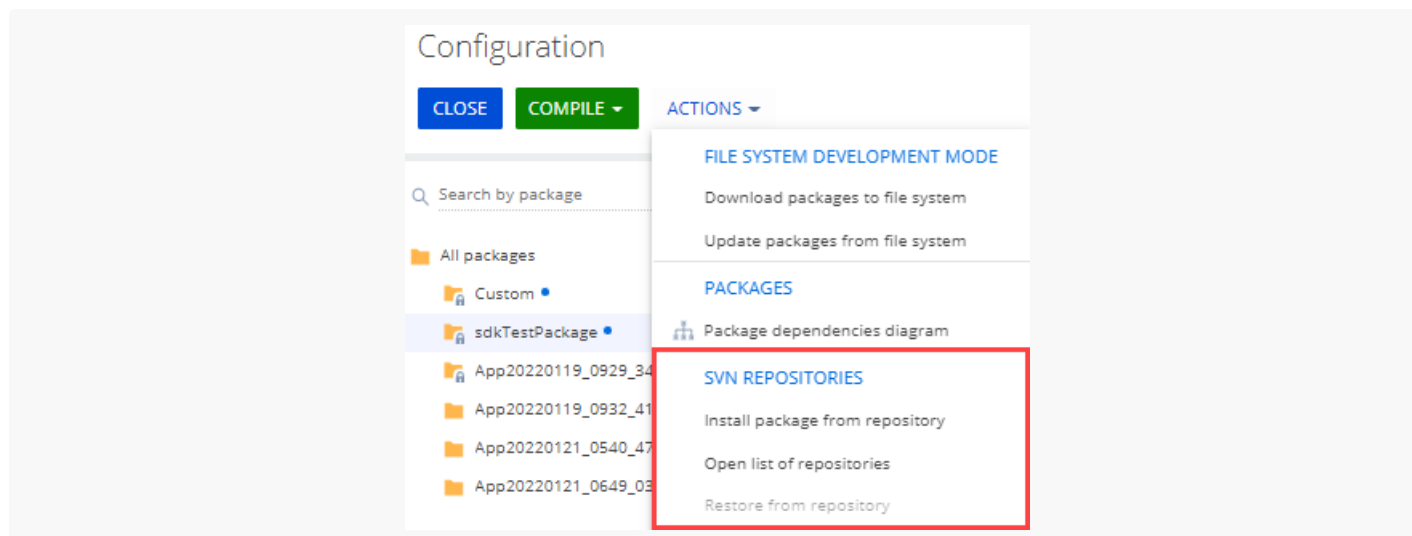
Use the [*Packages*] group (5) in the [*Actions*] drop-down list of the toolbar (1) to manage packages.



The [*Packages*] **action group** lets you open the [package dependencies diagram](#) ([*Package dependencies diagram*] item).

Manage SVN repositories

Use the [*SVN repositories*] action group (6) in the [*Actions*] drop-down list of the toolbar (1) to manage SVN repositories.



The [*SVN repositories*] **action group** lets you:

- Install a package from the SVN repository ([*Install package from repository*] item).
- Open the [*List of repositories*] tab ([*Open list of repositories*] item). The [*List of repositories*] tab lets you add, set up, and delete links to the SVN repositories available in Creatio.
- Update the configuration from the latest version in the SVN repository ([*Restore from repository*] item). The changes not yet committed to the SVN repository will be lost. The action is disabled if Creatio has no packages installed from the SVN repository.

The SVN version control is only available for Creatio .NET Framework. Learn more about managing SVN repositories in Creatio IDE in a separate article: [Version control in Creatio IDE](#).

Manage configuration elements

Creatio IDE lets you run the following **actions** that manage configuration elements:

- Add a configuration element.
- Select the type of the configuration element to display.
- Select the status of configuration elements to display.
- Execute configuration element actions.
- Update the configuration elements.
- Search for a configuration element.




The [*Configuration*] **section list** of the main workspace (3) contains the index of configuration elements.

The section list includes the following **columns**:

- [*Name*]. The name of the configuration element set at its creation. The configuration elements are sorted in alphabetical order. The column lets you view a list of modified configuration elements (marked with * next to the name). Creatio places the modified elements at the top of the record list. Learn more about adding configuration elements: [Add a configuration element](#).
- [*Title*]. The title of the configuration element.

- [*Status*]. The status of the configuration element. Use the [*Filters*] drop-down list of the section workspace (3) toolbar to filter the configuration elements to display by the current column value. Learn more about the statuses of configuration elements: [Select the status of configuration elements to display](#).

The [*Status*] column can have the following **values**:

-  — the configuration element must be updated.
-  — the configuration element contains an error.
-  — the configuration element must be updated and contains an error.

Hover over the [*Status*] column value to view the following **tooltips**:

- [*Needs to be installed in database*] for the [*SQL script*] and [*Data*] configuration elements.
- [*Needs to be updated in database*] for the [*Object*] configuration element.
- [*Needs generate source code*] for the [*Client module*], [*Source code*], [*Case*], [*Marketing campaign*], [*Business-process*], [*User task*] configuration elements.

Learn more about the types of configuration elements: [Select the type of configuration elements to display](#).

- [*Type*]. The configuration element type. Use the [*Type*] dropdown list of the section workspace (3) toolbar to filter the configuration elements to display by the current column value. Learn more about the types of configuration elements: [Select the type of configuration elements to display](#).
- [*Object*]. The object to which the bound package data is connected. The column value is available only for the configuration element of the [*Data*] type.
- [*Modified on*]. The modification date of the configuration element.
- [*Package*]. The name of the package that contains the configuration element.

Creatio IDE lets you sort the list column data in ascending or descending order. To **sort the data**, click the column name.

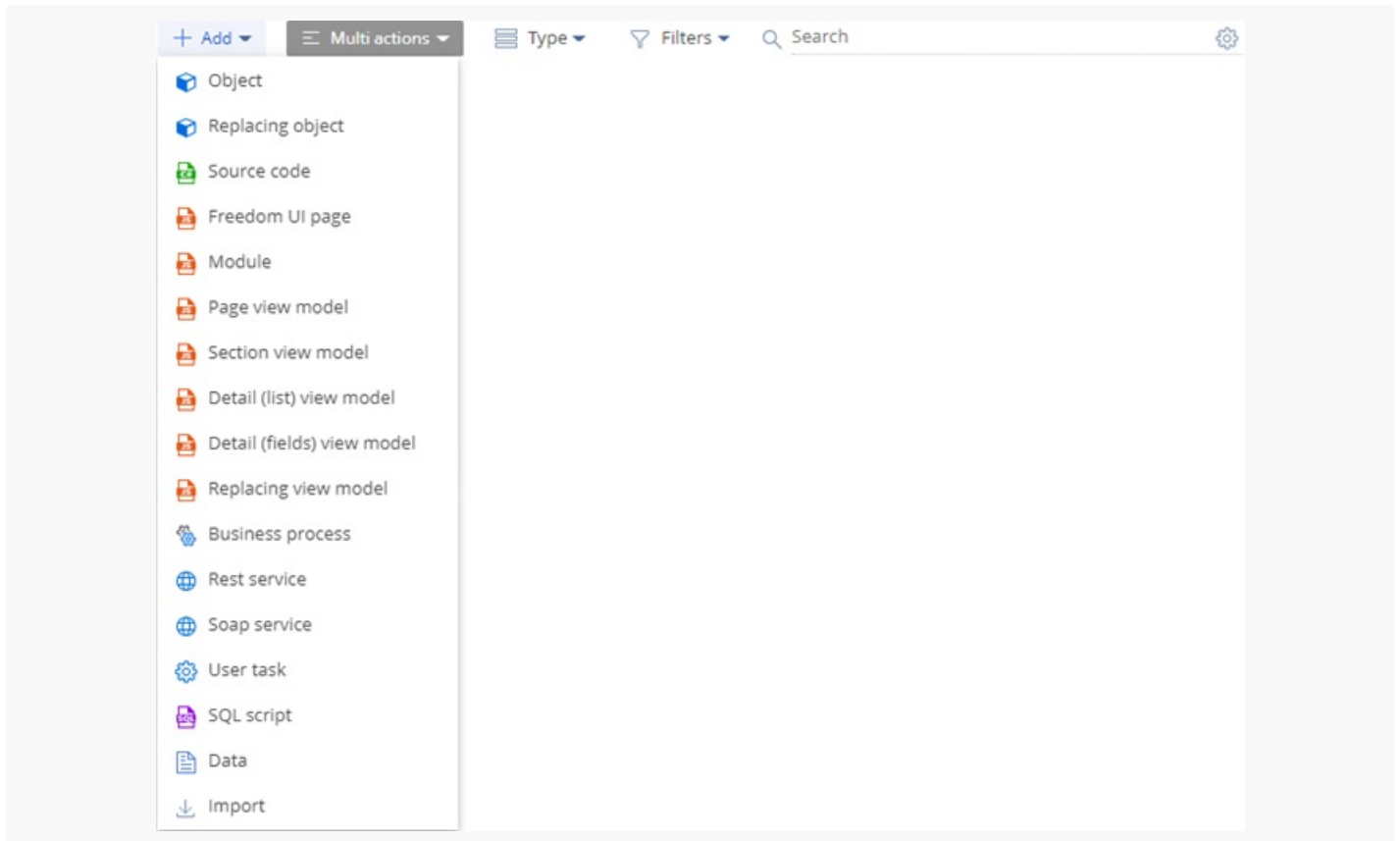
You can sort the list column data in the following **ways**:

- Sort the data in the **current package**. Select a package in the package workspace (2) to enable data sorting in the current package.
- Sort the data in **all packages**. Select the [*All packages*] folder in the package workspace (2) to enable data sorting in every package.

Add a configuration element

Use the [*Add*] **drop-down list** of the main workspace (3) toolbar to select the type of configuration element to add. Before you do this, select a package in the package workspace (2). Select a package to activate the items of the [*Add*] drop-down list. You cannot add configuration elements to preinstalled packages.

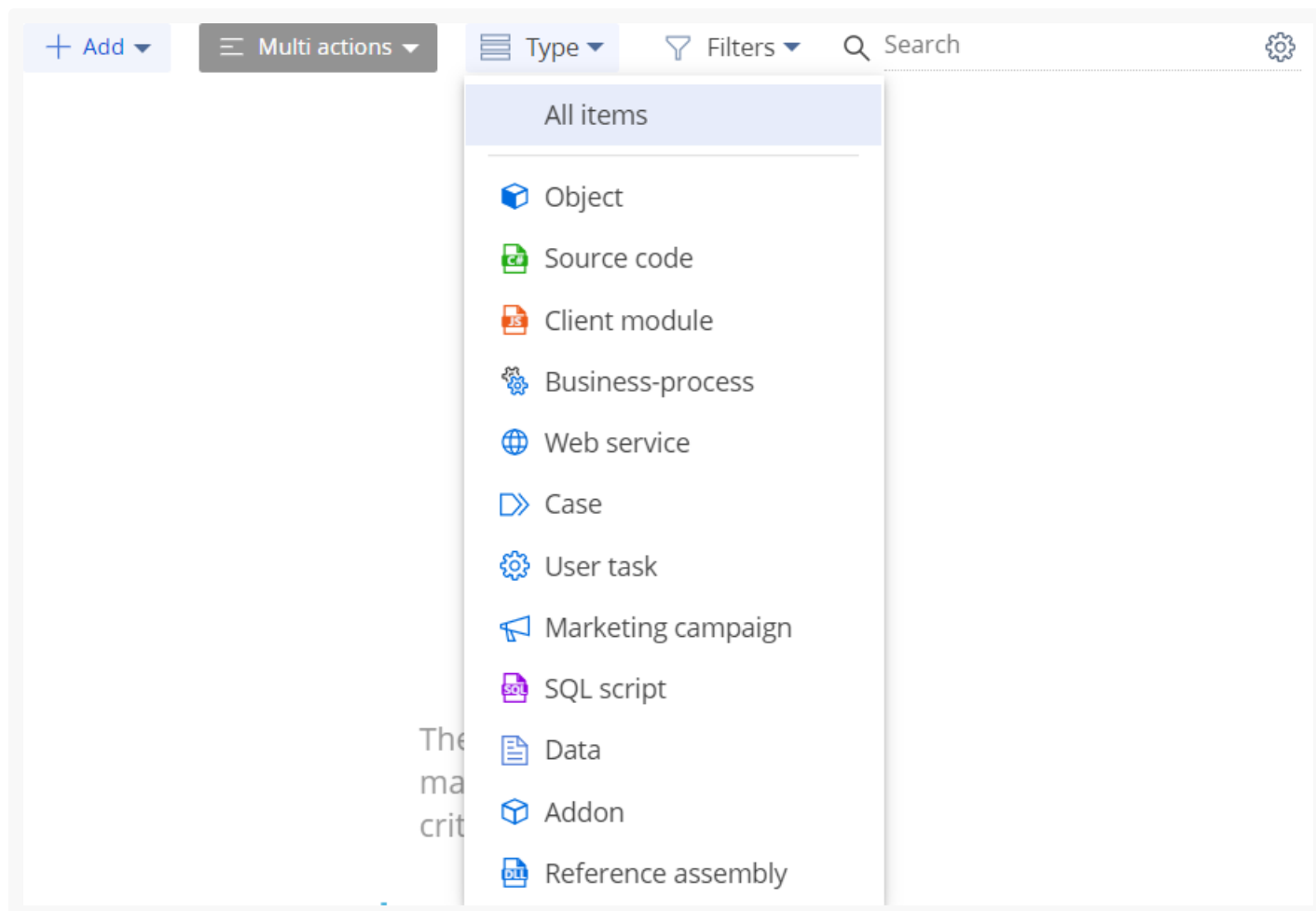
View the **types** of configuration elements to add in the figure below.



Select the type of configuration elements to display

Use the [*Type*] **drop-down list** of the main workspace toolbar (3) to select the type of configuration elements to display in the section list. Creatio displays the selected type in the [*Type*] column of the section list.

View the **types** of configuration elements to display in the figure below.



The following **configuration elements** have the [*Client module*] type:

- [*Freedom UI page*], available for Creatio 8.0 Atlas and later
- [*Module*]
- [*Page view model*]
- [*Section view model*]
- [*Detail (list) view model*]
- [*Detail (fields) view model*]
- [*Replacing view model*]

The following **configuration elements** have the [*Object*] type:

- [*Object*]
- [*Replacing object*]

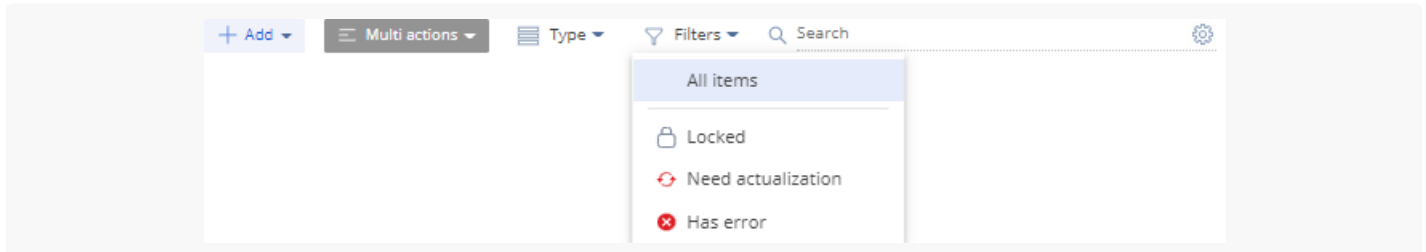
The following **configuration elements** have the [*Web service*] type:

- [*Rest service*]
- [*Soap service*]

Select the status of configuration elements to display

Use the [*Filters*] **drop-down list** of the main workspace (3) toolbar to select the status of configuration elements to display in the section list. Creatio displays the selected type in the [*Status*] column of the section list. Creatio saves the settings of the [*Filters*] drop-down list to the user profile and applies them when you open the [*Configuration*] section.

View the **statuses** of configuration elements to display in the figure below.




Run configuration element actions

Creatio IDE lets you run the following action **types**:

- Single. Runs with a single configuration element.
- Bulk. Runs with multiple configuration elements.

Run a single configuration element action

The **configuration element menu** of the main workspace (3) lets you run a single configuration element action. To **open the configuration element menu**, click  in the configuration element row of the section list. The item index of the configuration element menu depends on the configuration element type. Learn more about the types of configuration elements: [Select the type of configuration elements to display](#).


The **single action types** are as follows:

- Edit an object ([*Edit process*] item). If the object was created by a third party, Creatio displays the corresponding notification. Available for configuration elements of the [*Object*] type.
- Download the current configuration element in as an *.md file ([*Export*] item). You can install the exported configuration element into a different [environment](#). Learn more about exporting configuration elements in a separate article: [Transfer configuration element schemas](#).

Creatio displays the item for the following **configuration elements**:

- [*Object*]
- [*Source code*]
- [*Client module*]
- [*Business-process*]
- [*Web service*]
- [*Case*]
- [*User task*]
- [*Marketing campaign*]

- Move the current configuration element to another package ([*Move to another package*] item). The item opens a box that lets you select the destination package. When you move the configuration element, Creatio IDE can set dependencies automatically. Available for configuration elements of all types.
- Delete a configuration element ([*Delete*] item). Inactive for configuration elements in preinstalled packages. Available for configuration elements of all types.

You can also delete a configuration element in the section list ( button). The button is available for configuration elements of custom packages. Hover over the record in the [*Configuration*] section list to bring up the button.

- Install the current configuration element ([*Install*] item). Creatio installs the element into the database. If the data is not installed into the object of the [*Object*] column correctly, hover over the corresponding [*Status*] column value to view the error description. Creatio also displays the error description in the configuration element properties.

Creatio displays the item for the following **configuration elements**:

- [*SQL script*]
- [*Data*]
- Update the database structure for the object ([*Update database structure*] item). Available for configuration elements of the [*Object*] type.
- Generate the source code of the current configuration element ([*Generate source code*] item). Will run if the process contains compilable elements.

Creatio displays the item for the following **configuration elements**:

- [*Object*]
- [*Business-process*]
- [*User task*]
- Open the metadata tab of the current configuration element ([*Open metadata*] item).

Creatio displays the item for the following **configuration elements**:

- [*Object*]
- [*Source code*]
- [*Client module*]
- [*Business-process*]
- [*Web service*]
- [*Case*]
- [*User task*]
- [*Marketing campaign*]
- Open the source code tab of the current configuration element ([*Open source code*] item).

Creatio displays the item for the following **configuration elements**:

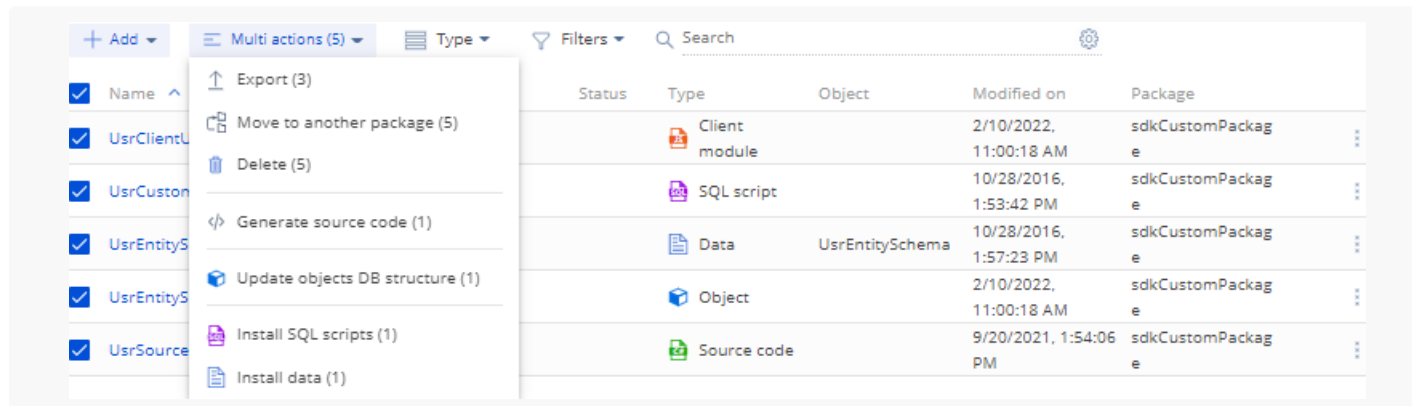
- [*Object*]
- [*Business-process*]

- [*User task*]
- Lock the current configuration element from changes in the connected SVN repository ([*Lock element in SVN*] item). The item is available only for configuration elements installed from the SVN repository. Available for configuration elements of all types.
- Unlock the current configuration element for changes in the connected SVN repository ([*Unlock element in SVN*] item). The item is available only for configuration elements installed from the SVN repository. Available for configuration elements of all types.
- Discard the changes from the version control system repository ([*Discard changes*] item). The item is available if the configuration element's package is connected to a version control system repository. Available for configuration elements of all types.
- Open the properties box of the current configuration element ([*Properties*] item). Available for configuration elements of all types.

Execute bulk configuration element actions

Use the [*Multi actions*] **drop-down list** of the main workspace (3) toolbar to run bulk actions with the selected configuration elements. Select the relevant configuration elements in the section list of the main workspace (3) to activate the items of the [*Multi actions*] drop-down list. The index of displayed items in the [*Multi actions*] drop-down list depends on the type of configuration elements selected in the section list. Learn more about the types of configuration elements: [Select the type of configuration elements to display](#).

View the **bulk actions** with configuration elements in the figure below.



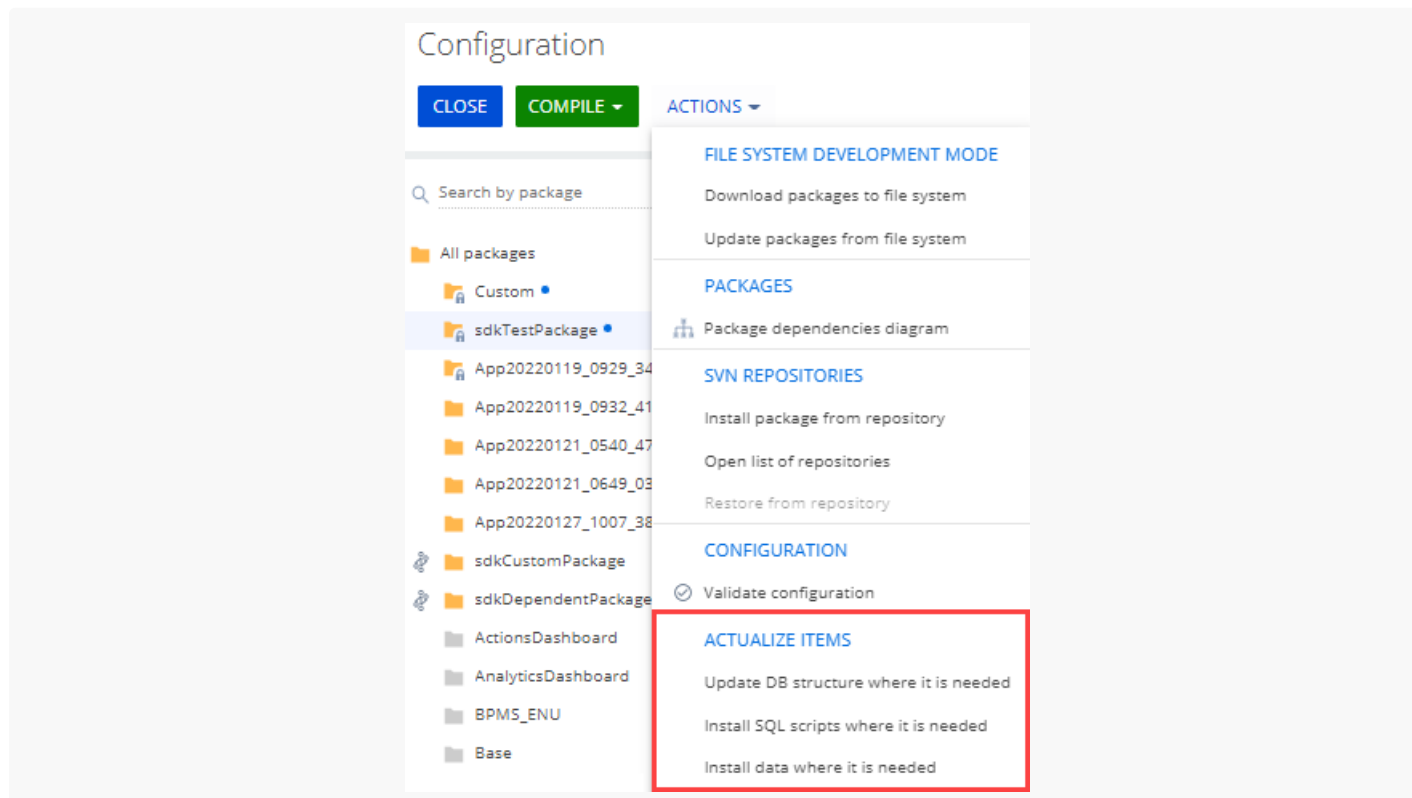
Creatio offers the following **bulk action types**:

- Export the configuration elements as a *.zip archive ([*Export*] item). You can install the exported configuration elements into a different environment. Learn more about exporting packages in a separate article: [Transfer packages](#).
- Move the package configuration elements to a different package ([*Move to another package*] item). The item opens a box that lets you select the destination package. When you move the configuration elements, Creatio IDE can set dependencies automatically.
- Delete the configuration elements ([*Delete*] item).
- Generate the source code of the configuration elements ([*Generate source code*] item). Will run if the process includes compilable elements.

- Update the database structure for the configuration elements ([*Update objects DB structure*] item).
- Install the configuration elements of the [*SQL script*] type into the database ([*Install SQL script*] item).
- Install the configuration elements of the [*Data*] type into the database ([*Install data*] item). The data is installed into the object of the [*Object*] column.

Update the configuration elements

Use the [*Actualize items*] action group in the [*Actions*] drop-down list of the toolbar (1) to update the configuration elements.



The [*Actualize items*] **action group** lets you:

- Update the database structure for outdated configuration elements ([*Update DB structure where it is needed*] item).
- Install the necessary configuration elements of the [*SQL script*] type ([*Install SQL scripts where it is needed*] item).
- Install the necessary configuration elements of the [*Data*] type ([*Install data where it is needed*] item).


Creatio will display the corresponding notification after updating the configuration elements.

Search for a configuration element

Use the [*Search*] **search bar** of the main workspace (3) toolbar to search for a configuration element in the section list by the element name. Creatio saves the search settings to the user profile and applies them when you open the [*Configuration*] section.

You can search for a configuration element in the following **ways**:

- Search for a configuration element **in the current package**. Select the package in the package workspace (2) to enable searching for a configuration element in the current package.
- Search for a configuration element **in all packages**. Select the [*All packages*] folder in the package workspace (2) to enable searching for a configuration element in every package.

To **set up additional search parameters**, click  in the [*Search*] search bar of the main workspace (3) toolbar.

Creatio IDE lets you set up the following additional **search parameters**:


- Search by title ([*Search by column "Title"*] item). Selected by default.
- Search by a unique ID ([*Search by column "UID"*] item).
- **Search mode**.
 - The configuration element name starts with the text you type in the [*Search*] search bar ([*Starts with*] item). Selected by default.
 - The configuration element name contains the text you type in the [*Search*] search bar ([*Contains*] item).
 - The configuration element name is the same as the text you type in the [*Search*] search bar ([*Equals*] item).

Click [*Apply*] to apply the changes.

Use hot keys

Creatio IDE lets you use hot keys in the Designers of the following **configuration element types**:

- [*Source code*]
- [*Client module*]
- [*User task*]
- [*SQL script*]

To **display the index of available hot keys**, click  in the corresponding Designer of the configuration element.

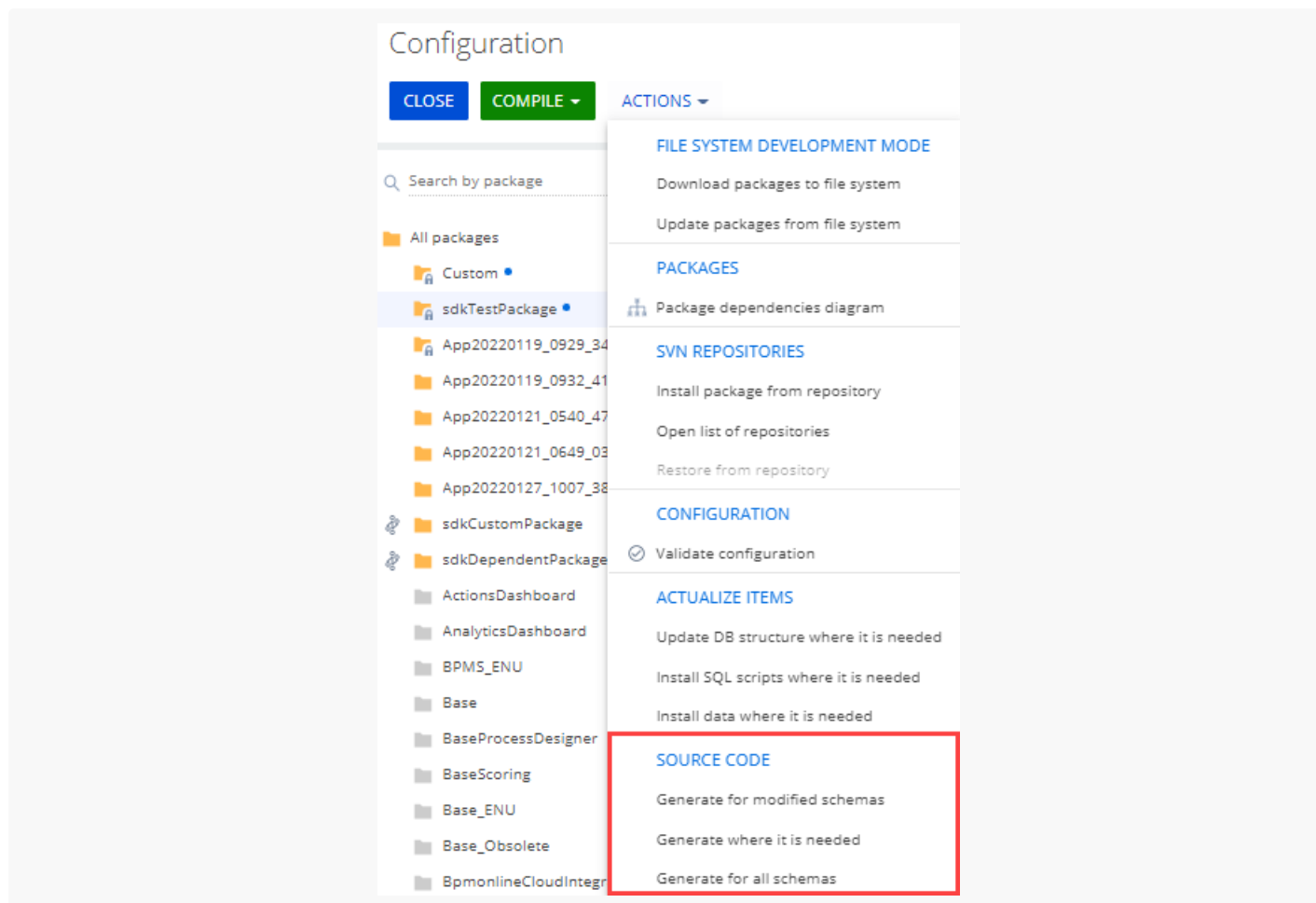
View **hot keys** supported in Creatio IDE in the table below.

Hot keys

Hot key	Action
Ctrl+A	select all
Ctrl+Z	undo
Ctrl+Y	redo
Ctrl+F	find
Ctrl+G	find next
Shift+Ctrl+G	find previous
Shift+Ctrl+F	replace
Shift+Ctrl+R	replace all
Ctrl+D	delete line
Alt+Left	go to line start
Alt+Right	go to line end
Alt+G	jump to line
F11	fullscreen code editor
Esc	exit fullscreen mode
Ctrl+Space	call autocomplete

Manage the source code

Use the [*Source code*] group (8) in the [*Actions*] drop-down list of the toolbar (1) to manage the source code.



The [*Source code*] **action group** lets you:

- Generate the source code for modified schemas ([*Generate for modified schemas*] item).
- Generate the source code for schemas that require it ([*Generate where it is needed*] item).
- Generate the source code for every schema ([*Generate for all schemas*] item). This operation might take more than 10 minutes.

Creatio generates the source code for schemas [in the background](#).

The **major features** of background generation are as follows:

- Background generation does not affect the core user workflows.
- Starting compilation or a new source code generation is not possible while the running operation is not complete. If you attempt to start these actions, Creatio warns you that the source code generation is still in progress.
- We do not recommend working on functionality that requires compilation until the source code generation is done. That includes installing applications and extensions, configuring the UI and business logic.

As a result of the source code generation, Creatio will display the corresponding notification in the [communication panel](#).

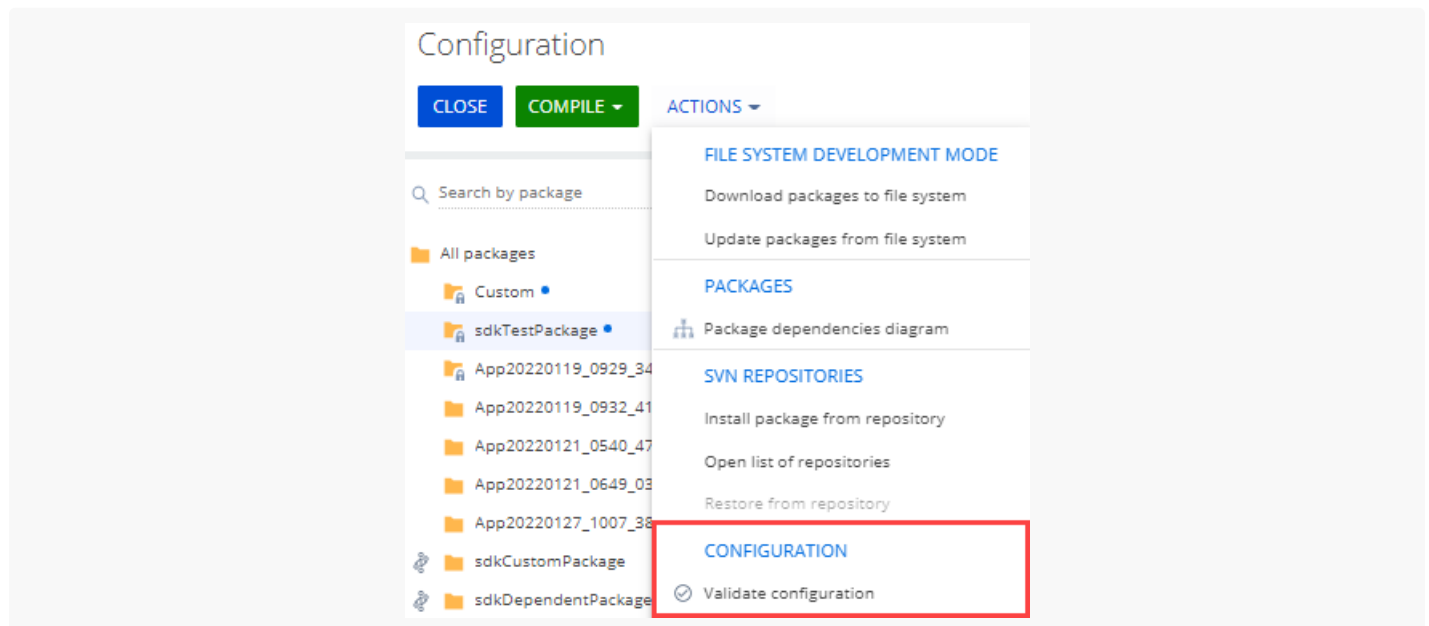
Manage the configuration

Creatio IDE lets you execute the following configuration management **actions**:

- Validate the configuration.
- Compile the configuration.

Validate the configuration

Use the [*Configuration*] action in the [*Actions*] drop-down list of the toolbar (1) to validate the configuration.



The [*Configuration*] **action group** lets you check for dependency conflicts that might appear after you transfer elements between packages ([*Validate configuration*] item).

Compile the configuration

Run the actions that compile the configuration in the section toolbar.

You can compile the configuration in the following **ways**:

- Compile only the configuration changes ([*Compile*] button on the toolbar (1)).
- Compile the configuration ([*Compile all*] button of the [*Compile*] button's drop-down list on the toolbar (1)).



Creatio runs the following **actions** as a result of the configuration compilation:

- Update the executable files.
- Download the [static content](#) to the `...\Terrasoft.WebApp\conf` directory.

Once the compilation finishes, Creatio displays a corresponding notification. The changes take effect for users working in the relevant configuration.

Creatio displays any compilation **errors** that might occur as part of configuration compilation in the dialog box.

The compilation errors have the following **properties**:

- The error type icon (error  or warning .
- The name of the relevant file.
- The error description.
- The error code.
- The number of the line with an error.