

User management

Add users

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

Add users	4
Add a system administrator user	4
Add a regular employee user	6
Add a new contact	6
Create a user	7

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



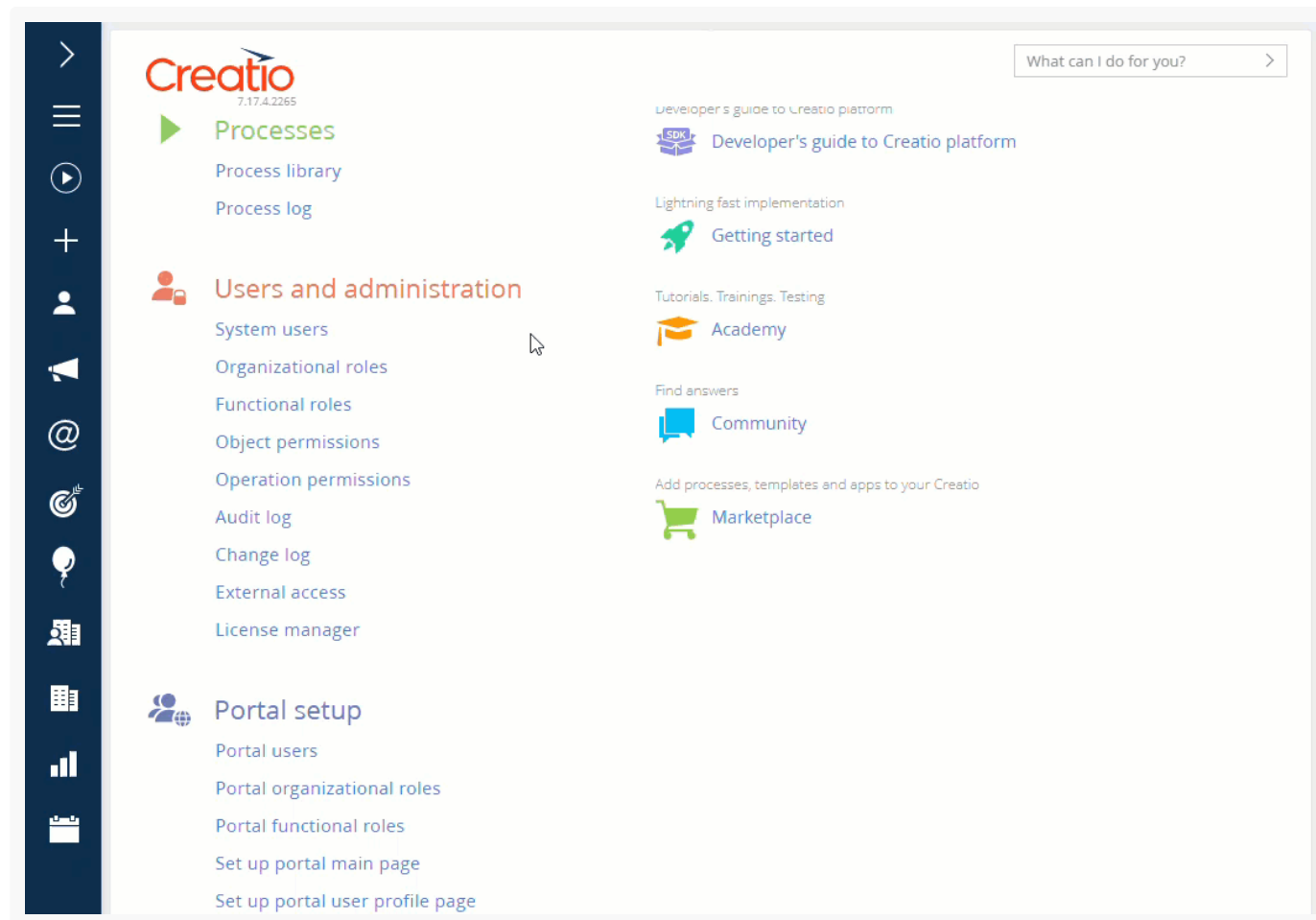
1. Click  → System Designer → [*System users*].
2. Open the user page → the [*Roles*] tab.
3. Click  in the [*Organizational roles*] detail and specify the “**System administrators**” role (Fig. 1).

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




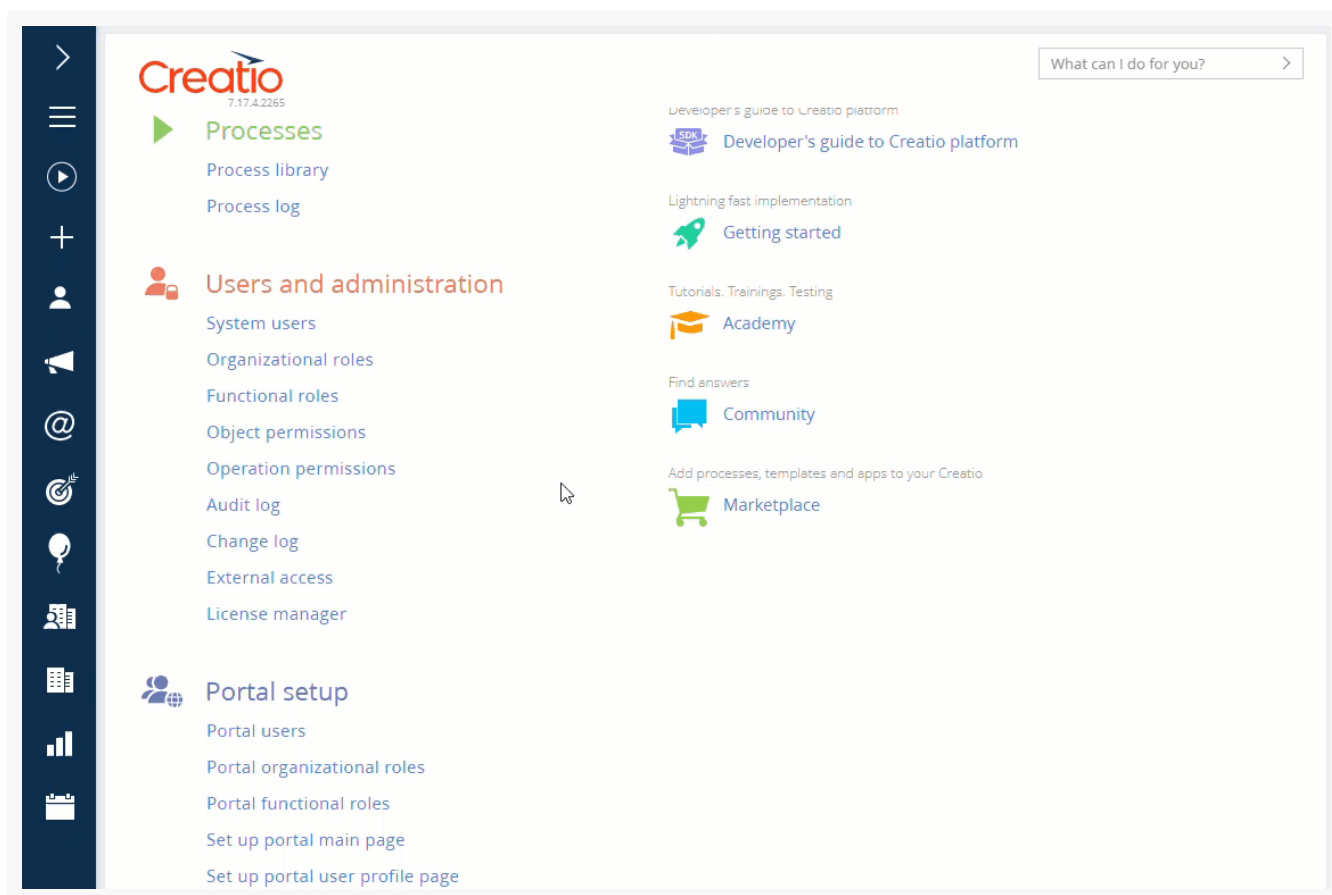
1. Click  → [*Organizational roles*].
2. In the list of organizational roles represented in the form of a folder tree, select the “System administrators” role. The area to the right of the roles tree will show the page of the selected role.
3. On the [*Users*] tab:
 - a. Click  and select [*Add existing*] 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

The screenshot shows the 'Contacts' page in the Creatio system. The page header includes the title 'Contacts', a search bar with the text 'What can I do for you?', and the Creatio logo with version '7.17.4.2265'. Below the header, there are buttons for 'NEW CONTACT' and 'ACTIONS', along with 'Filters/folders' and 'Tag' options. The main content is a table of contacts:

Name	Account	Job title	Business phone	Mobile phone	Email
Alexander Wilson	Alpha Business	CEO	+1 212 542 4238	+1 212 854 7512	a.wilson@alphabusiness.com
Alice Phillips	Axiom	CEO	+1 212 1440 5222	+1 212 1204 5477	alice.phillips@axiom.com
Andrew Baker (sample)	Accom (sample)	Specialist	+1 617 440 2031	+1 617 221 5187	a.baker@ac.com
Andrew Wayne	Apex Solutions	CEO	+44 141 429 1595	+44 141 258 9878	a.wayne@apex.co.uk
Andrew Z. Barber	Infocom	Specialist	+1 206 480 3801	+1 206 587 1036	a.barber@gros.com
Bruce Clayton	Streamline Development	Specialist	+1 404 532 3976	+1 404 389 0476	clayton@streamlinedev.com
Caleb Jones	Our company	CEO	3010	+44 782 223 4967	c.jones@yahoo.co.uk

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

The screenshot shows the 'Users' page in the Creatio system. The page header includes the title 'Users', a search bar, and the Creatio logo. Below the header, there are buttons for 'NEW' and 'ACTIONS'. A dropdown menu is open, showing the following options:

- Portal user
- Company employee (selected)

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. [*Password*], [*Password confirmation*] - enter the password the user will use to log in to Creatio. These are required fields.
 - c. [*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.
 - d. [*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.

