



STUDIO  **Creatio**

free edition

User guide



ACCELERATE 



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Studio Creatio, free edition

Studio Creatio, free edition is a collaborative business process modeling tool, intended for creating, documenting, discussing and sharing BPMN diagrams. Business processes in studio free correspond to [BPMN 2.0](#) specification, which is easily understandable by all business users, from analysts to developers.



Registration

Add and invite new studio free users to your organization.



Process library

Create and organize your library of business processes.



Process designer

Automate key business processes using a powerful yet simple visual process designer.



Designing business processes

Model processes in BPMN 2.0 using pre-configured elements for creating and processing data.



Exporting/importing business processes

Import and export your work in the *.bpmn format.



Documenting processes

Communicate your processes in a standardized manner, add descriptions and specification annotations.



Collaborative process design

Collaborate with your colleagues, add comments and discuss processes.



Keyboard shortcuts

Learn easier and quicker methods of using the process designer.



Community

Join the community of Creatio users and exchange your expertise.

Registration and profile

You will need to create a user account before you begin designing and sharing business processes in Studio Creatio, free edition. Once you have a user account, you can begin designing processes, collaborate with other users on their processes or invite them to your team.

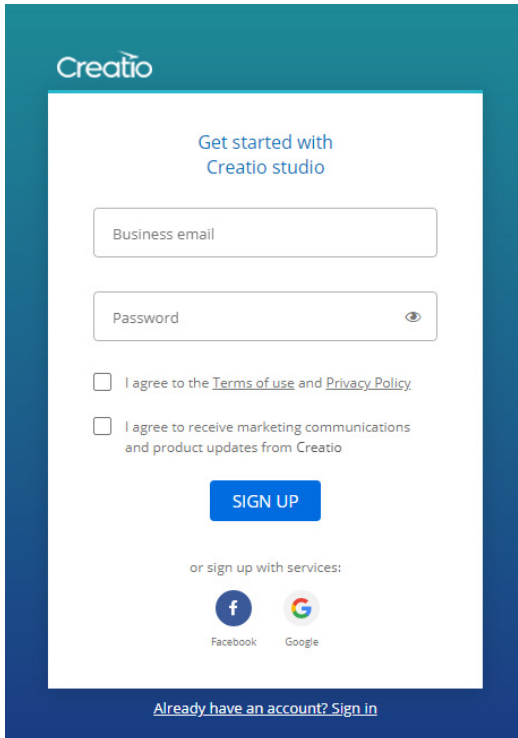
Signing up

There are two ways to create an account in Studio Creatio, free edition:

- **Receive an invitation.** Your colleagues or associates may invite you to participate in their projects via an invitation page in their organization account settings. [Read more >>>](#)
- **Self-registration.** You can complete the steps below to sign up to Studio Creatio, free edition on your own. As a result, you will become an administrator of a new organization account – a team that can collaborate on business process development. As an administrator, you will be able to send invitations to join your team. You can learn more about organization accounts in the “[Collaboration](#)” article.

Self-registration

1. Go to the [Studio Creatio, free edition registration page](#).
2. Enter your email and password and click **Sign up**.



The screenshot shows the 'Get started with Creatio studio' registration page. It features a teal header with the 'Creatio' logo. Below the header, the text 'Get started with Creatio studio' is displayed. There are two input fields: 'Business email' and 'Password'. Below the password field is a checkbox for 'I agree to the [Terms of use](#) and [Privacy Policy](#)' and another checkbox for 'I agree to receive marketing communications and product updates from Creatio'. A blue 'SIGN UP' button is positioned below the checkboxes. At the bottom, there is a section for 'or sign up with services:' with icons for Facebook and Google. A link at the very bottom reads 'Already have an account? [Sign in](#)'.

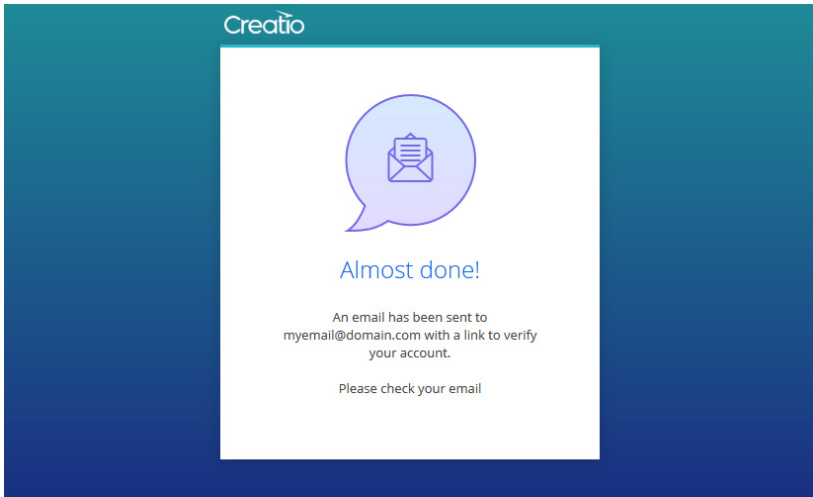
NOTE

You can quickly sign up with your Google or Facebook account. If you register manually with your Gmail, or email address used for your Facebook account, you will still be able to sign in quickly using the corresponding Google/Facebook account.

ATTENTION

Make sure you have access to your registration email: you will need to use it for account verification and password restoration purposes.

3. Studio Creatio, free edition will send you confirmation email.

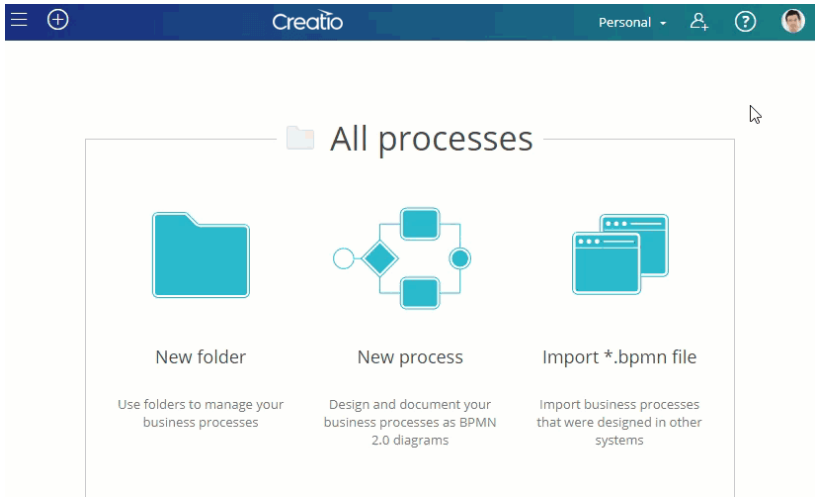


4. Check your registration mailbox and confirm your registration by clicking the **Confirm email** link in the email from Studio Creatio, free edition.

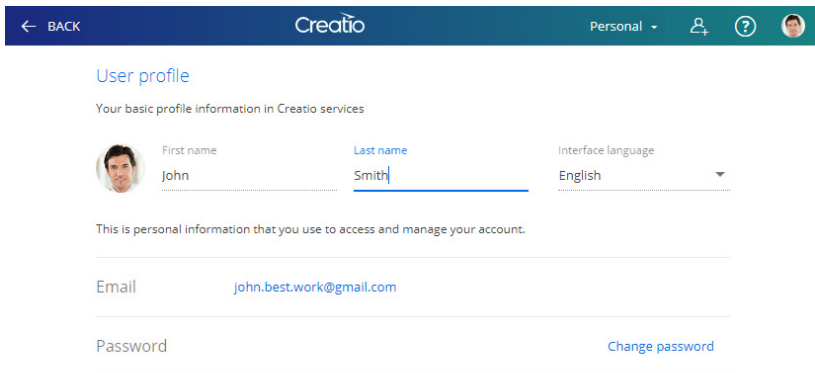
Changing displayed name

Your **first and last name** will be visible to other Creatio users who collaborate with you on the business process design. These names do not affect your login information. You can change your visible name at any time.


1. Click your profile picture or the  icon. Select **Profile** in the menu. Profile page opens.

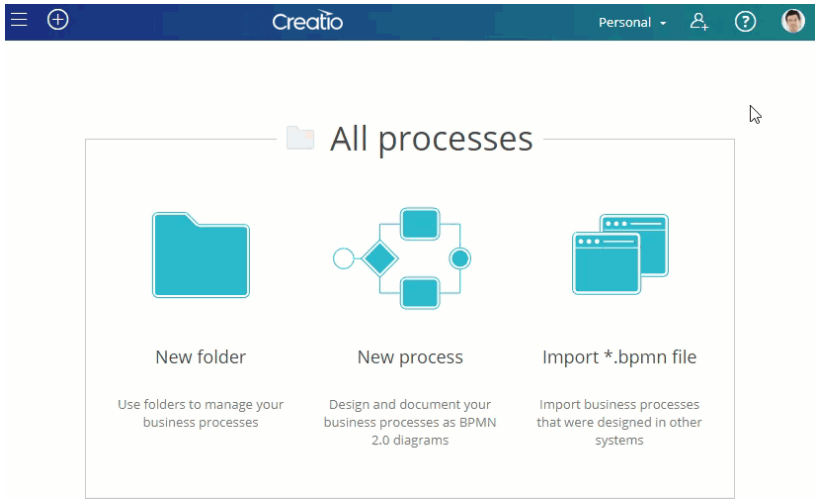


2. Edit your name by typing in the **First name** and **Last name** fields.

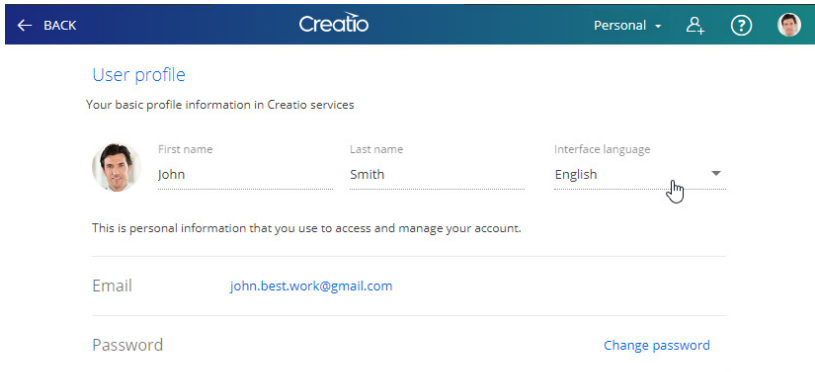


Changing interface language


1. Click your profile picture or the  icon. Select **Profile** in the menu. Profile page opens.

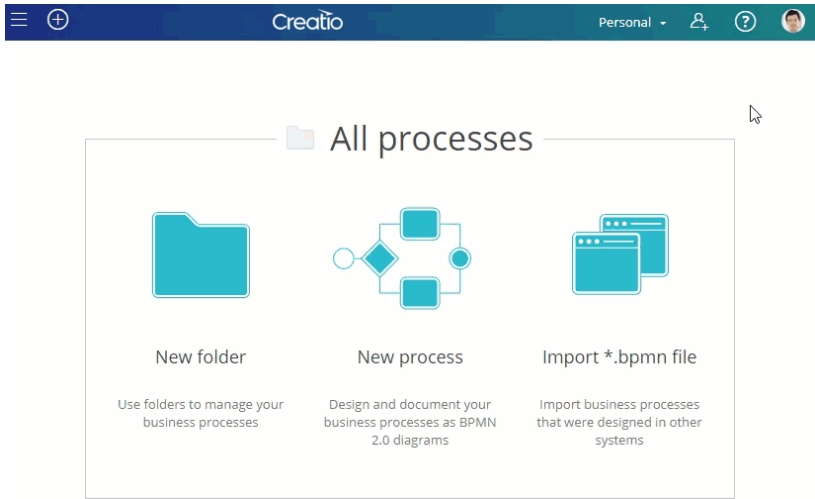


2. Select interface language in the **Interface language** field.

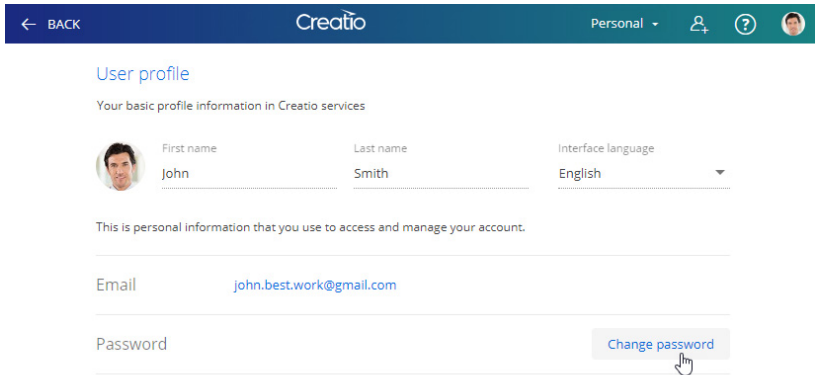


Changing password

1. Click your profile picture or the  icon. Select **Profile** in the menu. Profile page opens.



2. Click **Change password**.



3. Enter Current password and New password and click Change.


The screenshot shows the 'User profile' page in the Creatio interface. At the top, there is a dark blue header with a 'BACK' button, the 'Creatio' logo, and user navigation options including 'Personal', a user icon, a help icon, and a profile picture. Below the header, the page title 'User profile' is displayed. A subtitle reads 'Your basic profile information in Creatio services'. The profile information is organized into sections: 1. Personal Information: Includes a profile picture, 'First name' (John), 'Last name' (Smith), and 'Interface language' (English). 2. Account Information: Includes 'Email' (john.best.work@gmail.com). 3. Password Section: Labeled 'Password', it contains two input fields: 'Current password' and 'New password', each with an eye icon for visibility control. To the right of these fields is a blue 'CHANGE' button with a mouse cursor hovering over it.

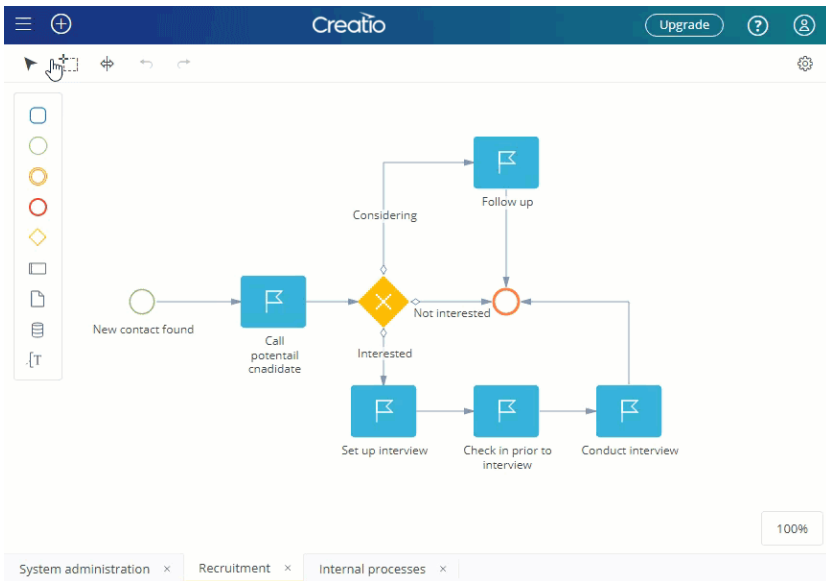
Process library

All business processes belonging to your organization are stored in the **process library**, which enables you to:


- Easily navigate your entire library of business processes
- Add new business processes to your library by **creating** or **importing** them
- Organize business processes in a hierarchical structure
- Search for processes and folders

Navigation

Use  to toggle the **process library panel**. A list of all folders and processes that belong to your organization will be displayed on the left-hand side of the application.

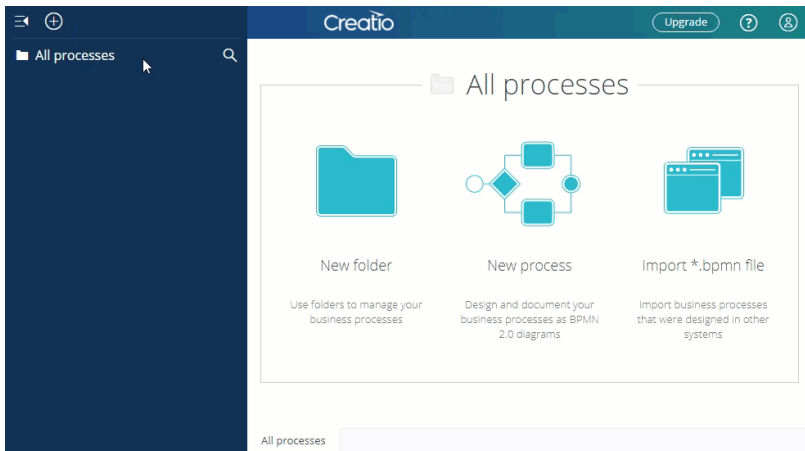


Adding new processes and folders


Use  to add new folders or processes, as well as **import *.bpmn** files to the library.

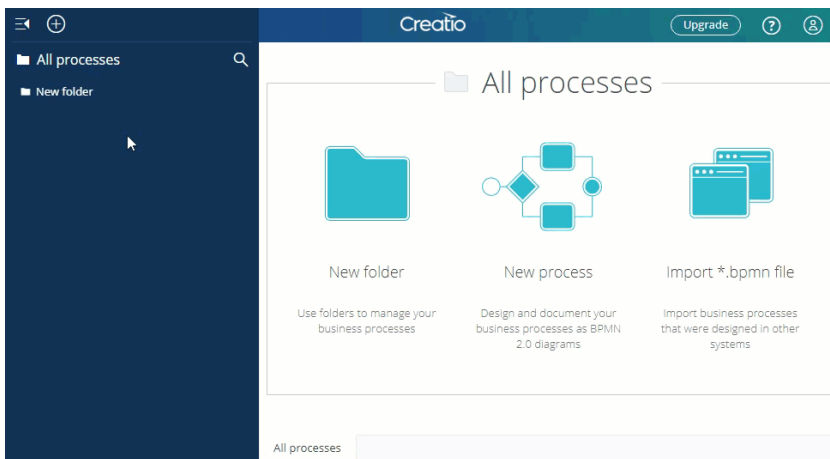
NOTE


In the process library, the root "All processes" folder is created by default and cannot be modified.

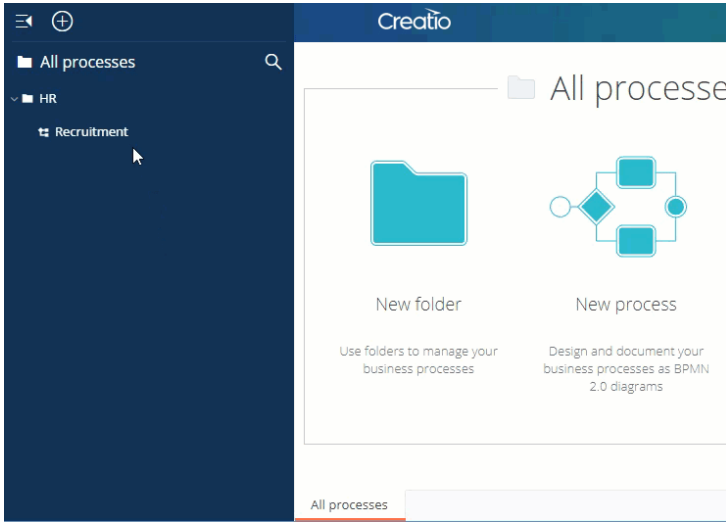


Organizing your work

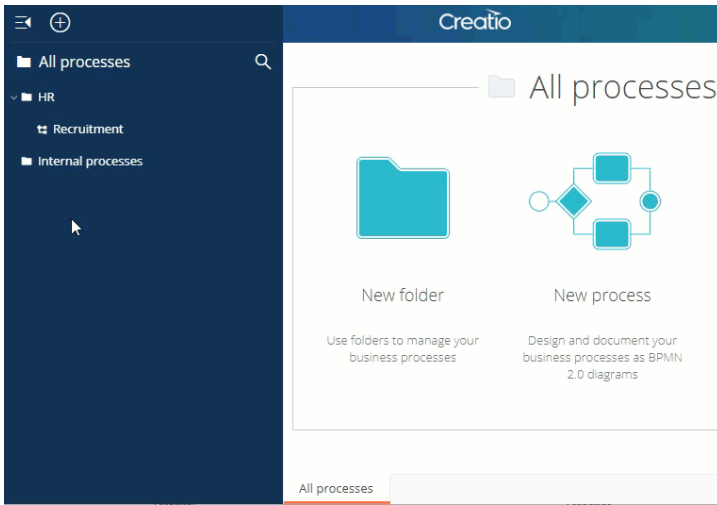
You can organize your folders by creating a folder tree. To create a subordinate folder, select the root folder and add a new one via the  button.




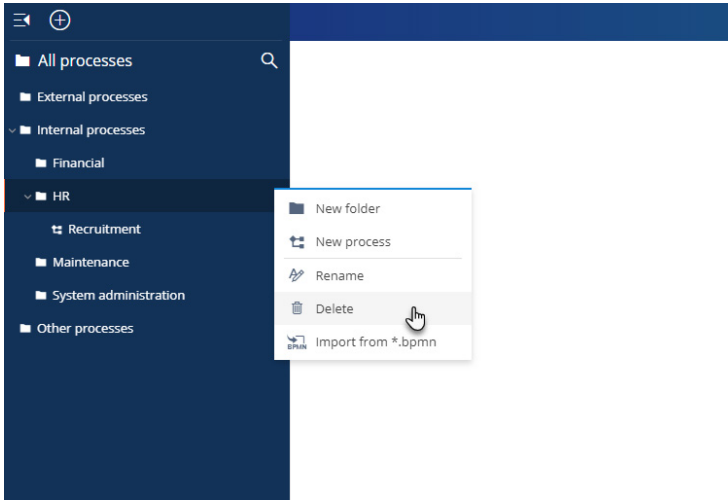
To [add a new process](#) to a specific folder, select the folder and add a process via the  button.



Drag and drop processes (or folders) to move them from one location to another. Moving an entire folder will also move all its contents.




To delete or rename a folder / process, click  and select the necessary option in the list. Additionally, you can [import](#) a process from a *.bpmn file or add it directly into the selected folder.

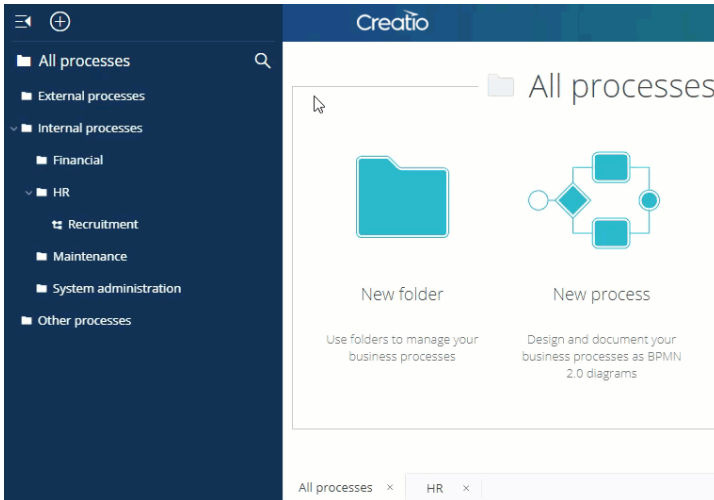


ATTENTION

Deleting a folder will delete all its contents, i.e. all other processes and folders in it.

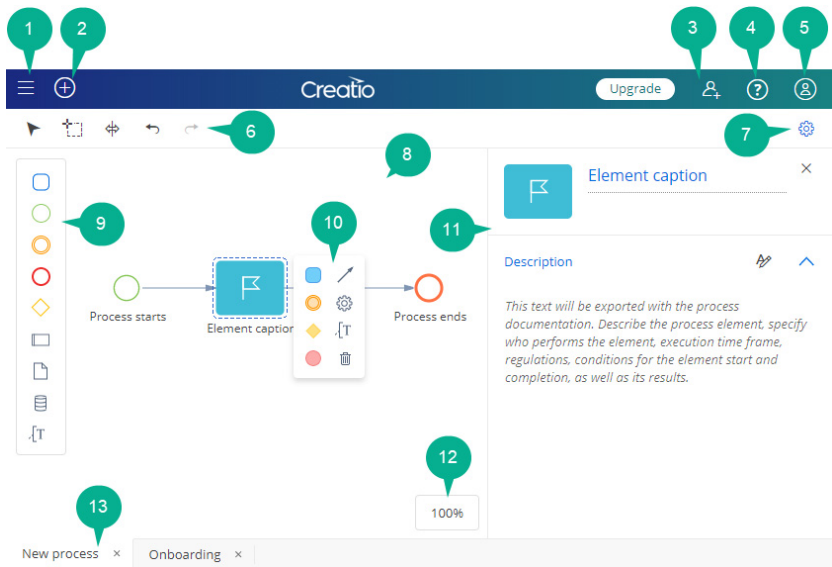
Searching folders and processes

To search for folders and processes, click  and start typing your request. The **process library panel** will show a list of folders and processes that match search criteria. Click a list item to open it.









Process designer

Process designer opens whenever you create or open a business process in Studio Creatio, free edition. The process designer UI has several key elements marked on the screen shot below:




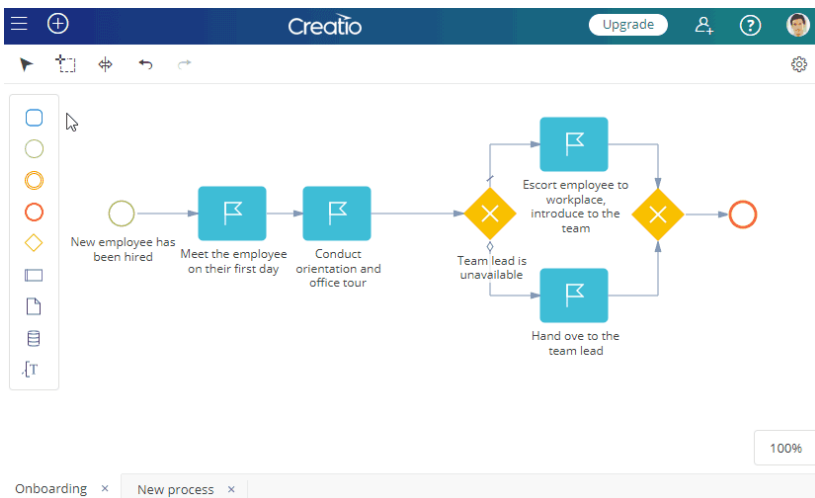
Legend:


1	 – process library button toggles process library panel to the left of the process designer. Read more >>>
2	 – add menu creates new processes and new process library folders, or import a bpmn business process .
3	 – invite member button opens a popup where you can invite other users to collaborate on the process design with you. Read more >>>
4	 – help button opens this help.
5	 – profile menu . User profile , organization account , and log out options.
6	Tools menu . Read more >>>
7	 – setup area button . Toggle setup area of the currently selected process element or current business process.

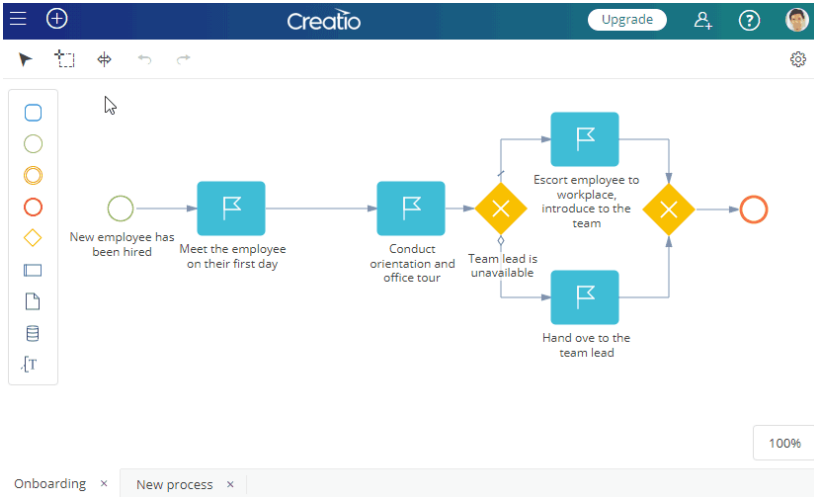
8	Working area – drag and arrange process elements here. Read more >>>
9	Process element toolbar – drag process elements from here to the working area to design a business process.
10	Process element context menu – contains a list of elements that can be added to the diagram after the currently selected element. Also contains a sub-menu (⚙️) for changing the current element's type.
11	Setup area – shows name and description of the currently selected process element. Element descriptions are used when exporting process documentation. Read more >>>
12	Zoom menu – use this button to restore default zoom level and alignment of the process diagram. Read more >>>
13	Tab area – use tabs to quickly access any of the currently opened process diagrams.

Process designer tools

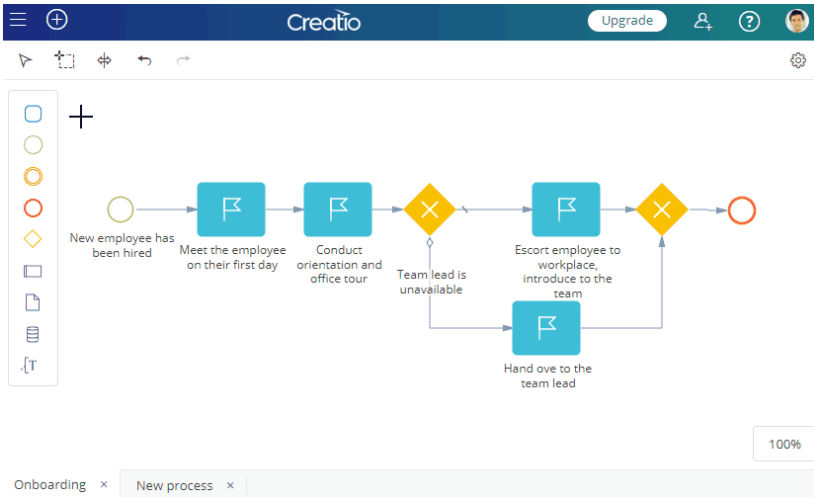
Use the  **Lasso** tool to select several elements at once. Selected elements can be moved, copied (Ctrl + C) or deleted (Del).





Use the  **Space** tool to shift all elements on the diagram left/right or up/down. For example, click and hold, then drag your mouse down to shift down all elements that are below the mouse cursor.

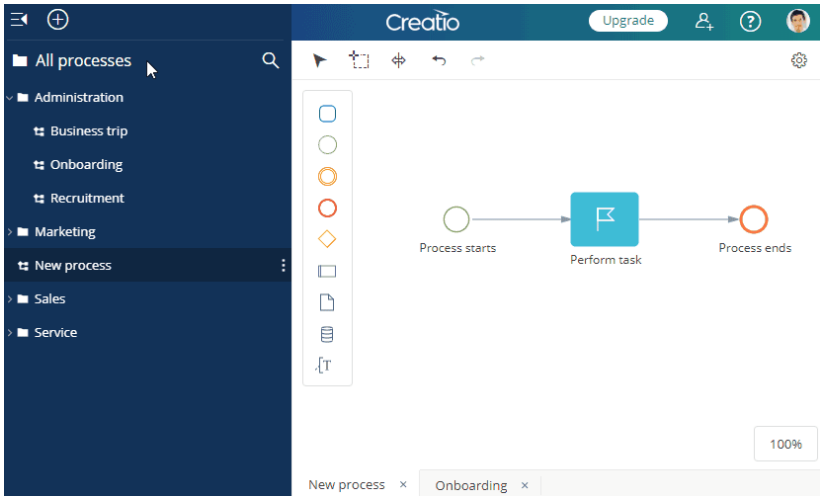


The **Arrow** tool is the default mode in which you work with the elements on the working area. Use the toolbar to switch the cursor back to **Arrow** after using **Lasso** or **Space** tool.

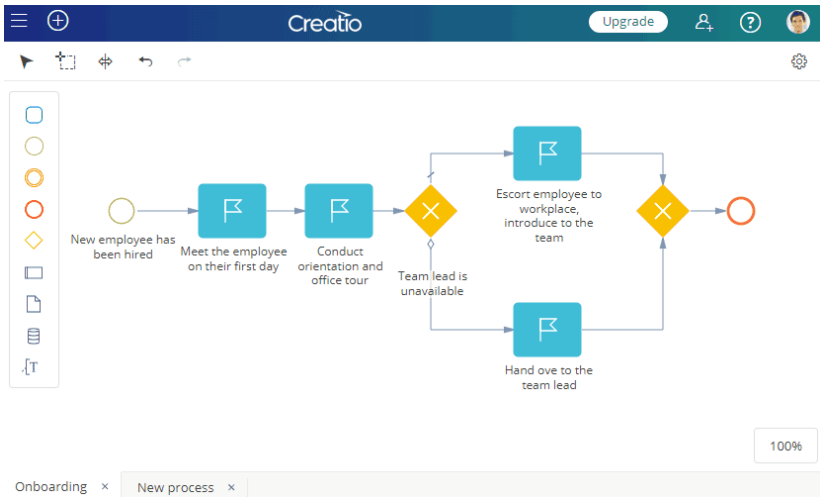


Navigation

Use  button to toggle **process library menu** to the left, and the  button – to toggle the **setup area**. You can toggle between several opened processes using **tabs**.



Drag&drop the working area canvas to **navigate large diagrams**. Use the **mouse wheel** while holding down the **Ctrl** key to zoom. Use the **zoom menu** to restore default zoom and alignment.



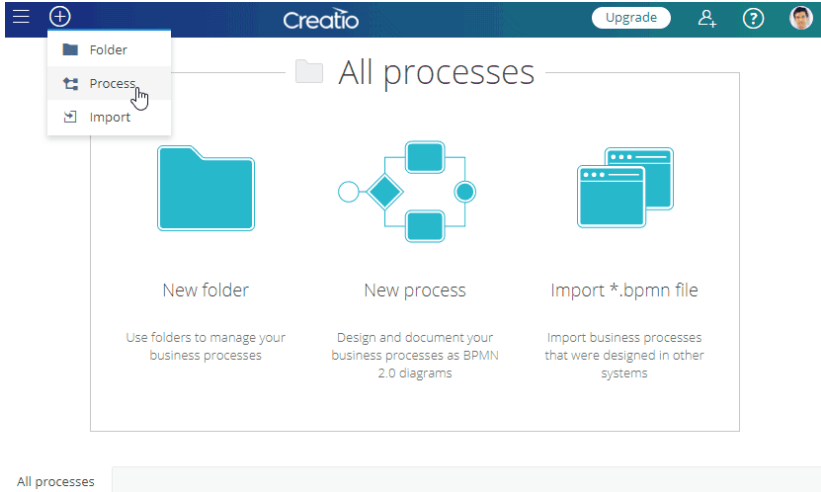
Creating business processes

You design a business process by adding elements on the working area, arranging them, connecting them, and adding their descriptions.

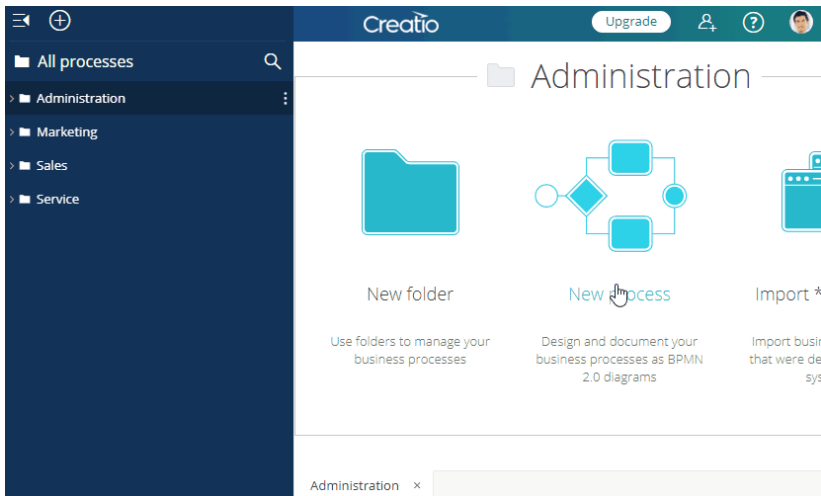
Creating a new process

There are several ways you can add a new process:

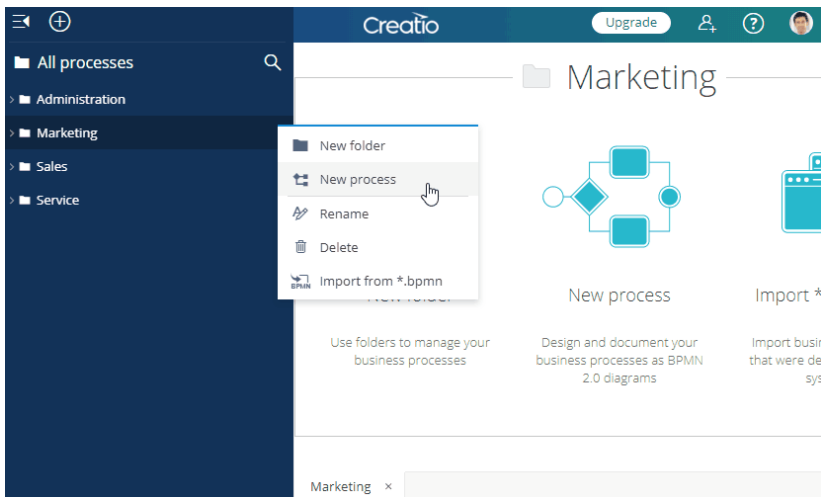
- Click  in the studio toolbar and select **Process**. A new process will be added in the currently selected process library folder.



- Select a process library folder and click **New process**.



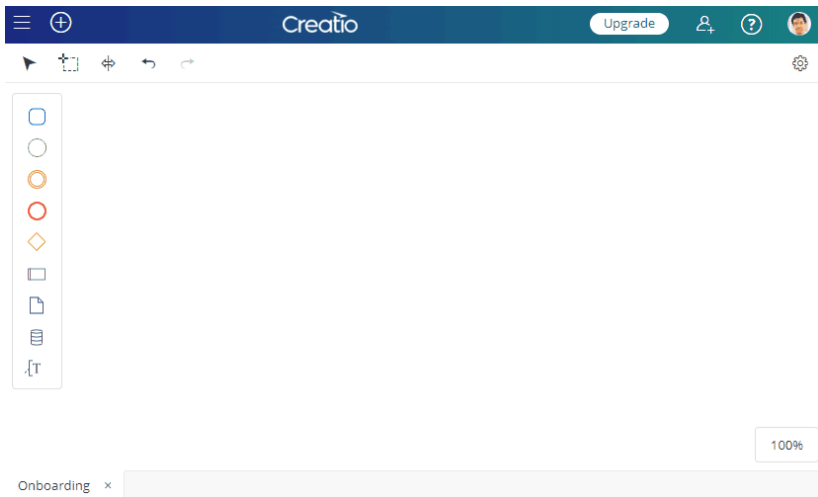
- In a process library folder menu, click **⋮** and select **New process**.



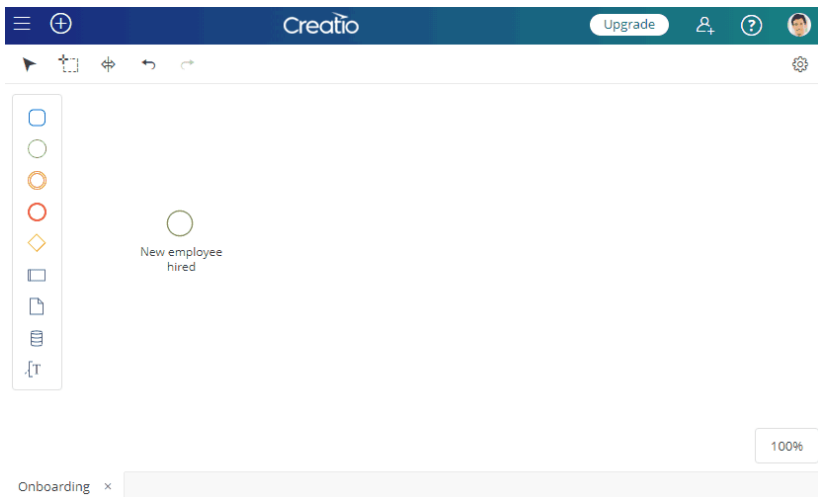
Adding elements

There are two ways of adding process elements in Studio Creatio, free edition:


- Drag&drop an element from the element toolbar.

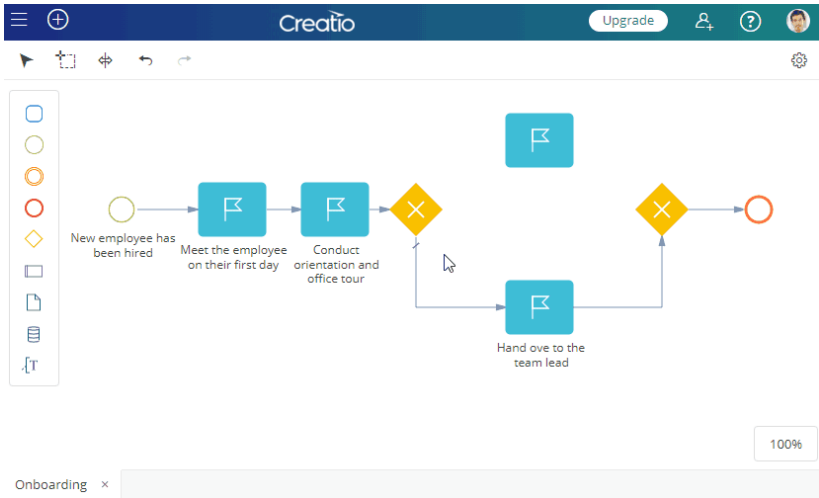


- Drag&drop an element from any element on the diagram. This will add the corresponding new element, connected to the previously selected element with a sequence flow.



Adding flows

To connect two elements on the diagram with a **flow**, click the first element, click  **flow** in the element context menu, then drag the flow to the second element. After the new flow has been added, you can change its position on the diagram, and the flow type (conditional or default).




Changing element type

The **process element toolbar** and **process element context menu** contain general categories of elements: action, start/intermediate/end event, gateway, flow.

To add specific process element first add an element of the corresponding category (e.g., "action"), and then set its type (e.g., "User action").

To change an element type:

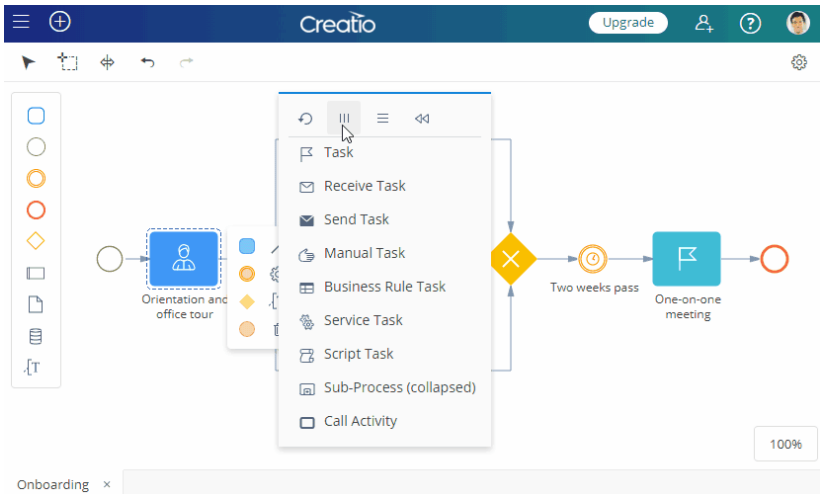
1. Select the element.
2. Click  in its context menu.


3. Select the needed type from the menu that appears.

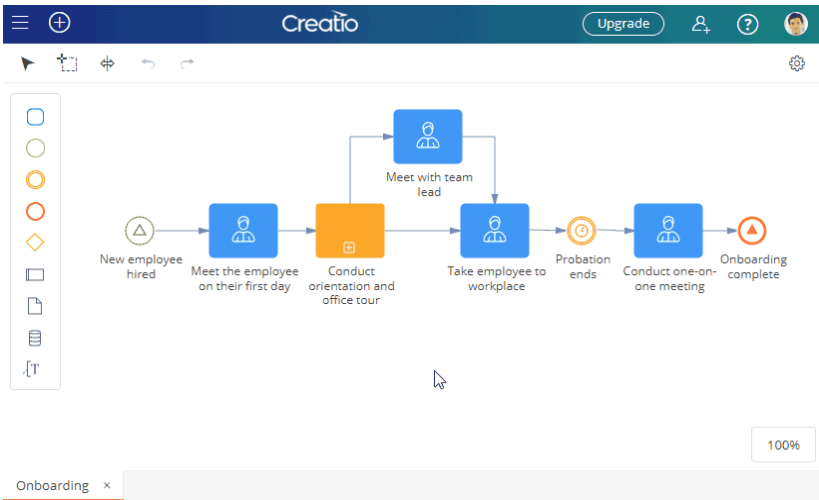


In the similar fashion, you can change types of other elements:

- To add loop, parallel, sequential or compensation marker to an activity – select it, click in its context menu and select the needed marker.



- To add a **conditional flow** or **default flow**, add a **sequence flow**, select it, click  in its context menu and change its type to the needed one.



Adding descriptions

Use the **setup area** of the Process Designer to change process or element **name** and add **description**, which is vital for [documenting business processes](#).



Make sure that you **populate description for the process and each of its elements**. Description normally explains what happens when the element is executed as part of the process flow.

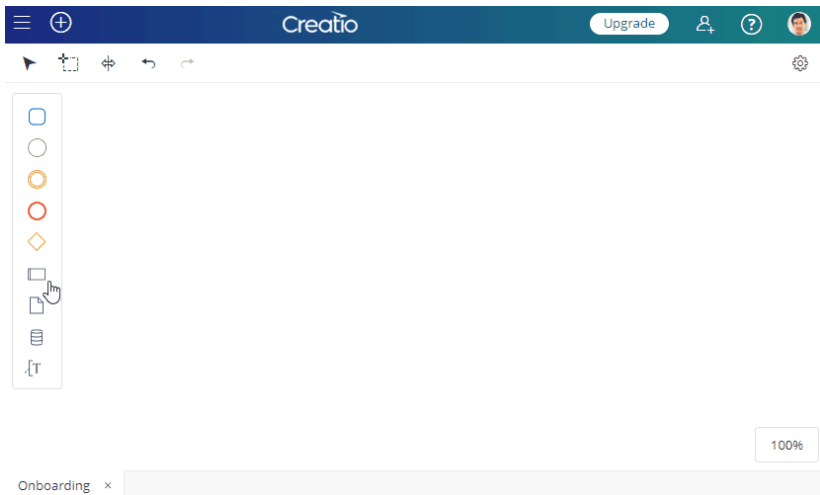
There are two ways of opening the setup area:



- Double-click an element to open its **setup area**. If you double-click empty process designer **working area**, process setup area will open.
- Click  in the top right side of the Process Designer window to open the **setup area** of the currently selected element. If no elements are selected, process setup area will open.

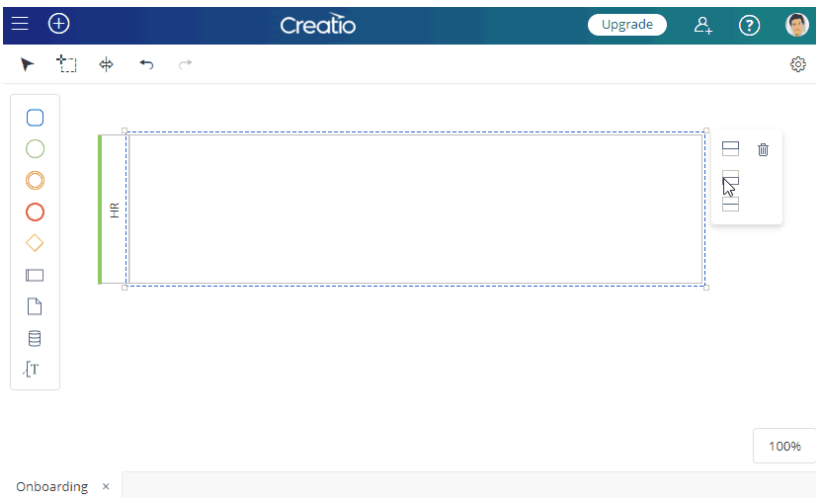
Adding swimlanes


Swimlanes are means of organizing elements on the diagram. They usually denote different process participants, as well as organize and categorize activities. You can add swimlanes at any time, but it is generally recommended to map them first, and add other elements on the needed pool/lane, instead of rearranging existing process steps.

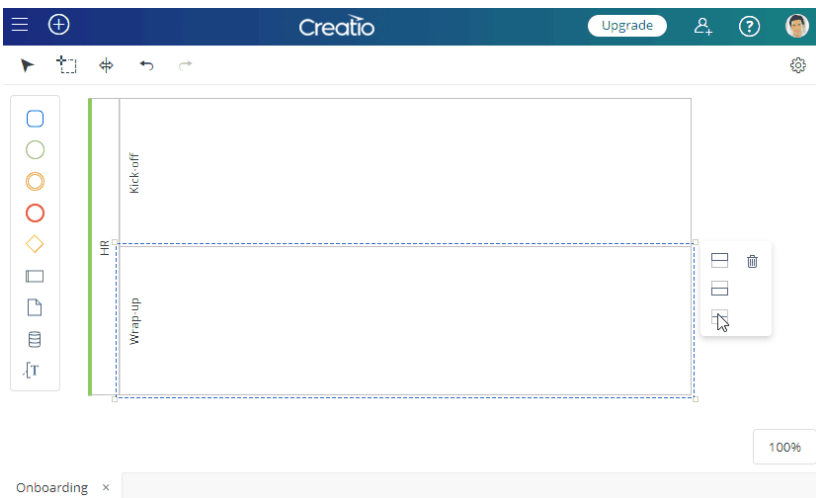
- To add a  **pool**, drag it to the designer working area from the **element toolbar**.



- To add a lane, select a **pool** on the diagram and click  or . A lane will be added to selected pool in the corresponding position.



- To split a **lane** in two, select the lane and click .



Import / Export

You can create a new business process by importing a *.bpmn file. You can also export any business process in Studio Creatio, free edition as a *.bpmn file, or an *.svg or *.png image.

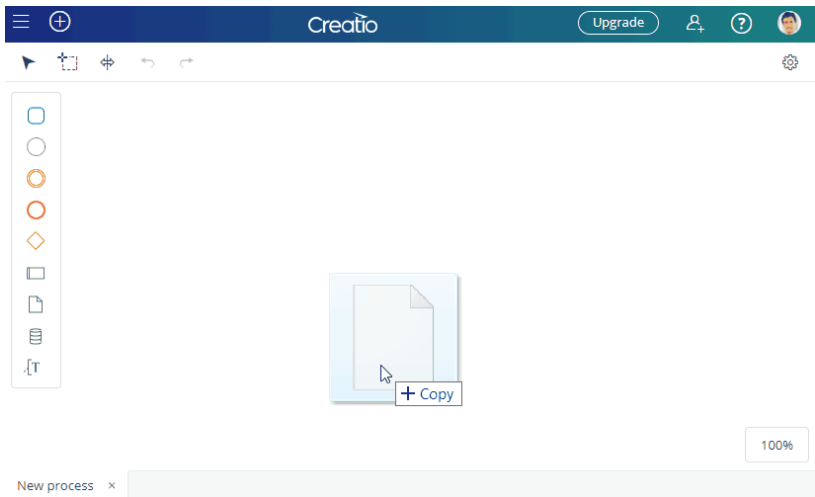
NOTE

A *.bpmn file is an XML document, describing a BPMN diagram. The XML structure corresponds to the one documented in [BPMN 2.0 specification](#). This universal format is supported by most business process editors and is perfect for migrating BPMN processes between different systems.

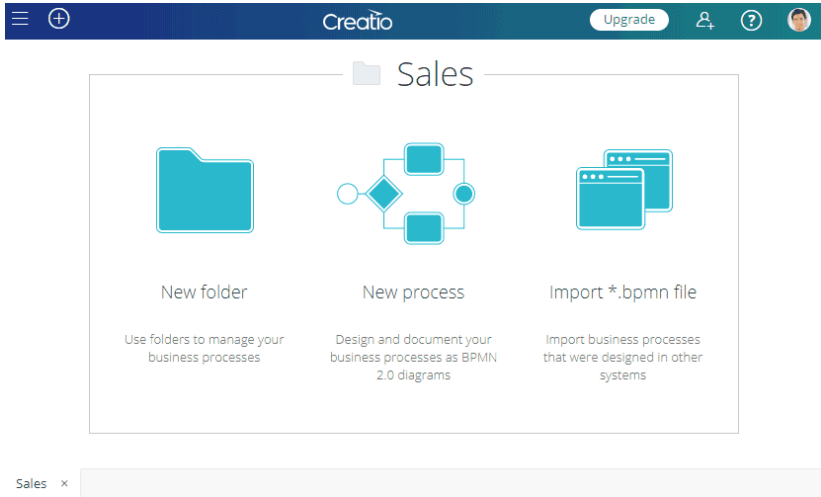
Importing *.bpmn files

There are several ways you can import a business process from a *.bpmn file.

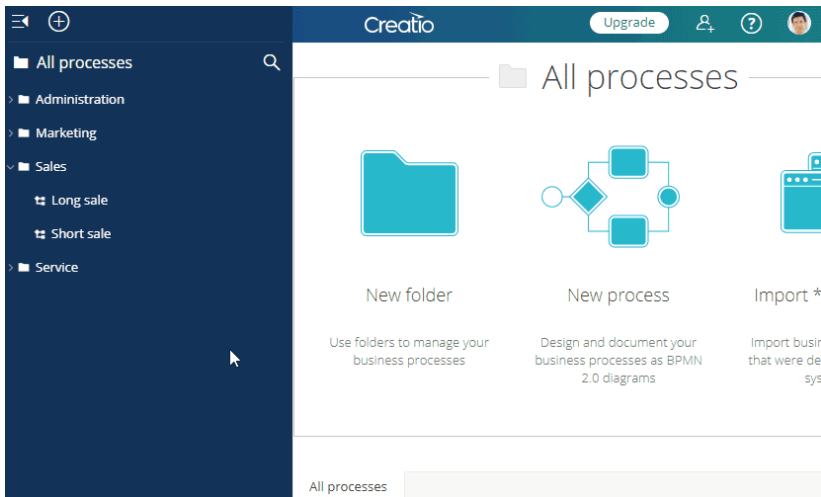
- Drag&drop a *.bpmn file on the Process Designer working area.




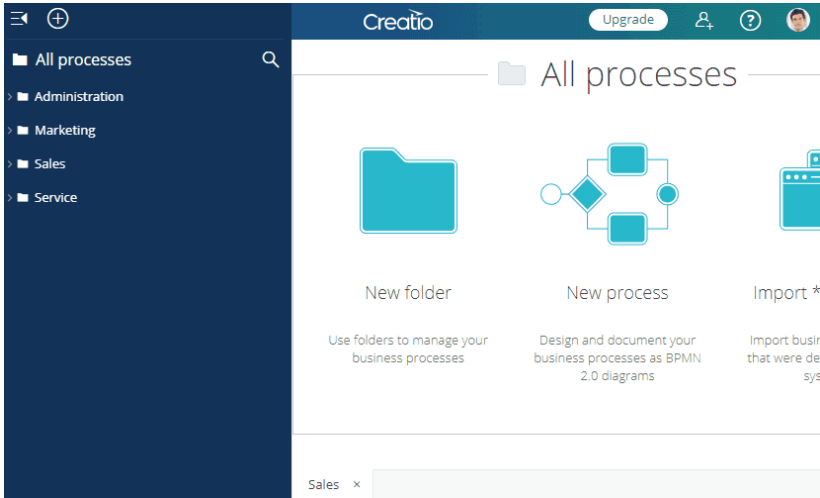
- Select a folder and click **Import *.bpmn file**. Locate and select a local *.bpmn file to import.




- Select a folder in the process library, click  and select **Import from *.bpmn**. Locate and select a local *.bpmn file to import.

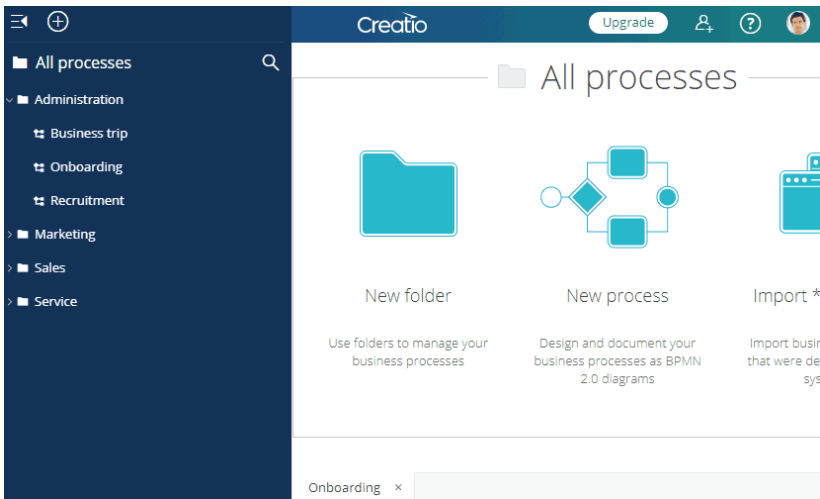


- Click  in the studio toolbar and select **Import**. Locate and select a local *.bpmn file to import. As a result, a new process will be imported in the folder currently selected in the process library.




Exporting business processes

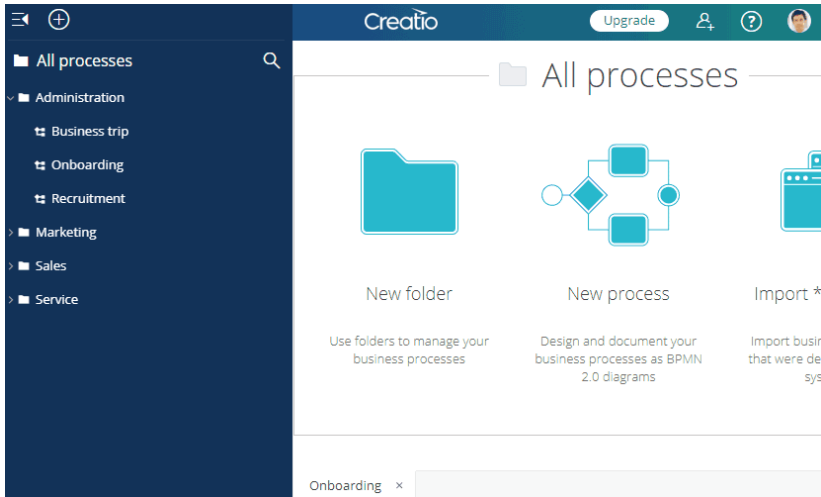
To export a business process, select it in the process library, click  and select **Export to *.bpmn**, **Export to *.svg** or **Export to *.png**. This action will download corresponding file via your browser download UI.



Documentation

Proper communication of a business process to its users is key to its successful implementation. For each business process you create in Studio Creatio, free edition, you can export a document that describes the process flow. The document is exported in PDF and contains descriptions of the process elements organized in an easy-to-read workflow – perfect for introducing the business process to the users and employee training.

To generate a process document, select the process in the process library, click  and select **Download documentation**. This action will download corresponding file via your browser download UI.



Make sure that you document the process and its elements in studio before exporting process documentation:

1. **Process name.** Give your process a name that describes its goal. In general, a process name describes a single instance of the process, e.g., “Long sale”, “Shipment of goods”, etc.
2. **Process description.** Enter process description. In addition to explaining the process purpose, make sure to include any notes that are not covered by the process diagram itself. The process description will make the introduction to the process document.
3. **Process element names and descriptions.** Name each process element properly, according to BPMN notation. Make sure that process element names are as brief and to-the-point as possible; avoid articles, pronouns, and precisions, e.g., “Conduct meeting” instead of “Conduct the scheduled meeting with the customer”.

Here are some BPMN 2.0 process element naming conventions and recommendations:

Process elements	BPMN naming convention and documenting suggestions
Activities	<p>Activity name should start with a verb that best describes the actual activity, e.g., "Call customer".</p> <p>Activity description should detail the actions that are performed. e.g., "The manager calls the customer and appoints the first meeting." Based on these descriptions, the process users will determine what they should do to advance the process.</p>
Events	<p>Event name should consist of the event object and a past participle, e.g., "Employee hired". Timer and conditional events may break this rule, if this is required to specify the corresponding timing (e.g., "Every day, at 10:00AM") or condition (e.g., "Yes", "Correct", etc.) correspondingly. Make sure that paired intermediate events (catching and throwing messages/signals) have identical names.</p> <p>Event description should include detailed information about the event: what happens, how it happens and/or when it happens. Based on these descriptions, the process users will determine whether the event has happened yet.</p>
Gateways	<p>Gateway name depends on the type of the gateway. Diverging exclusive gateway name is a question, whose answers are represented by outgoing conditional flows, e.g., "Time slot available?". Other types of gateways (diverging or converging) do not require a name.</p> <p>Gateway description should depict the behavior of the process flow at the corresponding gateway, e.g., "The process flow branches, depending on whether the time slot is available" (diverging exclusive gateway).</p>
Flows	<p>Flow name for conditional flow names must depict the condition under which the corresponding flows are activated. Regular sequence flows, as well as default flows should not be named.</p> <p>Flow description is optional and is not included in the process documentation.</p>
Artifacts	<p>Data object name contains the "business object" name, e.g., "Account profile".</p> <p>Text annotation contains comments to specific process element and can be in any form.</p>
Swimlanes	<p>Lane name must correspond to a role of the business process participant. The process documentation will list lanes as "Participants".</p>

Collaboration

To **collaborate** on business process design in Studio Creatio, free edition, you need to invite people to your team or join someone else's team. Business process design teams are represented with "organization accounts".

Organization accounts

Once you complete your registration in Studio Creatio, free edition, you will have a user profile and an organization account.

- **User profile** is your [personal account](#), that you use to log in to Studio Creatio, free edition.
- **Organization account** is how you share business processes and collaborate during the process design.

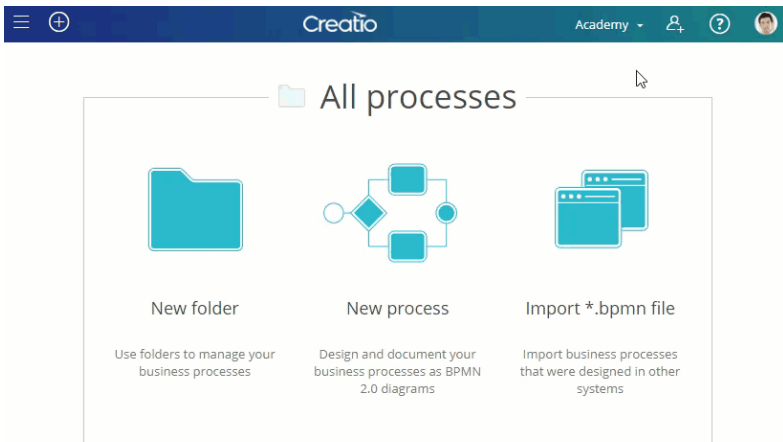
By default, every new user, who registers in Studio Creatio, free edition on their own (as opposed to being invited to someone's account) has an organization account. You can be invited to participate in other organization accounts by receiving an invite from your colleagues or associates. If you accept, a new organization will be displayed in **the list of organization accounts**.

NOTE

If you register in Studio Creatio, free edition on your own, the name of the created organization account defaults to your email address.

Switching organization accounts

To switch between your organization accounts, click the name of the organization on the toolbar and select a different organization from the list.



NOTE

You will be able to resume working where you left off if you switch organization accounts, i.e., your open tabs and processes will remain open.

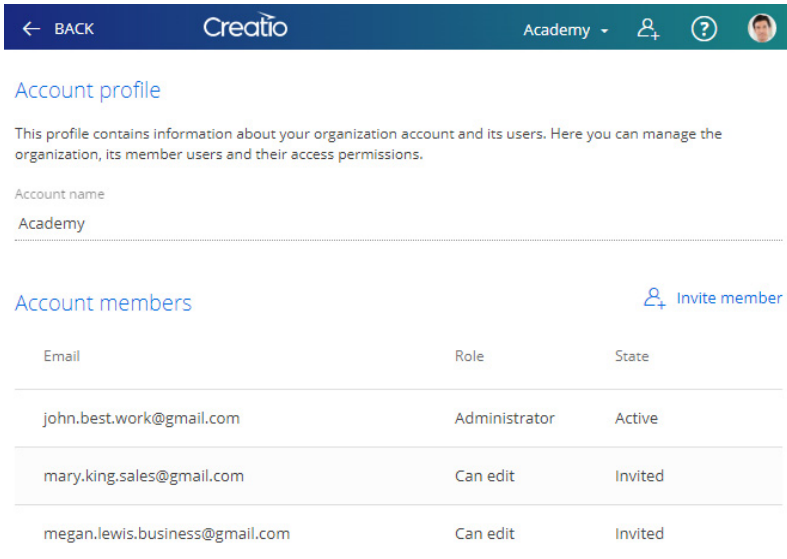
Managing organization accounts


You can rename your organization, as well as invite or remove users on the "Manage account" page.

1. Click on the organization account name and select **Manage account** in the menu.



2. Account profile page opens.



- a. To rename your team in Creatio studio, type in the new name in the **Account name** field.
- b. To add more users, click **Invite member** and type in their email.
- c. To kick a user from your team, click  next to the user's email.

NOTE

If you kick a user from your team, they can sign up again on their own. However, they will no longer be able to see or work with your team's processes and folders.

Users

There are two types of users in an organization account:

- **Can edit.** Any user who has been **invited** to the account by its administrator and accepted the invitation becomes the editor user. These users can create, view, edit and delete all folders and business processes.
- **Administrator.** Each user who signs up to Studio Creatio, free edition on their own (without an invitation), becomes an administrator user. In addition to all “Can edit” privileges, administrator users can manage organization accounts.

If the user who initially created the organization deletes their user account, other team members will be able to continue their work on the organization’s business processes.

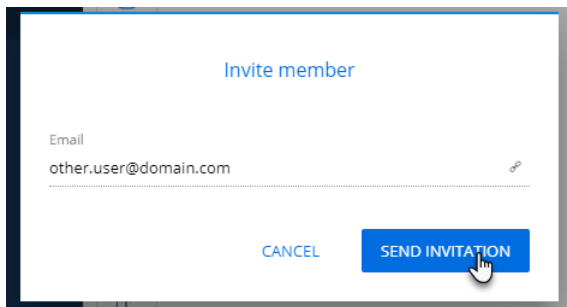
Inviting users to your organization account

The users you invite to your organization account have access to your business processes, i.e., can edit and document them. As an administrator, you can invite users to the currently selected organization directly from the toolbar.

1. Click the  icon.



2. User invitation pop-up opens. Enter the email address of the user who you wish to invite and click **Send invitation**.



As a result, Studio Creatio, free edition will send a sign-up invitation to the entered email address. The invitation will display in your organization account settings as a new user with the “Can edit” role in the “Invited” state.

If the user accepts the invitation and signs up, their state will change to “Active”.

NOTE

You can only invite new users if they have not signed up for Studio Creatio, free edition previously.

All changes to organization accounts are saved in real time.

Keyboard shortcuts

Key	Function
Ctrl + A	Select all elements on the Process Designer working area.
Ctrl + C	Copy selected element(s) on the Process Designer working area to clipboard.
Ctrl + V	Paste element(s) from clipboard to the current position of your cursor on the Process Designer working area.
Del	Delete selected element(s) on the diagram.
Ctrl + Z	Undo last action on the Process Designer working area.
Ctrl + Y Ctrl + Shift + Z	Redo last action on the Process Designer working area.
Drag with left mouse button	Navigate the canvas in the Process Designer working area.
Shift + drag with left mouse button	Select multiple elements on the diagram via selection box (similar to the "Lasso" tool).
Ctrl + left click	Select multiple elements by clicking on them. If you left click a folder or process in the process library while holding down the Ctrl key, that folder or process will open on a new browser tab.
Mouse wheel	Scroll the canvas in the Process Designer working area up/down.
Shift + mouse wheel	Scroll the canvas in the Process Designer working area right/left.
Ctrl + mouse wheel	Zoom the diagram in and out. If you place the mouse cursor over the diagram, only the diagram will be zoomed.
Ctrl + Enter Shift + Enter Alt + Enter	Insert line break when entering element captions on the working area or in the setup area.