

[G-2] User manual - Governance for Creatio

- [Application installation](#)
 - [General](#)
 - [Deployment](#)
- [User-Interface - how to use application](#)
 - [Controls](#)
 - [Control UI page:](#)
 - [Control parameters](#)
 - [Control automations](#)
 - [Environments](#)
 - [How to connect new Environment](#)
 - [Connection issues](#)
 - [User Interface overview](#)
 - [General information](#)
 - [Issues tab](#)
 - [Audits tab](#)
 - [Controls](#)
 - [Actions](#)
 - [Environment controls](#)
 - [How to access Environment controls](#)
 - [Environment control page](#)
 - [Environment control parameters](#)
 - [Audits](#)
 - [Audits UI](#)
 - [On left area:](#)
 - [On a right under “Controls” tab:](#)
 - [Issues](#)
 - [Issue item](#)
 - [Governance homepage](#)
- [Implementation of control automations](#)
 - [Control: Manager assignment for employees](#)
 - [CEO job title parameter](#)
 - [Control automation](#)
 - [Business process:](#)
[G Controls Automation EmployeeManagerAssignment](#)
 - [Business process parameters](#)
 - [Elements of business process:](#)
 - [Control: Password complexity](#)
 - [Control property: password minimal length](#)
 - [Control automation](#)
- [Common business processes for automations](#)
 - [Business process: G Audits CreateIssues](#)
 - [Process parameters](#)
 - [Process flows](#)

- [Business process: G Automations BP Check SysSetting Int](#)
 - [Business process parameters](#)
 - [Process flow for getting values](#)
- [Development documentation](#)
 - [Package: G General](#)
 - [Objects](#)
 - [User tasks](#)
 - [Data](#)
 - [Package: G Creatio API](#)
 - [User tasks - default controls](#)
 - [User tasks - custom controls](#)
 - [Package: G Environments](#)
 - [Objects](#)
 - [Data](#)
 - [User tasks](#)
 - [Business processes](#)
 - [Business process: G BP Connect To Creatio Site](#)
 - [Parameters:](#)
 - [Elements](#)
 - [Business process: G BP Environments Connect](#)
 - [Parameters](#)
 - [Elements](#)
 - [Business process: G Environment BP ClearAllData](#)

Application installation

General

Governance application comes as single install package. You can install it from Creatio Marketplace using application hub.

Deployment

Governance application was design for installation on a single stand alone Environment of Creatio, but it also possible to install app to your common Creatio Environment.

Deploy as separate environment allows to isolate application from your main production instance in order to sparate business functions of employees and increase performance of automations executions.

User-Interface - how to use application

Controls

In the context of Governance applications, "Controls" refer to policies and rules that determine compliance with specific regulations or standards. To access these controls, navigate to the "Controls" section within the Governance workspace. The Governance application includes a predefined list of controls that can be applied to your Environments.

Name	Description	Type	Created
1 Password change control	Each user password should be changed regularly, values are set in control param...	User access governance	27/6/2023 9:36 P
2 Password complexity	Each user's password should follow password complexity policy, which is defined...	User access governance	27/6/2023 9:36 P
3 Self-managed employees	Controls requires no employees with self management.	Operational governance	2/28/2023 8:24
4 Manager is assigned for each employee	Control requires manager assignment for all employees	Operational governance	2/28/2023 8:28 P
5 Manager is empty for CEO	Control requires no manager assignment for employees with CEO job role	Operational governance	2/28/2023 8:00
6 Data export control	Company should restrict access for data export for employees. Data export should...	User access governance	27/6/2023 9:36 P
7 Users with system administration rights	Company should restrict and maintain access administrative access for users	User access governance	27/6/2023 9:36 P
8 Test users	Generates an issue for each user which is recognised as test	User access governance	27/6/2023 9:38 P
9 LDAP authentication	Controls LDAP authentication configuration for users	User access governance	27/6/2023 9:39 P
10 User deactivation for fired employee	Each system user should be deactivated if employee no longer works for company	User access governance	27/6/2023 9:38 P
11 User is active for employees	Each system user should be activated if employee works in company	User access governance	27/6/2023 4:57 P
12 Sensitive data access control	Each object with sensitive data should be administered by records, operations an...	Data governance	27/6/2023 9:36 P
13 System data maintenance	Add system data tables should be maintain, not needed records should be erased	Data governance	27/6/2023 9:36 P
14 Business process operational control	Company should apply governance recommendations for business process modu...	Operational governance	27/6/2023 9:36 P
15 Customisation integrity control	Controls how customisation is applied to environment	Operational governance	27/6/2023 9:36 P
16 Development features control	Development features should be disabled for production environments	Operational governance	27/6/2023 9:36 P
17 Applications integrity control	Company should maintain packages consistency according to recommendations	Operational governance	27/6/2023 9:36 P
18 Secure file upload control	Company should restrict types of files allowed to be uploaded to environment for ...	Security governance	27/6/2023 9:36 P
19 Private users access control	Access without records administration to data should be approved for portal users	Data governance	27/6/2023 9:36 P
20 Sensitive data mapping control	Each data column containing sensitive data should be marked as sensitive	Data governance	27/6/2023 9:36 P
21 Creatio updates control	Company should maintain actual Creatio version	Operational governance	27/6/2023 9:36 P

Control UI page:

As an example let's overview Password complexity control. This control checks Creatio system settings for managing password complexity.

Control: Password complexity

General info

Parameters & Automations

Name	Description	Type	Is default
1 Password minimal length	Parameters allow to set min value for MinPasswordLength system setting	System setting	<input checked="" type="checkbox"/>
2 Password minimal lowercase characters count	Parameters allow to set minimum required value for MinPasswordLowerCase	System setting	<input checked="" type="checkbox"/>
3 Password minimal numeric characters count	Parameters allow to set minimum required value for MinPasswordNumeric	System setting	<input checked="" type="checkbox"/>
4 Password minimal special characters count	Parameters allow to set minimum required value for MinPasswordSpecialCh...	System setting	<input checked="" type="checkbox"/>
5 Password minimal special characters count	Parameters allow to set minimum required value for MinPasswordSpecia...	System setting	<input checked="" type="checkbox"/>

Control Automations

Name	Description	Is default
1 Password complexity check system on	Automations checks the value of system...	<input checked="" type="checkbox"/>

On a left of the page, under General information you can find:

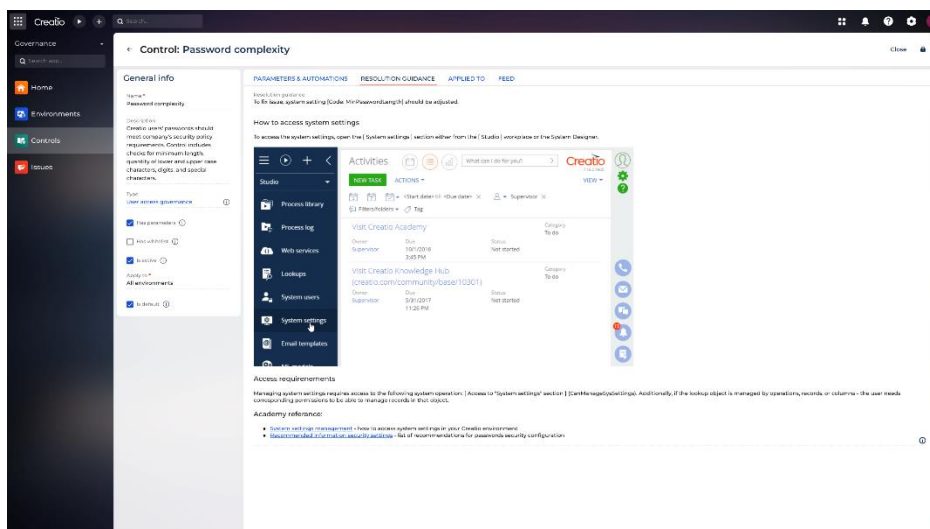
- Name - desired name for control.
- Description - short description, that will be used in Controls section.
- Type - refers to control groups, user for control organisation and filtration within registry.

- Has parameters - defines if parameters will be used within control. Parameters - are values, that could be customise for specific Environment. For example, one Environment requires minimal password length to be 10 symbols, on other Environment it required to be 8.
- Has whitelist - defines if there is a whitelist functionality for current control. Inclusion into whitelist allows to ignore issue creation.
- Is active - defines if control is active for all environment and will be applied during audit runtime process
- Apply to - refers to which environments control could be applied. It has options:
 - All environments - controls applied to all connected Envrionemnts
 - Environments Groups - controls applied to group of Environments. Useful, when you implement specific check for your Production, pre-production and development environments within a group.
 - Selected environments - controls applied to specified environments.
- Is default - defines if current control comes out of the box after application installation.

On a right under Parameters & Automations:

- Full description - field contains information about what organisation desire of control within Environment
- Created issue name - field defines the Name for new Created issues
- Issue item descriptions - each issue is a group of violations. Issue item - is specific violation. Issue item description helps user to understand what fields are represented in Issue item.
- Parameters configuration guidance - instruction for user for configuration parameters and it's values.
- Controls parameters - list of configurable parameters within a control
- Control automations - list of automations that being executed during audit process
- Whitelist guidance - user instruction for adding new item into whitelist

On a right under Resolution Guidance:



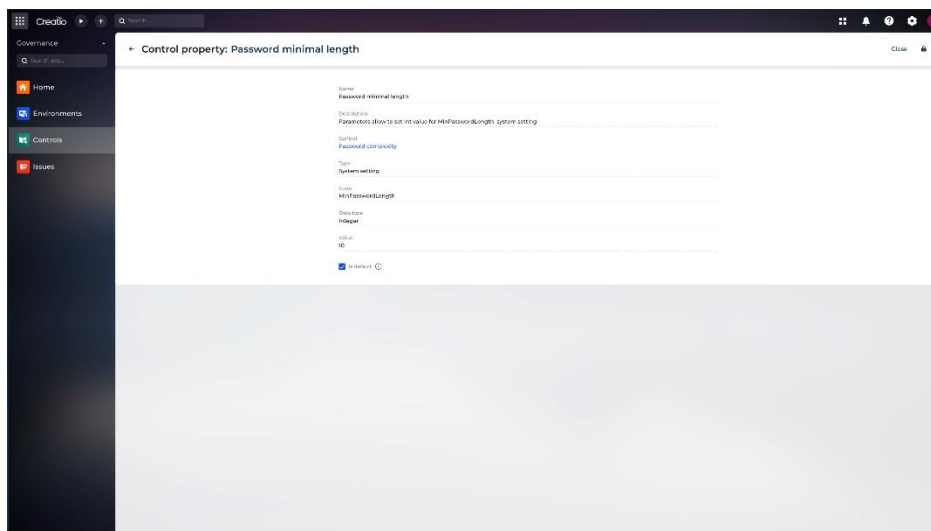
This field allows to add user instructions of what to do, in order to resolve specific issue and its items. This information will be displayed for specific issue item.

On a right under Applied to tab:

- Business rules display dynamic content, based on “Apply to” filed under General info
- Allows to add environments groups
- Allows to add specific environments

Control parameters

Control parameter - configurable parameter for control.



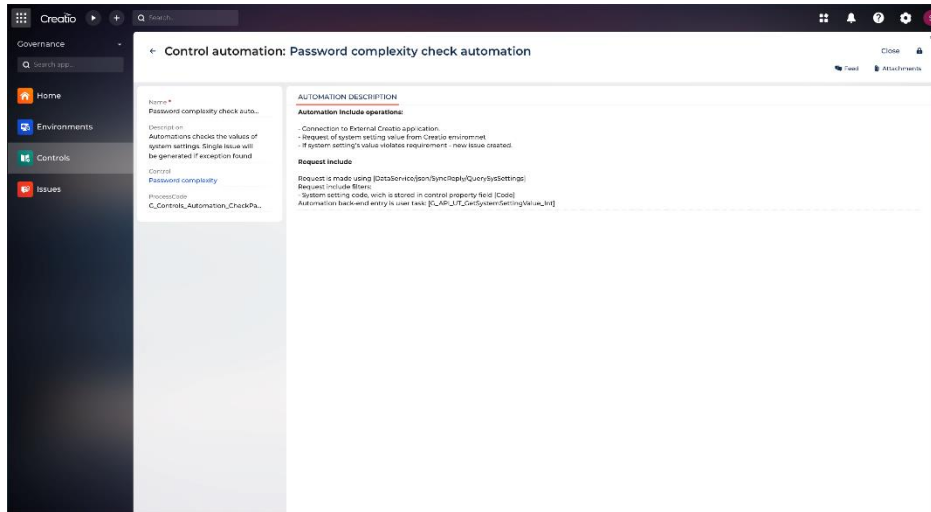
There are fields on control property page:

- Name - desired name for control parameter
- Description - description of purpose of current parameter
- Control - link to control
- Type - is what current target of parameter in Creatio Environment
 - System setting - refers to system setting
 - System operation - refers to system operation within Creatio
 - Value - refers to custom value of parameter
- Code - relates for code, which refers the code of Environment component
- Data type - allow to specify data type of parameter
- Value - defines a controlled value of parameter.

Control automations

Control automations - are automatic procedures lunched during audit process for specific control. Goal of automation is to run process during which data from external environment will be

received and checked. If violation found - new issue will be created within business process, which is linked to automation



Description of fields:

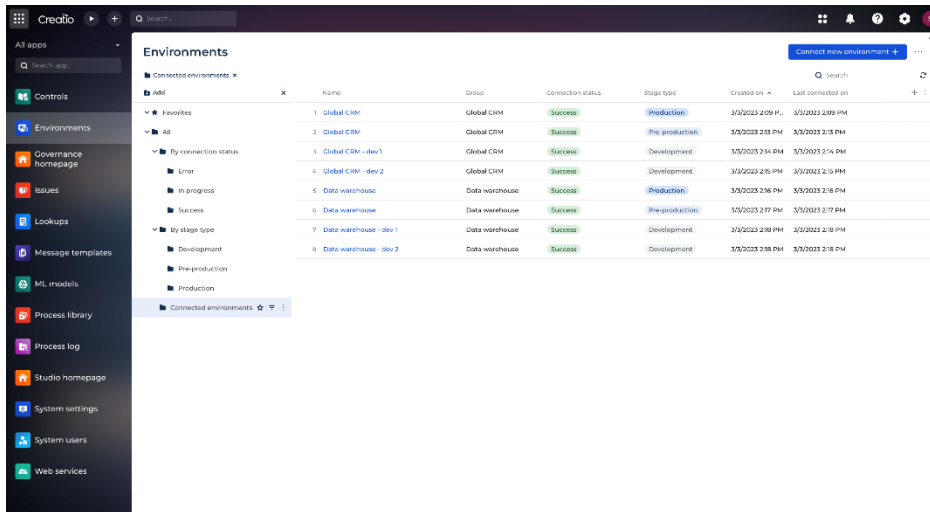
- Name - desired name for control automation
- Description - short description of automation procedure
- Control - link to Control
- ProcessCode - code of business process, that will be launched during automation execution
- Automation description - full description of what is done on a back-end of automation.

Environments

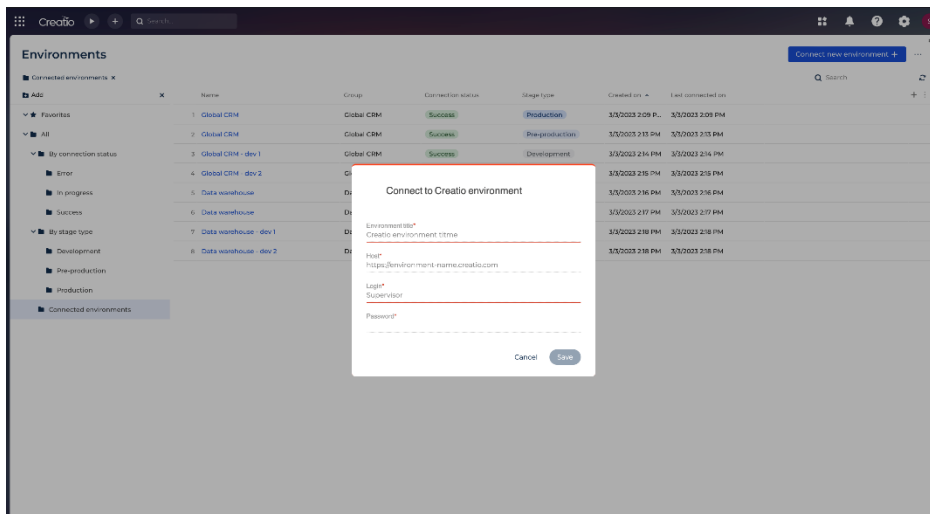
Environment in the context of the Governance application refers to an instance of the Creatio platform that is deployed in the cloud or on-site.

How to connect new Environment

To add new Creatio environment you can click on action "Add new environment" in Environments section.



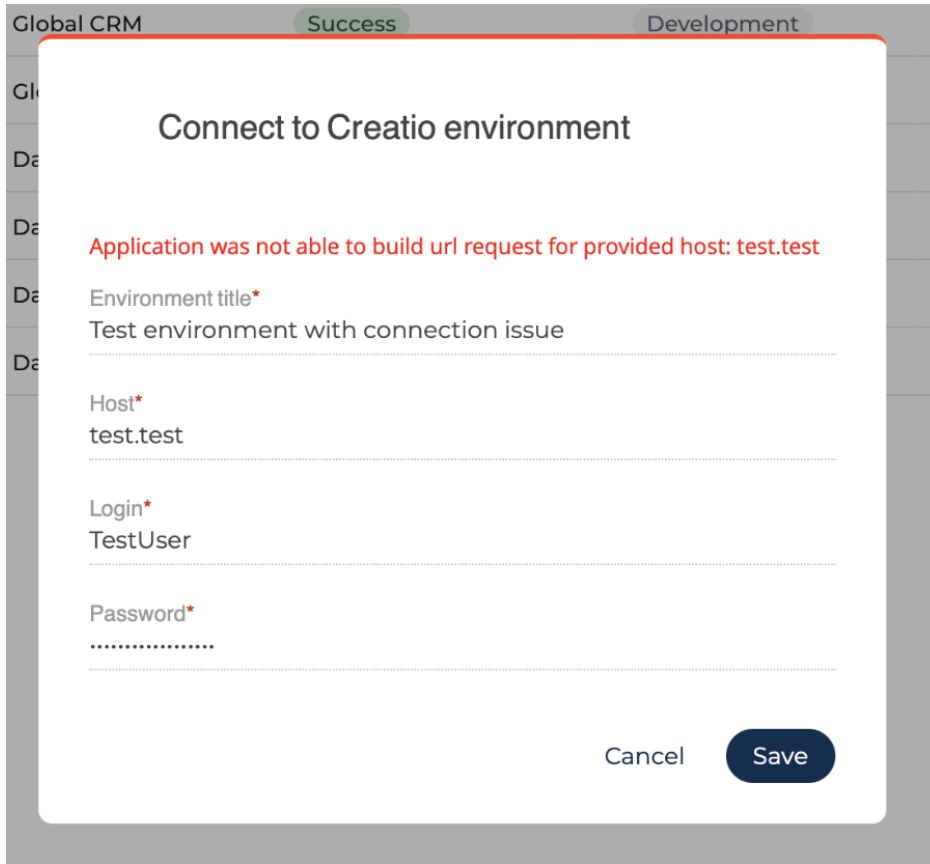
You will see a modal window with required fields:



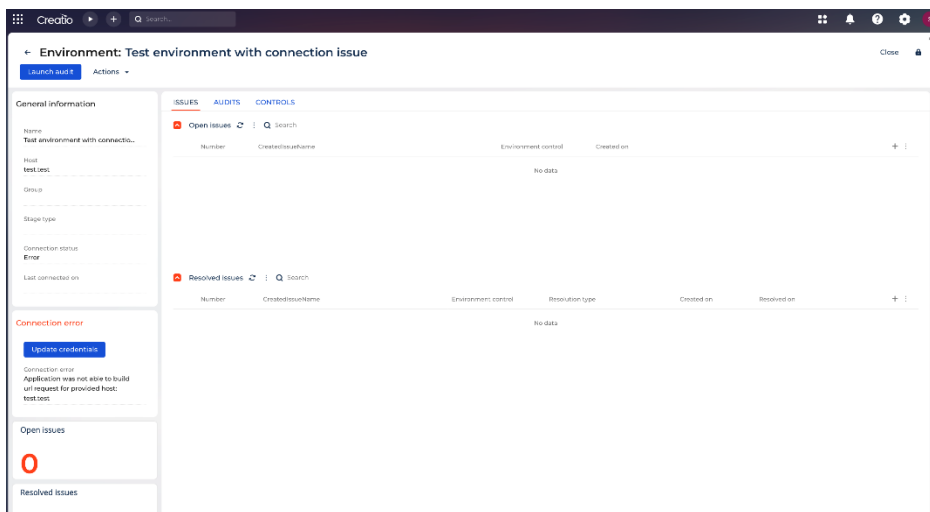
- Environment title - specify desired name for Environment.
- Host - web address by which governance application will be able to establish connection
- Login - user login
- Password - user password

Connection issues

In case Governance application faced connection issues - short description will be displayed in modal window



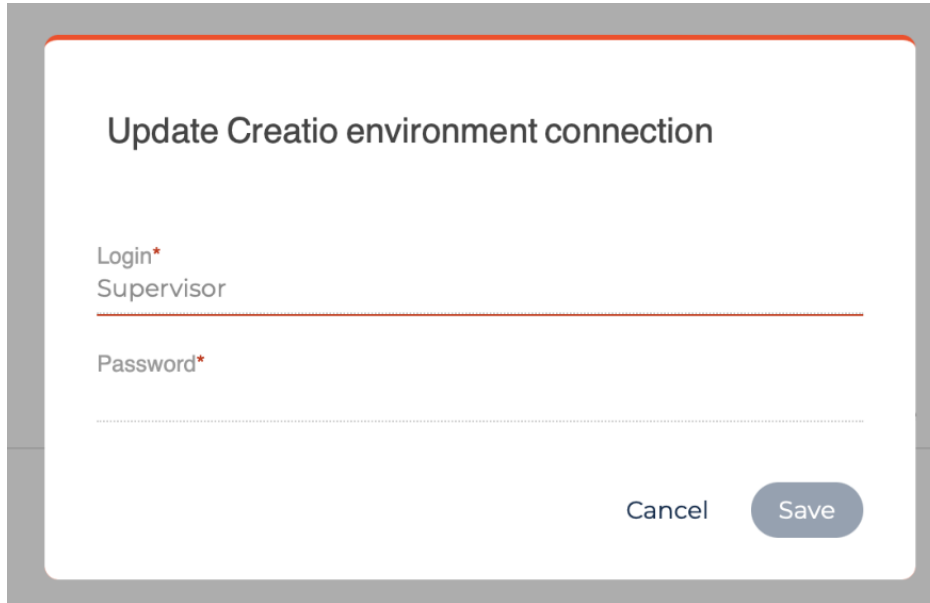
In case connection step was abandoned - this issue information is still accessible in Environment page.



If you need to modify host address, you can change the value in UI

If you need to Update credentials for user connection - you can click on Update credentials.

If you will do so, new modal window will be pop-up.



The image shows a modal window titled "Update Creatio environment connection". It contains two input fields: "Login*" with the text "Supervisor" and "Password*". At the bottom right, there are two buttons: "Cancel" and "Save". The modal has a white background with rounded corners and is set against a grey background.

User Interface overview

You can navigate to environment by clicking on a record in Environment section

Environments

Connect new environment +

Search

Name	Group	Connection status	Stage type	Created on	Last connected on
1 Global CRM	Global CRM	Success	Production	3/3/2023 2:09 PM	3/3/2023 2:09 PM
Open	Global CRM	Success	Pre-production	3/3/2023 2:16 PM	3/3/2023 2:16 PM
Delete	Global CRM	Success	Development	3/3/2023 2:16 PM	3/3/2023 2:16 PM
5 Data warehouse	Data warehouse	Success	Development	3/3/2023 2:16 PM	3/3/2023 2:16 PM
6 Data warehouse	Data warehouse	Success	Pre-production	3/3/2023 2:17 PM	3/3/2023 2:17 PM
7 Data warehouse - dev 1	Data warehouse	Success	Development	3/3/2023 2:18 PM	3/3/2023 2:18 PM
8 Data warehouse - dev 2	Data warehouse	Success	Development	3/3/2023 2:18 PM	3/3/2023 2:18 PM

Environment: Global CRM

Launch audit Actions Save Cancel

Open issues

30

Resolved issues

30

General information

Name: Global CRM

Host: https://application.terram.com

Group: Global CRM

Stage type: Production

Connection status: Success

Last connected on: 3/3/2023 8:04 AM

ISSUES AUDITS CONTROLS

Issues by date

Open issues

Number	Created issue name	Environment control	Created on
1	I-005338		2/22/2023 12:00 AM
2	I-005331		2/23/2023 12:00 AM
3	I-005333		2/26/2023 12:00 AM
4	I-005445	Password complexity setting is lower than recommended minimum EC-002647	3/30/2023 8:04 AM
5	I-005441	Password change policy violates recommended configuration EC-002648	3/30/2023 8:04 AM

Resolved issues

Number	Created issue name	Environment control	Resolution type	Created on	Resolved on
1	I-005332			3/2/2023 12:00 AM	3/2/2023
2	I-005334			3/2/2023 12:00 AM	2/21/2023
3	I-005336			3/2/2023 12:00 AM	2/24/2023
4	I-005335			3/2/2023 12:00 AM	2/23/2023

General information

General information

Name

Global CRM

Host

https://application.tscrm.com

Group

Global CRM

Stage type

Production

Connection status

Success

Last connected on

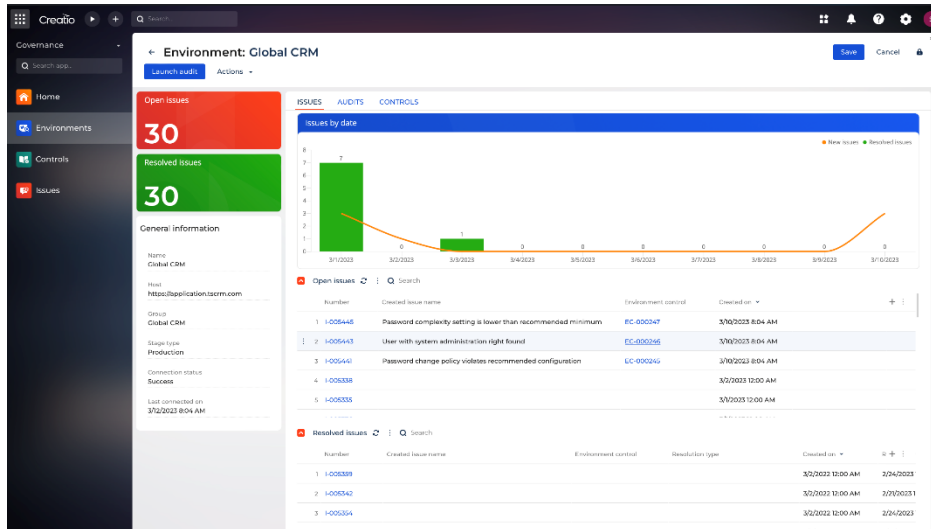
3/12/2023 8:04 AM

Includes information:

- Name - specified desired name for Creatio instance
- Host - web address of Creatio instance
- Group - this is lookup field for grouping your environments by its functionality. For example you may have production, development, pre-production instances and you would like to apply same audits and controls to all Environments within a group.
- Stage type - defines stage type such as: production, pre-production and development. Based on selected values - issue priorities will be set during audit process

- Connection status - defines if connection status. This could be Success or Error
- Last connected on - last date, when governance application was able to connect to Environment

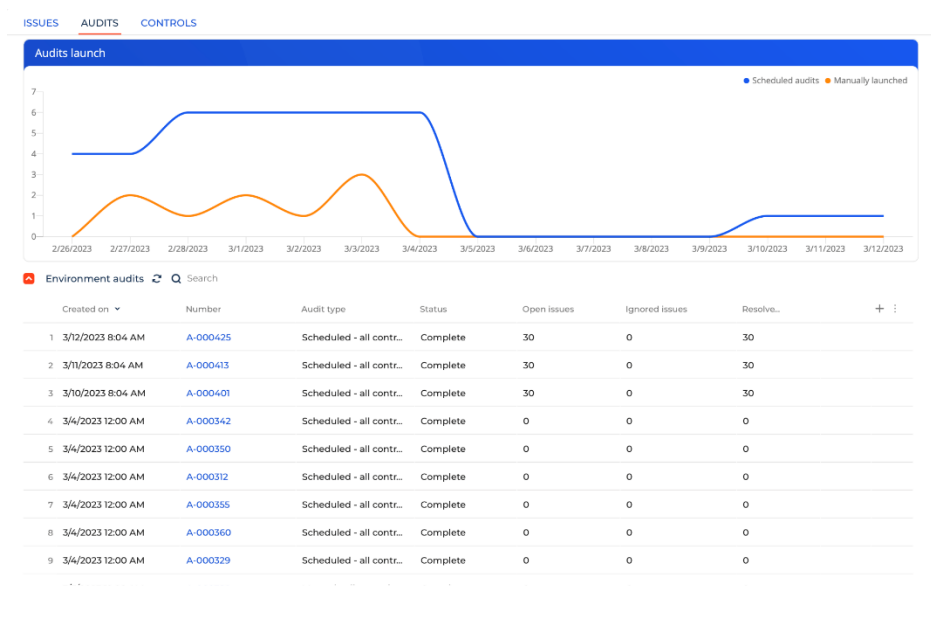
Issues tab



Issues - are found problems on your Environment

There are two lists within tab for: open issues and resolved issues.

Audits tab

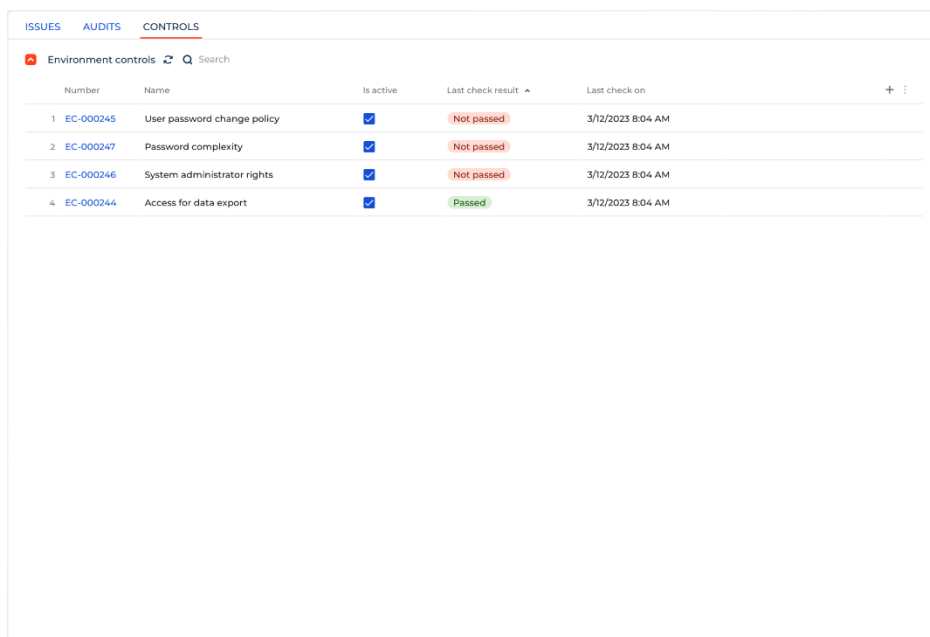


Audits contain a list of launched audits for current environment. During the audit automation checks each control for selected environment. If some violations of rules will be found - new issue will be generated.

Here are some important fields within detail:

- Audit type - this the type of audit launch. It could be:
 - Scheduled - means that audit was initiated by schedule, for example ones a day
 - Manual - all controls - means audit was initiated by specific user manually.
 - Manual - specific controls - means audit was initiated for selected control.

Controls



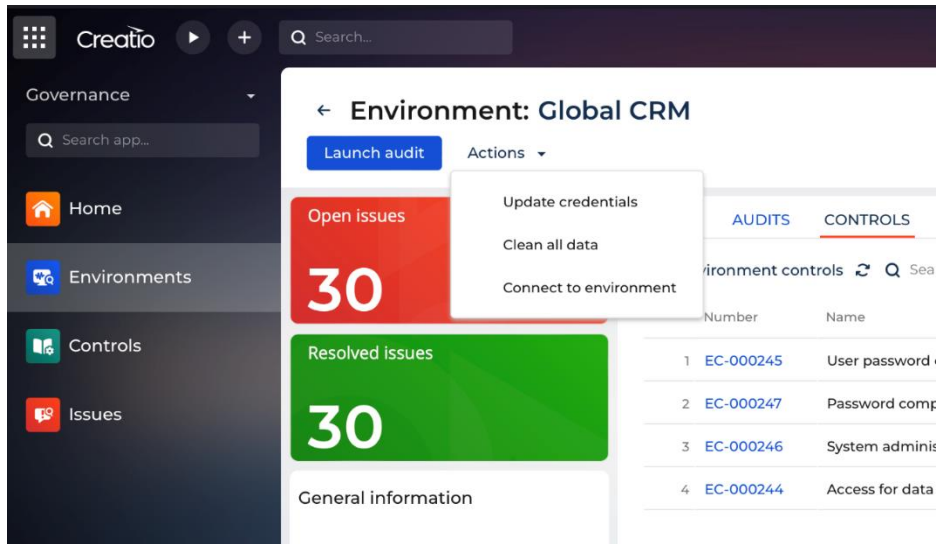
Number	Name	Is active	Last check result	Last check on
1 EC-000245	User password change policy	<input checked="" type="checkbox"/>	Not passed	3/12/2023 8:04 AM
2 EC-000247	Password complexity	<input checked="" type="checkbox"/>	Not passed	3/12/2023 8:04 AM
3 EC-000246	System administrator rights	<input checked="" type="checkbox"/>	Not passed	3/12/2023 8:04 AM
4 EC-000244	Access for data export	<input checked="" type="checkbox"/>	Passed	3/12/2023 8:04 AM

Refers to controls applied to specific Environment. During the launch of audit - Active controls will be filtered by “Apply to“ setting of control and added to Environment. This will allow to modify control parameters, whitelists or disable control on Environment level.

Detail has fields:

- Is active - defines if specific control is active for current environment
- Last check result - displays the last check result of control.
 - Passed - means no violations found
 - Not passed - means violations found and issues created
 - Scheduled - means this control is scheduled for audit check
- Last check on - the date time of last control check

Actions



In top bar of the Environment page you can find:

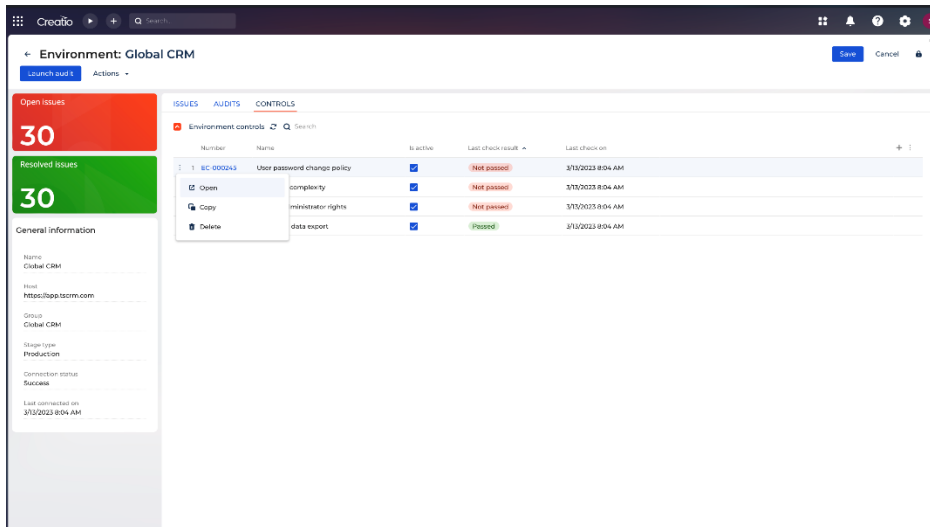
- Launch audit - by clicking this button - new audit will be created and applied to Environment
- Actions
 - Update credentials - pop-up will be shown in order to update login and password for Environment
 - Clean all data - erases all environment data, except whitelists
 - Connect to Environment - governance application tries to connect to Environment

Environment controls

Environment control - is the control applied to specific Environment. You are able to define, if control is applicable and active for specified Environment, assign specific control parameters for current Environment.

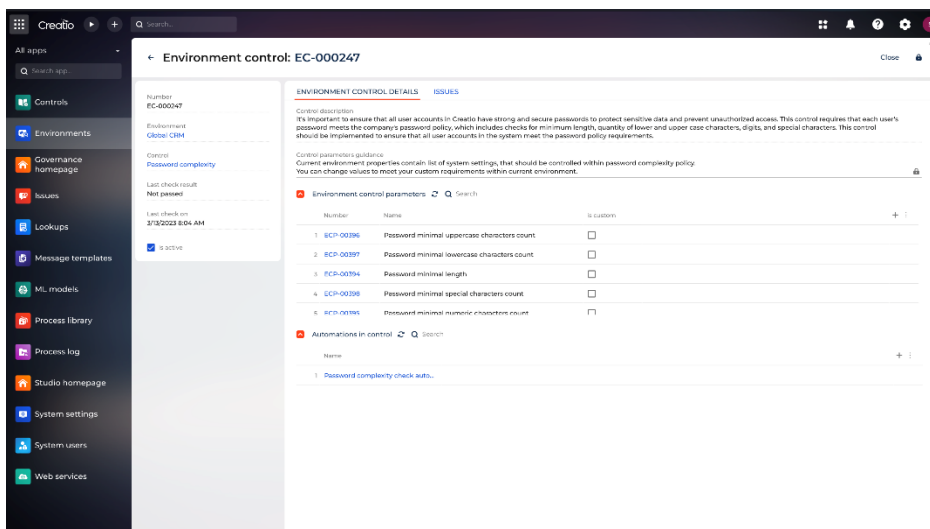
How to access Environment controls

In order to access Environment controls: open Environment, navigate to Controls and open a record. In order to open Environment control, click on “Number” caption



Here on Controls tab you are able to disable specific control for current Environment, by unchecking "Is active" checkbox in the detail.

Environment control page



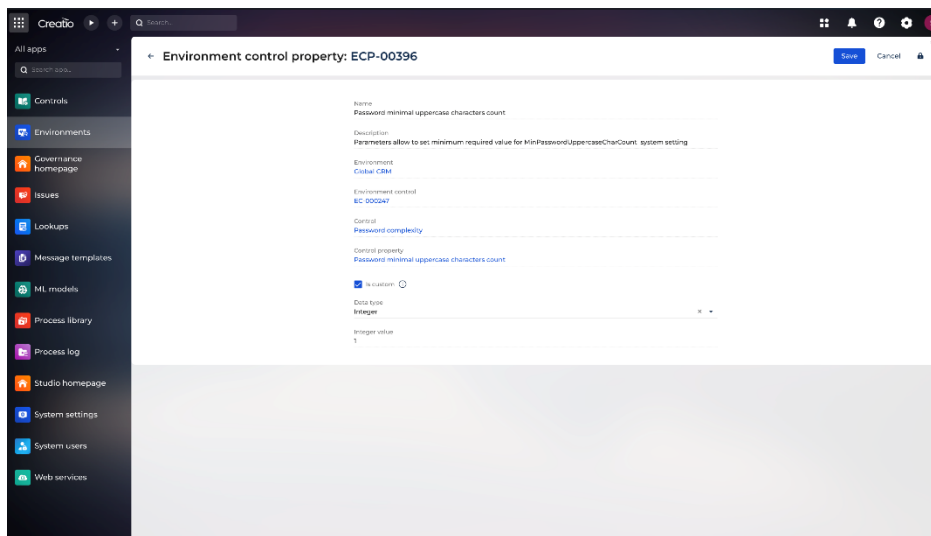
On a left there are fields:

- Number - autogenerated display name for applied control to Environment
- Environment - Environment to which current control is applied
- Control - Link to global control within controls section
- Last check result - the last result of control check during last audit. Possible values are:
 - Scheduled - control is scheduled for execution
 - Not passed - check of control was not successful
 - Passed - check of control was successful
- Last check on - date time of last check

On a right under Environment control details:

- Control description - field is taken from control description, field displayed as linked field. Provides an overview of control.
- Control parameters guidance - Guidance of how configure Control parameters
- Environment control parameters - List of configurable parameters for current Environment. “Is custom” checkbox defines if parameter has specific value for current Environment.
- Automation in control - link to automations defined in global control under “controls” section

Environment control parameters



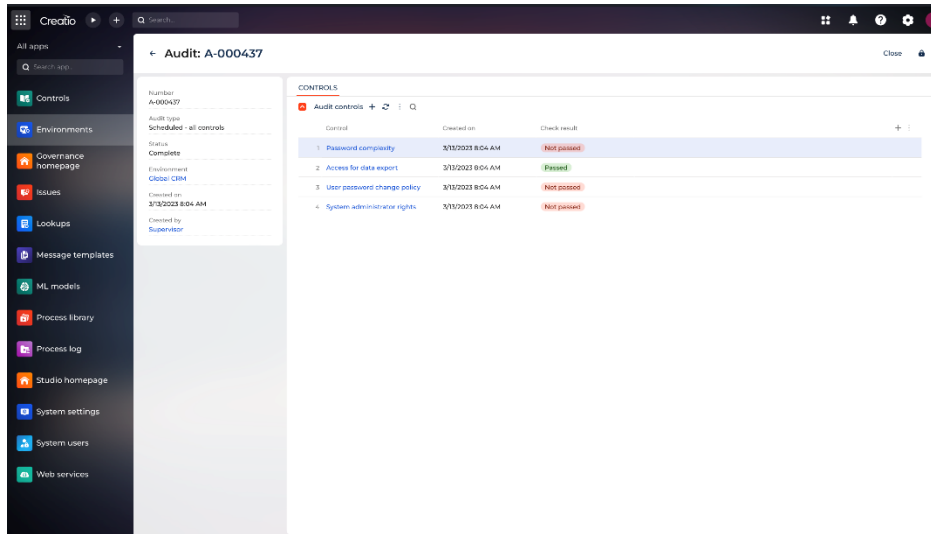
This page has the same logic as control parameters. In order to define value for specific parameter within Environment - “Is custom“ checkbox should be checked. After, value customisation is accessible.

Audits

Audit represent a launch of control checks within specific environment.

Audits accessible via Environment page under Audits tab.

Audits UI



On left area:

- Number - autogenerated number of launched audit for Environment
- Audit type - represents types of launched audit:
 - “Manual - all controls” - execution of all assigned controls within environment
 - “Manual - specific control” - execution of specific controls within Environment. Added on action “Check if resolved“ from Issue or Issue-item.
 - “Scheduled - all controls“ - execution of all controls on a daily basis.
- Status - represent a progress status for audit execution
- Environment - to which environment current audit was applied to
- Created on - data time of audit launch
- Created by - user which created current audit.

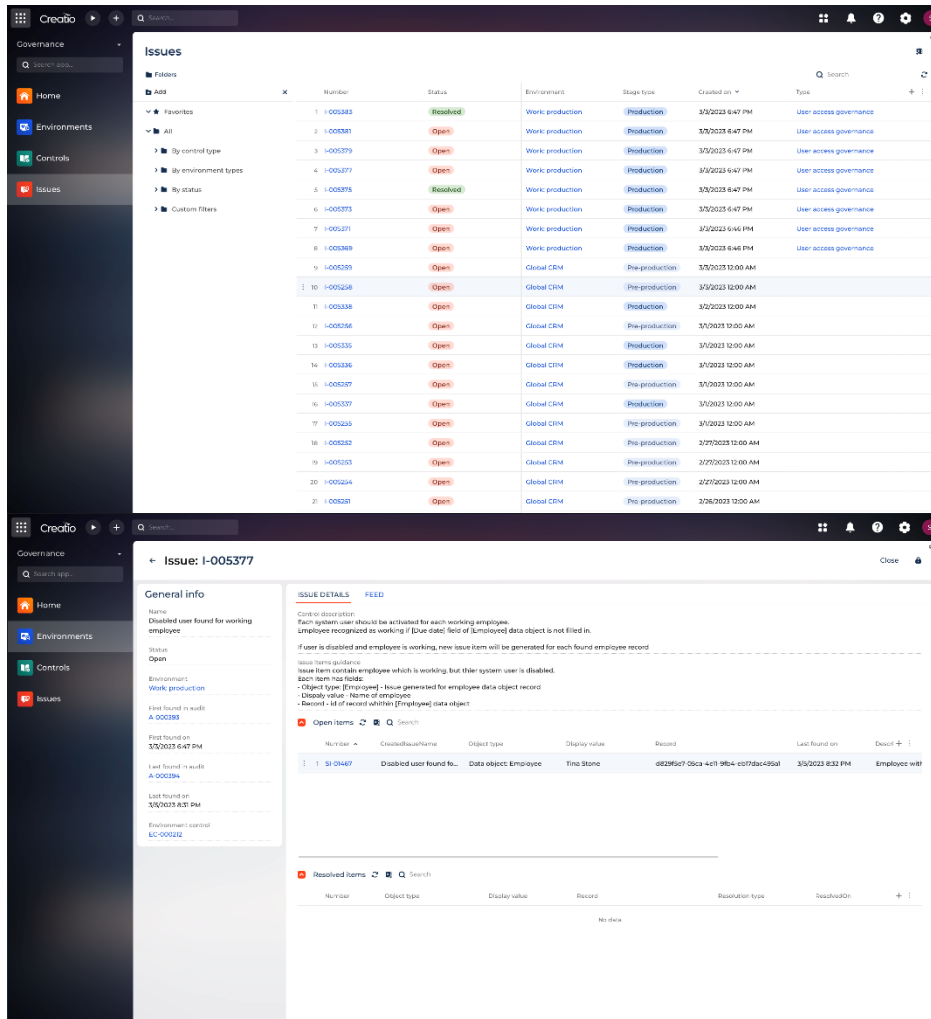
On a right under “Controls” tab:

Is located audit controls details, which represent status of check of specific controls within launched audit.

Issues

Issues - are found violations within environments for specific controls

You can view issues view Issues sections or via Environment page



On a left of the page you can find:

- Name - value for new issue, which is set in control
- Status - defines a status of an issue
- Environment - on which environment current issue was found
- First found in audit - defines during which audit, issue first appeared
- First found on - date of first finding
- Last found in audit - during which audit issue was lastly found
- Last found on - date of last finding
- Environment control - link to control within Environment

On a right under issue details:

- Control description - Control policy defined within control
- Issue item guidance - User guidance for fields within issue items
- Open items - list of open issue items
- Resolved - list of resolved items
 - Resolution type - defines a resolution for issue:

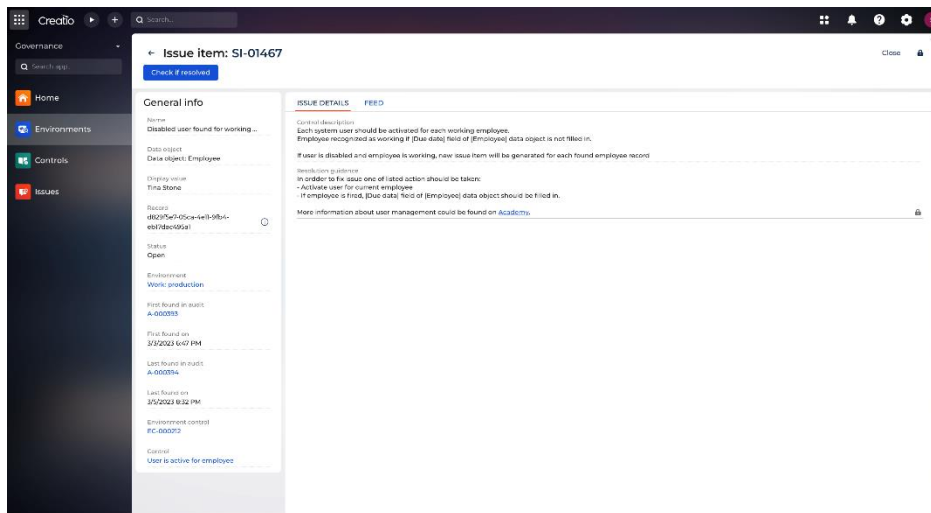
- Fixed - issue no longer appear in Environment
- Whitelisted - whitelist record was created for current issue item
- Canceled - control disabled - if control was disabled on Environment level - Resolution will be set to canceled.

In top-bar there are actions:

Check if resolved - lunches audit for control connected to issue

Issue item

Issue item - is violation item, that relates to specific record or configuration within Environment grouped under specific issue.



It has fields:

- Name - is set in control in field “Created issue name”
- Data object - target object of violation
- Display value - display value of record
- RecordId - Id of record
- Status - issue status.
- Environment - link to Environment

Issue details:

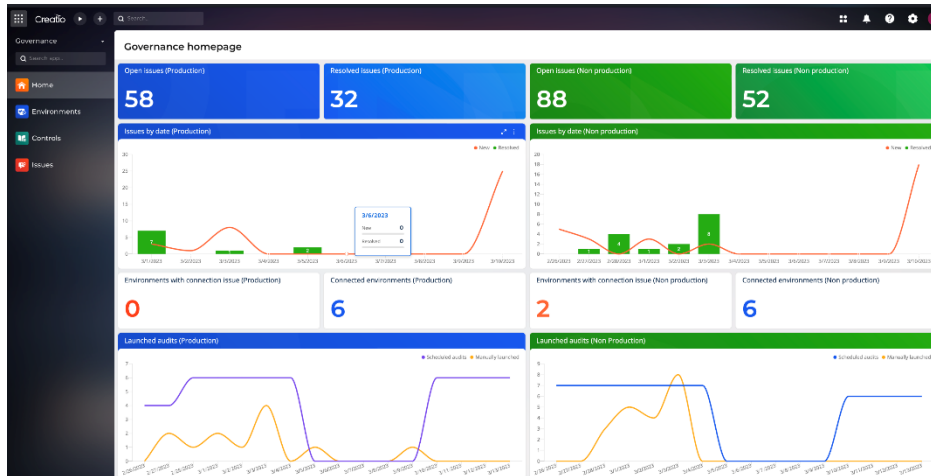
- Control description - control description, which is set within control
- Resolution guidance - guidance of how to resolve an issue

In top-bar there are actions:

Check if resolved - lunches audit for control connected to issue

Governance homepage

Dashboard with provides general information about audits and issues.



Dashboard is divided on two areas: left represent production environments and right non-production such as pre-production and development.

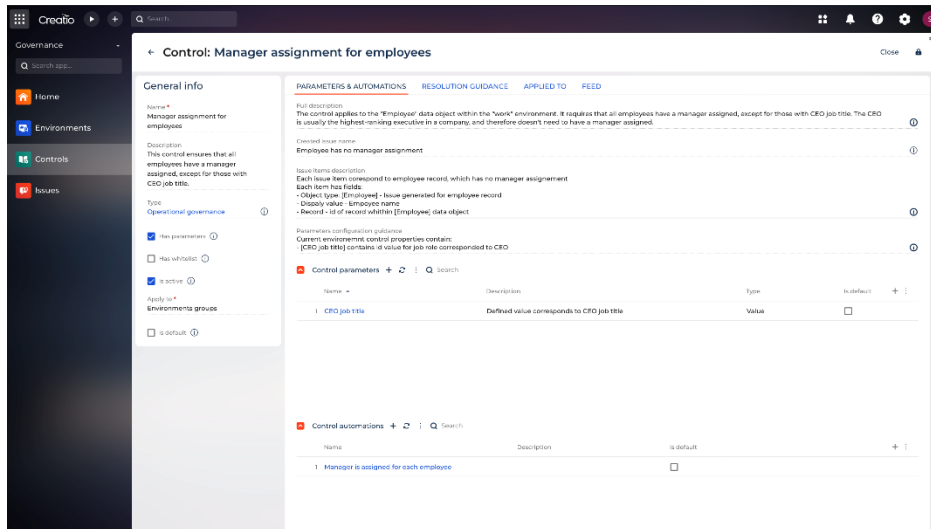
- Open issues - number of issues with status - “Open”
- Resolved issues - Number of issues with status - “Resolved“
- Issues by date (Production) - represent dynamics of issue creation.
 - New - on which data, how many new issues found
 - Resolved - how many issues were resolved on a specific date
- Environments with connection issues - number of Environments, which have issue with connections.
- Connected environments - number of Environments with success connection status
- Launched audits - number of launched audits
 - Scheduled audits - represent number of automatically launched audits within specific date
 - Manually launched - audit launch initiated by user.

Implementation of control automations

Control: Manager assignment for employees

Current control is custom, which is not provided as out of the box. The goal of current control is to make sure each employee of company has assigned manager. There is condition, that if Employee has CEO job title, no manager assignment needed.

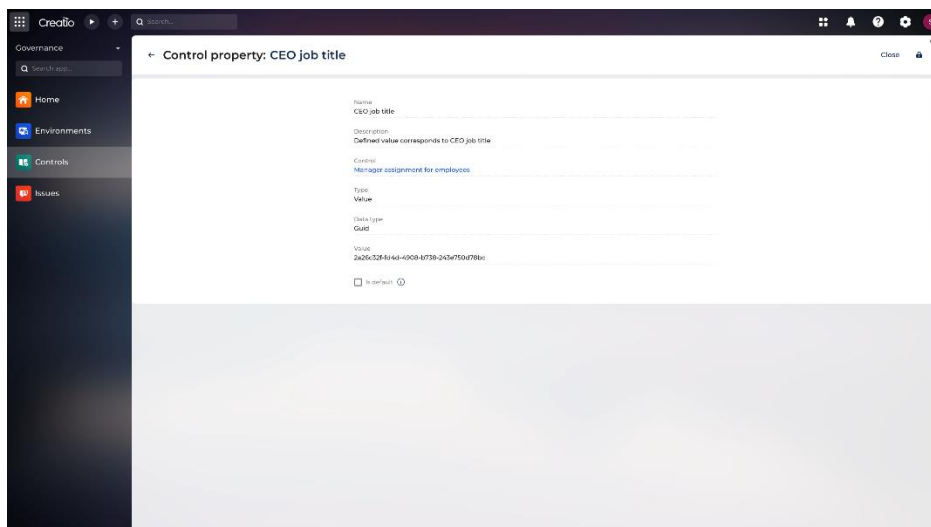
You can view all filled in details within control on a screenshot below.



On left area:

- “Has parameters” is checked, which means, that there is configurable parameter, value of which is used within automation. Details of controls parameters are listed under “parameters and automations“ tab in “Parameters configuration guidance“ field.
- “Has whitelist” is not checked, which means, that all issues could be resolved only, and there will be no option for whitelisting.
- “Apply to” is set to “Environments groups”, which means that this control will applied only to Environments, which are specified under “Applied to“ tab.

CEO job title parameter



- Value - is Id of job title, which correspond to CEO job title. This value is used within automation.

- AuditControlId
- ControlAutomationId
- ControlId
- EnvironmentControlId
- EnvironmentId

Output:

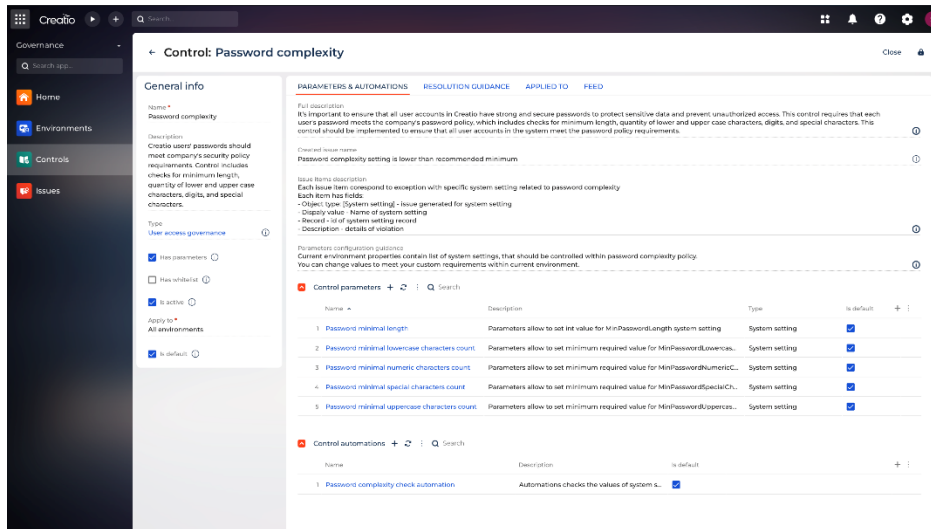
- Success

Elements of business process:

- Connect to Control automation - connects business process log to automation record.
- Set control property Id - sets an Id for control property, which was described above.
- Get environment control property Id - get's id of control property within Environment. Each control property is assigned separately to Environment.
- Is Custom - split flow if "Is custom" value is set for current Environment
 - If not custom - set's value from "control property"
 - If custom - set's value from "environment control property"
- G_API_UT_Employees_WithoutManagers - executed custom user task, which returned a collection of Employees with control violation
- G_Audits_CreateIssues - runs business process, which will created issues for found employees.
- Success = true - set's success value.

It's important to implement business process as sequential process and "Run in background" shouldn't be used. Main back-end logic waits for Success parameter. And if it's not set - control status will be set as "Not passed". In case "Run in a background" will be used in any element before Success will be set - automation will allayed receive false value and control will be "Not passed"

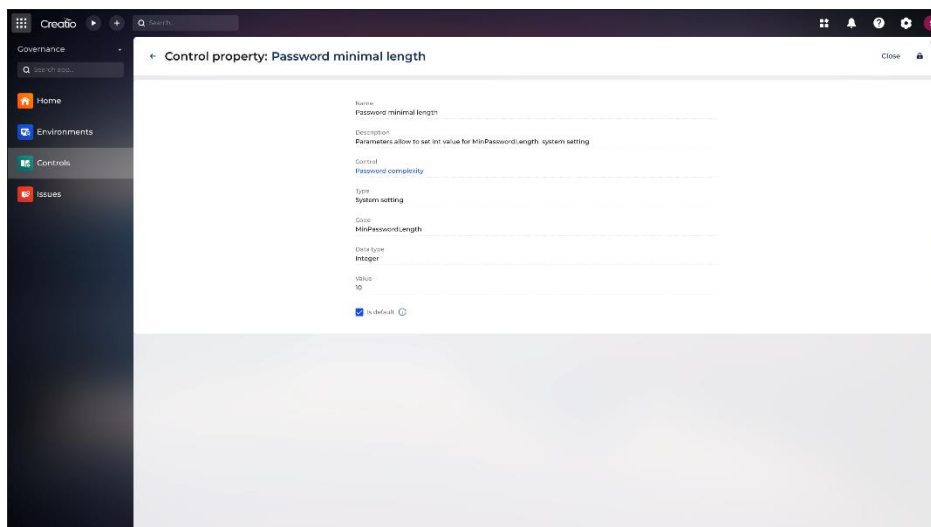
Control: Password complexity



On left area:

- “Has parameters” is checked, which means, that there is configurable parameter, value of which is used within automation. Details of controls parameters are listed under “parameters and automations“ tab in “Parameters configuration guidance“ field.
- “Has whitelist” is not checked, which means, that all issues could be resolved only, and there will be no option for whitelisting.
- “Apply to” is set to “All environments”, which means that control will be executed for all Environments.

Control property: password minimal length



Value as 10 symbols is set for password minimal length

Control automation



Check minimal password length

Which process to run?

G_Automations_BP_Check_SysSetting_Int



Process parameters

Id AuditControlld

→ [#AuditControlld#]

Id AuditId

→ [#AuditId#]

Id Controlld

→ [#Controlld#]

Id ControlPropertyId

→ [#Lookup.Control parameters.Password minimal length...]

Id EnvironmentControlld

→ [#EnvironmentControlld#]

Id EnvironmentId

→ [#EnvironmentId#]

🔍 Property compare condition

→ [#Lookup.Property compare condition.More or equal.3...]

123 IntegerValue

← Select value

T IssueDescription

← Select value

IssueFound

← Select value

G_Automations_BP_Check_SysSetting_Int - business process provided out of the box, that allows to check Integer system settings.

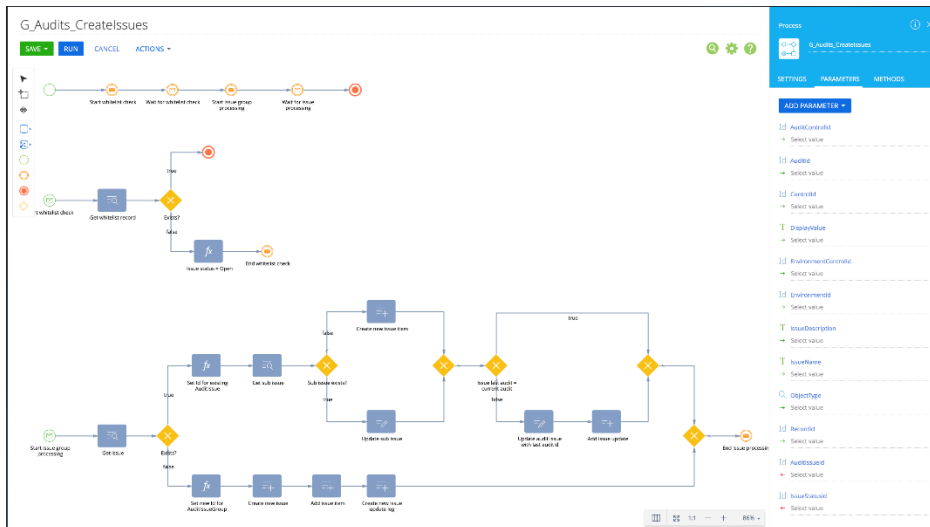
- ControlPropertyId - value for control property
- Property compare condition - lookup field, which allows to set condition of property compare.

Overview of current business process will be provided later in manual under **Common business processes for automations**

Common business processes for automations

Business process: G_Audits_CreateIssues

Current business process is used for handling issue creation.



Process parameters

Process



G_Audits_Createlssues

SETTINGS

PARAMETERS

METHODS

ADD PARAMETER ▾

Id AuditControlld

→ Select value

Id AuditId

→ Select value

Id Controlld

→ Select value

T DisplayValue

→ Select value

Id EnvironmentControlld

→ Select value

Id EnvironmentId

→ Select value

T IssueDescription

→ Select value

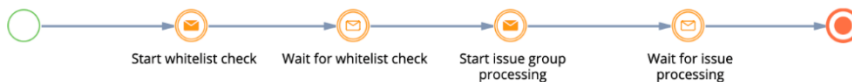
T IssueName

Listed input parameters are required for issue creation handling.

- AuditControlId - Id audit control record
- AuditId - Id of audit record
- ControlId - Id of executed control
- DisplayValue - Each issue has display value field, for example if some SysSetting has issue, name of SysSetting could be used.
- EnvironmentControlId - Id of environment control record
- EnvironmentId - Id of environment record
- IssueDescription - short description of issue
- IssueName - name of created issue
- ObjectType - type of object for found violation. For example it could be name of data object, system setting, system operation and more.
- RecordId - Id of record, which violates control

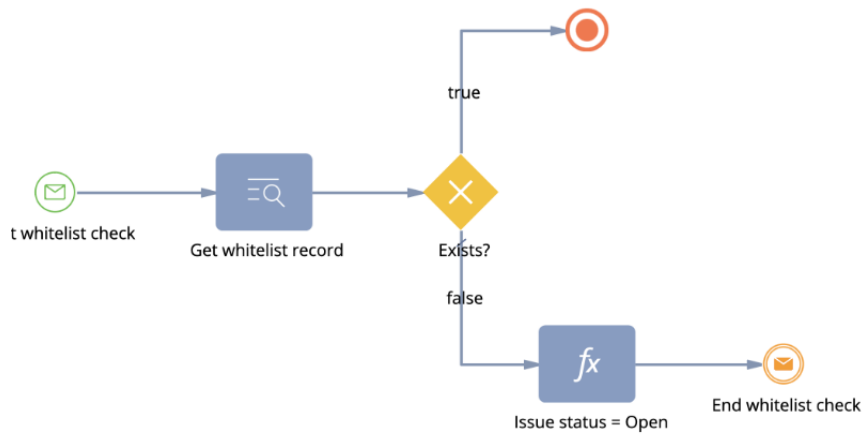
Output parameters used only within process.

Process flows



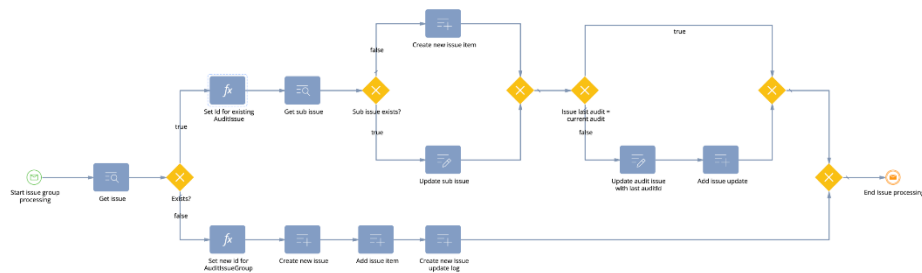
This flow is used to separate process logic and make it more readable:

- Start whitelist check - starts check of whitelist inclusion
- Wait for whitelist check - waits for finish of whitelist inclusion
- Start issue group processing - starts flow for actual issue creation
- Wait for issue processing - waits for finish of issue creation






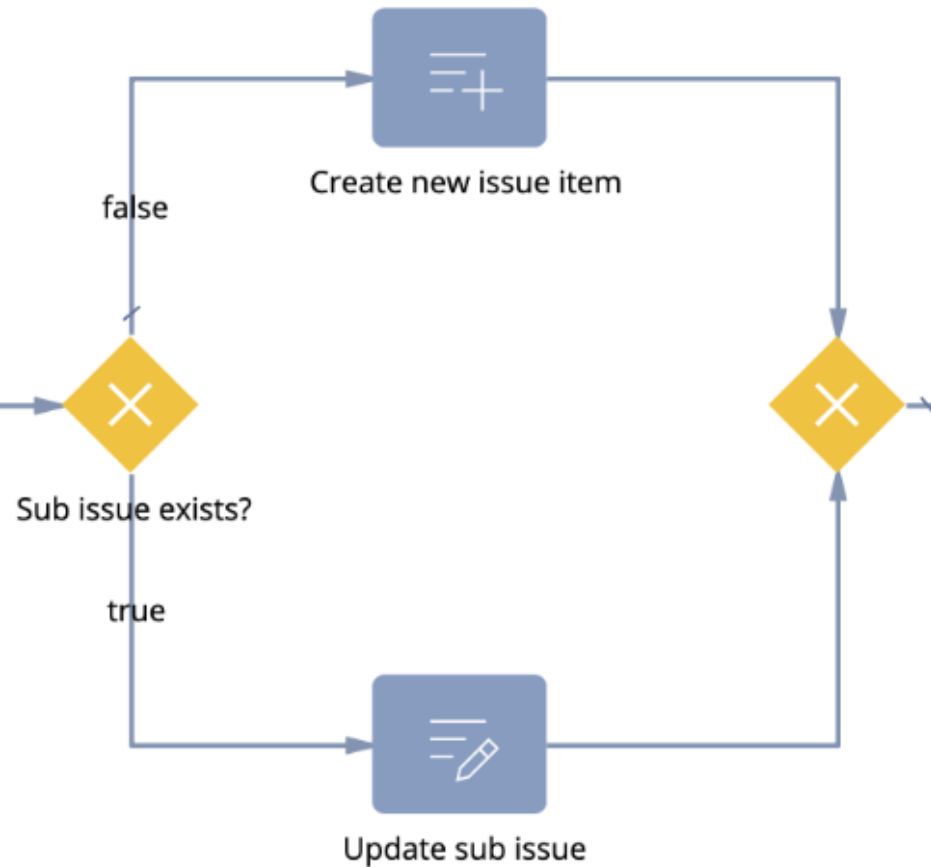
This flow is used for whitelist check:

- Get whitelist record - checks, if record is added to whitelist
- Exists - checks if record exists
 - If Exists - > terminate process
 - If not - > Sets issue status to open



This flow is executed for actual issue creation

Element	Description
 <p data-bbox="256 1730 393 1766">Get issue</p>	<p data-bbox="1149 1612 1386 1713">Tries to get open issue it for control and environment</p>

 <p>Exists?</p>	<p>Flow split in case issue exists</p>
 <p>Get sub issue</p>	<p>Tries to get issue item corresponded to provided RecordId</p>
 <pre>graph LR; Start(()) --> D1{Sub issue exists?}; D1 -- true --> U[Update sub issue]; D1 -- false --> C[Create new issue item]; U --> D2{ }; C --> D2; D2 --> End(())</pre>	<p>If issue item exists - Updates record fields</p> <p>If not - creates new issue</p>

	<p>Updates issue item field such as “Last audit“ and “Last found on” in case issue already was found during previous audit process</p>
	<p>Creates new issue</p>
	<p>Created new issue item and adds issue update log</p>

Business process:
G_Automations_BP_Check_SysSetting_Int

Process



G_Automations_BP_Check_SysSetting_Int

SETTINGS

PARAMETERS

METHODS

Id AuditControlld

→ Select value

Id AuditId

→ Select value

Id Controlld

→ Select value

Id ControlPropertyId

→ Select value

Id EnvironmentControlld

→ Select value

Id EnvironmentId

→ Select value

Property compare condition

→ Select value

123 IntegerValue

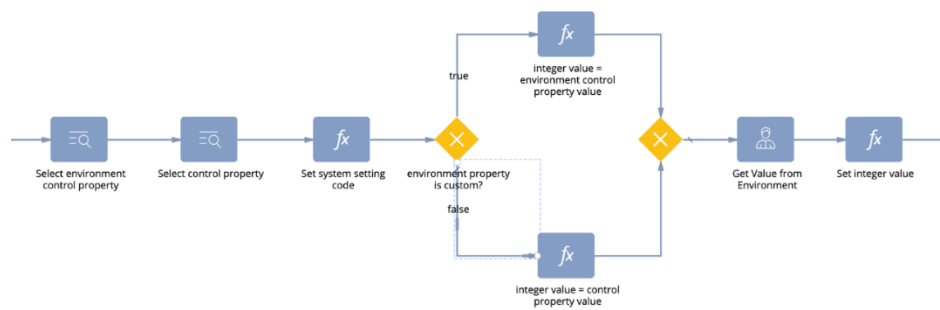
← Select value



Input parameters are required:







- AuditControlId - Id of audit control record
- AuditId - Id of audit record
- ControlId - Id of control record
- ControlPropertyId - Id of control property record
- EnvironmentControlId - Id of environment control record
- EnvironmentId - Id of environment record
- Property compare condition - lookup value of how int value of system setting should be checked

Output parameters used within a process.

Process flow for getting values



Element	Description
 <p data-bbox="240 1579 630 1684">Select environment control property</p>	<p data-bbox="714 1503 1195 1541">Selects Environment control property</p>
	<p data-bbox="714 1797 1006 1835">Select control property</p>

	Sets system setting code for process parameter
	Depending on customisation of control property - sets it's value
	Gets system setting value and set's it's value to process parameter
	Depending on set value for parameter "Property compare condition" runs scenario and generates issue description
	If issue found - generates issue
	Terminates a process

Development documentation

Package: G_General

Package implements common back-end logic used across application.

Objects

Name	Description
G_AllDataTypes	Implements virtual data object with all Creatio data types. Used as parent object for control properties

User tasks

Name	Description
G_UT_SetGlobals	Used to store system setting values and user session in memory

Data

Name	Description
SysSettings	Used for installation of system settings.
SysSettingsValue	Used for installation of system settings value

Package: G_Creatio_API

Package implements back-end API for Creatio platform. Contains user tasks and c# code for calling external application

User tasks - default controls

List of user tasks for default control implementation

Name	Description
G_API_UT_GetSysAdminUsers	Returns list of users with system administration rights
G_API_UT_GetSystemSettingValue_Int	Returns int value for system setting code
G_API_UT_GetUsersWithExportPermissions	Returns list of users with global export permissions

User tasks - custom controls

Useful for designing custom controls. Provided as examples for custom controls implementation

Name	Description
G_API_UT_Employees_GetCEOWithManagers	Returns list of employees with CEO title, who has manager assigned. Currently used by custom control
G_API_UT_Employees_WithSelfManagers	Returns list of employees, who are self managed
G_API_UT_Employees_WithoutManagers	Returns list of employees, who has no manager and who's job title is not CEO
G_API_UT_GetActiveEmployeesWithDisabledUsers	Returns list of employees, who are employees, but their user is disabled
G_API_UT_GetDisabledEmployeesWithActiveUsers	Returns list of employees, who are fired, but their user is active
G_API_UT_GetUsersWithoutLDAP	Returns list of user, who doesn't have LDAP auth configured
G_API_UT_Users_GetTestUsers	Returns list of users, who recognised as test user

Package: G_Environments

Package implements back-end logic for interaction with Environment

Objects

Name	Description
G_Environments	Main object for Environments data
G_EnvironmentGroups	Lookup for managing environment groups
G_EnvironmentStageType	Lookup for managing stages.
G_EnvironmentConnectionStatuses	Lookup for environment connection statuses
G_CreatioVersions	Lookup for Creatio environment version

Data

Name	Description
G_EnvironmentConnectionStatuses	Data for Environment connection statuses
G_EnvironmentStageType	Data for Environment stage types

User tasks

Name	Description
G_ConnectToCreatio_UT	Connects to Creatio environment and saves auth data to memory for reuse in control automations
G_RemoveAccessInfo_UT	Removes auth data for Creatio environment from memory

Business processes

Name	Description
G_BP_Connect_To_Creatio_Site	Handles connection to Environment, used while creation of new environment or audits execution
G_BP_Environments_Connect	Is sub process. Deletes all data in objects for specified Environment
G_Environment_BP_ClearAllData	Allows to clear all data within environment. Whitelists are not cleaned within current process

Business process: G_BP_Connect_To_Creatio_Site












Parameters:



- EnvironmentId - id of environment for connection
- Success - defines, if connection was successful

Elements

Element	Description
	 <p>Sets global variables such as:</p> <ul style="list-style-type: none"> • Data base operation limit - used for batch requests • API limit - used to batch requests to external environment • IsDebug - allows to set limits regardless of specified values for debug purposes
	 <p>Allows to establish connection to external environment. Saves auth data to memory for reuse within control automations</p>
	<p>Set's value for Success parameter from "Connect to Creatio environment" user task</p>
	 <p>Updates last success connection data in Environment object</p>
	 <p>Sets Error status to environment</p>

Business process: G_BP_Environments_Connect



Parameters



- EnvironmentId is set from manual operation or as internal BP parameter
- LastConnectedOn - date for las connection to Environment

Elements

Element	Description
	 Initiates business process, if new Environment created
	 Initiates business process if credentials updated
	Used for manual launch of connection procedure from UI
	 Removes connection data from application memory

Business process: G_Environment_BP_ClearAllData

Deletes data for Environment within current package

