

BPMN Process Library

Administrator's Guide — a home for your BPMN process diagrams in Creatio, and the way out of Studio Free

CREATIO 10

V1.2.2

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1 • What this application does

Creatio Studio Free is being retired. The BPMN Process Library gives your process diagrams a new home in your own Creatio: a **Process diagrams** section with nested folders, and a full-screen designer with the complete Studio Free element palette. You move your Studio Free library in one go, with its folders and descriptions, and keep designing in the same diagram editor.

Export from Studio Free



Import the library zip



Design and share in Creatio

- **Process diagrams** are Creatio records: you search, tag, filter and restrict them like any other record.
- **Folders** organise the library, as in Studio Free.
- **BPMN 2.0** is the exchange format: a diagram goes out as a standard `.bpmn` file that Studio Free and other BPMN tools open, and comes back in the same way. It also exports as a picture.
- **Working together**: the page shows who else has a process open, and one user's save never silently overwrites another's.

The diagrams are documentation: the application stores and draws them. It does not run them as Creatio business processes.

2 • Requirements and installation

2.1 What you need

- **Creatio 10.0 or later**, any product, on **PostgreSQL** or **Microsoft SQL Server**; on .NET 8 or .NET Framework, so Creatio cloud sites included. A site that runs on several servers (a web farm) is supported.
- The application is delivered as one file, `CrtBpmnLibrary.gz`.

- To move a library from Studio Free: **Google Chrome**, Microsoft Edge or another Chromium browser, to run the Studio Free exporter (section 5).

2.2 Install or update

1. Sign in as a user who may install applications, open **Configuration** and use **Install from file** with `CrtBpmnLibrary.gz` (or `clio push-pkg CrtBpmnLibrary.gz`). Wait until the install reports that it has finished.
2. Refresh the browser. The **Process diagrams** workplace appears in the navigation panel.

To update, install the newer `CrtBpmnLibrary.gz` the same way, over the installed version. Your diagrams, folders and permissions stay.

2.3 Who can open and change diagrams

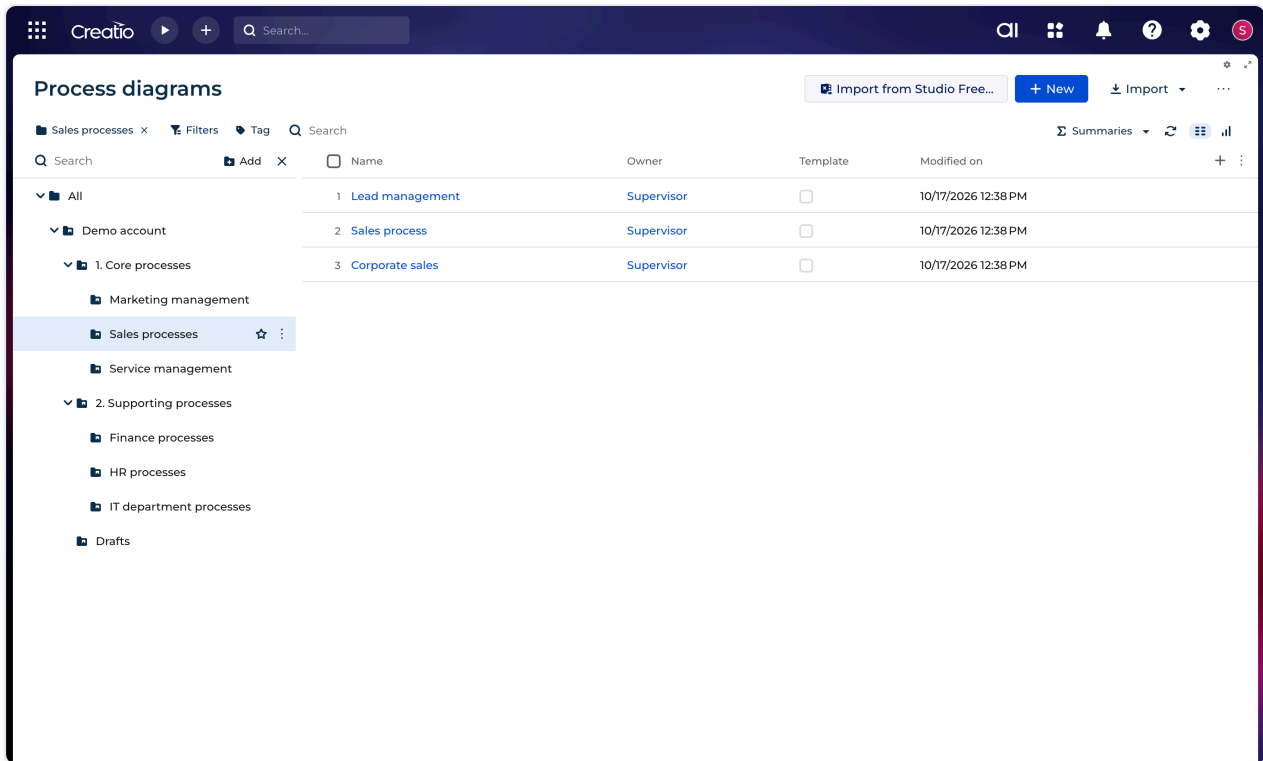
The **Process diagrams** workplace is visible to **All employees**. Diagrams use **record permissions**: the first install lets *All employees* read, edit and delete them. Change this in **Object permissions** (object **Process diagrams**); updates keep your setting. As with any record, you can restrict a single diagram to specific users or roles. Every action respects these permissions: a user sees only the diagrams they may read, and an import or a move never changes a diagram they may not edit.

2.4 Turning off "who else has the process open"

The presence display (section 7.1) is on after the install. To turn it off for everyone, switch off the feature **CrtBpmnPresence** on the platform's **Feature toggles** page, or with clio: `clio set-feature CrtBpmnPresence 0`. Open process pages show nobody within about two minutes. The save protection of section 7.2 keeps working.

3 • The Process diagrams section

Open the **Process diagrams** workplace. The list shows each diagram's **Name**, **Owner**, whether it is a **Template**, and when it was last modified. The name is a link to the diagram; a double-click on the row opens it too. **Search** finds diagrams by name; **Filters** and **Tag** work as in any Creatio section.

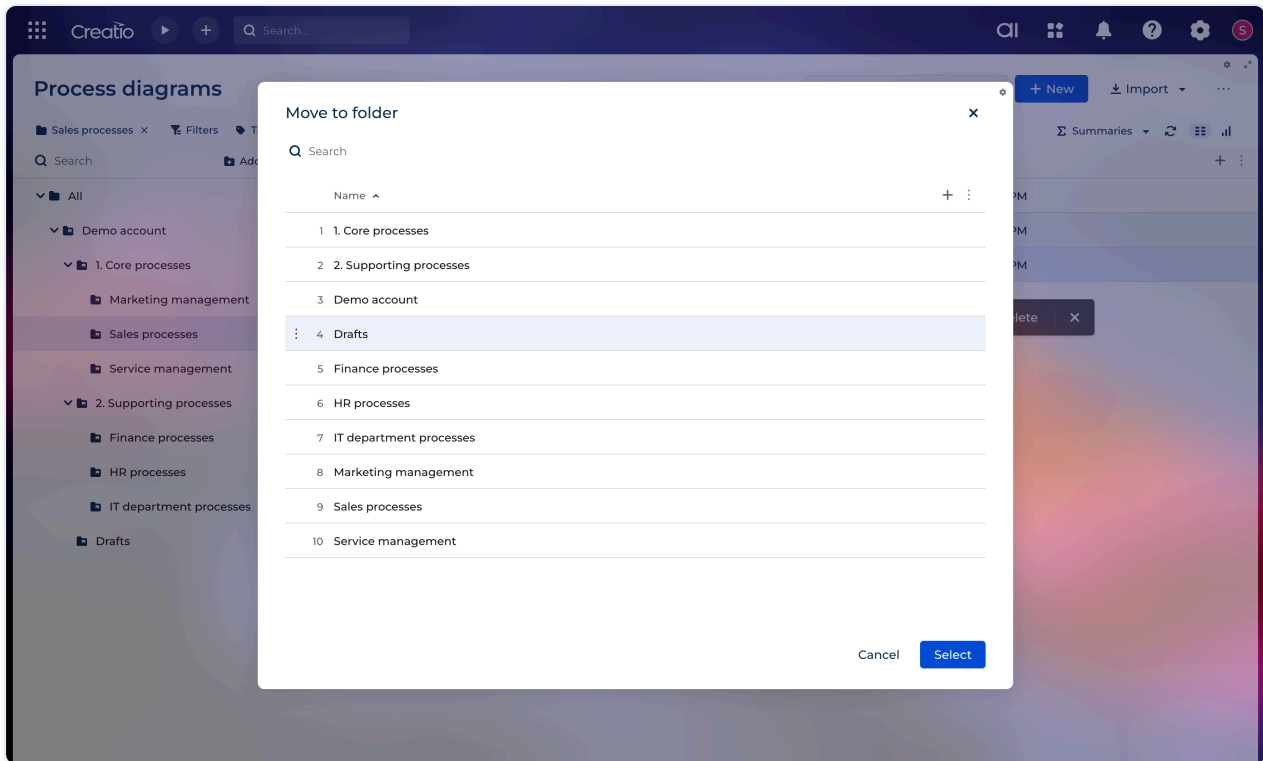


The Process diagrams section, with the folder tree of an imported library open.

3.1 Folders

Folders opens the folder tree. Folders nest to any depth; a library imported from Studio Free arrives in a folder named after its Studio Free account. Use the menu of a folder in the tree to add a subfolder, rename it or delete it, as in other Creatio sections. Choose a folder to see the diagrams in it.

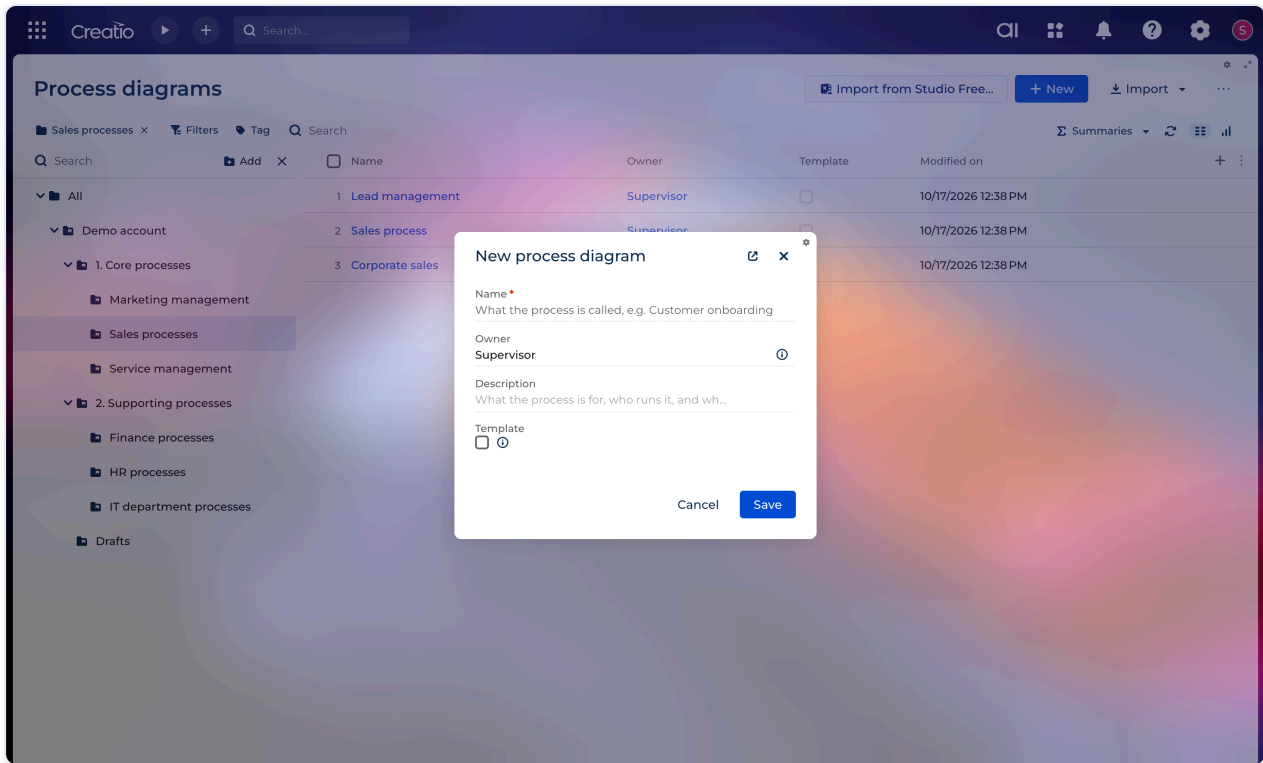
To move diagrams, select them in the list and choose **Move to folder**, then the folder: each diagram leaves the folder it was in and lands in the one you chose; the message says how many were moved and how many you may not edit. **Remove from folder** takes the selected diagrams out of their folders.



Two diagrams selected, and **Move to folder** asking where they go.

3.2 Create a process diagram

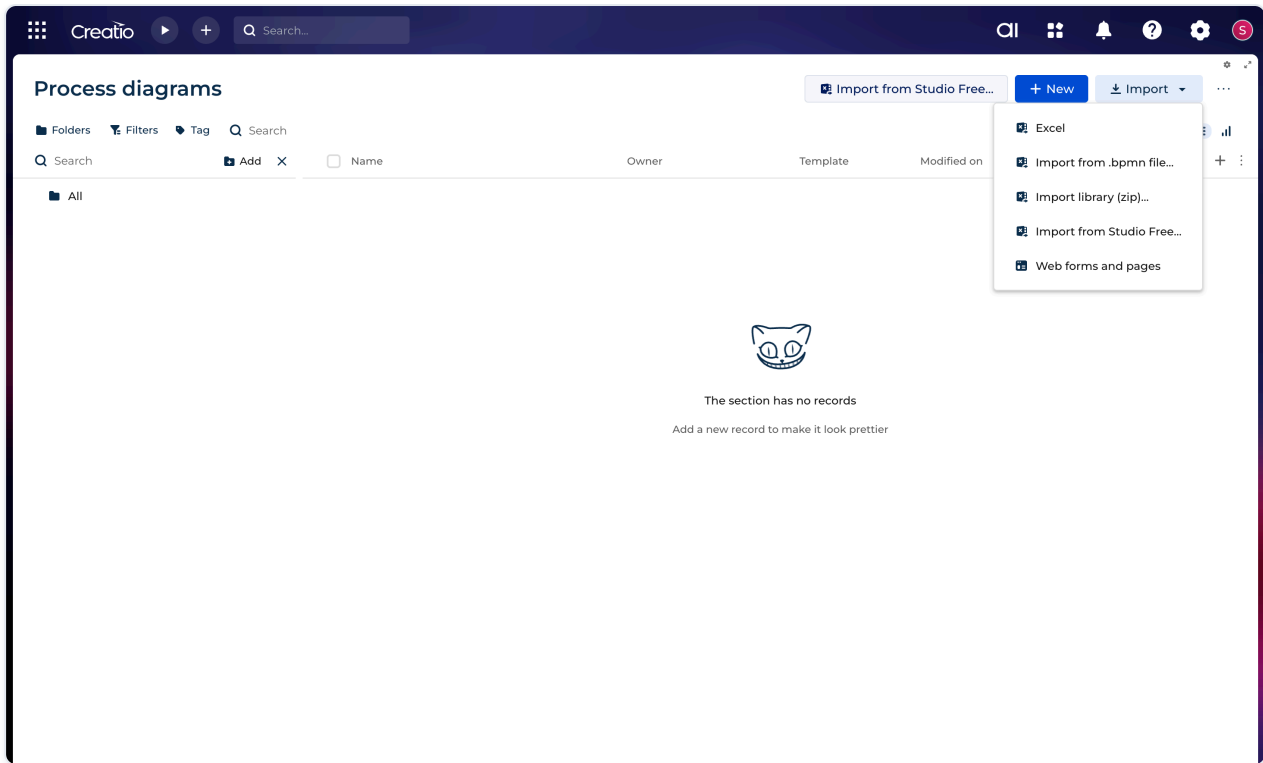
Click **New**. Give the diagram a **Name**; add a **Description** (what the process is for, who runs it and when it starts) and an **Owner**, the person who keeps the diagram current — it is you unless you choose someone else. Mark it as a **Template** when it is a starting point to copy rather than a working process. Save, and the designer opens with an empty canvas.



New process diagram: a name is all a diagram needs to start.

3.3 Actions on the list

Where	Action	What it does
A row's menu	Open, Copy, Export to .bpmn, Delete	Copy makes a new diagram with the same content; Export to .bpmn: section 6.1.
Selected rows	Add tag, Move to folder, Export to Excel, Delete	The first two also hold Remove tag and Remove from folder ; folders: section 3.1.
Import menu	Import from .bpmn file..., Import library (zip)..., Import from Studio Free...	Sections 6.1, 5.3 and 5. The menu also keeps Creatio's own Excel import.

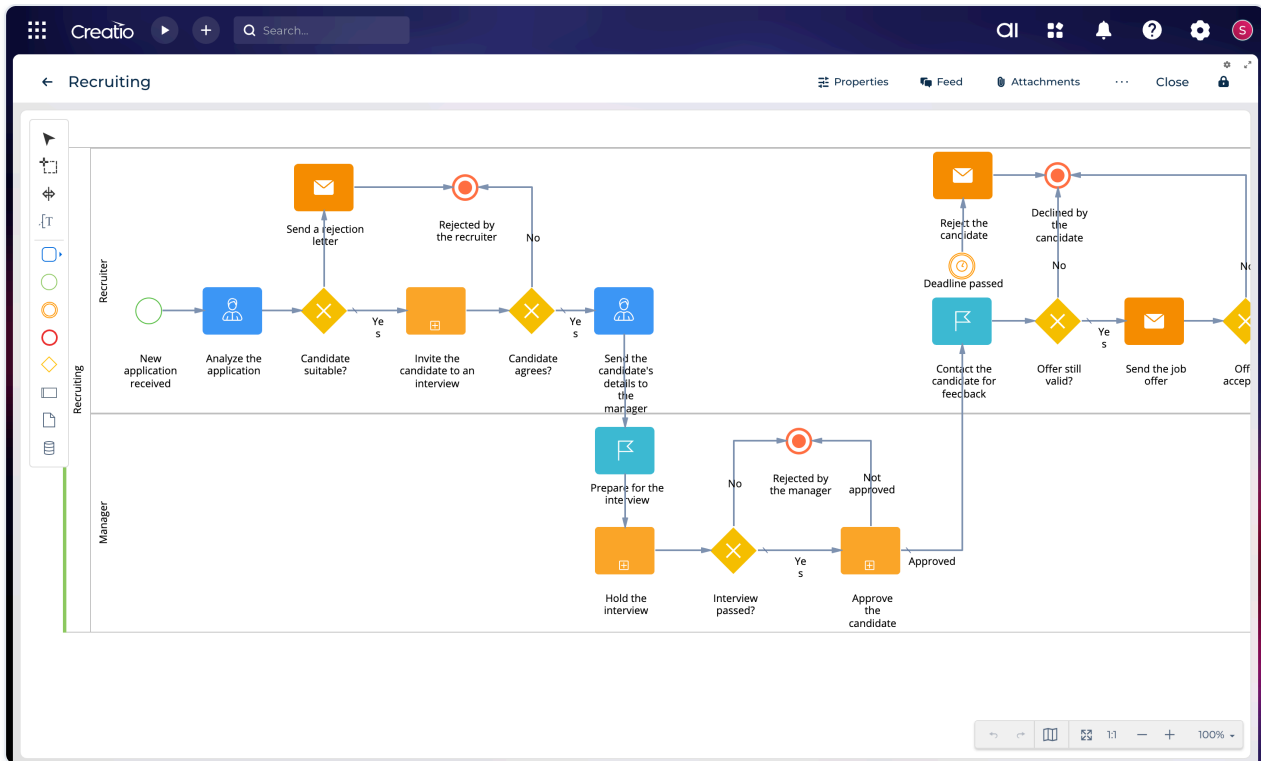


The **Import** menu: a single `.bpmn` file, a library zip, or the way out of Studio Free.

4 • The designer

Opening a diagram shows it full screen in the designer, with the name in the header.

← takes you back to the list. **Feed** and **Attachments** work as on any Creatio record.



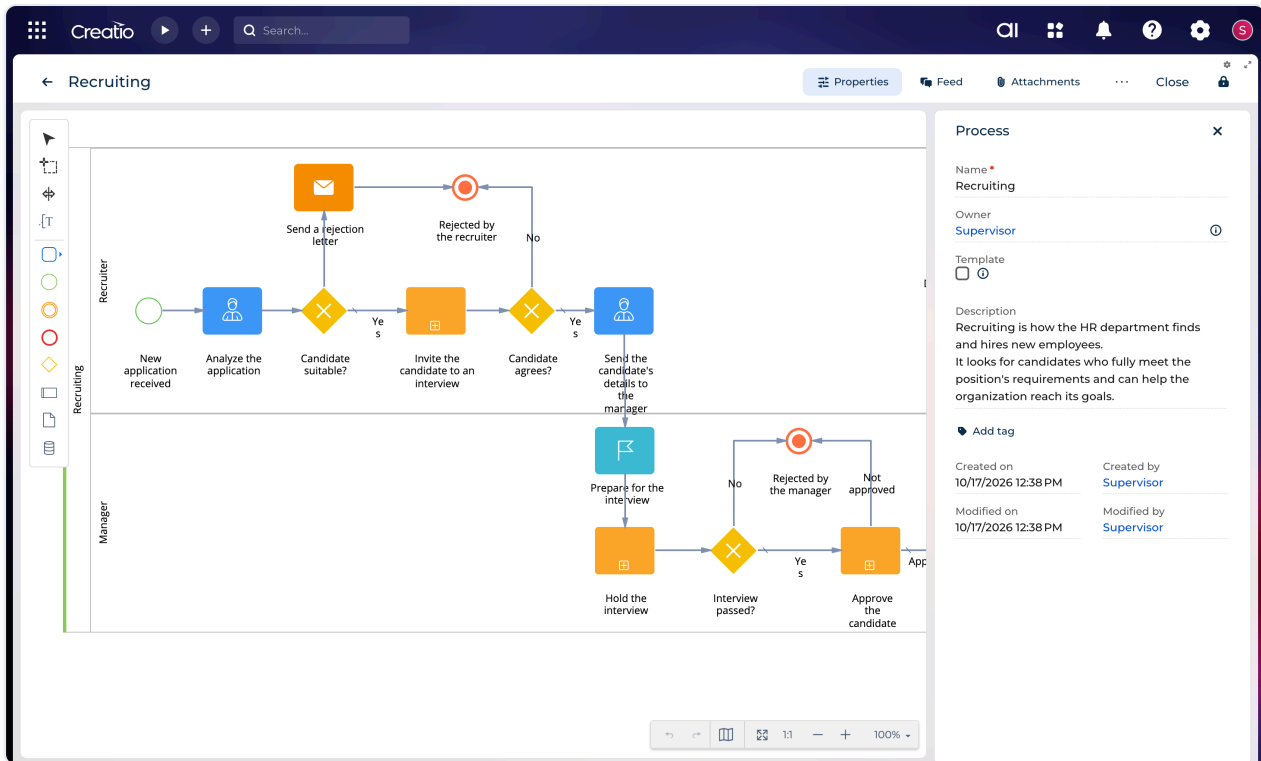
A diagram in the designer: the palette on the left, the canvas with pools and lanes, and the toolbar at the bottom right.

4.1 Drawing the diagram

- **The palette** on the left holds the tools (select, lasso, space) and the elements: tasks, events, gateways, pools and lanes, data objects and data stores. The small arrow next to an element opens its variants — the complete Studio Free set of task types, events and gateways.
- **Drag** an element onto the canvas, then drag from its arrow to connect it to the next one. Select an element to change its type, add a marker (loop, multi-instance, compensation) or delete it from its context menu.
- **Captions:** double-click an element or a flow to type its caption on the canvas.
- **The toolbar** at the bottom right: **Undo** and **Redo** (the tooltip shows the keyboard shortcut), the minimap, fit to screen, actual size, zoom out and in, and the zoom level.
- **Keyboard:** Undo and Redo, Copy and Paste, Delete, and select all.

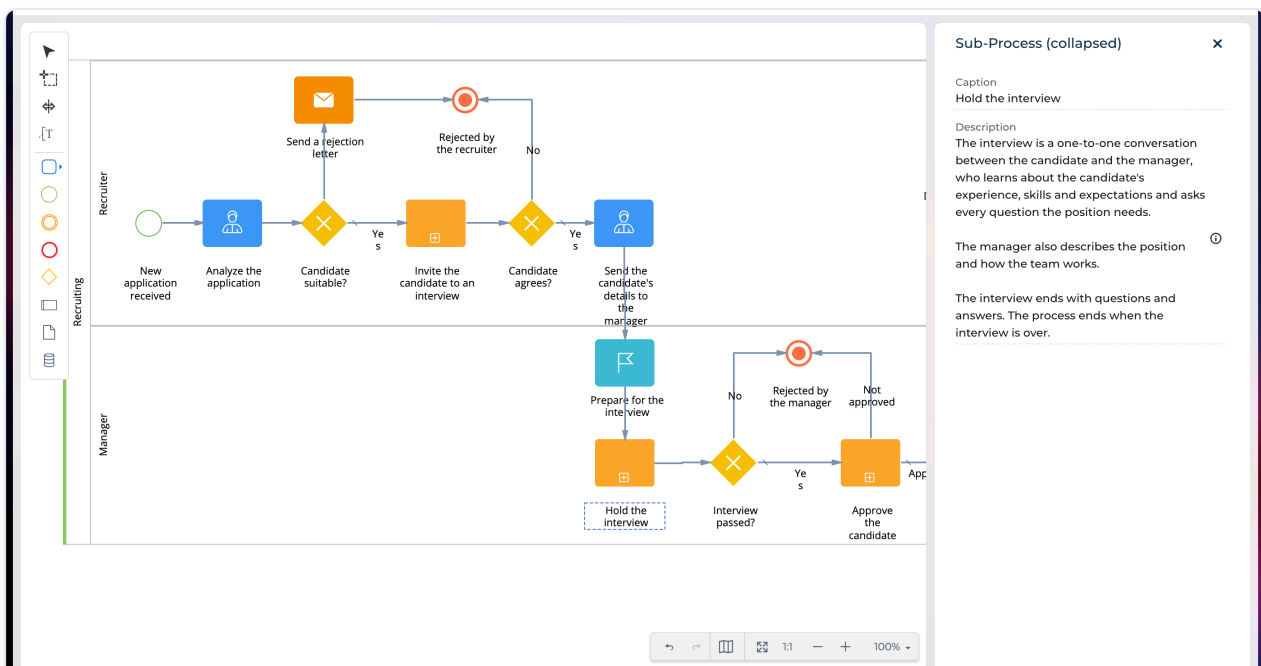
4.2 Properties of the process and its elements

Properties opens the panel on the right. With nothing selected, it shows the **Process**: its **Name**, **Owner**, **Template** and **Description**, its tags, and who created and last modified it, and when. A process imported from Studio Free brings its description along, with its paragraphs and links.



Properties with nothing selected: the process itself.

Select an element or a flow on the canvas and the panel shows it under its type, for example **Task**: its **Caption** and its **Description**. The description is stored as the element's BPMN documentation, so it travels with the diagram when you export it.



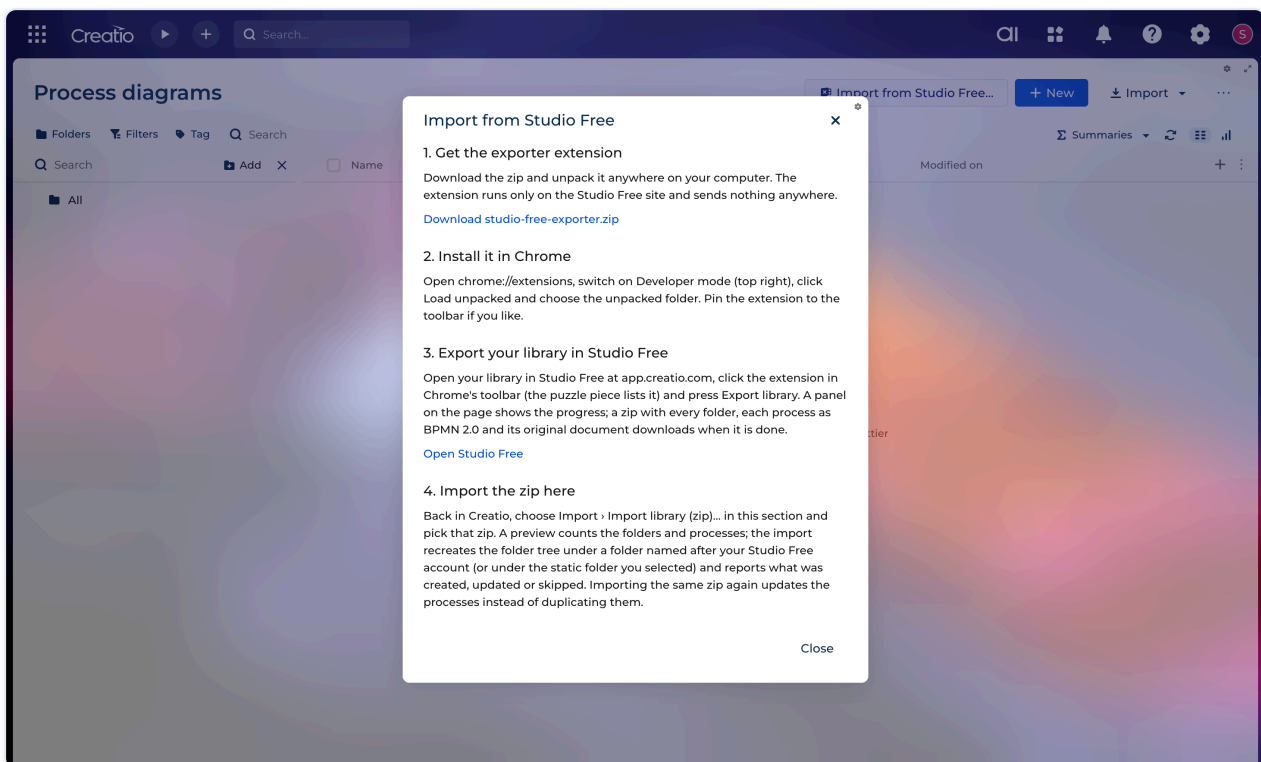
A selected task: its caption and its description, as they were written in Studio Free.

4.3 Saving and cancelling

As on any Creatio record, changes are kept until you click **Save**; **Cancel** reverts them. Undo and Redo change what Save will store, not only the picture. Leaving the page with unsaved changes asks first. When another user changed the same process meanwhile, Save tells you instead of overwriting their work (section 7.2).

5 • Moving your library from Studio Free

Studio Free has no export of a whole library. The application ships a small Chrome extension, the **Studio Free exporter**, that saves every folder and process of your library into one zip, which the section then imports. **Import ▾ ▸ Import from Studio Free...** walks you through it. In a Chromium browser that has no exporter yet, the same window also opens from the **Import from Studio Free...** button next to **New**.



Import from Studio Free: get the exporter, install it, export, import the zip.

5.1 Get and install the exporter

1. In **Import from Studio Free**, click **Download studio-free-exporter.zip** and unpack it anywhere on your computer. You always get the exporter that comes with the installed version of the application.
2. In Chrome, open `chrome://extensions`, switch on **Developer mode** (top right), click **Load unpacked** and choose the unpacked folder. Pin the extension to the

toolbar if you like.

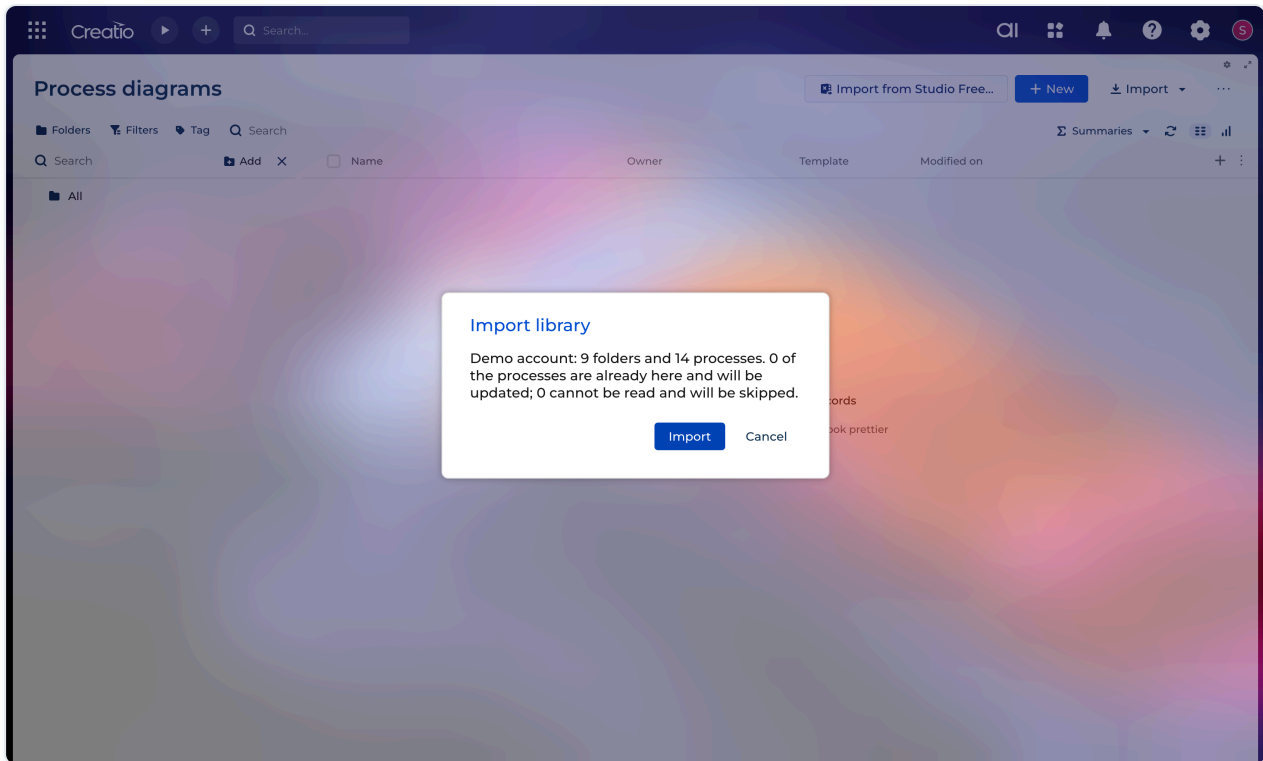
The exporter runs only on the Studio Free site and sends nothing anywhere: it reads your library in your own signed-in browser and saves the zip to your computer. To update it, download it again, remove the old one on Chrome's extensions page and load the new folder.

5.2 Export the library

1. Open your library in Studio Free at app.creatio.com (**Open Studio Free** in the window), signed in with your Studio Free account. A library that still opens at an older Studio Free address works as well.
2. Click the exporter in Chrome's toolbar (the puzzle piece lists it) and press **Export library**.
3. A panel on the page shows the progress; at the end, a zip with every folder and process downloads.

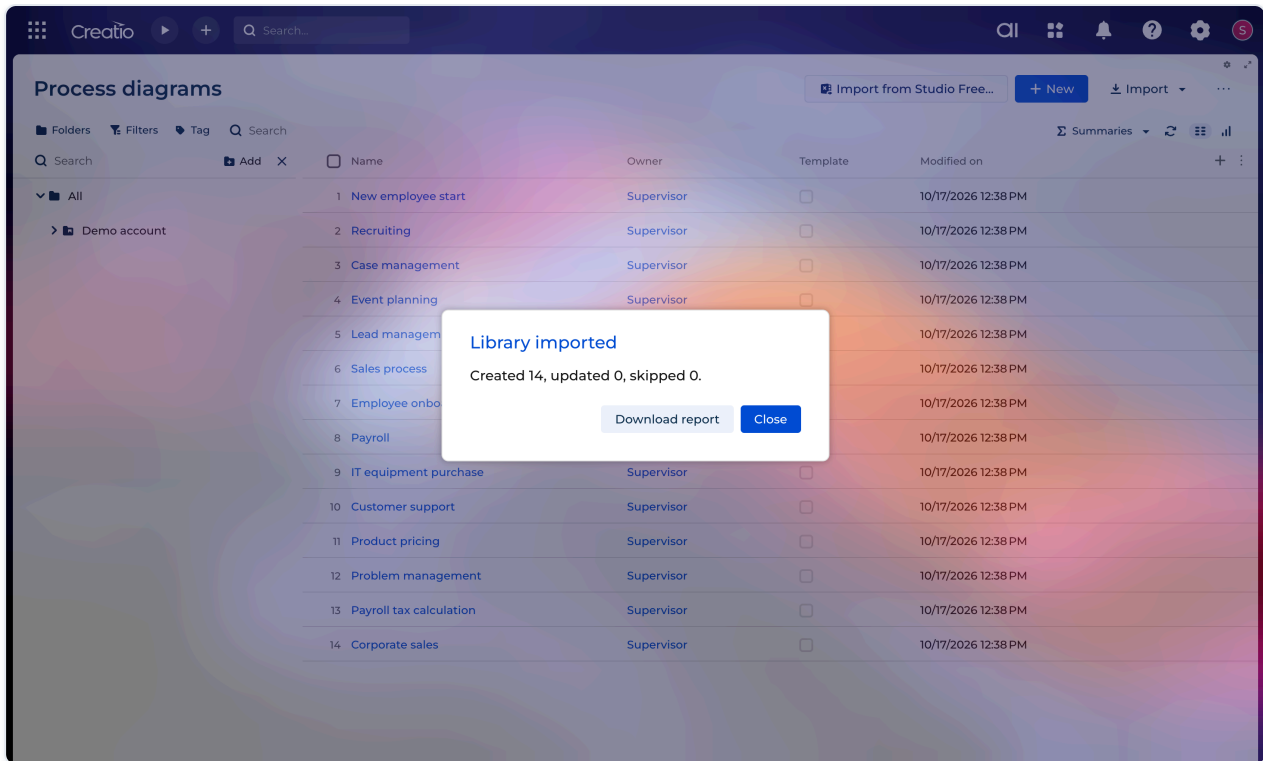
5.3 Import the library

Back in Creatio, select a folder if you want the library inside it, then choose **Import ▾** **› Import library (zip)...** and pick the zip. Before anything is written, a preview says what the zip holds and what will happen:



The preview: the account, how many folders and processes, which are already here, which cannot be read.

Import recreates the folder tree under a folder named after your Studio Free account, inside the folder you selected or at the top. Each process arrives with its diagram, its description, and the captions and descriptions of all its elements. A progress message counts the processes; at the end, the report says what was created, updated or skipped. **Download report** saves the details, one line per process.



The report of a first import: every process created.

5.4 Importing again

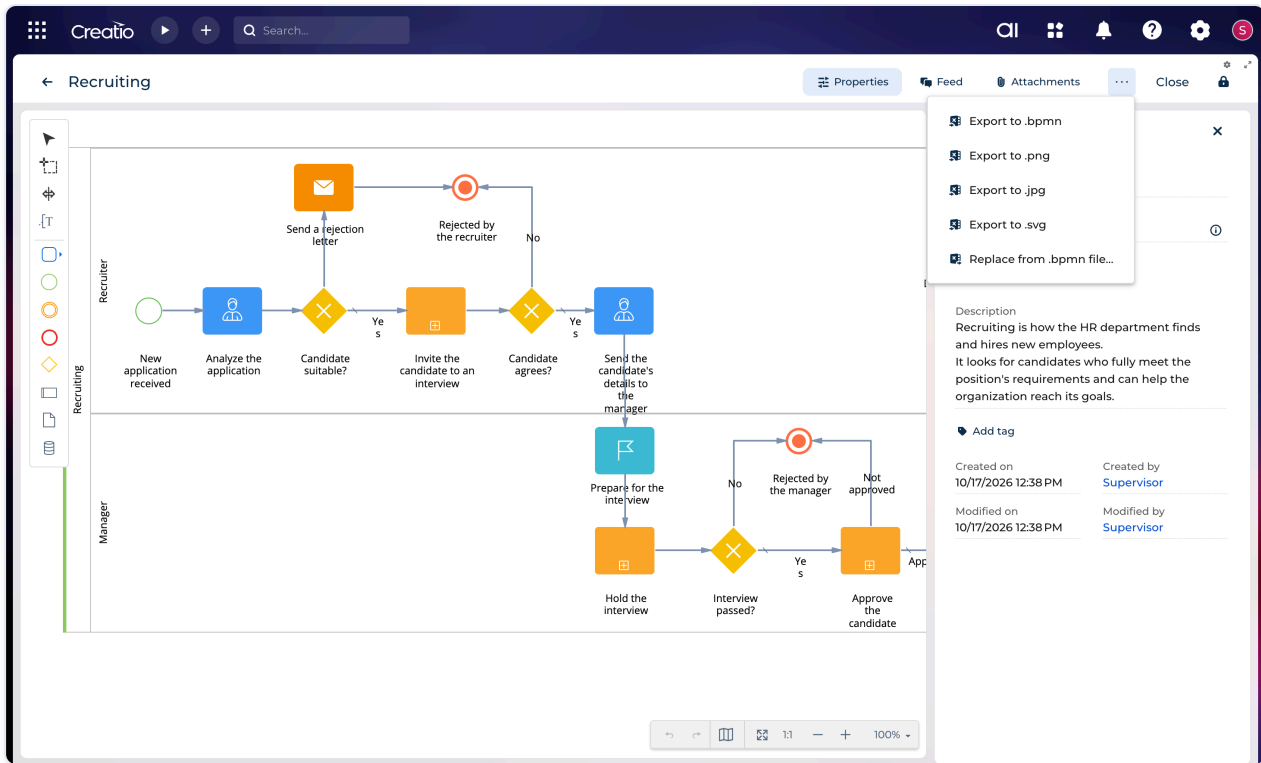
The import remembers where each process came from. Importing the same library again **updates** the processes already in Creatio and creates no copies — useful while your team still works in Studio Free during the move.

6 • Import and export

6.1 One process as a .bpmn file

- **Export to .bpmn** — from the diagram's **Actions** menu or the list row's menu — downloads a standard BPMN 2.0 file that Studio Free and other BPMN tools can open.
- **Import ▾ > Import from .bpmn file...** creates a new diagram from a BPMN file, including files exported from Studio Free, with the process description.
- **Actions ▾ > Replace from .bpmn file...** on an open diagram replaces its content, and its description, with the file's, after you confirm. You can still **Cancel** before saving.

A diagram holds up to 8 MB; a larger file is refused with a message.



The **Actions** menu of an open diagram: BPMN in and out, and pictures.

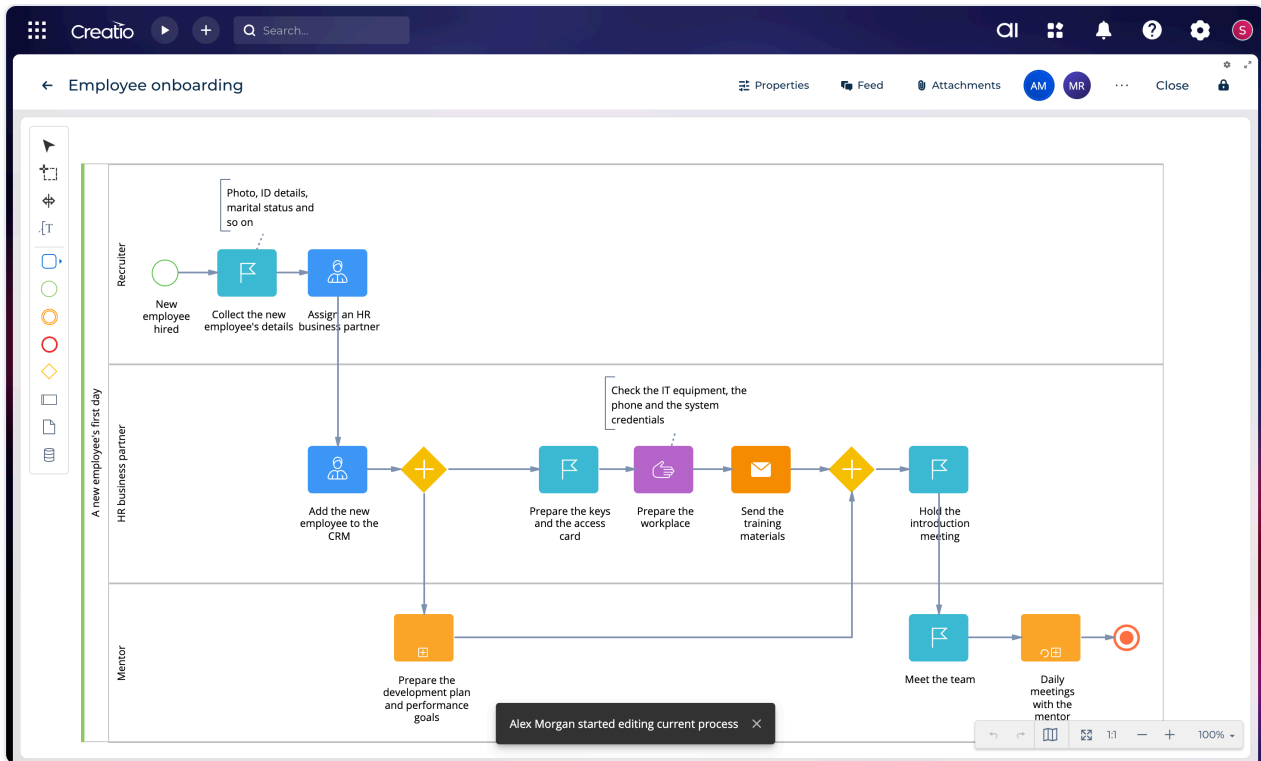
6.2 Pictures of a diagram

Actions › **Export to .png**, **Export to .jpg** or **Export to .svg** saves a picture of the diagram. The picture shows the whole diagram, whatever part of it you are looking at and however you zoomed, including changes you have not saved yet. PNG and JPEG pictures are made at twice the diagram's size, so they stay sharp in documents and slides; SVG scales to any size.

7 • Working on a process together

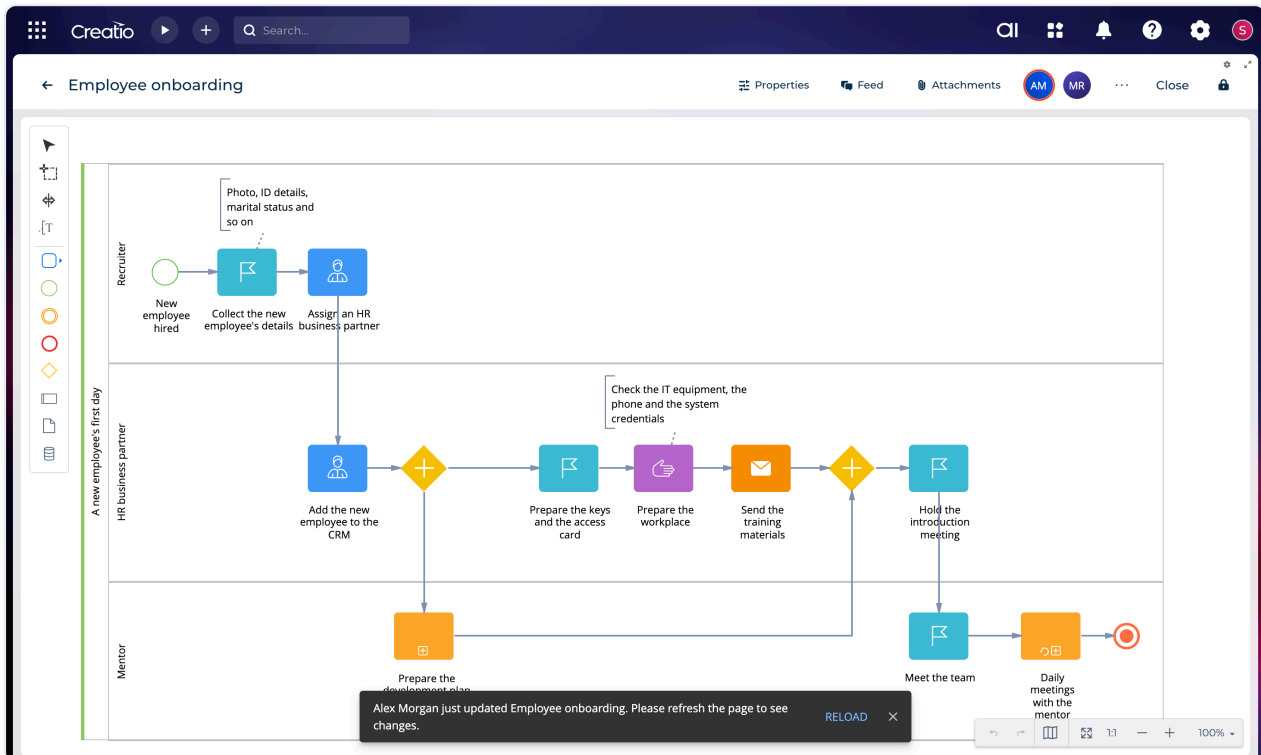
7.1 Who else has the process open

Next to **Properties**, the page shows the other users who have the same process open, each as a picture or initials. The picture is ringed while that user edits. Point to a user to read whether they are viewing, editing, or saved and how long ago, for example "Saved (3 minutes ago)". With four or more other users, the page shows two and **+N**, which opens the full list.



Alex Morgan and Maria Rossi have the process open; Alex has just started editing it.

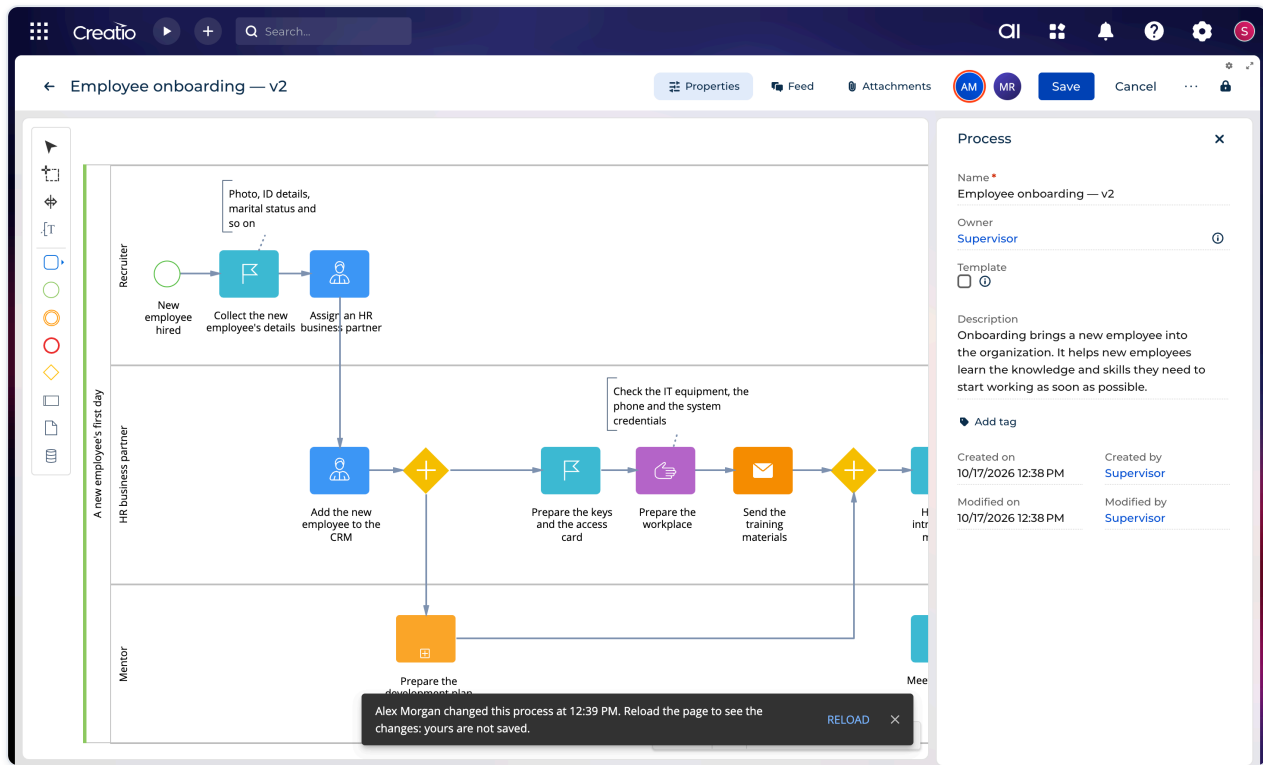
When someone starts editing the process you have open, or saves it, you get a message. After their save, **Reload** shows you their version.



Alex saved the process: **Reload** shows the new version.

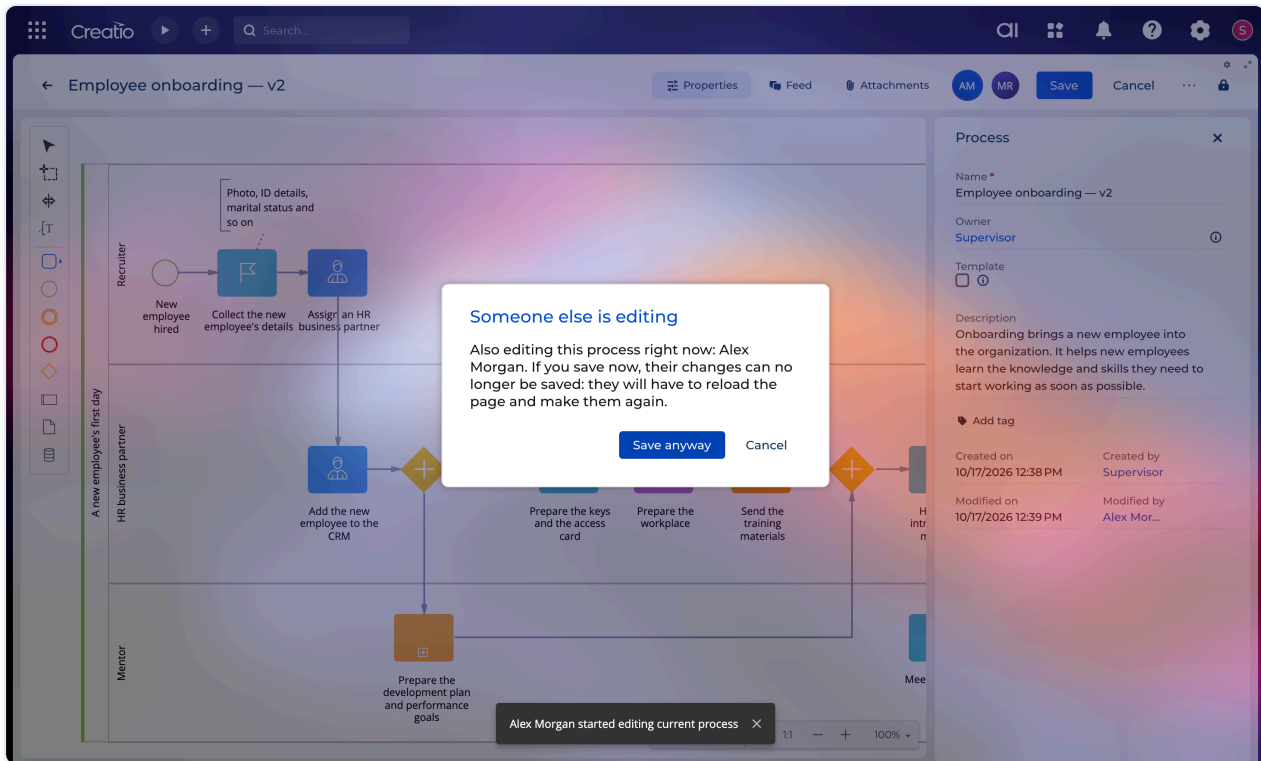
7.2 A save that loses nothing

When someone else saved the process after you opened it, your **Save** is refused: the message says who changed the process and when, in the time zone and format of your Creatio profile. Nothing of your version is written. Reload the page to see their changes, then make yours again.



A refused save: Alex changed the process after it was opened here.

When someone else has **unsaved** changes to the process, **Save** asks first. **Save anyway** saves your version; the other user then has to reload and make their changes again. **Cancel** writes nothing.



Someone else is editing: save anyway, or leave the process to them for now.

8 · Appendix — troubleshooting

"Import from Studio Free..." stays in the header after I installed the exporter

- The button hides once the section sees an exporter of version 0.1.4 or later in this browser. Download the exporter again from the window, remove the old one on `chrome://extensions` and load the new folder.
- In browsers that are not Chromium-based the button never shows: the exporter runs in Chromium browsers only.

"The file is not a library zip"

- Choose the zip the exporter downloaded, not a `.bpmn` file or a zip of your own.
- "This library zip was made by a newer exporter": update the application, then import the zip again.

"The library could not be imported"

- Try again: a second import creates no copies (section 5.4).

An imported process has no description

- Processes imported with a version before 1.1.3 arrived without it. Import the same library zip again: the import updates them.

"The picture could not be made"

- Try again; if it still fails, export the diagram to `.bpmn` instead. When a picture on the diagram could not be loaded, check that every picture it uses is still available.

Some diagrams were not moved, or were skipped by an import

- You may not edit them. Check the diagram's permissions, or ask its owner.

The page shows nobody else, though a colleague has the process open

- The feature `CrtBpmnPresence` may be switched off (section 2.4).
- The colleague may not be allowed to read the process: the page lists only users who may.

What's new

What's new in v1.2.2

Looking at a process no longer counts as changing it

This update fixes **Save** and **Cancel** appearing on a process you had only looked at, makes **Undo** reliable after you change an element's type, and keeps the Administrator's Guide current with the release.

Save appears only after a real change

Opening and closing **Properties**, or selecting an element on the diagram, no longer shows **Save** and **Cancel**. Before, the page took these for changes, and leaving it asked about changes you never made.

Cancel forgets a Description you did not keep

When you edit the Description of a process and then press **Cancel**, the edit is gone for good. Before, a later save of something else, such as a new name, could still write the cancelled Description into the diagram. For a process imported from Studio Free before v1.1.3, it could empty the description the diagram carried.

Undo after changing an element's type

After you change an element's type, for example a task into a user task, **Undo** brings the old type back and **Redo** the new one. Before, Undo left the diagram showing the new type while the process was saved with the old one.

The Administrator's Guide

The release includes [BPMN-Process-Library-Admin-Guide-v1.2.2.html](#), updated for this version. This single file, with its pictures included, describes installation, the Process diagrams section and its folders, the designer, moving a library from Studio Free, import and export, and working together.

Requirements

Creatio 10.0 or later, any product, on PostgreSQL or Microsoft SQL Server.

What's new in v1.2.1

Clearer messages when working together and when something fails

This update polishes v1.2.0: times now follow your Creatio profile, and a failed import or export tells you what to do instead of showing a technical error.

Times in your time zone and format

When your save is refused because another user saved the process first, the message tells the time of their change in the format of your Creatio profile. It shows only the time when the change happened today in your time zone, and the date and time otherwise, whatever the time zone of your computer.

Next to the **Properties** button, pointing to the picture of a user who saved the process tells how long ago they saved it, for example "Saved (3 minutes ago)", counted up to the moment you point. Before, it could keep saying "Saved recently".

Messages you can act on

When exporting a diagram as a picture, exporting or importing a `.bpmn` file, importing a library from Studio Free or moving processes to a folder fails, Creatio now says what happened and what to do next. Before, the message could end with a technical error text.

Requirements

Creatio 10.0 or later, any product, on PostgreSQL or Microsoft SQL Server.