



MGS – Document Tools for Creatio

User Manual

Contents

Chapter 1: Installation:	3
1.1 Document Tools for Creatio custom component – Pre-requisites	3
1.2 Document Tools for Creatio – Installation Steps	5
Chapter 2: Configuration:	6
2.1 Post-Installation Verification	6
2.2 Post-Installation Pre-requisites	7
Chapter 3: User Interface:	11
Appendix: Azure AD App Setup Guide	14
Part 1: Create an Azure AD App and Get Client ID + Secret	14
Step 1 Sign in to Azure	14
Step 2 Go to Azure Active Directory	14
Step 3 Create the App	14
Step 5 Create Client Secret	14
Part 2: Give Permissions to Microsoft Graph	15
Step 6 Go to API Permissions	15
Step 7 Add Required Permissions	15
Step 8 Grant Admin Consent	15
Part 3: Get SharePoint / OneDrive Site ID	16
Using Graph Explorer:	16
Replace the placeholders:	16
Part 4: Add System Settings in the System	16

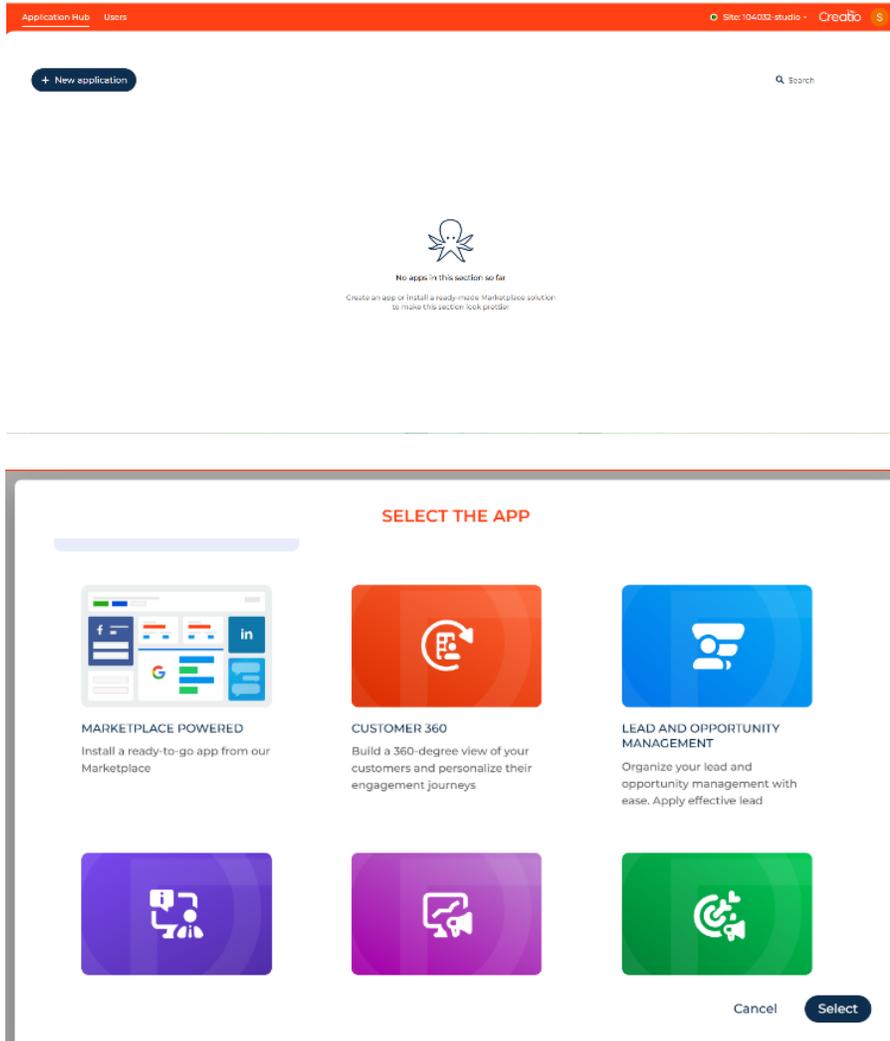
Chapter 1: Installation:

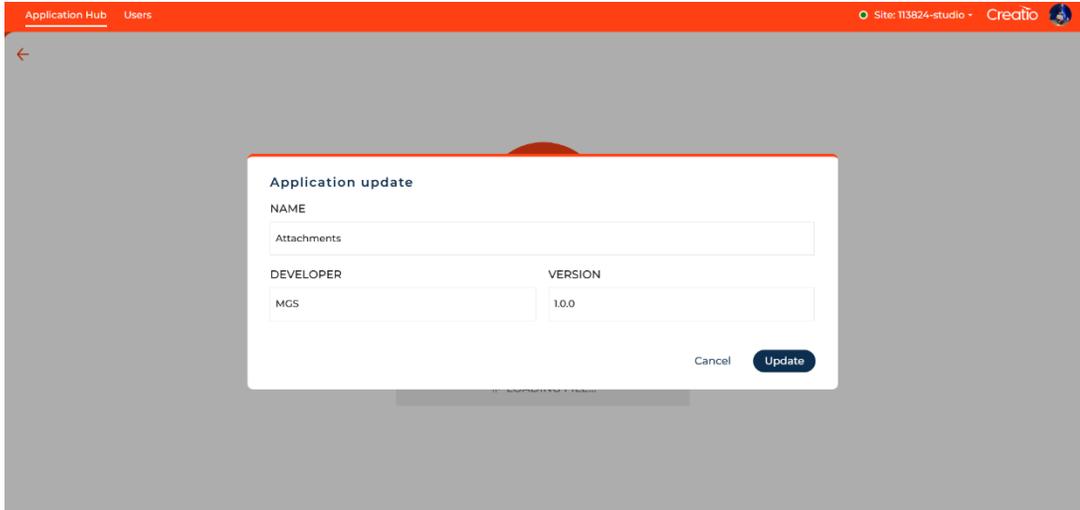
1.1 Document Tools for Creatio custom component – Pre-requisites

Before installing Document Tools for Creatio custom component, ensure that the following prerequisites are met:

1. Access Requirements

- Ensure you have administrative access to the environment.
- Verify that you have the required permissions to install new applications.

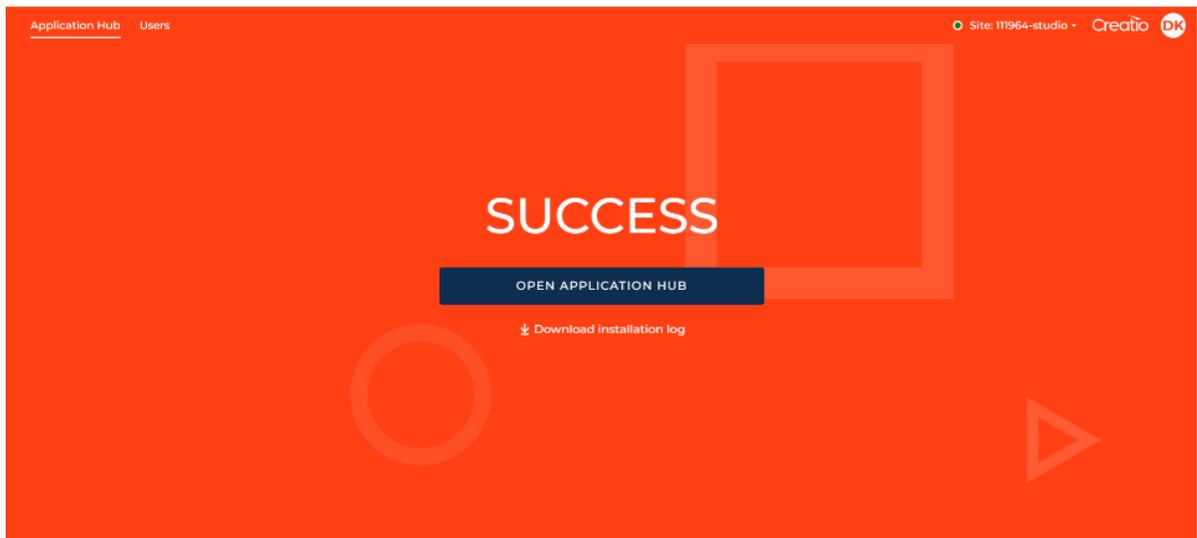




1.2 Document Tools for Creatio – Installation Steps

Follow the steps below to install Nested Files application:

1. Navigate to the **Application Hub**.
2. Click on the + **New Application** button.
3. Search for **Document Tools for Creatio** for Creatio.
4. Click **Install** and wait for the installation process to complete.
5. Once successfully installed, navigate back to the **Application Hub**.
6. Run Nested Files application to ensure it is functioning properly.



Chapter 2: Configuration:

2.1 Post-Installation Verification

After installation, verify that the application is properly configured:

1. **Check Application**
 - Open the **Application Hub** and confirm that **Document Tools for Creatio** appears in the “My Application” list of installed applications.
2. **Run Initial Tests**
 - Launch the application and check for any loading errors.
3. **User Access Verification**
 - Confirm that designated users can access the application without issues.
 - Validate that all necessary permissions have been assigned correctly.

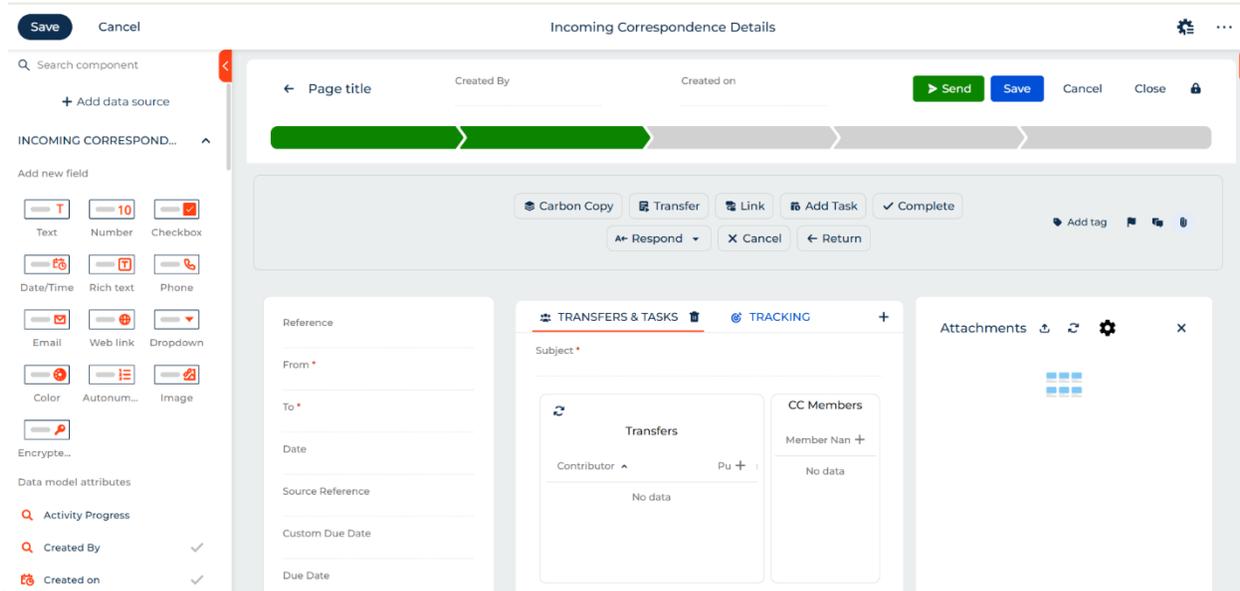
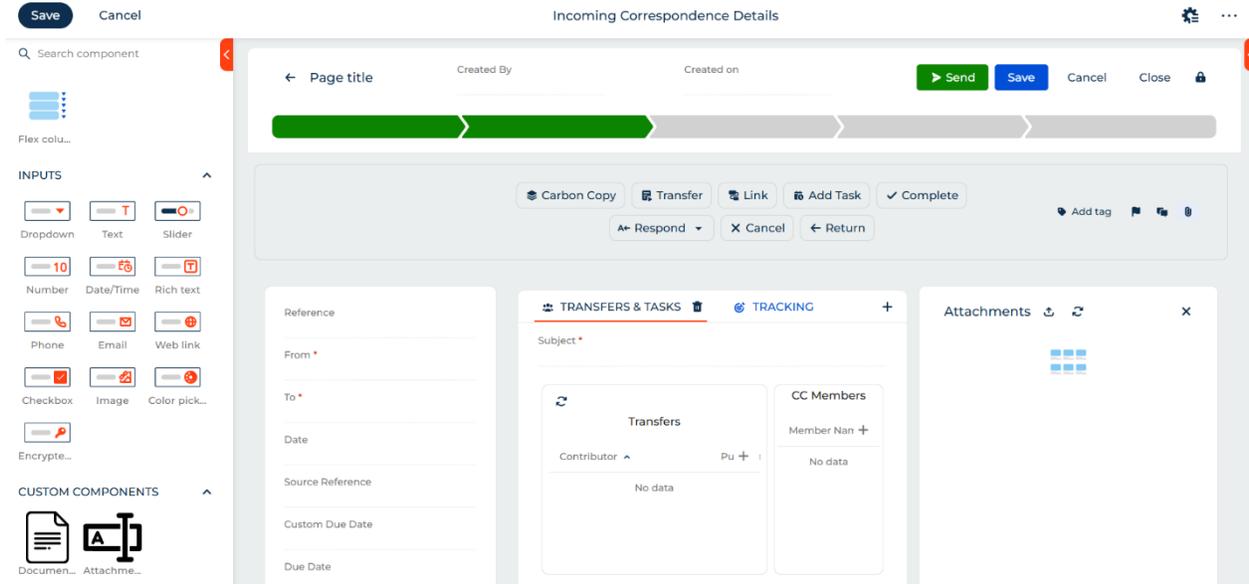


- Go to System Settings on the Settings page, search for the setting, and enter its default value (Please refer to the Appendix part for reference).
 - GraphClientSecret
 - GraphTenantId
 - GraphClientId
 - GraphSiteId

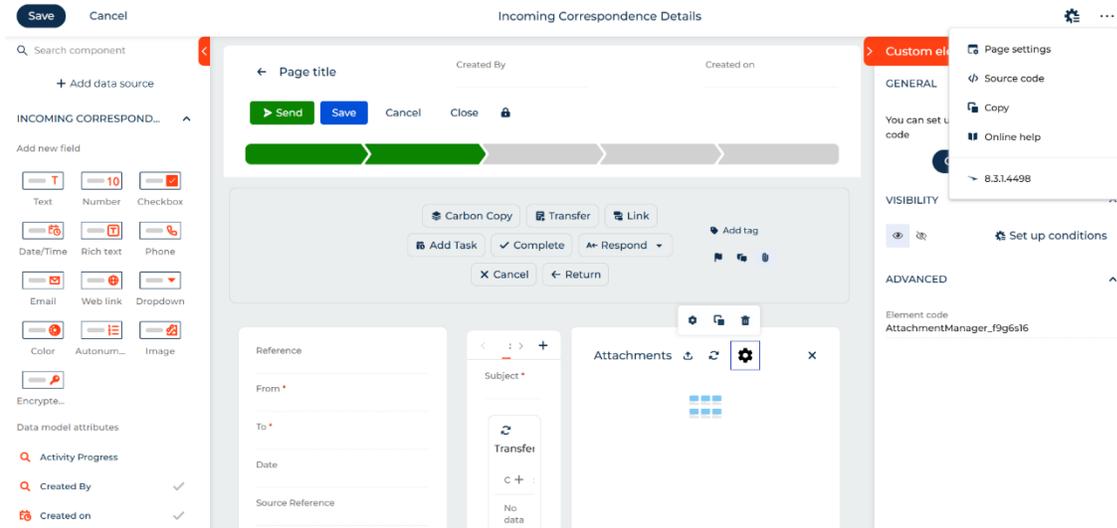
2.2 Post-Installation Pre-requisites

1- Navigate to the edit page of the application where you want to add the Document Tools for Creatio:

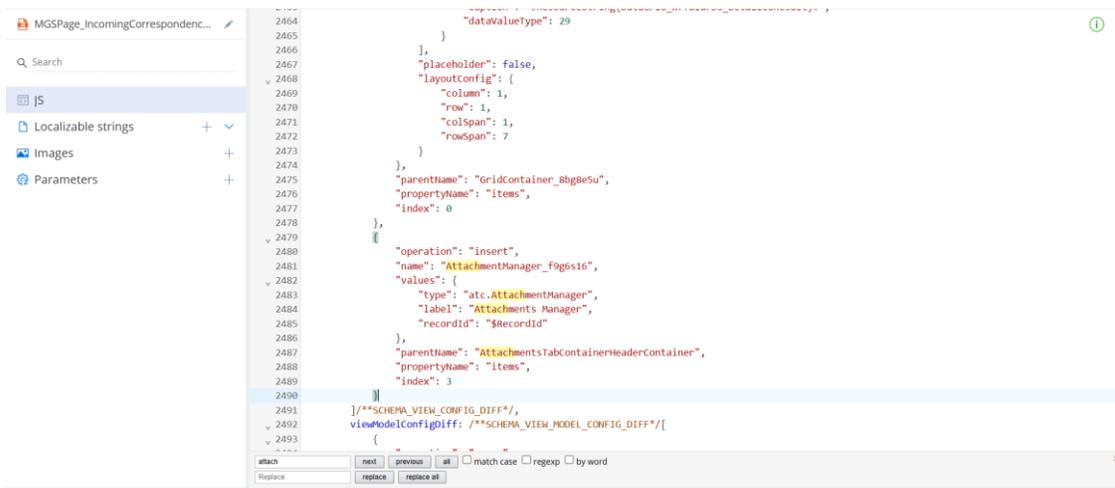
- Scroll down the edit page to locate a custom component labeled “Document Tools for Creatio.”



- After saving, Press on the three dots on the top right of the page and press on “Source Code”



- Click the “Edit” button at the top right to modify the source code, then click “Apply.”
- Scroll to the bottom of the source code page and enter the handler there.
 - Press **Ctrl + F** (Windows) or **Cmd + F** (Mac) to open the search function.
 - Search for **"type": “Attachments Manager ”**.
 - This will help you locate Document Tools for Creatio component in your page code.
 - Add the following code under the label: **"recordId": "\$RecordId"**



- Add a source named “blob:” and include the following allowed directives

← blob: Close

Source URL • blob: Active Verified

Description

ALLOWED DIRECTIVES

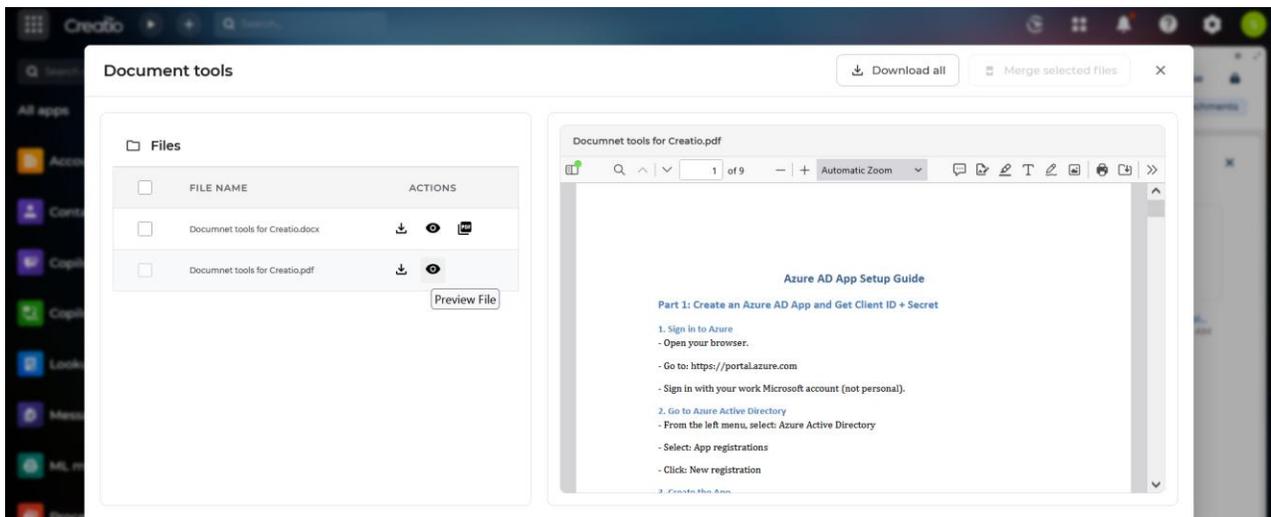
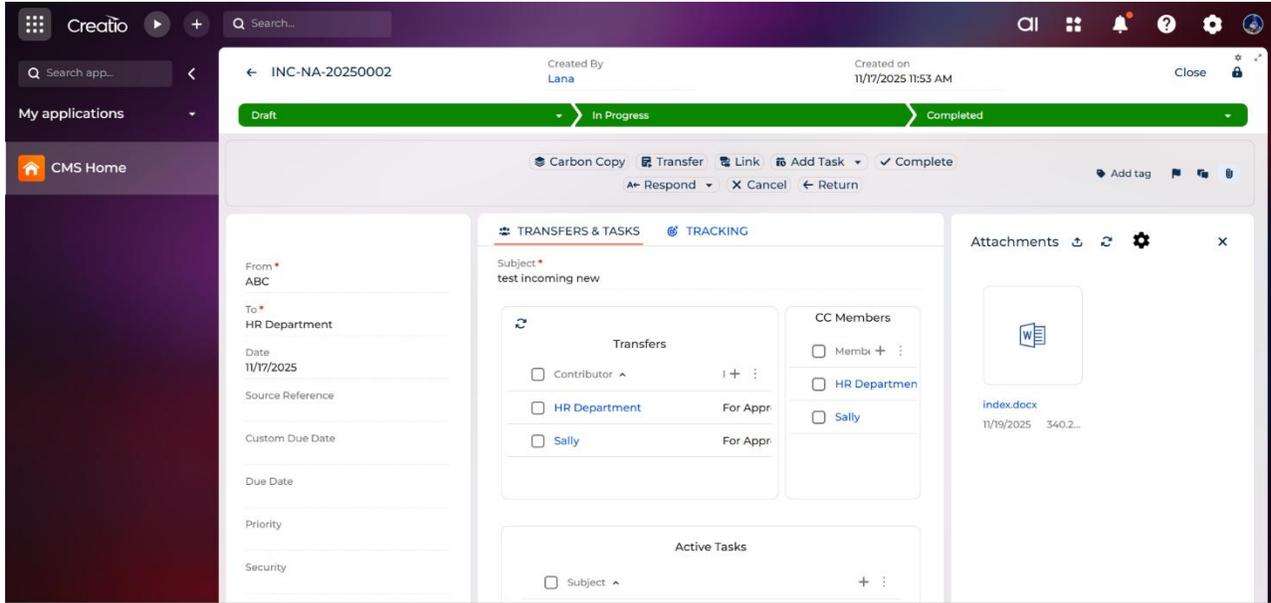
Directive + ⋮

- 1 object-src
- 2 worker-src
- 3 frame-src
- 4 script-src
- 5 child-src
- 6 img-src
- 7 base-uri
- 8 frame-ancestors

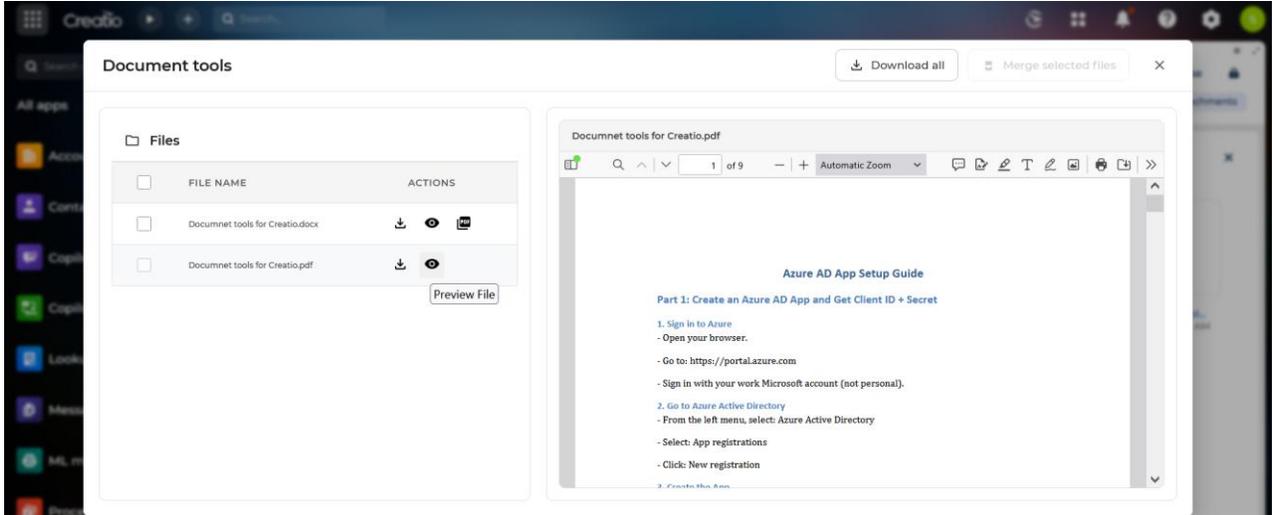
+ New

Chapter 3: User Interface:

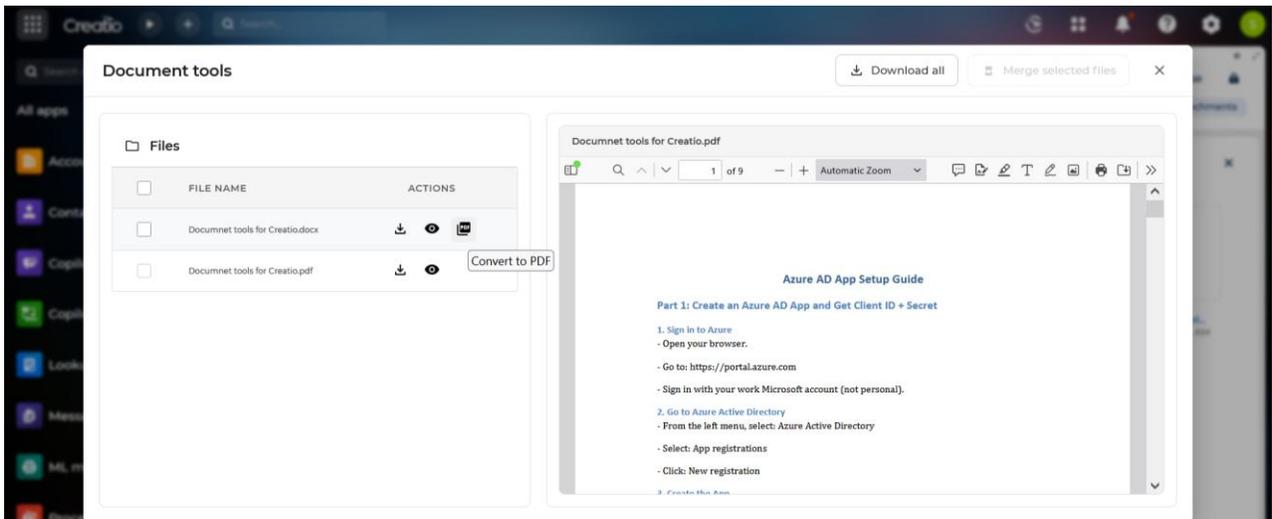
- Once you locate the **Document Tools for Creatio**, the related data will appear in the attachments area.



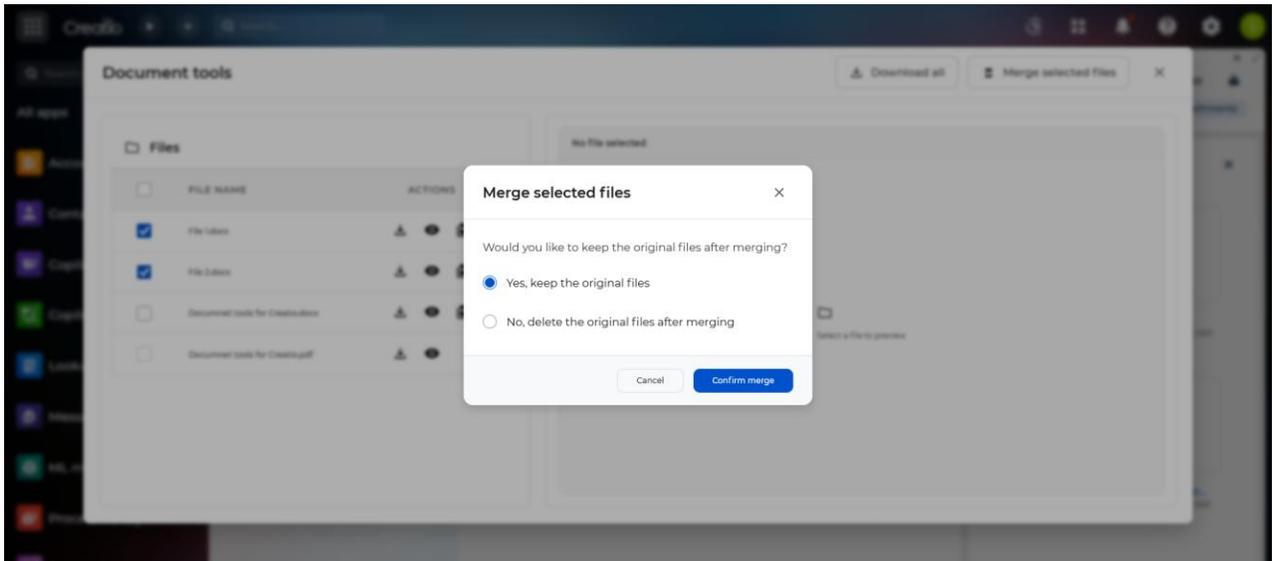
- To preview the document, click the eye icon.



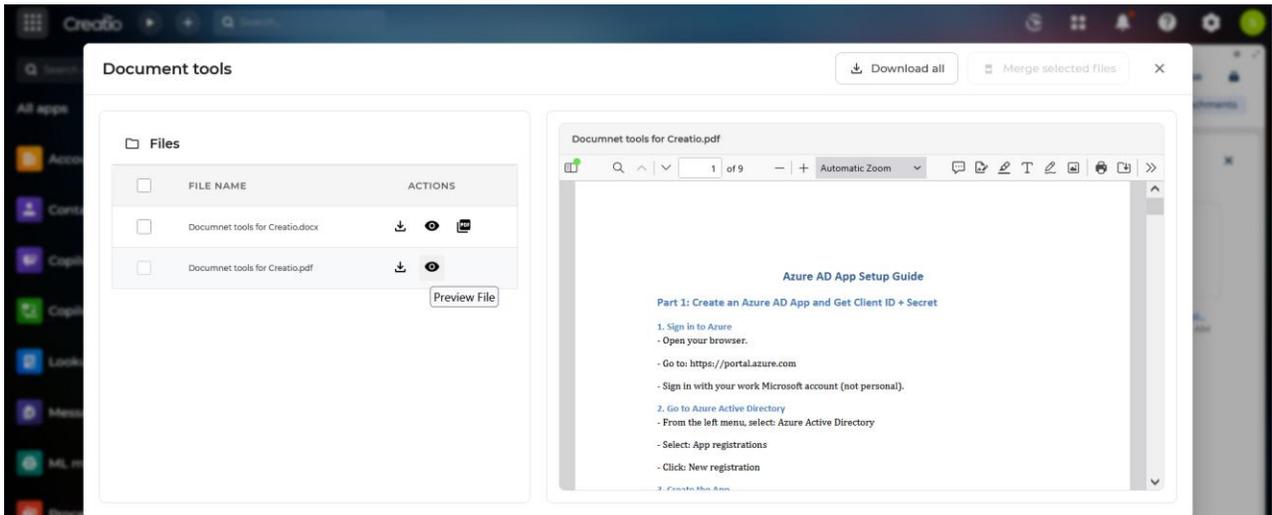
- To convert the document to PDF, click the PDF icon.



- To merge Word documents, select the files and click the “Merge Selected Files” button.



- To download the files, click the “Download All” button.



Appendix: Azure AD App Setup Guide

Part 1: Create an Azure AD App and Get Client ID + Secret

Step 1 Sign in to Azure

- Open your browser
- Go to: <https://portal.azure.com>
- Sign in with your work Microsoft account (not personal)

Step 2 Go to Azure Active Directory

- From the left menu, select: Azure Active Directory
- Select: App registrations
- Click: New registration

Step 3 Create the App

- Fill in the fields:

Field	Value
Name	WordToPDFApp (or any name you like)
Supported account types	Accounts in this organizational directory only
Redirect URI	Leave blank

- Then click: Register
- Step 4 Get Client ID + Tenant ID
- After creating the app, copy the following:
- Application (client) ID
- Directory (tenant) ID

Step 5 Create Client Secret

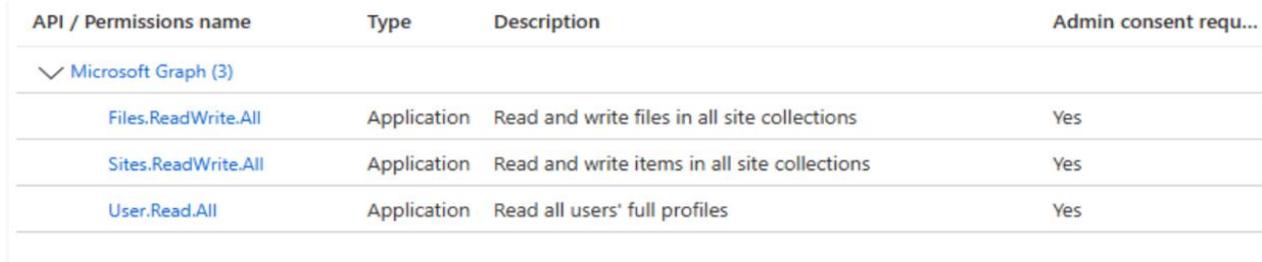
- Go to Certificates & secrets
- Click: New client secret
- Description: AppSecret
- Expiration: 24 months
- Click Add

△ Important: Copy the Value immediately (ClientSecret). You won't be able to see it again!

Part 2: Give Permissions to Microsoft Graph

Step 6 Go to API Permissions

- Select: API Permissions
- Click: Add a permission
- Choose: Microsoft Graph
- Select: Application permissions

API / Permissions name	Type	Description	Admin consent requ...
			
Files.ReadWrite.All	Application	Read and write files in all site collections	Yes
Sites.ReadWrite.All	Application	Read and write items in all site collections	Yes
User.Read.All	Application	Read all users' full profiles	Yes

Remark: This API requires Application permissions, not Delegate permissions

API / Permissions name	Type	Description	Admin consent requ...
			
Files.ReadWrite.All	Application	Read and write files in all site collections	Yes
Sites.ReadWrite.All	Application	Read and write items in all site collections	Yes
User.Read.All	Application	Read all users' full profiles	Yes

Step 7 Add Required Permissions

- Click: Add permissions

Permission Type	Permissions
SharePoint/OneDrive	Sites.ReadWrite.All
SharePoint/OneDrive	Files.ReadWrite.All
Optional	Sites.Selected

Step 8 Grant Admin Consent

- Click: Grant admin consent for <Your Tenant>
- All permissions should turn green ✓

Part 3: Get SharePoint / OneDrive Site ID

Using Graph Explorer:

- Go to: <https://developer.microsoft.com/en-us/graph/graph-explorer>
- Log in with your work Microsoft email
- Use URL format:
<https://graph.microsoft.com/v1.0/sites/<your-domain>:/personal/<your-email>>:

Replace the placeholders:

Placeholder	Description
<your-domain>	Your SharePoint domain (e.g., company-my.sharepoint.com)
<your-email>	Your work email username (e.g., john_doe_company_com)

Example response:

```
{ "@odata.context": "https://graph.microsoft.com/v1.0/$metadata#sites/$entity", "@microsoft.graph.tips": "Use $select to choose only the properties your app needs.", "createdDateTime": "2024-04-22T10:00:00Z", "description": "This is the user's personal space...", "id": "", "lastModifiedDateTime": "2025-11-15T16:00:00Z", "name": "user_example_contoso_com", "webUrl": "https://contoso.sharepoint.com/personal/user_example_contoso_com", "displayName": "Example User", "root": {}, "siteCollection": { "hostname": "contoso.sharepoint.com" } }
```

Note: Copy the "id" value → this is your SiteId

Part 4: Add System Settings in the System

Steps:

- System Designer
- System Settings
- Add Settings