



MGS Policy and Procedure Management for Creatio

Installation Guide

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Chapter 1: MGS Policy and Procedure Management for Creatio –Prerequisite

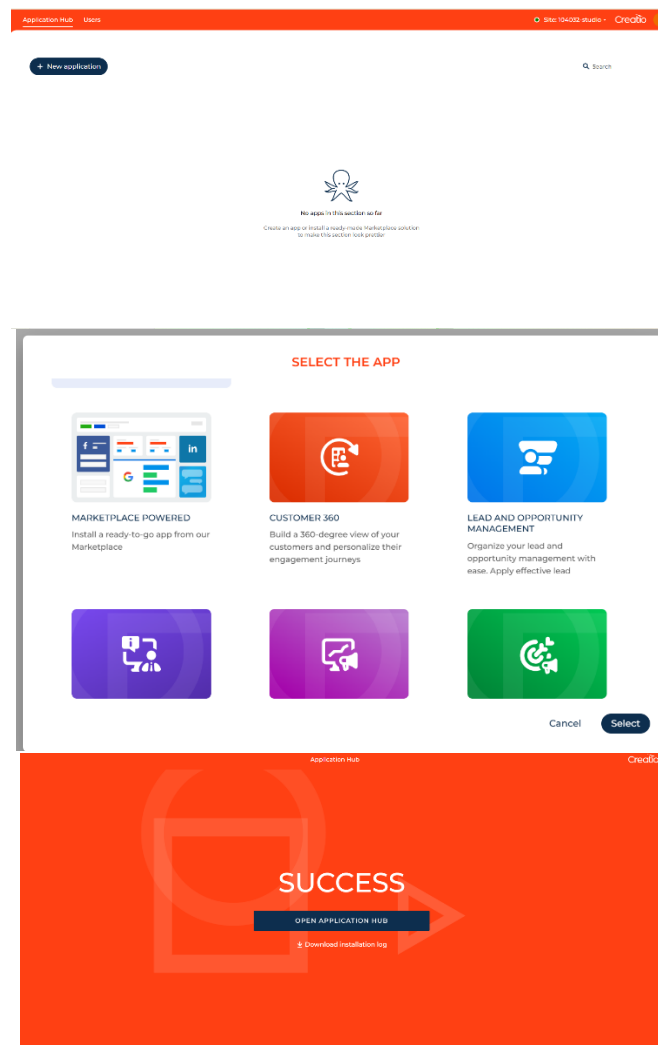
Before installing the Policy and Procedure application, ensure that the following prerequisites are met:

1. Access Requirements

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

2. Required Applications

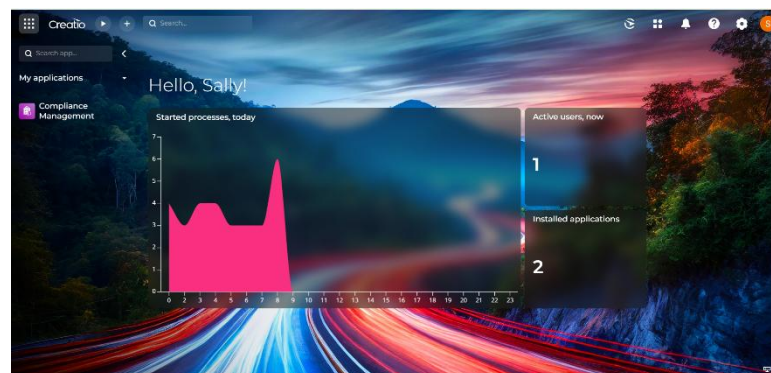
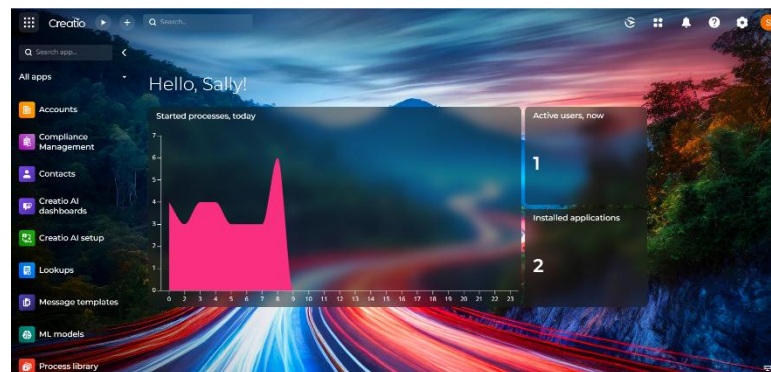
- From the **Application Hub**, click the + **New Application** button.
- Search for and install **Customer 360** to the environment.



Chapter 2: MGS Policy and Procedure Management for Creatio– Installation Steps

Follow the steps below to install the Policy and Procedure application:

1. Navigate to the **Application Hub**.
2. Click on the **+ New Application** button.
3. Search for **Policy and Procedure 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 the **Policy and Procedure** application to ensure it is functioning properly.
7. Confirm that both **Customer 360** and **Policy and Procedure** applications are visible and active.

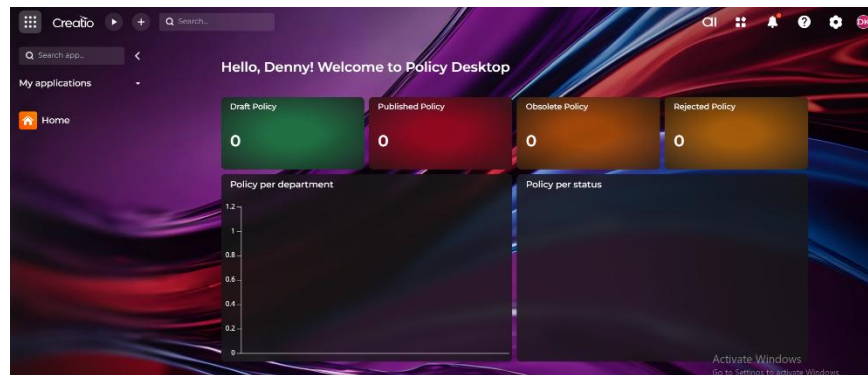


Chapter 3: MGS Policy and Procedure Management for Creatio - Post-Installation Verification

After installation, verify that the application is properly configured:

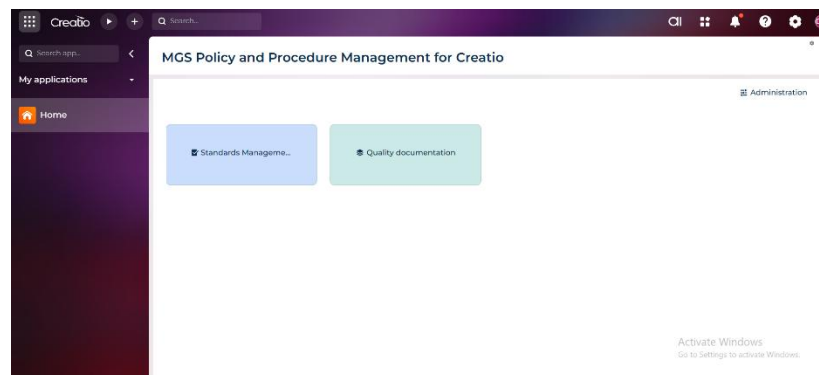
1. Check Application

- Open the **Application Hub** and confirm that **Policy and Procedure** appears in the “My Application” list of installed applications.



2. Run Initial Tests

- Launch the application and check for any loading errors.
- Ensure all required modules and dashboards are accessible.

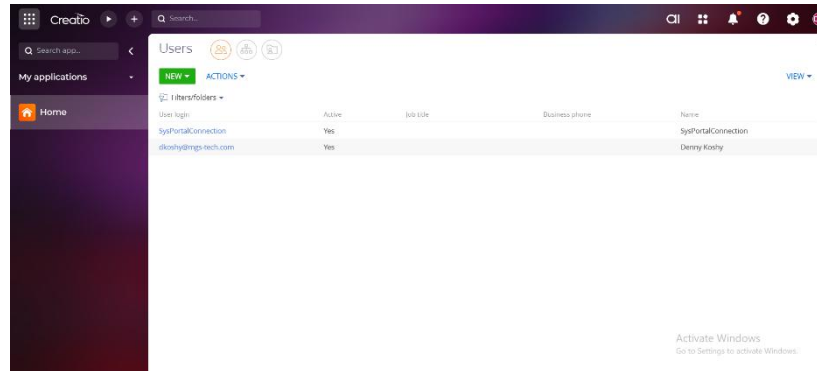


3. User Access Verification

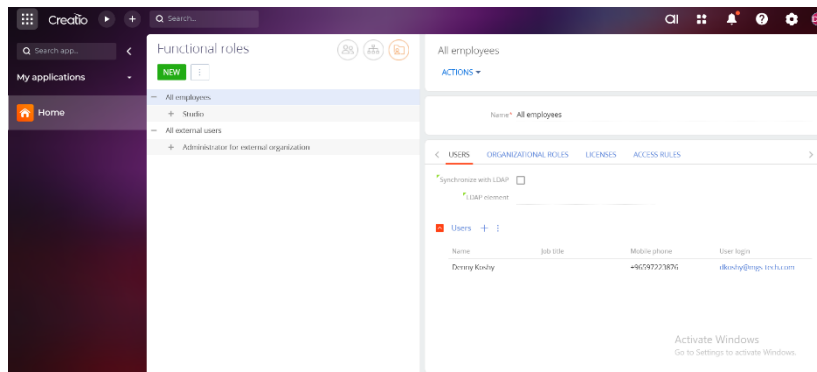
- Confirm that designated users can access the application without issues.
- Validate that all necessary permissions have been assigned correctly.

Chapter 4: MGS Policy and Procedure Management for Creatio - Post-Installation Prerequisites

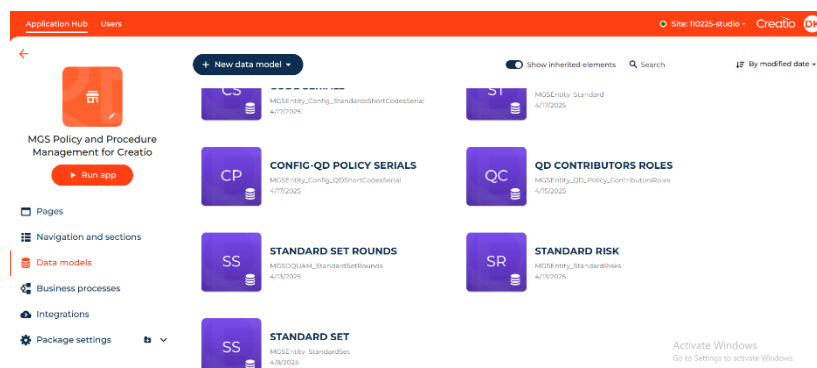
- 1- From the right side on the top left of the page:
 - Go to the users and start adding the “Company Employees” from the “Users” page.



- Go to the “Functional Role” page and under the “All Employees” add the users with its appropriate functional role.



- Go to the Lookup Section, and start creating the lookups that are related to the data models.
- In the Lookup section, create a new lookup for each data model related.



Note: To start using the application, please follow the user manual.