

## User Guide for Configuring Creatio OData Connection in Proxima Vision

### Step 1: Set Up OAuth 2.0 Authorization in Creatio

- 1. Access the OAuth 2.0 Settings:**
  - Open the [OAuth 2.0 authorization setup page](#) in the Creatio documentation for detailed information about OData authorization in Creatio.
- 2. Create an OAuth 2.0 Application:**
  - Navigate to the **System Designer** in Creatio.
  - Go to **OAuth 2.0 applications**.
  - Click **New** to create a new application.
  - Fill in the necessary details:
    - **Name:** Give your application a name (e.g., "Proxima Vision").
    - **Client ID:** Auto-generated or custom value.
    - **Client Secret:** Auto-generated or custom value.
    - **Redirect URI:** Specify the redirect URI required for your integration.
- 3. Save the Application:**
  - Click **Save** to store the application details.
  - Note down the **Client ID** and **Client Secret** for later use.
- 4. Configure OAuth 2.0 Token Endpoint:**
  - In the same section, find the **Token URL** which is typically in the format:

```
https://[Identity Service URL]/connect/token
```

### Step 2: Configure Access to Creatio Endpoint in Proxima Vision Software

- 1. Open Proxima Vision Software:**
  - Launch the Proxima Vision software and navigate to the data source configuration section.

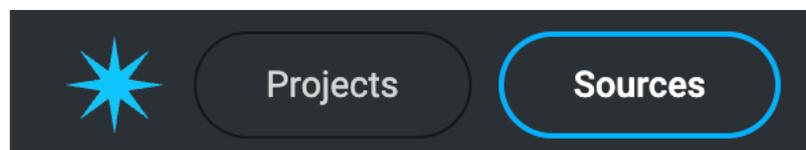


Figure 1 Navigation to Sources

- 2. Add New Data Source:**
  - Click on **Set up source** under the **New data source** section.
  - Switch to **Set up source** menu



Figure 2 New source button

### New data source

Name:

Figure 3 Change to Set up Source menu

### 3. Fill in the Required Fields:

- **Name:** Enter a name for your data source (e.g., "Creatio OData Source").
- **Type:** Select **Creatio** from the dropdown list.
- **OData URL:** Enter your Creatio OData endpoint URL, typically:

`https://[Creatio instance URL]/0/odata/SysProcessElementLog`

- **Token URL:** Use the token endpoint URL noted earlier:

`https://[Identity Service URL]/connect/token`

- **Client ID:** Enter the Client ID from your OAuth 2.0 application.
- **Client Secret:** Enter the Client Secret from your OAuth 2.0 application.
- **Proxy URL:** If you use a proxy, enter its URL here. Otherwise, leave it blank.

### 4. Select the Process:

- Choose **Process name** from the dropdown list under **Process**.

5. **Save the Configuration:**

- Click **Save** or **Add** to store the new data source configuration.

**Troubleshooting Tips:**

- **Invalid Credentials:** Double-check the Client ID and Client Secret.
- **Incorrect URLs:** Ensure the OData URL and Token URL are correctly formatted.
- **Network Issues:** Verify that there are no network restrictions or firewall rules blocking the connection.