

CREATIO ADMINISTRATION, CONFIGURATION AND BUSINESS PROCESS AUTOMATION

Who should take this course: The training program is intended for users familiar with Creatio products aspiring to gain practical skills to configure, administer and customize Creatio to its needs.

What to expect: Participants will learn how to prepare the system for the commercial operation: enter lookups, import data from other systems and databases, set up new fields, details and sections. Participants will also learn how to license users, work with administrative tools, configure access rights, create workplaces, configure new printable and create new business processes.

Course duration & format: The training takes place over 2 days with a total of 8 hours each session. In-person or online.

Time	Topic
DAY 1. CREATIO ADMINISTRATION & CONFIGURATION	
10 min	Introduction to Creatio, interface overview and terminology
20 min	System Architecture <ul style="list-style-type: none"> • Structure and Hierarchy • Packages and Data Binding • User Limitations
5 hours	Wizards <ul style="list-style-type: none"> • Object Model • Data Binding • Section Wizard • Detail Wizard • Business Rules • Lookups
1 hour	Security and Access Permissions <ul style="list-style-type: none"> • Users, Operational and Functional Roles • Access rules default / by operation / by column • Operations Permissions
30 min	Printable forms <ul style="list-style-type: none"> • Installing and configuring MS Word plugin • Creating new printable Form
1 hour	MISC <ul style="list-style-type: none"> • Data import and export • Common System Settings and Lookups • Queue and Agent Desktop • Dashboards
DAY 2. BUSINESS PROCESS AUTOMATION	
6 hours	<ul style="list-style-type: none"> • Business Processes • Web-Services • Intro to Machine Learning
2 hours	Case Management <ul style="list-style-type: none"> • Tasks • Manual and Auto Stage Transition • Sub-process and Results • BPM vs CM