

## CREATIO ADMINISTRATION AND CUSTOMIZATION GUIDED LEARNING

**Who should take this course:** This guided learning course is intended for implementation consultants, CRM coordinators, business analysts and other users that are familiar with any Creatio product at end-user level and are looking to learn more about its customization capabilities.

**What to expect:** The participants will take part in a variety of learning courses on all topics listed below. Additionally, they will be able to apply their knowledge by completing practical assignments with the help of our trainer.

- ⚠️ PREWORK: The participant must successfully complete the required e-learning courses before starting their guided learning:**
- [CREATIO BASICS](#)
  - [CREATIO ADMINISTRATION AND CONFIGURATION](#)
  - [BUSINESS PROCESSES MANAGEMENT IN CREATIO](#)

Time	Topic
<b>DAY 1. PACKAGES AND SECTION WIZARD</b>	
<b>1 hour</b>	<b>Packages</b> Using packages to transfer configured functionality to other environments
<b>1 hour</b>	<b>Section wizard</b> Using the section wizard to create and edit sections.

Time	Topic
<b>DAY 2. BUSINESS RULES &amp; DEFAULT VALUES</b>	
<b>1.5 hour</b>	<b>Business rules</b> Setting up business rules.
<b>30 minutes</b>	<b>Default values</b> Adding default values to fields.

Time	Topic
<b>DAY 3. DETAILS &amp; COLUMNS</b>	
<b>1 hour</b>	<b>Detail wizard</b> Using the detail wizard to create and edit details..
<b>1 hour</b>	<b>Setting up columns in section lists</b> A variety of tasks related to system objects and their connections.

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Time	Topic
<b>DAY 4. ANALYTICS &amp; REPORTS</b>	
1 hour	<b>Dynamic folders and dashboards</b> A variety of tasks related to system objects and their connections.
1 hour	<b>Reports</b> Setting up printables using the MS Word plugin.

Time	Topic
<b>DAY 5. ACCESS PERMISSIONS</b>	
1 hour	<b>Managing users and the organizational structure</b> Creatio user administration and management.
1 hour	<b>Setting up access permissions to objects and operations</b> Access permissions to objects, sections and operations. Inheritance of access permissions.

Time	Topic
<b>DAY 6. DYNAMIC CASES</b>	
2 hours	<b>Case management</b> Creating cases. Various use examples in sections.

Time	Topic
<b>DAY 7. DYNAMIC CASES</b>	
1 hour	<b>Case management + Business processes</b> Examples of using business processes in cases. Connecting processes and cases.
1 hour	<b>Business processes</b> Extended capabilities of the process designer. Common examples of practical use.

Time	Topic
<b>DAY 8. BUSINESS PROCESSES</b>	
2 hours	<b>Business processes</b> Extended capabilities of the process designer. Common examples of practical use.

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DAY 9. BUSINESS PROCESSES & INTEGRATION	
1 hour	<b>Business processes</b> Extended capabilities of the process designer. Common examples of practical use.
1 hour	<b>Integrations</b> Configuring web-services and launching integration via business process

Time	Topic
DAY 10. APPLICATION HUB & FREEDOM UI DESIGNER	
2 hours	<b>Application hub &amp; Freedom UI Designer</b> Setting up a new application with Atlas 8.0 tools