

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
DAY 1. WIZARDS AND BUSINESS RULES	
1 hour	Section wizard Using the section wizard to create and edit sections.
1 hour	Detail wizard Using the detail wizard to create and edit details.
1 hour	Business rules. Setting up business rules.

Time	Topic
DAY 2. FILTERS, ANALYTICS, AND PRINTABLES	
2 hours	Setting up columns, dynamic groups and analytics A variety of tasks related to system objects and their connections.
1 hour	Printables Setting up printables using the MS Word plugin.

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Time	Topic
DAY 3. USERS, ACCESS PERMISSIONS, AND CASES	
1 hour	Managing users and the organizational structure Creatio user administration and management.
1 hour	Setting up access permissions to objects and operations Access permissions to objects, sections and operations. Inheritance of access permissions.
1 hour	Case management Creating cases. Various use examples in sections.

Time	Topic
DAY 4. PROCESSES AND CASES	
30 minutes	Case management Creating cases. Various use examples in sections.
2 hours	Business processes Extended capabilities of the process designer. Common examples of practical use.
30 minutes	Case management + Business processes Examples of using business processes in cases. Connecting processes and cases.