

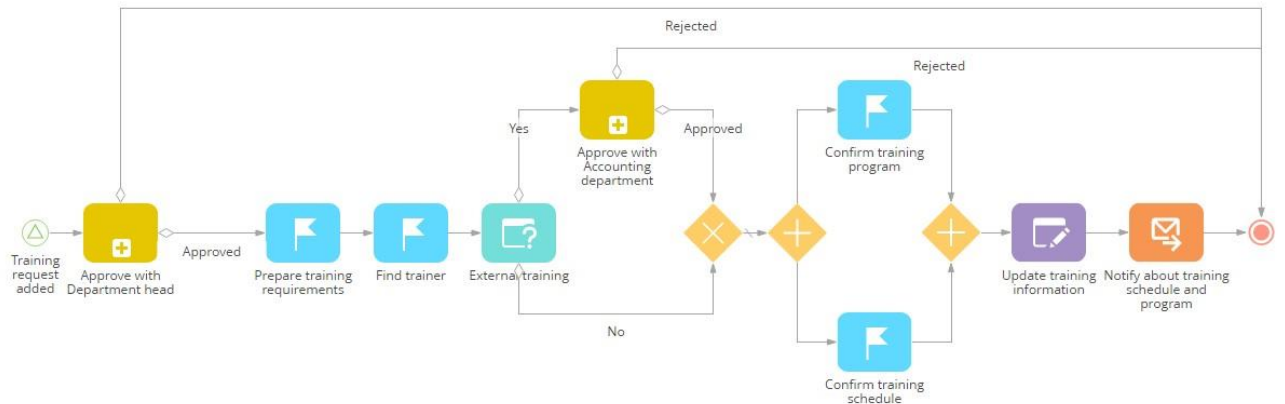
Training request

Characteristic	Description
Purpose	Processing employee training requests Approving training requests with Department head Approving external training requests with Accounting department Monitoring training preparations and schedule
Area	HR
Creatio compatibility	All base products on Creatio platform 7.10+
Required system objects	Base sections: <ul style="list-style-type: none">• Contacts• Employees• Activities• Requests New sections: System sections: <ul style="list-style-type: none">• Users

List of process participant roles

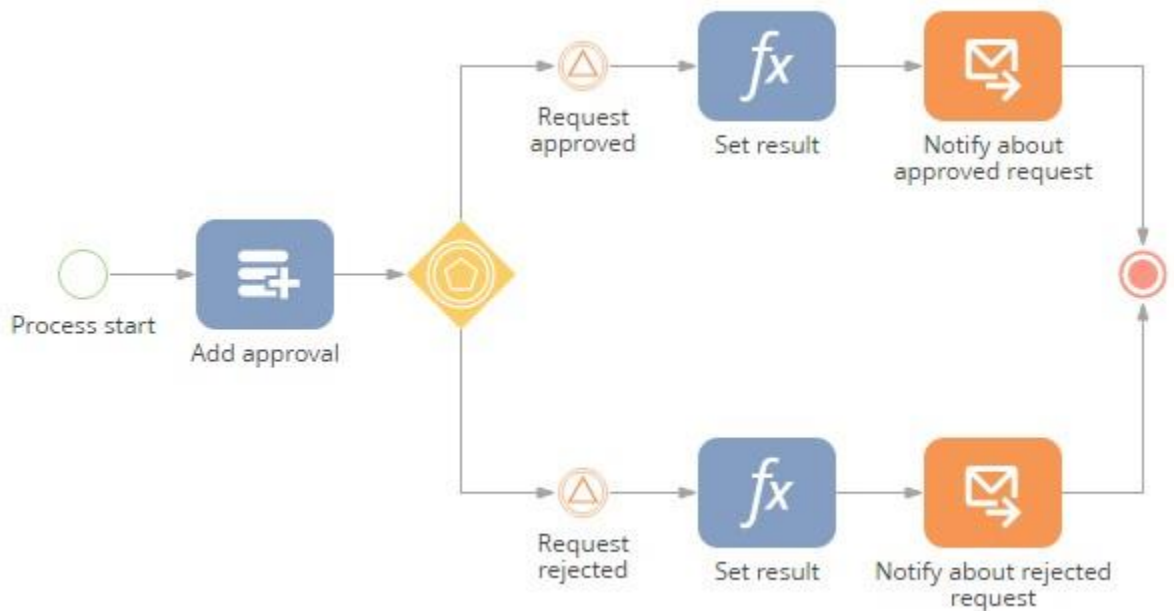
Role	Responsibilities
Requestor	Prepares training requirements Coordinates training schedule and program prepared by the assigned trainer
Department head	Approves training requests for their department
Training manager	Clarifies training requirements: goals, objectives, format. Assigns a trainer Monitors training preparations and schedule, coordinates with Requestor
Accountant	Approves external training requests

Process description



Process step	Executed by	Step description
Training request added	Requestor	Requestor adds a training request, specifies training key goals and format requirements. Requestor clicks the [Send for approval] action to run the [Training request] process.
Approve with Department head	Department head	The [Getting request approval] sub-process starts for Department head. The approval notification shows up in their notification center.
Prepare training requirements	Training manager	Training manager checks the training requirements and (if necessary) clarifies additional information with Requestor.
Find trainer	Training manager	For internal trainings – Training manager selects the trainer from employees. For external trainings – Training manager creates a list of possible providers and coordinates the trainer selection with Requestor and Department head.
External training?	Training manager	Training manager specifies the training type based on the trainer selection.
Approve with Accounting department	Accountant	The [Getting request approval] sub-process starts for Accountant in case of external training. The approval notification shows up in their notification center. Accountant checks if the cost of the training conforms to the budget.
Confirm training program	Training manager	Training manager checks the training program prepared by the trainer and agrees it with Requestor.
Confirm training schedule	Training manager	Training manager checks the training schedule prepared by the trainer and agrees it with Requestor.
Update training information	Training manager	Training manager adds the training program and schedule to the request.
Notify about training schedule and program	Training manager	The training manager notifies Requestor and Department head that the training preparations are complete.

The [Getting request approval] sub-process



Process step	Executed by	Step description
Add approval	Creatio	Adding an approval.
Set result	Creatio	The approval result is passed to the main process.
Notify about approved request	Creatio	Requestor receives a notification via email if the request is approved.
Notify about rejected request	Creatio	Requestor receives a notification via email if the request is rejected.

Implementation guidelines

1. Install packages using the [Installed applications] functionality in [System designer] (please, install packages in the following order: 1. BpmRequests; 2. BpmTrainingRequests).
2. Add HR personnel in Creatio.
3. To configure automatic request approval routing, enter the following information in Creatio:
 - a. add all working employees in the [Employees] section,
 - b. in the lookup [Organization structure items] add all departments (for each department specify their head), and
 - c. update all working employees with their organization unit and manager.
 - d. fill out the «Training manager» system setting.
4. The following system setting is required to send automatic email notifications – “Mailbox for sending email with information on approval” (configure the synchronization with at least one mailbox in Creatio to fill in this setting)
5. To start the process, select a training request in the [Requests] section and click the [Send for approval] action.