

COURSE OUTLINE – (FP01) MANAGEMENT CONSOLE

Overview

Management Console (MC) is the application that administers the User security and Enum functionality within the FINEOS product suite. This course explains how to create and administer the two sub-systems contained within Management Console:

- Security sub-system facilitates the administration of Users, Company Structure, and Secured Actions
- Enum sub-system facilitates the administration of Enums (Drop down lists)

Objectives

To provide attendees with an understanding of all functionality contained within the Management Console application, and how this functionality interacts with and can be applied in the context of an overall FINEOS Solution

Who should attend?

All project resources involved in the business configuration and administration of a FINEOS Solution

Topics

Introduction and Overview

- Accessing MC
- MC Terminology

The Two Subsystems

- The Enum Subsystem
- The Security Subsystem

Company Structure

- Creating a Servicing Company
- Creating a Department
- Creating Sub-departments
- Linking/Unlinking Departments (to Servicing Company & to other departments)
- Working with Users
- Creating new Users
- Updating Users
- Linking Users to Departments
- Changing Users' Passwords

Profiles

- Creating a User Profile
- Creating a Department Profile

Secured Actions

- Adding/Removing a Secured Action to/from a User
- Adding/Removing a Secured Action to/from a Department

System Parameters

- Updating System Parameters

Profiles

- Creating a Department Profile
- Creating a User Profile

Domains

- Creating a Domain
- Updating a Domain

Domain Subsets

- Creating a Domain Subset
- Updating a Domain Subset

Instances

- Creating an Instance
- Updating an Instance
- Creating a Subset Instance
- Updating a Subset Instance

Pre-requisites

None

Formats & Duration

Training Format	Description	Maximum number of attendees	Duration
Classroom	An instructor-led session combining a blended learning approach of theory, hands-on exercises and knowledge checks	8	One Half Day
Workshop	In addition to attending the classroom training, the workshop will focus on the business configuration elements of a FINEOS implementation. Attendees will explore the core product knowledge gained in the classroom training with a view to applying it in the business configuration element of a project.	8	One Day

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