

COURSE OUTLINE: (FP02) PROCESS MANAGER ADMINISTRATION

Overview

The Process Manager Administration component allows you to create and maintain different Task types and Roles. Once you have created the Task Types, you can assign them to different roles within a department/s. A user is then assigned a role, thus only the tasks which they are able to perform display in their personal work or case queue.

Objectives

To provide attendees with an understanding of all functionality contained within the Process Manager Administration component, and how this functionality interacts with, and can be applied in the context of an overall FINEOS Solution implementation

Who should attend?

All Project Resources involved in the business configuration of a FINEOS Solution

Topics

Introduction and Overview

- What is Process Manager Administration?
- Task Types and Roles

Task Type Administration

- Adding and Editing Task Types
- Task Type Details tab
- Additional Information tab
- Task Type Integration tab
- Task Type Routing tab
- Place on hold tab
- Task Type Service Level tab

Role Administration

- Adding and Editing Roles
- Linking Users to Roles
- Linking Work Types to Roles

Administration Functions

- Queue Manager
- Running Reports

Pre-requisites

Attendance at the FINEOS Management Console and Process Manager modules would be an advantage

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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