

## COURSE OUTLINE: (FP12) FINEOS RULES MANAGER

### Overview:

The Rules Manager Component is set to become all-pervasive throughout the FINEOS Product Suite.

Rules Manager Provides FINEOS customers with numerous capabilities including:

- Configuration of Global Business Rules
- Configuration of Validations
- Configuration of Auto Decision making in Workflow
- Calculation and Lookup Capabilities

### Objectives:

This session is focussed primarily towards Business Users, and will provide attendees with an understanding of the Capabilities of Rules Manager as well as hands-on training in the configuration and management of Expression Rules from a Business Configuration User Perspective.

### Who should attend?

Any Business project resource that will be involved in the configuration of the FINEOS Solution.

### Topics

#### Topic

- Introduction & Overview
- Getting Started
  - Accessing Rules Manager
  - Terminology
- Rules
  - Rule Uses & Examples
  - Rule Types
  - Rule Properties
  - Rule Parameters
- Writing Expression Rules
  - The Expression Editor
  - The Object Browser

#### Topic

- Events
  - Event Types
  - Creating Events
  - Linking Events & Rules
  - Event Parameters
- Testing Rules
- Lookups
- Validation Rules
  - xml configuration
- Conclusion & wrap-up

### Pre-requisites

Attendance at the FINEOS Process Composer and Advanced Business Configuration training sessions is strongly recommended prior to attending this course.

### Format & 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 Day

### For further information, contact FINEOS Training Services:

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