

## COURSE OUTLINE – (FTB-F-001)

### FINEOS GUI OVERVIEW - FRONT OFFICE

#### Overview

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The ***FINEOS GUI Overview - Front Office*** course is designed to present the different FINEOS components at a high level while demonstrating the functionality through pre-configured scenarios on the application

#### Objectives

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To provide attendees with an overview of the functionality contained within the FINEOS application. It also exposes attendees to the overall look-and-feel of the application and general navigation on the Front Office GUI.

At the end of this course participants should have a high-level understanding of the following:

- Customer Manager
- Process Manager
- Document Manager
- Case Manager

#### Who should attend?

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Anyone seeking an overview of the FINEOS application:

- Project Managers
- Marketing Consultants
- Finance
- HR consultants
- Training Consultant

#### Pre-requisites

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N/A

#### Course Content

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##### Module 1: Customer Manager

- Customer Manager functionality
- Customer Manager tabs

**Module 2: Process Manager**

- Process Manager functionality
- Process Manager tabs

**Module 3: Document Manager**

- Case document management
- Customer document management
- Task document management

**Module 3: Case Manager**

- Case Manager functionality
- Case Manager tabs

**Format & Duration**

Delivery	Lecture Style Presentation	Duration	3/4 Day
<b>Description</b>			
<p>Courses in this category take the format of a <b>lecture style presentation</b> i.e. non-practical. They are intended to give participants an overview of a particular capability of the FINEOS product through demonstration rather than participation. The desired effect is for participants to '<b>SEE</b>' how a particular part of the product works in order to facilitate communication with colleagues.</p>			

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

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