

COURSE OUTLINE – (FTB-F-003)

FINEOS BASIC NAVIGATION

Overview

The ***FINEOS Basic Navigation*** course is designed to guide attendees through the process of logging in and out of the FINEOS application and how to navigate around once successfully logged in.

Objectives

To provide attendees with an understanding of the overall look-and-feel of the application and general navigation around the FINEOS GUI..

At the end of this course participants should know how to do the following:

- Log in
- Navigating FINEOS Front Office
- Log out

Who should attend?

Anyone seeking hands-on experience of the FINEOS application:

- Project Managers
- Business Consultants
- Business Analysts
- Technical Consultants
- Marketing Consultants
- Sales Consultants
- Finance & HR consultants
- Training Consultants

Pre-requisites

Courses:

FTB-F-001 – FINEOS GUI Overview - Front Office

FTB-F-002 – FINEOS Configuration Overview – Front Office

Course Content

Module 1: Logging In & Logging Out

- How to login
- How to log out

Module 2: Navigating and accessing the main components

- Management Console
- Document & eForm management
- Process Manager Administration
- Process Composer
- Case Type Maintenance
- Process Manager
- Customer Manager
- Case Manager
- Claims Manager
- Payments Manager
- Rules Manager
- GUI Configuration




Module 3: Navigating Front Office

- Navigating through the main tabs and icons
- Using list views
- Managing lists
- Exporting list view contents
- Using drop-down lists
- Using dates
- Using text boxes
- Using tree views
- Using Ellipsis button
- Using the Search icon
- Using the Edit icon

Format & Duration

Delivery	Tutor-Led Practical	Duration	1/2 Day
Description			
The desired effect for participants on completion of this course is an acquisition of skills i.e. to 'KNOW' how to use a particular area of the FINEOS product. Participants are led through practical exercises relevant to the particular skills area directed and assisted by the tutor.			

For further information, contact FINEOS Training Services:

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