

COURSE OUTLINE – (FTB-F-005)

FINEOS BASIC CONFIGURATION - MANAGEMENT CONSOLE

Overview

The ***FINEOS Basic Configuration - Management Console*** course covers the use of Management Console (MC) which is the application that administers the User security and Enum functionality within the FINEOS product suite. This course explains how to create and administer your Company Structure, Departments and Users, Secured Actions and also the administration of enums (drop-down lists).

Objectives

To provide attendees with an understanding of the Management Console functionality.

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

- Log on and navigate within Management Console
- Manage company structure and security
- Manage domains, instances and subsets

Who should attend?

Anyone involved in the setting up and administration of FINEOS application users:

- Technical Architects
- Test Engineers
- Business Analysts
- Business & Technical Consultants

Pre-requisites

Courses:

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

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

Course Content

Module 1: Introduction to FINEOS Management Console

- About Management Console
- How Management Console works

Module 2: Logging on and navigating

- Logging on
- Logging out
- Navigating Management Console

Module 3: Managing company structure and security

- Managing company structure
- Managing users
- Viewing parent departments of departments
- Viewing parent departments of users
- Creating profiles
- Configuring logon and password settings
- Managing secured actions




Module 4: Managing domains, instances, and subsets

- Managing domains
- Managing domain instances
- Managing domain subsets
- Managing subset instances

Format & Duration

Delivery	Tutor-Led Practical	Duration	½ 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.			

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