

COURSE OUTLINE – (FTB-F-006)

FINEOS INTERMEDIATE CONFIGURATION - FRONT OFFICE

Overview

The **FINEOS Intermediate Configuration - Front Office** course explains the main concepts behind the configuration and set up of the FINEOS Front Office system. The course includes exercises to show how to manage tasks, processes, cases, documents and rules.

Objectives

To provide attendees with an understanding of the configuration functionality within the FINEOS application. It also addresses the inter-dependency of the components.

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

- Use Process Manager Administration
- Use Case Manager Administration
- Use Process Composer
- Use Document and eForm Administration

Who should attend?

Anyone involved in the configuration of the FINEOS application:

- Software Engineers
- Test Engineers
- Business Analysts
- Business and Technical Consultants

Pre-requisites

Courses:

- FTB-F-001 – FINEOS GUI Overview - Front Office
- FTB-F-002 – FINEOS Configuration Overview – Front Office
- FTB-F-005 – FINEOS Basic Configuration - Management Console

Course Content

Module 1: Process Manager Administration

- Introduction to Process Manager Administration
- Navigating Process Manager Administration

- Administering tasks
- Understanding processes and their properties
- Administering roles
- Searching for departments, documents, and work types

Module 2: Case Manager Administration

- Introduction to Case Manager Administration
- Navigating Case Manager Administration
- Creating case types and adding sub-cases
- Configuring case types

Module 3: Process Composer

- Composing processes
- Advanced process configuration
- Using Process Manager rules




Module 3: Document and eForm Administration

- Accessing Document Type Administration
- Terminology and Definitions
- Configuring Word Document Types
- Adding Word Templates
- Configuration and use of eForms
- eForm hierarchy
- Adding/uploading documents

Format & Duration

Delivery	Tutor-Led Practical	Duration	2.5 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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