

COURSE OUTLINE – (FTB-F-007)

FINEOS INTERMEDIATE CONFIGURATION - RULES MANAGER

Overview

The FINEOS Intermediate Configuration - Rules Manager course is designed to provide trainees with the ability to configure Global Business Rules, Validations, Auto-decision making in workflow processes and Calculation and lookup capabilities.

Objectives

To provide attendees with an understanding of the configuration functionality within the FINEOS application in relation to rules manager. It builds on the configuration basics as provided in the FINEOS Intermediate Configuration - Front Office course.

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

- Write expression rules
- Link rules and events
- Test rules

Who should attend?

Anyone involved in the configuration of the FINEOS Rules Manager:

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

Pre-requisites

Courses:

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

FTB-F-003 – FINEOS Basic Navigation

FTB-F-006 – FINEOS Intermediate Configuration – Front Office

Course Content

Module 1: Introduction to Rules Manager

- Accessing Rules Manager
- Navigating the Rules Manager Interface

Module 2: Rules Manager Functionality

- Definitions
- Usage
- Examples
- Rule Types

Module 3: Rules Manager Components

- Expression Rule Editor
- Rule Parameters and Properties
- Object Browser

Module 4: Events

- Event Types
- Creating Events
- Linking events and rules
- Event parameters




Module 5: Validation Rules

- Creating and Testing Validation rules
- XML Configuration

Format & Duration

Delivery	Tutor-Led Practical	Duration	1 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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