

## COURSE OUTLINE – (FTB-F-016)

### FINEOS DOCUMENT ADMINISTRATION

#### ***About this Course***

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The **FINEOS Document Administration** course explains the main concepts behind the configuration and set up of the document templates within the FINEOS application. This half-day instructor-led course enables trainees to design Word document templates that can be used for correspondence. Trainees will also be able to design customised electronic forms that could replace paper forms.

#### ***At Course Completion***

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After completing the course, trainees will gain the skills to:

- Design Word document templates
- Design electronic forms (FINEOS EForms)
- Configure a mechanism for uploading documents

#### ***Audience Profile***

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Anyone involved in the configuration of the FINEOS application:

- User Support
- Software Engineers
- Test Engineers
- Business Analysts

#### ***Pre-requisites***

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Participants of this course must have previously completed the following FINEOS training module:  
**FTB-F-006 – FINEOS Configuration Studio**

### Course Content

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Module	Description
<b>Document and EForm Administration</b>	This module enables trainees to configure document types. It encompasses configuring Word Document templates to make them available to end users of the FINEOS system. It also details how to design EForms and also how to configure the document upload functionality.




### Format & Duration

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<b>Delivery</b>	<b>Tutor-Led Practical</b>	<b>Duration</b>	<b>.5 Days</b>
<b>Description</b>			
The desired effect for participants on completion of this course is an acquisition of skills i.e. to <b>'KNOW'</b> 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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