FINEOS Global Training Services

COURSE OUTLINE – (FTB-F-014)

DOCUMENT MANAGER OVERVIEW

About This Course

The **Document Manager Overview** Course takes participants through the use of the FINEOS document management functionality from the end-user perspective. Document Manager allows you to manage documents and document-related correspondence. You can create a document from a list of predefined templates in the context of the case record or party record in which you are working. Additionally, you can automatically create documents as part of a prescribed workflow, giving flexibility in managing correspondence to customers.

Course Objectives

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

- Manage Word documents on customer or case records
- Add and complete electronic forms (FINEOS EForms)
- Upload documents to customer or case records

Who Should Attend?

Anyone seeking hands on experience of the FINEOS components from an end-user perspective

Pre-requisites

Participants of this course must have previously completed the following FINEOS training module:

FTB-C-003 FINEOS Claims Overview

Course Content

Module	Description
Document Manager	This module enables trainees to manage documents for party and case records. It details how to add and manage document groups, edit document properties and transfer documents to different customer or case records.

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Format & Duration

Delivery	Tutor-Led Practical	Duration	0.5 Days
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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