FINEOS Corporate University

COURSE OUTLINE – (FTB-F-014)

FINEOS CONFIGURATION MANAGER

About this course

Configuration Manager is a UI-based configuration tool that you can use to configure elements in FINEOS. Configuration Manager uses categories to represent elements in the application. Each category contains properties that define the configuration of the element that the category represents.

Course objectives

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

- Access the FINEOS Configuration Manager component
- Manage widget and non-widget categories
- Configure widgets
- Configure list views
- Configure tree views
- Import and Export configuration settings

Who should attend?

Anyone involved in the system and user interface configuration of the FINEOS system:

- Business
- Technical

Pre-requisites

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

FTB-F-011

Course content

Module	Description
Introduction	This module introduces candidates to categories and properties via FINEOS UI configuration. The candidate is also introduced to the different types of categories in FINEOS, widget (single widget configuration) and non-widget (multiple widget configuration) categories.
Using Configuration Manager	The candidate is shown how to access Configuration Manager and navigate through the different tabs available. The candidate is then

	shown how to manage categories and properties.
Configuring widgets using Configuration Manager	This module will enable candidates to disable and hide screen items, use generic secured actions and configure widgets for a particular party type or case type.
Configuring list views and tree views using Configuration Manager	This module enables candidates to configure list views and tree views via Configuration Manager.
Configuring screens using Configuration Manager	FINEOS allows you to configure each screen that displays in the application. A screen is a container for all of the other UI elements that display.
Importing and exporting configuration settings	Candidates can import and export configuration settings using Configuration Manager. Configuration settings define the appearance and behaviour of the application.

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 Corporate University:

✉ FINEOSCorporateUniversity@fineos.com **T** +353-1-639-9700 **F** +353-1-639-9701 **W** www.FINEOS.com	FINEOS Corporate University, FINEOS Corporation, FINEOS House, EastPoint Business Park, Dublin 3, Ireland