

COURSE OUTLINE – (FTT-C-001)

INTRODUCTION TO FINEOS FOR TECHNICAL TRAINING

About This Course

The *Introduction to FINEOS for Technical Training* course familiarises participants with the FINEOS application. It takes participants through the use of customer manager, management console, document manager, workflow management and case manager functionality from both the administrator and end-user perspective while allowing the participant to get some high-level hands-on experience on the application.

Course Objectives

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

- Manage basic customer information
- Understand the Management Console and configure secured actions
- Configure EForms and understand document management
- Configure and understand cases
- Configure and understand tasks and processes

Who Should Attend?

Anyone seeking an overview of the FINEOS application and a familiarity with the GUI components that will not be using the application in detail:

- IT consultants
- Auditing staff
- Java Developers

Pre-requisites

N/A

Course Content

Module	Description
Customer Manager	An introduction to the terminology and concepts surrounding customer relationship management and hands-on experience managing party records on the FINEOS application.

Document Manager	An introduction to working with documents and EForms linking to party and case records. Also covers configuring a simple EForm type and making it available to users on the system.
Management Console	An introduction to the Management Console and its functions. Experience configuring secured actions on the Management Console.
Process Manager	An introduction to the terminology surrounding tasks and processes and experience of managing work queues. Also covers the concepts of configuring task and process types.
Case Manager	An introduction to configuring and using electronic case files that can be used to manage all case-related work, including forms, documents, in-bound and out-bound inquiries, and financial transactions.

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 Global Training Services:

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