

## COURSE OUTLINE – (FTB-S-001)

### PRODUCTION SUPPORT OPTIMIZATION

#### **About this course**

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The purpose of the Production Support Optimization course is to provide attendees with an understanding of supporting the FINEOS application post go live. This two day instructor-led course will enable the customer to become self-sufficient in troubleshooting the FINEOS application, enhance their self-support capabilities and reduce the number of tickets logged to FINEOS.

#### **Course objectives**

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

- Transfer work-related files between FINEOS staff and customers
- Create, track and monitor a FINEOS Service Request
- Provide the relevant information required by FINEOS when reporting an issue
- Understand FINEOS Architecture and application structure
- Follow recommended guidelines for customers to carry out a data scrubbing exercise
- Understand FINEOS batches
- Understand the process undertaken for projects going live on FINEOS

#### **Who should attend?**

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Anyone involved in the support and configuration of the FINEOS application:

- Business and Technical
- Software Engineers
- Application Support

#### **Pre-requisites**

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

**N/A**

#### **Course content**

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Module	Description
<b>File Manager</b>	File Manager is a secure file transfer system for transferring work-related material between FINEOS staff and customers. This module informs the attendees of the Acceptable Usage Policy, how to access your File Manager account, and how to manage folders and upload files.

<b>FINEOS SR Management</b>	<p>FINEOS Support Request (SR) Manager is a web-based application, which allows users to report and monitor issues with FINEOS. This module provides attendees with the skills to create a SR, add an attachment to a SR, and navigate through the different screens. Attendees learn how to track and monitor the status of a SR and are taken through the lifecycle of a SR request.</p>
<b>Application Structure</b>	<p>The FINEOS Application Structure module provides technical attendees with an understanding of the anatomy of an application developed using the FINEOS platform. It provides a high-level overview of the structure of the FINEOS application including a typical network topology and introduces application components, business objects, technical components and configuration management files.</p>
<b>Performance Management</b>	<p>This module provides the skills to analyse the information required by FINEOS when logging the detail of performance problems encountered by the FINEOS system.</p> <p>An overview of diagnostic log files from a period when the slowness of the FINEOS application was experienced including:</p> <ul style="list-style-type: none"> <li>• FINEOS TA logs</li> <li>• FINEOS Stats logs</li> <li>• Application server system logs</li> <li>• HTTP logs</li> </ul> <p>This module covers a detailed SR logging checklist to help ensure FINEOS customers provide relevant information up front when logging performance related SRs.</p>
<b>Database Sanitising</b>	<p>This module serves as a helpful starting point for FINEOS customers when they apply data scrubbing to the FINEOS base product data model. The guidelines specified here should also be adopted when scrubbing custom data.</p>
<b>Understanding Batches</b>	<p>This module provides an overview of batch management within FINEOS including:</p> <ul style="list-style-type: none"> <li>• FINEOS WorkPerformer</li> <li>• FINEOS Payment batches</li> <li>• Batch performance analysis</li> <li>• Batch scheduling</li> </ul>

**Format & duration**

Delivery	Tutor-Led Practical	Duration	2 days
<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 Corporate University:**

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