FINEOS Global Training Services

COURSE OUTLINE – (FTB-F-006)

FINEOS CONFIGURATION STUDIO

About This Course

The purpose of the **FINEOS Configuration Studio** course is to provide non-technical attendees with an understanding of the configuration capabilities of the FINEOS application. This is done by working with the configuration functions in the FINEOS GUI.

This two and a half day instructor-led course provides trainees with the skills to configure and route work throughout the FINEOS system. Trainees will be able to define and automate business processes. In addition this course details how to configure electronic case files to meet various business requirements, including how to configure claim case types.

Course Objectives

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

- Set up a company structure including departments and users
- Create and manage user accounts for the FINEOS application
- Manage drop-down lists (FINEOS enums)
- Configure work item templates (FINEOS task types)
- Configure automated workflow (FINEOS process types)
- Configure electronic case files (FINEOS case types)
- Configure claim case files (FINEOS claim case types)

Who Should Attend?

Anyone involved in the configuration of the FINEOS application:

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

Pre-requisites

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

FTB-C-003 – FINEOS Claims Overview

Course Content

FINEOS Global Training Services

Module	Description
Management Console	Management Console is a component of the FINEOS product suite that provides an interface for administering the FINEOS system. This module enables trainees to configure company structure, manage users, control access, and manage drop-down lists (enums).
Process Manager	FINEOS Process Manager is a FINEOS component that can automate all elements of a business process and facilitate the management of workflow in your organization. Process Manager supports serial and parallel workflows and task assignments, which are generated dynamically, based on your business practices. Process Manager also establishes service alerts for any work approaching critical service deadlines. This also allows management to monitor activity and run thorough reports, enabling them to address operational issues before they become business problems.

	Task Type Configuration	**Process Type Configuration**
	To create a process, you must configure any work items (FINEOS task types) that you want to include in the process. After you create a task type, you can assign it to a role so users can perform that piece of work. This module covers information on the different varieties of tasks a user can add and how to configure task types.	Process Manager is designed with a user-friendly interface that allows business users to create and change processes as required by changes in the regulatory or operational environment. This module allows users to create various processes on the FINEOS application while at the same time providing them with the theory of process design and configuration.

Case/Claim Manager Administration	FINEOS Case Manager Administration is the administrative component for FINEOS Case Manager, a component that manages all elements of a business case/claim. A case/claim stores and manages all the information about your defined business case/claims. This module covers the basics of case configuration and also addresses specific configuration for claims including the use of case extensions to configure a case for a particular line of business.

FINEOS Global Training Services

Format & Duration

Delivery	Tutor-Led Practical	Duration	2.5 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 Global Training Services:

✉ TrainingAdmin@FINEOS.com ☎ +353 (0)1 639 9700	✎ Global Training Services, FINEOS Corporation, Pembroke House, 8-10 Lwr Pembroke St, Dublin 2, Ireland