

## COURSE OUTLINE – (FTB-F-013)

### FINEOS SCREEN CUSTOMIZER

#### **About this course**

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Screen Customizer is a UI-based configuration tool that enables you to configure UI elements in FINEOS. Screen Customizer allows you to configure all of the configuration properties associated with the currently selected widget, list view, tree view, screen, or tab.

#### **Course objectives**

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

- Mark fields as mandatory
- Collapse or expand widgets
- Specify validation events for screens
- Control the visibility of fields
- Disable fields
- Add or edit a property to override product UI configuration
- Configure list views and tree views

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

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Anyone involved in the user interface configuration of the FINEOS application:

- Business
- Technical

#### **Pre-requisites**

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Participants of this course must have previously completed the following FINEOS training module:  
**FTB-F-011**

#### **Course content**

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Module	Description
<b>Introduction</b>	This module introduces the candidate to the configuration of FINEOS UI elements that are available via FINEOS Screen Customizer.
<b>Configuring widgets</b>	Widgets occupy a section of the screen and implement a well-defined piece of business functionality. Screen Customizer enables candidates with the skills to configure widgets and the screen elements that display in widgets, for example, buttons, drop-down lists, text fields, radio

	buttons, check boxes, numbers, secured actions and events.
<b>Configuring list views</b>	<p>A list view is a convenient way of displaying information, enabling management of long lists of data over several pages. This module enables candidates to configure list views via Screen Customizer:</p> <ul style="list-style-type: none"> <li>• Display, hide, and reorder columns</li> <li>• Define the height and width of list views</li> <li>• Define the number of characters that display in columns</li> <li>• Define the number of records that display in list views</li> <li>• Control the visibility of list views</li> <li>• Manage the display of list view icons</li> </ul>
<b>Configuring tree views</b>	<p>Tree views display hierarchical information related to parties, cases, departments, or other categories. This module enables candidates to configure tree views via Screen Customizer:</p> <ul style="list-style-type: none"> <li>• Displaying node elements on a tree view</li> <li>• Hiding node elements on a tree view</li> <li>• Defining the height of tree views</li> <li>• Manage the display of tree view icons</li> <li>• Manage tree view expansion</li> </ul>
<b>Configuring screens</b>	Screen Customizer allows you to validate Add and Edit screens by adding events to screens on saving or cancelling a screen.
<b>Translation configuration</b>	Translation Configuration enables candidates to edit the text that displays on screens throughout the application. This can alter the layout of the screens.

**Format & duration**

<b>Delivery</b>	<b>Tutor-Led Practical</b>	<b>Duration</b>	<b>1 day</b>
<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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