



BankWorld Channel Manager Configuration

BankWorld Channel Manager is the core component of CR2's self-service banking platform. It sits between the bank's back office systems and the various customer touch points, such as ATMs, POS devices, PCs and mobile phones.

This course gives participants an in-depth knowledge of how to perform the Channel Manager configurations that are required regardless of whatever channels are installed.

This is a hands-on course that allows participants to practice some of the relevant tasks.

Benefits:

You will be able to perform the necessary Channel Manager configurations. These must be configured regardless of any specific channel configurations and so it is important to be able to carry out these configurations.

Having staff trained in configuring the Channel Manager will enable the configuration process to be more efficient, and may in turn result in lower consultancy costs.



Duration:

1 day (classroom-based)

Audience:

This course can be taken by anyone, but it is designed in particular for:

- ❖ Bank Operations staff

Location:

CR2 offices in Dublin, Dubai and Amman. Can also be run onsite on request.

Our training is a blend of classroom and online training and includes:

- Overviews
- Installation
- Configuration
- Operations
- Tools

For more information please email us at training@cr2.com.

www.cr2.com



Pre-requisites:

- ❖ *BankWorld Architectural Overview* eLearning course
- ❖ *BankWorld Installation Process* eLearning course

Objectives: At the end of this course you will be able to:

1. Set up Admin Users to configure and operate the BankWorld system
2. Set up and assign Roles to users
3. Use sources (such as User Guides) to perform the various system configuration checks prior to going live, such as check the system parameters and security settings
4. Set up Host Banks and Branches
5. Amend regional settings, such as add a locale
6. Create new Transactions Types and Bank Instructions
7. Configure Account Product Types
8. Configure bill payment settings
9. Add/edit Customer Record and assign user to Customer Records.
10. Configure Issuer fee rules
11. Configure Back Office settings in BankWorld

Course Outline:

- ❖ BankWorld Channel Manager Overview
- ❖ Creating Admin Users
- ❖ Creating Roles
- ❖ Setting up Host Bank and Branches
- ❖ BankWorld Parameters
- ❖ Security Settings
- ❖ Regional Settings
- ❖ Bill Payment Settings
- ❖ Transaction Types Configuration
- ❖ Bank Instructions Configuration
- ❖ Account Product Types Configuration
- ❖ Customer-related Configurations
- ❖ Fee Rules Configuration
- ❖ Configure Back Office Connections
- ❖ Self-service Channels Configuration Summary
- ❖ Course Exam

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Materials:

Course Participant Guide, Course handouts / diagrams, Glossary, relevant User Guides, etc., supplied on Apple iPad¹ (or

¹ Apple iPad (or equivalent) only supplied if course is undertaken at a CR2 office location.



equivalent) or on USB key.

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