



BankWorld Web Portal System Configuration

BankWorld Web Portal is one of the many CR2 self-service channels that forms one part of CR2's multi-channel banking system.

This course gives participants an in-depth knowledge of how to perform the necessary configuration in order to operate the Web Portal System.

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 Web Portal System configurations. This may involve adding, or editing, Page Sets and Portlets.

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



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

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.



Pre-requisites:

- ❖ *BankWorld Web Portal System Overview* course
- ❖ *BankWorld Channel Manager Configuration* course

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

1. Identify the web portal configurations required and the GUIs you would use
2. Create Portal Administrators and assign relevant roles to users
3. Create new Page Sets
4. Modify Pages Sets including adding portlets, changing the layout of a page and colour themes of Page Sets
5. Customise portlets, such as changing the view and information displayed
6. Set up payment templates including utility payment templates and third-party payment templates
7. Configure corporate banking features, such as group payments and batch processing
8. Apply new transaction types and bank instructions to portals
9. Configure system security settings such as pass phrase security settings, higher authentication and online dual authorisation
10. Use the available sources to configure and maintain the system on an on-going basis

Course Outline:

- ❖ Web Portal System Overview
- ❖ Web Portal System Configuration Summary
- ❖ Create New Page Set
- ❖ Modify Page Sets
- ❖ Customise Portlets
- ❖ Payment-Related Configurations
- ❖ Corporate Banking Features Configuration
- ❖ Create and Deploy Additional Banking services Portlets
- ❖ Online Banking Security Configurations
- ❖ Course Exam

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Materials:

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

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