



BankWorld Channel Manager Operation

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 the regular tasks required to perform the operational tasks that are common across all channels.

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

Benefits:

You will be able to perform all the necessary operational tasks that are required regardless of which any channels you have deployed.

This knowledge will enable bank staff to perform the common operational tasks effectively and efficiently, and may also 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 Architectural Overview* eLearning course

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

1. Identify the main BankWorld operation tasks and which admin tools you would use to complete each task
2. Set up Admin Users and other bank staff such as Personal Bankers
3. Add or edit Roles and assign them to Customer Users
4. Operate the **BankWorld Manager** GUI to do the following:
 - Start and Stop BankWorld
 - Check gateway connections
 - Check Back Office connections
 - Add / maintain gateways
5. Look up transaction details across various channels
6. Add a new Customer Type, Customer/User and administer existing Customers including:
 - Update records
 - Change limits
 - Change customer status
7. Set up new Transaction Types and Bank Instructions
8. Add a new Account Product Type
9. Set up Utility companies in order to pay bills using templates
10. Operate the **Report Operator** GUI to generate standard reports, health check reports, add logo and custom reports.

Course Outline:

- ❖ BankWorld Channel Manager Overview
- ❖ Manage Sub Systems
- ❖ Channel Manager Core Configuration
- ❖ Admin User Maintenance
- ❖ Role Management
- ❖ Staff Administration
- ❖ Customer Types Administration
- ❖ New Customer Procedures
- ❖ Existing Customer Administration
- ❖ View Transaction Details
- ❖ Bill Payments
- ❖ Transaction Types
- ❖ Bank Instructions
- ❖ Account Product Types Administration
- ❖ Report Generation
- ❖ Health Check Reports
- ❖ Housekeeping procedures
- ❖ Self-service Channels Operation Summary
- ❖ 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.