

Syllabus of Guide-wire Training

Module 1: Introduction To PolicyCenter

- Introduction to PolicyCenter
- PolicyCenter Overview
- Policy File, Account
- Policy Transactions

Module 2: Policy Transactions

- Submissions 1: Quick Quotes
- Submissions 1: Full Application Quotes
- Renewalss
- Policy Changes
- The Cancellation Transaction Set
- Out-of-Sequence Transactions
- Merging and Splitting Account
- Documents, Notes, Forms

Module 3: The Product Model

- Introduction to Product Model
- Products and Policy Lines
- Availability, Coverage
- Coverage Term, Modifier
- Question Sets

Module 4: PC Configuration

- Introduction to PC Config
- Policy Center Data Model
- Location Group and Pages
- Job Wizard, Job Lifecycle
- Activities, Creating and Assigning Activities

Module 5: Revisioning

- Concepts of Revisioning
- Contacs and Location

Module 6: UW Authority

- Introduction to Underwriting Authority
- Config of Underwriting Authority

Module 7: Validation & Validation Rules

Module 8: Rating

Module 9: The Claim File

- The ClaimCenter data model
- The claim file

Module 10: Claims Process And Intro To Intake

- Claims processing – Business perspective
- Claims processing – Functional perspective
- The claim intake process
- Automated claim setup
- New claim validation

Module 11: ClaimCenter Demo

- Demonstration of ClaimCenter functionality

Module 12: Introduction To ClaimCenter Configuration

- ClaimCenter data model
- ClaimCenter user interface
- ClaimCenter rules
- Importing data into ClaimCenter

Module 13: Configuring Location Groups

- Location group basics
- Location group configuration
- Page configuration

Module 14: Configuring Wizards

- Wizard basics
- Wizard configuration
- Wizard step configuration

Module 15: Configuring Claim Setup

- Claim setup basics

- Pre-setup rules
- Segmentation rules
- Workplan rules
- Exposure and activity setup

Module 16: Configuring LOB Typelists

- Line of business model
- The LOB type lists
- The LOB editor

Module 17: Configuring LOB User Interface

- LOB model and the user interface
- Configuring exposure types
- Configuring new exposure menu behavior

Module 18: Configuring Validation Rules

- Types of validation
- Validation rule basics
- Validation rules in the user interface
- Warnings and errors
- Identifying invalid fields

Module 17: Configuring LOB User Interface

- LOB model and the user interface
- Configuring exposure types
- Configuring new exposure menu behavior

Module 19: Configuring Permissions

- ClaimCenter security functionality
- Checking system permissions in Gosu
- Creating system permissions
- Application permission keys

Module 20: Contact Roles

- Contact roles
- Categorizing contact
- Contact role configuration
- Contact role type constraints
- Entity role constraints

Module 21: Configuring LOB User Interface

- LOB model and the user interface

- Configuring exposure types
- Configuring new exposure menu behavior

Module 22: ClaimContact Widgets

- ClaimContact widget basics
- Configuring ClaimContact widgets

Module 23: Intro To Transaction Rules

- Transaction basics
- Transaction data model
- Transactions and Gosu
- The Financial Calculations Library

Module 24: Configuring Transaction Validation Rules

- Transaction and check life cycles
- Transaction validation basics
- Transaction validation rules

Module 25: Configuring Transaction Approval Rules

- Transaction approval basics
- Authority limits
- Transaction approval rules
- Approval routing rules

Module 26: Application Fundamentals

- Introduction to BillingCenter
- The BillingCenter User Interface
- The Billing Process
- User Interaction with BillingCenter
- Accounts

Module 27: Billing Wizards

- Billing Instructions, Policies, Invoice Streams
- How Charges Are Invoiced
- Invoicing Life Cycle
- Payments
- Payment Corrections and Credit Distributions
- Walkthrough with OOTB Billing Center

- Walkthrough of Direct, Agency Bill
- Overview of Billing flows

Module 28: Claim Exposure/Reserves

- Producers
- Commissions and Producer Maintenance
- Disbursements
- Delinquency
- Trouble Tickets and Activities

Module 29: Management And Configuration

- Security
- Configuring BillingCenter
- Permissions

Module 30: Agency Billing

- Introduction to Agency Bill
- Agency Bill Cycles and Statement Bill
- Statement Bill Payments
- Agency Bill Cycles and Account Current
- Account Current Promises and Payments

Module 31: Configuration Fundamentals

- Introduction to Guidewire Configuration
- Extending Base Entities
- Creating New Entities
- ubtypes
- Typelists

Module 32: User Interface

Module 33: Gosu

- Introduction to Gosu
- Business Rules
- Gosu Queries

Module 34: Further Study

- Popups 2: Create New Pop ups

- Dynamic Dropdowns
- Field Level Validation
- Enhancements

Module 35: Advanced UI Functionality

- Entity Names
- Dependent Dropdowns
- Partial Page Update

Module 36: Integration Fundamentals

- Introduction To Guidewire Integration
- Gosu For Integration
- Gosu Bundles
- Plugins Predefined
- Gosu Queries

Module 37: Web Service

Module 38: Messaging

- Messaging Sending
- Messaging Acknowledging

Module 39: Batch Process

- Batch Process
- Integration Point Authentication
- Integration Point Policy Retrieval
- Claim Process + Intake
- Claim Center Data Model
- Claim File

Module 40: Doubt Clearing Session

- ANY CONCERN & BLOCKERS
- ANY CARRIED FORWARD FROM PREVIOUS DAY

Module 41: Lab Exercises Validation

- SETTING UP ENVIRONMENT
- END TO END FLOW DEMO