All courses

T24 Introductory Courses
- Introduction to Temenos T24 (Functional Induction)
- Introduction to Temenos T24 (Technical Induction)

T24 Functional Courses
- T24 Arrangement Architecture Core
- T24 Arrangement Architecture Deposits
- T24 Arrangement Architecture Loans
- T24 Retail Accounts
- T24 Financial Accounting
- T24 Financial Reporting
- T24 Multi Company
- T24 Funds Transfer
- T24 Limits
- T24 Collateral
- T24 Teller
- T24 Business Insight

T24 Technical Courses
- T24 Arrangement Architecture Core (Technical)
- T24 Customer Relationship Management
- T24 Customisation
- T24 Delivery
- T24 Direct Connect Driver Oracle
- T24 Open Financial Service (OFS)
- T24 Security Management System days
- T24 Administration
- T24 COB Management
- T24 Temenos Open Connectivity Framework (TOCF)
- T24 Temenos Web Services
- T24 Process Flow
- T24 IF Inception – Microsoft Biz Talk Server

T24 Islamic Banking Courses
- T24 Introduction to Islamic Banking Products
- T24 Islamic Investment Products
- T24 Islamic Investment – Profit Distribution System
- T24 Islamic Finance Products
- T24 Islamic Trade Finance

Temenos Connect Courses
- edgeConnect Foundation
- Temenos Connect Internet Banking (TCIB) Introduction

Triple'A Plus (TAP) Courses
- TAP Introductory Courses
  - End User – PMS B2F
  - End User – PMS F2B
- TAP Functional Courses
  - R14 New Business Features
  - Implement – Scripts & Formats
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- TAP Technical Courses
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  - Administration – Architecture
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- TAP Design Studio Courses
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  - Design Studio TAP – WUI Adaptation
  - Design Studio TAP – WUI Processes
  - Design Studio TAP – OData API

WealthManager Courses
- WM Functional Courses
  - How to Use WealthManager
  - Sales & Advice (Campaigns & Opportunities)
  - Modelling
  - Performance
  - Orders
  - Advisory Models and Compliance
- WM Technical Courses
  - Technical Basics
  - Administration
  - Operations & Troubleshooting
Temenos always strives to help its customers maximise value when using Temenos products and solutions. Temenos University provides our customers with flexible methods of learning – to suit business requirements, assist in reaching your training objectives, close the skills gap and ultimately to ensure you are getting the best from your Temenos product.

At Temenos, we believe that people are the key asset to any company and by investing in training and improving skills, we are investing in the future of an organisation.

Our training courses provide an important element of the full range of services that we offer to our clients that can be delivered via a variety of methods that suit you – including Classroom, E-Learning and E-Simulation. We recommend that as well as attending the introductory courses, your Temenos users also attend regular follow-up training courses to continue to develop their knowledge and skills for the Temenos products they use.

Every participant of the Temenos training courses will receive hands-on experience of using the latest release of your Temenos products full course materials, access to specially designed workshops that will assess the knowledge that has been gained and access to experienced Temenos trainers to supplement their knowledge of the full range of Temenos products.

Along with the courses in this brochure we offer an array of additional training and education services. Please contact the team so we can work with you to shape the training and delivery package that’s right for you.

Whether you are new to Temenos or building on existing knowledge, we look forward to welcoming you to one of our training courses.

Paul Howell
Global Head of Training & Education
The training is really very helpful to understand our new product and to start working with it.

Olga Feschenko - Project Manager - Foranx
Introduction to Temenos T24 (Functional Induction)

This course gives an overall picture of the functional architecture of T24 and introduces the basic features of operating a financial institution through T24. Depending on the needs of those being trained, you can select the End User topics for this class and can have a duration between 3 and 8 days. The participants will have hands on experience in creating Customer records, opening Accounts for customers, sanctioning limits, giving loans, taking deposits, transfer money between accounts and see the resultant integrated operations of T24 by viewing accounting entries and delivery messages. They will also view the standard reports produced at close of business.

Content:
• Overview
• T24 navigation
• Basic end-user operations in the following modules. Customer and Account are always included in this course. The others will be selected based on your needs.
  • Deposits
  • Teller
  • Funds Transfer
  • Limits, Collateral
  • AA loans
  • Forex and Money Market
  • Securities

Prerequisites:
None
Introduction to Temenos T24 (Technical Induction)

This course will equip participants with adequate knowledge to understand the architecture and release methodology of T24, jBASE and the T24 directory structure and file classification. It will also cover Core parameter applications in T24, data storage when a database other than jBASE is used, plus equip participants with the knowledge to work on Browser Installation jBASE JED editor.

This course can be tailored to include a range of End-User topics, which can then be delivered over a duration of 3 to 5 days.

Content:
• Evolution and architecture of T24
• Navigation in Classic
• Browser installation
• Installation details for AGENTS architecture and JMS architecture
• Installation of jbase data base
• Installation of T24
• Installation of jBoss
• Configuration of T24 for Browser
• Configuring multiple T24 environments on a machine to use Browser

Prerequisites:
None
This training made us understand a very complex topic in an easy and simple manner!

Juha Volotinen - Programme Director - NDC

T24 Functional Courses

Select a course ▼

- T24 Arrangement Architecture Core
- T24 Arrangement Architecture Deposits
- T24 Arrangement Architecture Loans
- T24 Retail Accounts
- T24 Financial Accounting
- T24 Financial Reporting
- T24 Multi Company
- T24 Funds Transfer
- T24 Limits
- T24 Collateral
- T24 Teller
- T24 Business Insight
T24 Arrangement Architecture (AA) Core

This course will assist in learning the various product components. AAC module provides a flexible framework that allows a number of products to be created. It has the ability to allow users to construct banking products by combining different business components through AA Product Builder. It will also provide knowledge on how to simulate activities for “what-if” speculation scenarios when dealing with new and existing product instances, without creating or affecting live records.

Content:
- Introduction to AA Building blocks
- Product hierarchy
- Product Builder and Catalogue
- Building Products in AA
- Introduction to Product Conditions
- Proofing and Publishing in Product Catalogue

Prerequisites:
- Basic T24 navigation skills

2 days

More T24 Functional courses
View all courses

Contact us about this course
This course is designed to provide participants with an insight into T24 Arrangement Architecture module with special emphasis on AA Deposits. The course enables management and administration of Deposit activities. This course will touch upon key features of the module, setting up parameter tables, configuring a Deposit product and checking out the related Arrangement activities.

**Content:**
- Product Features
- Parameter Tables
- Various Property Class, property Product conditions
- Attributes and action in Property class
- Periodic attributes
- Accounting flow in AA deposit
- To design a deposit product

**Prerequisites:**
- Basic T24 navigation skills
- T24 AA Core

More T24 Functional courses
View all courses
T24 Functional Courses

T24 Arrangement Architecture (AA) Loans

5 days

This course is designed to provide the participants an insight into T24 Arrangement Architecture module with special emphasis on AA Loan. The course enables management and administration of Loan activities. This course will touch upon key features of the module, setting up parameter tables, configuring a Loan product and checking out the related Arrangement activities.

Content:
• Product Features
• Parameter Tables
• Various Property Class, property Product conditions
• Attributes and action in Property class
• Periodic attributes
• Accounting flow in AA Loan
• To design a Loan Product
• AA Simulation and Reverse replay

Prerequisites:
• Basic T24 navigation skills
• T24 AA core

More T24 Functional courses
View all courses

Contact us about this course
The course is designed to equip the participants with adequate knowledge to implement Arrangement Architecture Retail Accounts. This course will give the participants a sound knowledge of key features of this module, setting up relevant parameter tables, related files and using the module for maintaining Retail accounts. We will explore the different types of interest and charges settings, accounting rules and transaction processing stages within the Retail Account Module in T24.

Content:
- Product Features
- Parameter Tables
- Various Property Class, property Product conditions
- Attributes and action in Property class
- Periodic attributes
- Accounting flow in AA Retail Accounts
- To design a Retail Account Product
- AA Simulation and Reverse replay
- Product Bundle

Prerequisites:
- T24 Functional Induction course
- T24 AA Core
- A sound knowledge of underlying banking business
The Financial Accounting module (FA) processes a broad range of accounting and consolidation of accounting entries. It also dwells upon the conditions, rules and criteria for consolidation of accounting module. This Module enables the participants to know about the different types of accounting entries and also learn about the different methodologies for revaluation of foreign currency assets and liabilities. T24 Financial Accounting is a part of RE module and enables setting up accounting related parameters. This course will give the participants a sound knowledge of the key features of this module relating to accounting, setting up relevant parameter tables and its related files and using the T24 module for maintaining accounting entries.

Content:
• Overview
• Linkages with core tables
• Main Parameter Tables
• Different types of Accounting entries
• Consolidation of Accounting entries
• Revaluation of Assets and Liabilities
• Consolidated Reporting Base
• The course will cover the T24 accounting structure; however, it will not cover in detail, the accounting entries specific to various T24 modules

Prerequisites:
• T24 Functional Induction Course
• T24 Accounts recommended (details can be provided upon request)
• A sound knowledge of underlying banking business
• A sound knowledge of the basics of Accounting
T24 Functional Courses

T24 Financial Reporting

The T24 Financial Reporting training module (RE) defines the reporting tools relating to the structure of General Ledgers such as Header, Line and Column. It also talks about various utilities & tools for the extraction of General Ledger related reports in T24 for the purposes of Companywide consolidation reporting.

Content:
- Overview
- Reporting tools such as Headers, Columns and Lines
- Additional Tools
- Asset types
- Generation of different types of reports

Prerequisites:
- T24 Functional Induction Course
- T24 Financial Accounting Course
- A sound knowledge of underlying banking business

Contact us about this course

More T24 Functional courses

View all courses
T24 Multi Company

The course enables participants to understand management and administration of Multi Company. In addition this course will give the participants a sound knowledge of key features, setting up relevant parameter tables using the module for sharing data and accounting information.

Content:
- Introduction
- Course objectives
- Inter-company accounting and reporting
- COB processing & Parameter tables
- Setting up of a Multiple Company Environment
- Reports & Enquires

Prerequisites:
- Basic T24 navigation skills
- T24 Financial Accounting
- Underlying banking business

More T24 Functional courses
View all courses
T24 Funds Transfer

The course enables participants to understand management and administration of Funds Transfer. In addition we can also learn the key features of this module, setting up relevant parameter tables using the module for transaction processing. For example FUNDS.TRANSFER is one of the account based applications in T24 for moving funds around the system internally and externally which could involve transfer of funds from one account to another account.

Content:
- Introduction
- Course objectives
- Fund Transfer in T24
- Overview
- Parameter tables
- Product features
- Fund Transfer and the features
- Standing Orders

Prerequisites:
- Basic T24 navigation skills
- Underlying banking business

More T24 Functional courses
View all courses

Contact us about this course
T24 Limits

The course enables participants to understand management and administration of limits, covering the important features of Limits including revolving, non revolving, secured and unsecured, individual, group limits, product and sub products. In addition it covers the key features of this module, including the setting up of relevant parameter tables and using the module for transaction processing.

Content:
• Introduction
• Course objectives
• Limits in T24
• Overview
• Amending limits, other features
• Product features
• Cross Limits
• Reports & Enquires

Prerequisites:
• Basic T24 navigation skills
• Underlying banking Business

More T24 Functional courses
View all courses
The T24 Collateral course is designed to provide participants with knowledge of the T24 Collateral module, including the general features such as the management and administration enablement. It also covers how to set up parameter tables and how they relate to transaction processing.

**Content:**
- Product overview
- Parameter tables
- Product features
- Enquiries and reports
- System Maintained Table

**Prerequisites:**
- Basic T24 navigation skills
- Underlying banking business

Contact us about this course
T24 Teller

This course enables management and administration of Teller Transactions (TT). Teller is one of the account based applications in T24 for moving funds around the system internally and externally. It could involve transfer of funds from one account to another account. Cheque collection is one of the applications encompassed in the TT module. This covers various stages of the cheque collection process, like local clearing cheque and outstation cheque etc.

Content:
- Introduction
- Course objectives
- Tellers in T24
- Overview
- Product features
- Enquiries and reports

Prerequisites:
- Basic T24 navigation skills
- Underlying banking business

More T24 Functional courses
View all courses

Contact us about this course
T24 Functional Courses

T24 Business Insight

Topics covered in the T24 Business Insight course include a general introduction to the product and elements such as Financial and Operational Intelligence modules, Security, Reporter and Publisher Applications. Participants will also get the option to receive an overview of Insight Pricing Web Application.

**Content:**
- Insight Business Introduction
- Overview of Insight Customer Intelligence
- Financial Intelligence and Operational Intelligence Modules
- T24 DW Product and DW.EXPORT
- Insight Security
- Insight Reporter and Insight Publisher applications
- Insight Pricing Web Application overview (optional)

**Prerequisites:**
- T24 Functional and Technical Induction Courses

5 days

Contact us about this course
“This training made us understand T24 with ease and was very useful to bring us all to a comfortable user level.

K. Somchai - Project Manager - EXIM, Thailand

T24 Technical Courses

Select a course ▼

- T24 Arrangement Architecture Core (Technical)
- T24 Customer Relationship Management
- T24 Customisation
- T24 Delivery
- T24 Direct Connect Driver Oracle
- T24 Open Financial Service (OFS)
- T24 Security Management System days
- T24 Administration
- T24 COB Management
- T24 Temenos Open Connectivity Framework (TOCF)
- T24 Temenos Web Services
- T24 Process Flow
- T24 IF Inception – Microsoft BizTalk Server
T24 Arrangement Architecture (AA) Core Technical

The course will give an overall picture of the technical architecture of the T24 AA product, including how AA works with OFS and COB processing. This course will also equip the participants with adequate knowledge to create user-defined routines, local reference for a certain Property class, user-defined versions, and simulate activities. This will also help the participant to understand important Property class like ACTIVITY. API, ACTIVITY. PRESENTATION etc.

Content:
- Simulations in AA
- OFS Bulking in AA
- Important Property Classes like ACTIVITY. API, ACTIVITY. PRESENTATION, ACTIVITY. MESSAGING
- Product proofing and publishing related applications

Prerequisites:
- T24 Technical Induction Course
- T24 AA Core
- T24 Open Financial Services – recommended

3 days

More T24 Technical courses
View all courses

Contact us about this course
T24 Customer Relationship Management (CRM)

This course is designed to equip participants with knowledge of the CRM module along with the rules engine and how to use it within T24. The course provides a framework to learn about Customers’ needs and behaviours in order to develop strong customer relationships. By using T24 CRM, customers are able to aggregate information about Customers, sales, marketing effectiveness, responsiveness and market trends. This will allow our clients to provide better customer service and enables cross sell and up sell opportunities.

Content:
• Need for CRM in T24
• Detailed about operational CRM and analytical CRM
• Rules engine and integrating it with CRM
• Steps to create campaign and opportunity processing records in T24
• Types of services related to CRM
• Workshop integrating Rules Engine into CRM

Prerequisites:
• Basic T24 navigation skills
• Open Financial Services
T24 Customisation

This course will equip participants with knowledge of the customisation module, rules engine and how to use it with CUS module in T24. It also provides a framework to learn about various customisation tools. These sessions will also provide the knowledge required on how to create Menu and Local Reference fields, abbreviations and deal slips.

**Content:**
- Creating Abbreviations
- Auto ID Generations in T24
- Creating Local Reference Fields
- Creating Menus
- Creating Deal Slips
- Creating Fast Path Image Graphs

**Prerequisites:**
- T24 Functional Induction Course
- T24 Technical Induction Course

4 days
T24 Technical Courses

T24 Delivery

The course will give participants an in-depth knowledge of the Delivery subsystem in T24. This course will enable the participants to customise delivery messages and also configure and maintain the different carriers available.

**Content:**
- Delivery in T24
- Types of Delivery Advices / Carriers, Delivery Advices – An overview
- How to create delivery reference ID, Complete details in delivery advice
- Different types of Specifics, Mapping Stages
- Steps to Format

**Prerequisites:**
- Basic T24 navigation skills
- Basic knowledge of InfoBasic Programming

Contact us about this course

More T24 Technical courses

View all courses
T24 Direct Connect Driver Oracle

This course will give participants an insight into the working of the Direct Connect Driver and the conversion process. An all-encompassing course, participants will cover the complete end to end journey from Installation, Configuration and Testing of the connection.

Content:
• Installation, Configuration and Testing Connection
• Stub less Architecture
• Execution of Conversion Process
• Views, Indexes and Query Analysis
• Oracle 11G Feature Support

Prerequisites:
• Basic T24 navigation skills
This course will equip the participants with adequate knowledge on the importance of OFS and the technical architecture of OFS. This module will facilitate the need for OFS, configure OFS input and test OFS messages.

**Content:**
- Various types of OFS Modes
- Introduction & Common Messages
- OFS Batch Mode
- OFS Response
- OFS Telnet Mode
- Encryption

**Prerequisites:**
- T24 Technical Induction Course
- Advanced Technical Training – recommended (details can be provided upon request)
T24 Technical Courses

T24 Security Management System

This course will provide participants with the adequate knowledge and understanding of how to create users within the system, the importance of override messages in T24 and how to work with them. This module will also equip participants with Dispo Processing knowledge.

Content:
• Understanding the user application to create and manage the User in T24
• Creation of USER.SMS.GROUP
• Resetting of Passwords
• Override processing
• Dispo Processing

Prerequisites:
• T24 Functional Induction Course

More T24 Technical courses
View all courses

Contact us about this course
T24 Technical Courses

T24 Administration

This course will enable participants to understand the Temenos Upgrade procedure, the service pack installation process and also how to carry out new product installations. This course will equip participants with the knowledge on how to archive and create new users within T24, as well as the working of Override messages and Dispo Processing.

Content:
• Performing a T24 Upgrade
• Installing a Service Pack in T24
• T24 Updates
• Importance and need for archiving

Prerequisites:
• T24 Technical Induction Course
• jBASE – Recommended (full details can be provided upon request)
• T24 Programming (Full details can be provided upon request)
T24 Technical Courses

T24 COB Management

This course will enable participants to understand the configuration and execution of the COB process within the T24 environment. The sessions will go into detail around all aspects surrounding COB Management including Multi-threading and Global Processing.

**Content:**
- Multi Threading in T24
- Services
- COB Processing
- Global Processing

**Prerequisites:**
- T24 Technical Induction Course
- T24 Programming – recommended (full details can be provided upon request)
- T24 Multi Company Business Course – recommended

Contact us about this course
This course will arm participants with the requisite technical knowledge to install and configure Browser using Java Connector Architecture (JCA), a Temenos initiative. By using JCA, we will equip participants on this course with knowledge on how Temenos Open Connectivity Framework (EE), Agent and JMS architecture, configuration and components are used within T24.

**Content:**
- Introduction
- Course objectives
- TOCF in T24
- Various terminologies in the JCA Architecture
- Configuring browser using Agent Architecture and JMS
- Logging for TCS Listeners
- Setup Browser for Secure Document Download
- Test Secure Document download using an enquiry

**Prerequisites:**
- Basic T24 navigation skills
- T24 Technical Induction Course
- Working knowledge on Open Financial Services (OFS) and Temenos Connectors
This course will give participants the technical knowledge to enable T24 using TWS java. An all-encompassing course, participants will cover the complete end to end journey from Installation, Configuration and also Testing using SOAP UI.

Content:
- Understanding Web services (optional)
- Introduction to web services in general
- Install and configure TWS java
- Create and Deploy a Web service
- Test using SOAP UI
- Install and configure TWS.net

Prerequisites:
- T24 Temenos Open Connectivity Framework (TOCF)
- T24 Open Financial Services

More T24 Technical courses
View all courses
T24 Technical Courses

T24 Process Flow

This course will enable participants to understand the Process Workflow module within T24 and will enable them to maintain the process workflows appropriate to the business requirement.

Content:
• Introduction to PW in T24 and BPMN Overview
• PW Designer – Installation and creation of a process
• PW in T24 – Tables used in creating a process in T24
• Pattern based workflows in T24

Prerequisites:
• Basic T24 navigation skills
• T24 Technical Induction Course

3 days

More T24 Technical courses
View all courses

Contact us about this course
T24 Technical Courses

T24 Integration Framework (IF) Inception

The course will give participants a deep knowledge of the T24 Integration Framework and its adapter specific to the Microsoft Biz Talk Stack. It would also help the participants to guide the clients on the recommended methods of implementing all types of standard T24 interfaces using the Integration Framework.

**Content:**
- How to install & configure an entire environment – including T24, IF, Adapters, Biz Talk & ESB Layer
- Overview of Technology behind above solutions and how they link together
- How to upgrade traditional interfaces into the Framework

**Prerequisites:**
- T24 Technical Induction Course
- T24 Open Financial Service

4 days

Contact us about this course
“Training from the Temenos team was very satisfying – they showed excellent T24 knowledge.”

Kasfil Tanjung - Project Manager - Bank Artha Graha, Jakarta

T24 Islamic Banking

Courses

Select a course ▼

• T24 Introduction to Islamic Banking Products
• T24 Islamic Investment Products
• T24 Islamic Investment – Profit Distribution System
• T24 Islamic Finance Products
• T24 Islamic Trade Finance
Introduction to T24 Islamic Banking Products

The T24 Introduction to Islamic Banking Products covers the characteristic features of the Islamic Banking modules of T24, including how they are differentiated from conventional banking, and how they are based on Shariah laws. It also gives a level of understanding to the participants regarding the terminology that is widely used in Islamic Banking. Participants will learn about various Islamic banking products and features.

**Content:**
- Product Overview
- Difference between conventional banking and Islamic Banking
- Various types of Islamic Products like investment products, finance products

**Prerequisites:**
- Sound Knowledge on banking functionality and Islamic banking functionality
- Basic knowledge on Islamic Shariah laws

Contact us about this course
T24 Islamic Investment Products

The T24 Islamic Investment Products course covers the characteristics and features of the Islamic Deposit products used in T24 Islamic Banking. This course will equip participants with knowledge on various Islamic Deposit products like Wakala and Murabaha.

**Content:**
- Product overview
- Difference between conventional banking and Islamic Banking
- Various Islamic Banking features such as Wakala and Murabaha

**Prerequisites:**
- Sound knowledge on banking functionality and Islamic Banking functionality
- Basic knowledge on Islamic Shariah laws

Contact us about this course
T24 Islamic Banking Courses

T24 Islamic Investment – Profit Distribution System

The T24 Islamic Investment Profit Distribution System course covers the characteristics and features relating to profit distribution within Islamic Banking. It also explains the concept of Profit Distribution System (PDS). This course will equip the participants with knowledge of the distribution of profits and how to consider investment risks.

Content:
• Product Overview
• Parameter set-up
• Profit distribution, calculation and distribution
• Profit distribution and other features related to this module
• Enquiries and reports
• Accounting process

Prerequisites:
• Sound knowledge on banking functionality and also Islamic banking and Islamic products
• Basic knowledge on Islamic Shariah laws

More T24 Islamic Banking courses
View all courses

0.5 day

Contact us about this course
T24 Islamic Banking Courses

T24 Islamic Finance Products

The T24 Islamic Finance Products course covers the characteristics and features relating to Finance products like Murabaha, Musharaka, Ijara, Bai Salam, Qard Hasan, Repossession and PD payments. This course will equip the participant with a sound knowledge of various Islamic Finance products within T24 and the wider market.

Content:
• Product overview
• Parameter set-up
• Murabaha product
• Musharaka product features
• Ijara product features
• Repossession of assets and PD Payments

Prerequisites:
• Sound knowledge on banking functionality and also Islamic Banking and Islamic products
• Basic knowledge on Islamic Shariah laws

Contact us about this course
T24 Islamic Banking Courses

T24 Islamic Trade Finance

The T24 Islamic Trade Finance course covers the characteristic features relating to Letter of credit and its financing products. This course will equip the participants with sound knowledge on various LC products like LC Murabaha, LC Musharaka, LC Ijara and LC Musawama. This course equip the participants about how to input LC financing transaction under Islamic trade finance products.

Content:
- Product overview
- Parameter set-up
- Product features like LC Murabaha, LC Musharaka, LC Ijara and LC Musawama
- Enquiries and reports
- Accounting process

Prerequisites:
- Sound knowledge on banking functionality and also Islamic Banking and Islamic products
- Basic knowledge on Islamic Shariah laws

Contact us about this course
Training feedback from our side was extremely positive... thanks for a job well done!

Juha Volotinen - Programme Director - Aktia
This course will explain the software components that make up the development and run-time environment for an edgeConnect application. Participants will gain an understanding of the basic concepts and terminology used by edgeConnect. The creation of new applications and the rules that need to be adopted when using the product will also be covered.

**Content:**
- Create basis for a new application
- Data store and lists
- Screen functionality
- Rules
- XML integration
- Web services
- Components
- Language maps

**Prerequisites:**
- Download, install and license the edgeConnect 5.2 IDE

More Temenos Connect courses
View all courses
Temenos Connect Courses

Temenos Connect Internet Banking (TCIB) Introduction

Primarily aimed at Technical Staff such as Developers, Business/System Analysts and Technical Project Managers, this course will enable participants to make basic changes to the “look and feel” of the screens built. Armed with the knowledge from this course, participants should help specify the additional changes that may be required for their own application.

Content:
- Technical overview of TCIB
- Technical overview of edgeConnect
- An introduction to edgeConnect focussing on those capabilities that are used in TCIB and which are required to make the basic level of customisations. This includes a number of practical exercises.
- How TCIB uses edgeConnect
- Practical exercises to make a set of essential customisations to TCIB
- Q&A to determine the next level of training required

Prerequisites (On-site):
- Setup T24 with the necessary components to support TCIB
- Install and licence the edgeConnect IDE with the Developer, Deployer and Language Editor
- Obtain the Developer Release of TCIB

Note: Prior to commencement, participants must ensure that each of the three software releases are compatible with their own IT devices.
The course was very hands on. All in all, we were very happy with the training.

Martin Toner - IT Manager - KBC Bank

Triple’A Plus (TAP) Courses

Select a course ▼

TAP Introductory Courses
• End User – PMS B2F
• End User – PMS F2B

TAP Functional Courses
• R14 New Business Features
• Implement – Scripts & Formats
• Implement – Operations & Positions

TAP Technical Courses
• R14 New Technical Features
• Administration – Architecture
• Administration – Foundation
• Administration – Advanced
• Administration – Monitoring and Performance
• Administration – TSL

TAP Design Studio Courses
• Design Studio TAP – Administration
• Design Studio TAP – Technical Configuration
• Design Studio TAP – Foundation
• Design Studio TAP – WUI Adaptation
• Design Studio TAP – WUI Processes
• Design Studio TAP – OData API
End User – PMS B2F

This training will provide participants with an overview of the Portfolio Management Analysis (PMA) Triple'A Plus Module with theoretical notions and concrete exercises.

**Content:**
- Use the Context and Search tool
- Launch Portfolio Management Menu Functions
- Understand the views available and the results
- Understand what can be administrate through the WUI

**Prerequisites:**
- No previous knowledge required

Contact us about this course

More Triple'A Plus (TAP) courses
View all courses
End User – PMS F2B

This training will provide participants with an overview of the Triple’A Plus Order Management and the Proposal Generator Modules with theoretical notions and concrete exercises.

Content:
• Create a Single Order
• Launch an Allocate Order and a Rebalancing
• Use the order session and order list
• Create an order proposal and retrieve it

Prerequisites:
• No previous knowledge required

More Triple’A Plus (TAP) courses
View all courses

Contact us about this course
R14 New Business Features

The R14 New Business Features course is an excellent way to start learning what business novelties and concept were introduced in this version of Triple'A Plus.

The purpose of this course is to:
• Provide the participants with the business solution overview
• Help them discover the new functionalities of the solution per business component

Participants will gain a good foundation on which they will rely to continue working and be trained.

After attending this course, participants will learn:
• WUI usability enhancements
• Business and packaging improvements
• Strong emphasis on reporting enhancements, in term of architecture optimisation, usability and new standard reports
• Multi-channel extensions with new Client Portal solution and Tablet enhancements
• T24 integration
• R14.03 Core still compatible with OCS 1.30.6 SP6 to facilitate the migration

This course is dedicated to participants with an experience of the Triple'A Plus solution.

Content:
• Learning Objectives
• Business Solution Overview
• R14 New Business Features

Prerequisites:
• Clients & Partners having a good knowledge of Triple'A Plus
Implement – Scripts & Formats

Regarding Script, you will discover basic database concepts, understand the key concepts of scripting, use the script language reference guide, and customise the Triple'A Plus GUI. Regarding format, you will create and maintain formats according to user needs, manipulate format element attributes in order to define layout of financial function calculations and use Triple'A Plus script language, understand how to make basic screen customisation, and make the link between a user and a set of format and screen.

Content:
- Introduction to scripting
- Database concept and the data model in Triple'A
- Script language basics
- References
- Definitions
- User set-up in Triple'A Plus GUI
- Format – characteristics and attributes
- Format element – characteristics and attributes
- Global Exercise

Prerequisites:
- E-learning – Solution overview
- E-learning – Security overview
- E-learning – Data administration menu
- End User – PMS B2F
**Triple’A Plus (TAP) | Functional Courses**

**Implement – Operations & Positions**

You will understand the concepts of operations, positions and fusion in Triple’A Plus.

**Content:**
- Operation – Position – Fusion (Operation Accounting View, Operation Creation, Fusion, Valuation Mechanism, Fund Splitting)
- Operation – Position – Balance Position (Operation Creation, Position versus Balance Position)

**Prerequisites:**
- E-learning – Solution Overview
- E-learning – Security Overview
- E-learning – Data Administration Menu
- End User – PMS B2F

1 day

Contact us about this course

More Triple’A Plus (TAP) courses
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The R14 New Technical Features course is a presentation of all novelties introduced since the TAP R12SP1 release.

After attending this course, all participants will be able to:

- Understand the general architecture of TAP R14
- Have a good understanding of the enhancements introduced at the different levels of the solution

Content:

- Technical Solution Overview
- R13/R14 New technical Features
  - New features and enhancements on the Technical Framework and in the Databases
  - New artifacts in Design Studio TAP
  - WUI Packaging
- Temenos Connect introduction
- Presentation of the TAP Tablet application
- Interaction between TAP and T24
  - New modules introduced in the solution
    - Temenos Connect Internet Banking (TCIB) presentation
    - Design Studio T24 introduction

Prerequisites:

- CRTAP12T New Features or CRTAP140 - Administration – Architecture
- CRTAP144 - Administration – TSL

1 day

Contact us about this course
Administration – Architecture

This training presents in details the four TAP architecture layers: presentation, application, persistent and interfaces layers. After having followed this course, the participant will have a global understanding of the Triple’A Plus solution.

Content:
• Architecture overview (incl. J2EE server and databases)
• Application management (incl. security)
• TAP interface modules
• Web Services architecture
• Reporting architecture

Prerequisites:
• Understanding of database concepts, J2EE framework and client-server model

More Triple’A Plus (TAP) courses
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Administration – Foundation

This course is focused on the TAP installation and administration. After having followed this course, the participant will be able to install the whole Triple'A Plus software: TAP Core and Web, Live!Report, Gateway Pack and Design Studio. In addition, he will understand the basic configuration and some administrative tasks to manage an environment.

Content:
• Learning objectives
• Installation and configuration of the Core, Service Layer and Web parts
• Installation of Design Studio and initial package deployment
• Installation and configuration of the Reporting module (Live!Report)
• Interface module (Gateway Pack) presentation
• Management of all third parties software (Sybase, Actuate, WebLogic, WebSphere Transformation eXtended)
• Duplication of TAP environment using standard TAP tools (ICT, MICU)
• Brief presentation of the hotfixes and migration strategy
• Basic TAP administration

Prerequisites:
• Administration – Architecture
• Unix shell commands: basic knowledge (how to source files, vi, tar etc.)
• Database administration: good knowledge of Sybase and SQL
• J2EE good knowledge: experience with WebLogic or WebSphere is a plus
• Basic knowledge of Ant and Java

More Triple'A Plus (TAP) courses
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Contact us about this course
This training focuses on the customization of the application on Technical side, i.e. databases and web server part (Web Front-End excluded). After having followed this course, the participant will have a deep knowledge of the Triple'A Plus application and will be able to manage the technical customizations during an implementation project.

**Content:**
- Database customization by adding new user defined attributes and new user defined entities
- Database customization on the extended attributed (incl. parent and format child adaptation)
- Round-robin implementation (TAP Core servers and Actuate server)
- Job-Launcher concept and customization
- Reporting repository customization
- Packager management throughout Design Studio

**Prerequisites:**
- Administration – Architecture
- Administration – Foundation
- Design Studio TAP – Administration
- Unix shell commands: basic knowledge (how to source files, vi, tar etc.)
- Database administration: good knowledge of Sybase and SQL
- J2EE: good knowledge, experience with WebLogic or WebSphere is a plus.
- Programming: Basic knowledge of Ant and Java

**2 days**

Contact us about this course
Administration – Monitoring and Performance

The objective is to introduce the participants to the performance engineering concepts. The participants will have better understanding of the TAP application behaviour and being aware of all impacts for any business or technical decision. After following this course, the participant will also know in deep at global level the TAP engine.

Content:
- General concepts: architecture concepts, the unwanted behavior, the performance enhancers
- Core description: security, format, list, classification, script, caches
- Web: J2EE architecture, best practices, caches, Job Launcher
- Tools to perform the analysis of the system

Prerequisites:
- Administration – Architecture
- Administration – Foundation
The TSL (Triple'A Service Layer) is a framework allowing to store in the database computed data and to reuse them in order to speed up the response time to the end-user. The administration course presents in detail all features making up this module. Once this training is complete, the participant will know how to customize and manage the TSL module.

**Content:**
- Technical Solution Overview
- TSL engine (TSL flows, global/local cache concept, Rule based engine)
- TSL API and processes
- TSL pre-computed attributes
- Database management
  - Data model extension, extended entities
  - Meta-dictionary changes
  - SQL Formats & format elements
- BPI processes

**Prerequisites:**
- Administration – Architecture
- Administration – Foundation
Design Studio TAP – Administration

This training presents Design Studio product on technical side. During this course, the participant simulates a TAP implementation using different Design Studio artifacts.

At the end of the training, the participant will be able to:
- Install, update TAP Web application using DS
- Customize a DS project using the Maven concept
- Put in place the Web debug mode
- Manage artefacts using a Version Source Control software (SVN and/or GIT)
- Implement a build platform using Jenkins

Content:
- Learning Objectives
- Workspace management (configuration, debugging)
- Design Studio Projects (Packager and Servers)
- Maven introduction
- TAP Web deployment framework
- Life Cycle Management (environment strategy, TAP packages)
- Introduction to SVN and GIT perspective
- Build platform introduction using Jenkins

Prerequisites:
- Administration – Architecture or CRTAP12T – R12 New Technical Features
- Knowledge of Eclipse IDE and Maven concepts is a plus (not mandatory)
Design Studio TAP – Technical Configuration

This training focuses on the customization of the application on Technical side, i.e. web server part (Web Front-End excluded). After having followed this course, the participant will have a deep knowledge of the Triple'A Plus application and will be able to manage the technical customizations during an implementation project.

Content:
• Technical template projects
• Packager management throughout Design Studio
• TAP properties extension
• TAP Configuration file adaptation (using Patch file mechanism)
• Add external libraries files
• J2EE server customization (Jython script, Security, Web Services)

Prerequisites:
• Administration – Architecture
• Administration – Foundation
• Design Studio TAP – Administration
• Unix shell commands: basic knowledge (how to source files, vi, tar etc.)
• J2EE: good knowledge, experience with WebLogic or WebSphere is a plus.
• Programming: Basic knowledge of Ant and Java
Design Studio TAP – Foundation

The Design Studio (DS) Workbench application is a collaborative workspace that provides business consultants, developers, and technical consultants with business process modelling tools to build, configure, and deploy Triple’A Plus components.

The goal of the DS Workbench application is to get business and IT professionals collaborating seamlessly to produce optimal solutions that meet their clients’ business process needs. The application provides a workspace and common modelling tools to facilitate successful business and IT communication. By using graphical diagrams to translate business content to IT content, the focus is more on the logical creation of the business process and less on the programming code.

The purpose of this course is to:
• Present the Design Studio development workspace
• Introduce the main Design Studio TAP concepts (incl. the package concept)
• Explain the interaction between TAP Core and Design Studio

Content:
• Learning objectives
• Workspace configuration
• Model and templates projects
• PMS Packaging presentation
• Development strategies
• How to use the product to extend TAP Core meta-dictionary (User Defined Entity)
• Use of two designers (Models and Translation)

Prerequisites:
• Knowledge of Triple’A Plus
• Knowledge of Eclipse IDE and Maven concepts is a plus (not mandatory)

More Triple’A Plus (TAP) courses
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Design Studio TAP – WUI Adaptation

This training focuses on the adaptation of the TAP Web using the PMS packaging throughout Design Studio. During this course, the participant uses several Design Studio artefacts for customizing the WUI pages.

At the end of this training session, the participant will:
• Have a good overview of the standard WUI adaptation.
• Be able to apply the best practices learned through the exercises.
• Gain experience with Design Studio designers and the PMS packaging.
• Know the concept of processes that manage data in the system.
• Be able to manage WUI customization using Design Studio artefacts

Content:
• Learning objectives
• WUI pages adaptation on several PMS business functions
• Introduction to the PMS processes

Prerequisites:
• Administration – Architecture or CRTAP13T – R13 New Technical Features
• Design Studio TAP – Foundation

© 2 days
Design Studio TAP – WUI Processes

This training focuses on the processes available with the PMS packaging. During this course, the participant builds customised WUI pages with several processes throughout Design Studio.

At the end of this training session, the participant will:
• Have a global picture of the TAP Web PMS Packaging
• Be able to apply the best practices learned through the exercises
• Gain experience with Design Studio designers and the PMS packaging
• Know lots of processes that manage data in the system
• Be able to execute any Web customization using Design Studio artifacts

Content:
• Learning objectives
• WUI pages adaptation on several PMS business functions
• Introduction to the PMS processes

Prerequisites:
• Administration - Architecture or CRTAP13T – R13 New Technical Features
• Design Studio TAP – Foundation
• Design Studio TAP – WUI Adaptation

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Contact us about this course
Design Studio TAP – OData API

This course is focused on the OData implementation. The main purpose of this solution is to provide a facility for querying and managing TAP data. After attending this course, the participant will be able to use this protocol in a TAP environment.

Content:
• Architecture overview
• Security constraint using OData
• Concepts
• Execution of some queries and business functions

Prerequisites:
• Administration – Architecture or CRTAP12T/CRTAP13T-TAP New features
• Design Studio TAP – Foundation
• J2EE/Java knowledge

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WealthManager Courses

Select a course ▾

WM Functional Courses
• How to Use WealthManager
• Sales & Advice (Campaigns & Opportunities)
• Modelling
• Performance
• Orders
• Advisory Models and Compliance

WM Technical Courses
• Technical Basics
• Administration
• Operations & Troubleshooting

The training is really very helpful to understand our new product and to start working with it.
Olga Feschenko - Project Manager - Foranx
How to use WealthManager

This course introduces the end-user to the capabilities of WealthManager.

**Content:**
- Navigation throughout web interface
- Data Security – ensuring that users only see records that they are entitled to see
- Utilisation of the numerous Client Relationship Management features
- Performance of Wealth Management daily activities WealthManager
- Review book of business and portfolio performance
- Generation of Internal Reports
- Compliance adherence – Investment Policies and templates
- Client Communication – Client Reports (ad hoc and scheduled), Mass Mailings and Client Portal

**Prerequisites:**
- No previous knowledge required

© 3 days

More WealthManager courses

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Contact us about this course
WealthManager | Functional Courses

WealthManager – Sales and Advice

You will learn how to create and analyse sales opportunities and monitor the sales pipeline. How to create, administer and track marketing campaigns and incorporate all the components of a proposal.

**Content:**
- Proposal process
- Opportunity management
- Pipeline management
- Campaign management

**Prerequisites:**
- WealthManager – How to use WealthManager

1 day

Contact us about this course

More WealthManager courses
View all courses
WealthManager | Functional Courses

WealthManager – Modelling

This course explains how a model is used to leverage the expertise of a firm’s most experienced investment experts, to allow front line advisors to offer better investment advice to clients.

Content:
• Create and apply a model to a portfolio, asset class and proposal
• Generate trade lists as a result of the modelling process
• Create model parameters that will guide the remodelling process
• Manage a portfolio using a model

Prerequisites:
• WealthManager – How to use WealthManager

1 day

Contact us about this course

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WealthManager – Performance

In this course we learn how WealthManager calculates and stores performance data, describes where performance can be retrieved by users and state other factors that affect performance and financials.

Content:
• Performance calculation methods
• How performance is stored in WealthManager
• How performance is displayed in UI; views, reports and client reports
• Review of performance patterns
• Cashflows – how are they identified and stored
• Accrued income - how it is calculated, stored and used as part of performance calculation
• Account/Portfolio valuation - factors affecting valuation, required dependent data, handling of backdated updates (pricing, transactions)

Prerequisites:
• None, but WealthManager – Technical Basics course is recommended
WealthManager | Functional Courses

WealthManager – Orders

The objectives of this course are:
• Understand how WealthManager interacts with order management systems
• List the various types of orders that can be placed in WM
• Learn how to place orders in WM
• Understand the difference between a bulk order and a single order
• Describe the verifications and compliance checks that are performed once orders are created
• List available order statuses
• Recognize the difference between the Order Worksheet object and the Order object
• Learn about order configuration and how it affects the end-user: user roles, system parameters, system properties

Content:
• Different types of orders
• Creating, modifying, copying and deleting orders
• Order workflow
• Working with Order Worksheets
• Business rules
• Compliance checks
• Various states of an order
• System configuration

Prerequisites:
• WealthManager – How to use WealthManager
WealthManager – Advisory Models and Compliance

This course demonstrates how a Relationship Manager can use WealthManager to perform the following advisory functions:

- Offer standard yet customized investment management advice to prospects and clients
- Offer different investment products based on a client’s investment knowledge, level of involvement in portfolio management and any other differentiating factors
- Understand the risk tolerance of their clients and prospects
- Monitor client’s investments, financial goals, constraints/restrictions and risk factors on a daily basis

Content:

- Learn about the various components that make up an Investment Policy (IPS) Template, Proposal and IPS
- Create an IPS Template, Proposal and IPS
- Use a Risk Questionnaire and understand how it influences the creation of an IPS
- Understand how WM can monitor compliance
- Learn how an institution can offer multiple advisory models based on client’s investment goals, assets under management, investment sophistication or their intended involvement in the portfolio management process

Prerequisites:

- WealthManager – How to use WealthManager

1.5 days

Contact us about this course

More WealthManager courses

View all courses
WealthManager | Technical Courses

WealthManager – Technical Basics

This course describes WealthManager’s architecture and technology components, explains the components that make up the business, storage and operational services/layers.

**Content:**
- Business Object Model
- Data interfaces/Financial engines
- Architecture
- Web services
- Security model
- Data model

**Prerequisites:**
- No previous knowledge required.

Contact us about this course

More WealthManager courses

View all courses
WealthManager – Administration

You will learn how to perform administrative functions of WealthManager.

Content:
• Identify and correct loading errors through Data Administration
• Create and maintain users, business units and business unit hierarchies
• Object change requests
• SIF generators
• Instrument attributes
• Create and maintain prices
• Create, change, and assign a benchmark
• Position reconciliation between source system and WealthManager
• Management of month-end scheduled Client Reports
• Create and maintain asset mixes and models
• List and describe model parameters
• Alerts for the admin user
• Maintenance of Public Views

Prerequisites:
• WealthManager – Technical Basics

More WealthManager courses
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Contact us about this course
WealthManager – Operations & Troubleshooting

The objectives of this course are:
• Describe in detail how data is loaded from the source system to WealthManager
• Diagnose common loading errors and act upon them
• Determine the success of a data load
• Recognize and recommend actions for business data errors
• Understand data dependencies and assess impact to financial calculations
• Know how to gather relevant triage information for unexpected errors/issues for escalation support

Content:
• Data Model Overview
• WealthManager application UNIX environment
• Batch Concepts
• System Parameters Review
• Financial Engines
• Miscellaneous Errors
• Operations & Other Utilities
• Environment Troubleshooting

Prerequisites:
• WealthManager – Technical Basics

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