OneShield Enterprise Training Series

Course Outline

OneShield SOFTWARE | Business Solutions. Simplified.

OneShield Enterprise Training Series

OneShield Software offers comprehensive training in the following courses:

Course Title:	# of hours:
1. OneShield Enterprise Application Walkthrough	16
2. OneShield Designer Basic Configuration	80 - 90
3. OneShield Designer Advanced Configuration	80
4. OneShield Designer Product Configuration	80
5. Middle Tier Configuration	40
6. Services Designer Configuration	40

OneShield Enterprise Training: Course Overview

1. OneShield Enterprise Application Walkthrough

This course helps students in understanding the OneShield Enterprise application workflow. It includes product walkthroughs and smoke test execution.

Course Duration: 16 hours
Prerequisites: Understanding of insurance principles

Lesson Name:	Summary:	# of hours:
OneShield Policy Walkthrough	• How to create and manage partners, partner users, licenses, etc. • How to create quotes and bind them to policies.	6
OneShield Billing Walkthrough	• Introduction to OneShield Billing. • Overview of the OneShield Billing user interface. • How to generate invoices and current dues. • How to process single payments with auto cash apply. • How to process single payments with manual cash apply.	5
OneShield Claims Walkthrough	• Introduction to OneShield Claims. • Overview of the OneShield Claims user interface. • How to create a claim. • How to process transactions in OneShield Claims.	5

2. OneShield Designer Basic Configuration

This course is designed to teach application developers and business analysts to develop applications with our design tool, OneShield Designer. OneShield Designer accelerates the development process by using a common language and approach for developing applications effectively and efficiently. Upon completing the course, students acquire a basic knowledge of OneShield Designer.

Course Duration: 80 - 90 Hours
Prerequisites: Insurance, SQL, and object-oriented background

Lesson Name:	Summary:	# of hours:
OneShield Architecture	• Introduction to the components of OneShield Enterprise.	2
OneShield Designer	• Introduction to OneShield Designer and its interface. • How to create a session and manage it. • How to work with metadata tables.	2
Object Model Design	• Introduction to the object model, including concepts, terms, design criteria, and approach.	8
Object Model Configuration	• How to configure an object model using OneShield Designer.	4
UI and Application Workflow Design	• Introduction to the OneShield Enterprise application workflow design, including actions, action types, and action outcomes. • Overview of the OneShield Core objects. • Overview of different elements of the UI. • How to configure pages, navigate between pages, and analyze the system logs.	8
UI and Application Workflow Configuration	• How to configure an application workflow using OneShield Designer.	22 - 32
System Logs and Debugging Errors in Library Application	• Overview of the different types of system logs. • How to debug errors in OneShield Enterprise using logs.	2
Rules	• Overview of the different types of rules, such as display rules, read-only rules, mandatory rules, label rules, and other basic action rules. • How to create basic rules to apply business logic.	12
Lookup Lists (Incl. Ref List)	• How to create static lookup lists to populate UI elements, such as drop-downs and radio buttons. • How to create dynamic lookup lists from reference relations.	8
Object State	• Overview of object states, including their significance. • How to change the state of an object.	4
Object Tree	• Overview of object trees, including their significance. • How to configure an object tree and its nodes using OneShield Designer.	4
Evaluation	• Online exam consisting of multiple-choice questions. • Assignment submission. • Oral exam.	4

3. OneShield Designer Advanced Configuration

This course provides an understanding of application design principles, enabling students to use advanced techniques for creating interactive applications. It empowers students to improve end-user system performance and usability.

Upon completion of this course, students develop an understanding of the user interface and workflow functionality. The course equips students with the ability to add custom reference tables, create advanced rules, use Ajax, and handle real-world scenarios they encounter when developing OneShield applications.

Each lesson in this course includes a case study with exercises.

Course Duration: 80 hours
Prerequisites: OneShield Designer Basic Configuration

Lesson Name:	Summary:	# of hours:
Object Constructors, Templates and UTemplates	• How to create a child object and initialize its member variables when a parent object is created. • Overview of templates and UTemplates.	6
Rules Advanced	• Implementation of validation, initialization, and aggregation rules. • Overview of the rule compilation process.	26
Ajax Configuration	• How to implement Ajax for creating better, faster, and more interactive applications.	2
Custom Metadata	• How to create custom metadata tables.	2
Linking with Lookups	• How to create dynamic lookup lists from custom metadata tables (VLL and VVL).	14
OneShield UI Design Guidelines	• How to create various components of the UI for a rich and consistent user experience.	4
Datamarts	• How to store transactional data in relational tables called datamarts.	8
Advance Workflows and Object Transition	• How to implement complex workflows and hyperlinks. • How to handle multiple outcomes.	16
Evaluation	• Online exam consisting of multiple-choice questions. • Assignment submission. • Oral exam.	2

4. OneShield Designer Product Configuration

This course provides an introduction to product configuration. It guides students through the Core and policy object models. They learn how to configure and enhance the OneShield Base use case functionality. They also learn about requirements documents and how to build a prototype of a working product.

The OneShield Rating module is an important part of the OneShield Designer Product Configuration course. It describes design considerations and the implementation methodology for rate book revision. The course provides an understanding of how rate book revisions are related to rating, forms generation, workflow management, and third-party report processing rules, eligibility, and underwriting rules.

Course Duration: 80 Hours
Prerequisites: OneShield Designer Basic Configuration, OneShield Designer Advanced Configuration, and working knowledge of databases.

Lesson Name:	Summary:	# of hours:
Universal Object Model	• Introduction to the universal object model for core objects.	4
Requirements Template	• Introduction to the requirements template used for documenting product implementation requirements, such as pages, attributes, and rules.	4
Product Configuration	• How to configure the Pet Insurance product.	22
Underwriting Rules	• How to configure insurance coverages. • How to configure different types of coverage rules such as underwriter referral and hard stop.	8
Rating Configuration	• Introduction to the rating premium calculation process. • How to configure rating for a product.	16
Forms Configuration	• How to configure static and dynamic forms.	8
Payment Plan	• How to configure the preferred payment plan.	8
Test Results and Release Notes	• Overview of the template used for documenting the test results for a newly configured product. • How to fill the template and create release notes.	8
Evaluation	• Online exam consisting of multiple-choice questions. • Assignment submission. • Oral exam.	2

5. Middle Tier Configuration

This course provides an overview of OneShield's architecture, middle-tier concepts, integration, and the batch framework. It enables Java developers and individuals working with the middle tier to gain an understanding of third-party integrations, SOA, XML export/import and batch/job processes. Exercises include using Java/JEE technologies to create, implement, and execute middle-tier commands. Important debugging techniques, batch framework fundamentals, and core upgrade tasks are also covered as part of this training.

Course Duration: 80 Hours
Prerequisites: OneShield Designer Basic Configuration and experience as a Java or implementation developer.

Lesson Name:	Summary:	# of hours:
Java Workspace Setup	• How to set up a Java workspace with WildFly 8.2	6
OneShield MT Architecture	• Introduction to various components of the OneShield Middle Tier architecture.	4
MT Command	• How to create an MT command that prints a DNF object tree in the logs.	8
DXF Export and Import	• How to configure the DXF schema. • How to export and import the DXF schema with an MT command.	6
Services Designer	• How to customize a service operation and call it from SoapUI.	5
Robotic Processor	• How to configure a nightly process in OneShield Designer.	6
Generic Service Layer (GSL)	• Introduction to GSL. • Overview of the GSL framework with examples. • Overview of the GSL project architecture.	2
External Object Cache (EOC)	• Overview of EOC. • How to use EOC for outbound calls. • How to use EOC for inbound calls.	2
Evaluation	• Assignment submission.	1

6. Services Designer Configuration

This course introduces students to the various web services provided by OneShield, including data services, product-based metadata and transaction services, transaction processing services, and session and system management services. Students learn how to implement web services, send requests so they can access web services, and interpret responses and error messages.

Course Duration: 80 Hours
Prerequisites: OneShield Designer Basic Configuration, OneShield Designer Product Configuration, and experience as a Java or implementation developer

Lesson Name:	Summary:	# of hours:
Introduction to Services Designer	• Overview of Services Designer. • Introduction to the services catalog.	1
Service Operation Configuration	• Overview of the components of a service operation and configuration of an operation.	2
DXF Configuration	• Overview of DXF. • How to configure DXF, export XSD, and export XML. • How to set references by using ID and IDREF and Object Natural Key (ONK) in the schema definition. • Overview of subschemas.	5
Workflow Customization	• How to customize a workflow.	3
Error Handling and Logs	• Overview of the different types of logs. • How to debug errors.	1
SessionService	• How to invoke SessionService operations through SoapUI.	1
Processing Directives	• Overview of processing directives. • How to use processing directives in a service call.	1
ObjectAccessService	• How to implement createObject and searchForObjectList operations for the PolicyPPT object.	2
Pagination	• How to use pagination while sending requests.	**1**
Configuration of Pet Product in OneShield Designer	• How to configure a new product, including the product definition, user interface, rating, and payment plans.	8
WorkflowService	• How to customize a workflow and invoke it by using the executeWorkflow operation part of the WorkflowService.	**2**
RulesService	• How to create rules and invoke them by using the executeRules operation part of the RulesService.	1
UserService	• How to get information about a specific user by using the searchForUsers operation part of the UserService.	1

Configuration of a Pet Insurance Policy by using Web Services	• How to create a pet insurance policy by using the PolicyWorkflowService and the ObjectAccessService.	9
Validation Framework	• How to perform validations on the service operation calls.	1
Evaluation	• Assignment submission	1

OneShield Training Pricing

Course:	Online Training*:
1. OneShield Enterprise Application Walkthrough	$500 per trainee
2. OneShield Designer Basic Configuration	$3,000 per trainee
3. OneShield Designer Advanced Configuration	$3,000 per trainee
4. OneShield Designer Product Configuration	$3,000 per trainee
5. Middle Tier Configuration	$3,000 per trainee
6. Services Designer Configuration	$3,000 per trainee

*Note as of August 2020, we will continue to deliver the OneShield Enterprise training courses exclusively on-line. On-site training is not available at this time.

Lower your Total Cost of Ownership with OneShield Training

Training for your Business Users: Training courses are structured to get your business team up-to speed quickly on various aspects of the application. These courses are designed to enable business participation in the management and maintenance of your products today and well into the future, and is delivered for team members at all levels, including Developers creating applications using OneShield products and Rating Specialists who maintain rating tables and algorithms.

Ensure your Team is Certified and Self-Sufficient: With OneShield Training, you can ensure your staff members and partners are certified to manage, modify, and optimize OneShield Enterprise for your organization. The confidence gained from training also helps ensure your team members are self-sufficient, allowing them to do more complex work in-house without depending on outside consultants. We also offer training and certification of your external partners, such as reinsurers, agents, and other third parties.

e-Learning Course Modules: The standard training and certification program is available as e-learning courses with self-guided presentations and video instruction, quizzes, and course exercises. The courses are available online through a learning management system (EduBrite), which is accessible to students anywhere, anytime on a PC or tablet. Our e-learning includes support from OneShield trainers, so you are never on your own.

For further information, or you'd like to schedule training, please contact your OneShield Project Manager.

About OneShield Software:

OneShield Software delivers core business software solutions to the global insurance and broader financial services industry, deployed in the cloud or on-premise. OneShield Enterprise, our portfolio of standalone, subscription and cloud-based software products includes enterprise-class policy management, billing, claims, rating, product configuration, business intelligence, and analytics solutions that leverage a tool-based open architecture and single data model platform to streamline your business.

OneShield automates and simplifies the complexities of core systems with targeted solutions, seamless upgrades, collaborative implementations, and lower total cost of ownership. With corporate headquarters in Marlborough, MA, and offices in India and Canada, OneShield Software has 50+ products in production across the global P&C insurance market.

For more information visit us at www.OneShield.com

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