Trade Finance Technical Specialist Prep - Course Design Document

Ver 1.0

1. About the Document:

This design document specifies all the decisions made about the course up to this time, including:

- Purpose of the course
- Intended outcome of the course
- Audience description
- Delivery method(s)
- What to train
    - High level outline
    - Detailed lesson outlines
- Objectives of each lesson
- Assessments/exercises for each task

2. Purpose of the Design Document:

The purpose of the design document is to obtain agreement with all stakeholders about the vision and plan for the course. These parties include:

- Internal clients (BU SME's) and reviewers
- Team members (iLD) working on the course
- External clients, if any

3. Sign-off:

Obtaining sign- off on the design document is important in ensuring agreement on the plan at this point. Once an agreement is secured from key stakeholders work on developing the course materials can begin.

An approved course design document is required to release a course as an official curriculum

Key stakeholders for Design sign-off

- Designated Leader from BU (for BU developed courses)
- Head of iLD

Contents of a Design Document

Sr No	Content	Page Number
1	Purpose of the course	
2	Audience description	
3	Course objectives	
4	Learning Assessment	
5	Instructional Strategies	
6	Media	
7	Duration	
8	Course Scope -detailed outline by unit /module, including: - Introduction - Objectives - Topic List - Duration - Practice check method	
9	Activities Conducted - detailed outline for each activity planned, including: - Activity - Objective - Duration	
10	Developmental Tools	
11	Ownership and maintenance	
12	Development time	

13	Support requirements	
14	Project signoff sheet – ID, Project Manager, Client (internal or external)	

Purpose of the Course:

This course provides a Technical overview of the Intellect Trade Finance system. The course covers a detailed understanding on the important technical aspects of the Product

Audience Description:

Pre-sales, Business Analysts, Relationship Managers, Developers, Testers, SolutionArchitect, Consultant, Product Engineer, Service Delivery, Product Implementation

Course Objectives:

After completing this course, the learner will understand the important technical aspects of:

- Charges Module,
- Data Migration,
- Server Slowness,
- Data Migration,
- SWIFT,
- Processing Queue,
- Routing Screen,
- AML Changes and Test Automation Framework,

Learning Assessment:

Nil

Instructional Strategies:

Self-paced Instructor led Delphi Session

Media:

The course will utilize the following media

- Videos
- PDF

- PPT

Duration:

This course is covered in a single block of **27 Hours 45 Minutes** Dephi instructor led session.

- Pre Training Activity: Nil
- Post Training Activity: Nil

Course Scope:

The course contains **2** lessons. The lesson brief is given below:

Lesson	Objective	Topic List	Delivery Method	Duration	Practice check Method	Annexure
1	Trade Finance	a. Trade Finance (120 Mins) b. Trade Finance Technical Part 1 (20 Mins) c. Trade Finance Technical (120 Mins) d. Trade Finance Technical Part 3 (18 Mins) e. Server Slowness – Investigation, diagnosis and resolution (62 Mins) f. Charges Modules – Changes Settlements Methods & Flows (36 Mins) g. Data Migration (58 Mins) h. SWIFT Technical Part I (59 Mins) i. SWIFT Technical Part II (61 Mins) j. SWIFT Technical Part III (115 Mins) k. Clause Library(54 Mins) l. Processing Queue Part I (57 Mins) m. Processing Queue Part III (22 Mins) n. Reversal of Cash Margin (51 Mins) o. Routing Screen (60 Mins)	Video / PDF / PPT	550 mins	Nil	

		p. AML Changes (61 Mins) q. Customer Specific Pricing (50 Mins) r. Correspondence Message – Part I (48 Mins) s. Correspondence Message – Part II (18 Mins) t. Production Support – Incident Management Process L1 and L2 (17 Mins) u. Trade Back Office Security Workshop (80 Mins) v. Security Issues – SQLInjection Fixes Review & Discussion (50 Mins) w. Test Strategy & Approach for customizations (37 Mins) x. Test Strategy (20 Mins)				
2	Test Automation Framework	a. Basic Intro (47 Mins) b. Basic Intro Q & A (29 Mins) c. Framework Overview (62 Mins) d. Creating First Script Part 1 (30 Mins) e. Creating First Script Part 2 (38 Mins) f. Fetching DB details (18 Mins) g. Validation (29 Mins)	Video / PDF / PPT	253 mins	Nil	

Activities Conducted:

Activity #	Activity	Objective	Duration	Annexure

Development Tools

Not Applicable

Ownership

The design and Development of the course is by Delphi

Course approved by Not Applicable

Course revision from time to time by Delphi

Approved facilitators:Not Applicable

Development Time

Not Applicable

Support Requirements

Not Applicable

Project Sign off

Approved by :

Date   :

Place   :