Client Portal Guidelines, Version 2.0

Contents

Introduction

Purpose and Scope

The FIS Client Portal Guidelines (Portal Guidelines) are intended to establish formal corporate governance policy, processes and guidelines for content created, displayed and shared within the FIS Client Portal application (Client Portal).

This policy and content guide applies to the specified content created and shared through the Client Portal, but not to all information exchanged through the Portal, i.e. software downloads, invoices, etc., as other policies may impact information communicated to FIS clients through this secure web portal.

Other items excluded from scope of this document include:

- The formal establishment of a corporate tools governance council. (While the governance council will provide periodic review of and high-level direction to this policy document, it does not provide for formation of such committee which has been completed separately.)
- Policy for access and permissions provided to external users of the FIS Client Portal. (Subsequent to these guidelines, a process will be developed by the governance council for developing and implementing a process to facilitate the review of access privileges for external users.)
- Standards for encryption triggers on the email gateway for emails sent outside of FIS.
- An enforcement mechanism to drive compliance with these guidelines and other FIS web security requirements on all extranet sites.

The policy is not intended to impact other FIS internally developed systems, such as the Case Management System (CMS) and Entity Management System (EMS) with which the Client Portal is integrated.

Policy Statement

The Client Portal is used to provide clients with a secure environment to access information about FIS and the FIS products/ services they use, obtain billing information, access reports, download software and much more. As the primary online mechanism for clients, the Client Portal is subject to these Guidelines as policy intended to ensure FIS presents information that is consistent, complete, appropriate and accurate. These Portal Guidelines may also serve as the foundation of each business/product line’s Client Portal content strategy.

While this policy provides standard guides for Portal content, it does allow flexibility to modify the content based on product characteristics, staffing models, specific risks, client expectations and sound business judgment as determined by each product line’s management team. It is not intended to replace the normal process of evaluating, designing and delivering content or functionality within existing FIS products and services.

Applicable content follows the Portal site’s seven or eight major sections, depending on the navigation view. These content areas are available to clients depending on the features opted for by each client and for which they have configured their environment. Portal views are also based on FIS knowledge of the client, the FIS products and services each uses, their entity type, client groups, event attendance, etc.

This policy specifically refers to the following types of content as subject to the Portal Guidelines:

- General Information, Product Alerts and Bulletins
- Support and Contact Information
- Product Information, Documentation and FAQs
- Collaboration, Client Groups, Forums and Projects
- Conferences and Conference Materials

- Services, Client Services, Education, Webinar Details and Professional Services
- Reports, General and Executive

Applicability

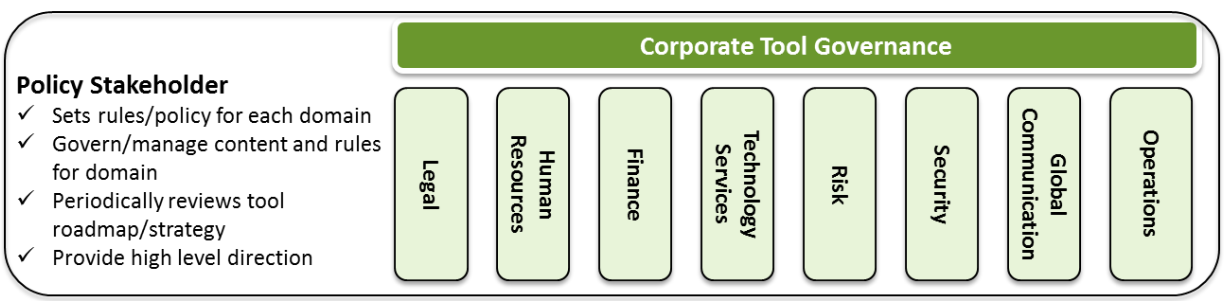
All FIS employees and subcontractors are required to adhere to established policies and standards. Violation of FIS policies and standards may result in disciplinary action up to and including termination. Any suspected violation of an FIS policy or standard should be reported to a supervisor, management representative, and Human Resource representative or to the FIS Chief Compliance Officer (CorporateCompliance@fisglobal.com). If you are aware of, or suspect, a security incident you should immediately report the incident to the FIS Security Incident Response Team (FSIRT) by calling 866.950.9986 or 414.357.3000, option 1, then 1; or e-mailing FSIRT@fisglobal.com. Violations may also be reported using the FIS Ethics Web site (www.fnisethics.com) or Hotline**.** FIS has a strict no retaliation policy and will not tolerate any kind of retaliation against anyone who, in good faith, reports a violation of FIS policy or law.

Policy Owner

As the owner of these Guidelines, the Corporate Tools and Information Governance Council (the Council) is comprised of the tool sponsor and representation from each of the following content domains: Legal, Human Resources, Finance, Technology Services, Risk, Security, Global Communication and Operations (e.g., lines of business or specific functional areas). The Council will provide oversight of corporate systems, tools and information management; the scope of which includes:

- Establishing the governance model and stakeholder roles
- Validating compliance with established policies and standards
- Establishing usage and content guidelines, as in this Client Portal Guidelines document, and ensuring Guidelines are comprehensive and updated with changing technology capabilities and business conditions
- Periodically reviewing tool sponsor’s roadmap/strategy

Each Council stakeholder represents their respective domain of expertise and ensures alignment to the associated corporate policies represented. Each Council member is empowered to make or facilitate decisions respective to their representative area. The role of each representative includes establishing rules and guidelines that govern content and interpretation of corporate policies, as well as assessing their related rules/guidelines to ensure they are comprehensive and updated with changing technology capabilities and business conditions. Stakeholders are responsible for driving accountability within the organizations they represent, clarifying policies and ensuring compliance of Corporate System tools and information management.



As there are various business lines and functional organizations using the Client Portal tool, user organizations are responsible for the integration of the Client Portal tool into their specific business work flows, processes and procedures. User organizations are fully accountable for ensuring usage of the tool and information content complies with corporate policies and standards. User organizations are also responsible for remediation of all compliance issues within their respective areas, including but not limited to exception notification received from the tool owner/sponsor.

Review Frequency

Annually or as determined by the governance body.

Questions

If you have any questions or experience technical issues with the Client Portal, please contact Naomi Ford at naomi.ford@fisglobal.com. For content policy questions, please contact Kerry Schicker at Kerry.Schicker@fisglobal.com.

About this Guide

This guide is geared toward internal FIS general users, account managers, database administrators and Portal administrators. These Guidelines are not intended for Client Administrators, however if Client Administrators have the ability to create content in any section it will be clearly indicated throughout.

Major portions of this Guide are organized to mirror the two navigation views found on the site. These views vary content found on the left navigation menu depending on user selection. Where applicable, hyperlinks are provided through this document to facilitate connectivity between these two views.

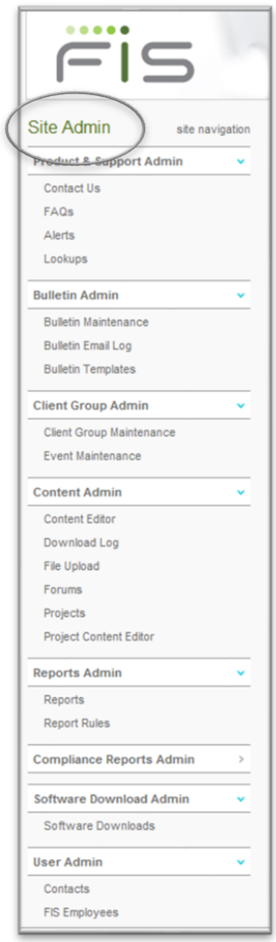
Site Admin View

Content Creation

The first and most significant section of these Guidelines represents the navigation view an FIS employee with administrative content creation capabilities would utilize. This view enables FIS users to create the text, files and documents to be displayed and shared with clients.

While it differs a bit from the more widely-used Site Navigation menu, it does follow the same general content, yet is grouped and organized to more efficiently enable content development.

When logged in as an FIS employee, users can see views for multiple products within the Client Portal, though many will create content for only one FIS product line.



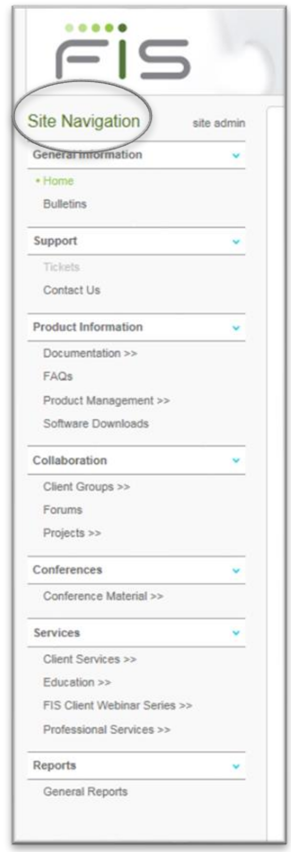
Site Navigation View

Content Display

The latter section of the Guidelines illustrates the view generally used by bank clients. As a rule of thumb, clients have limited ability to create content, with the exception of Forum replies and creation of Tickets.

This view is primarily used to access information, download attachments or software, and for simple navigation throughout the Portal.

For this document, this view illustrates how content ultimately appears and may offer examples to those creating content.



Users

These guidelines are intended for use by the FIS business unit content developers and administrators who initially create and setup content for clients. While Client Administrators have the capability to create user access levels specific for the people in their organization, they do not generally create content to be displayed or shared within the FIS Client Portal.

These Guidelines may also serve as the basis for formal training and awareness of the Client Portal.

General Content Creation Standards

Portal content may be created as dialog-box-generated text, HTML text and graphics, and/or documents or files as attachments. As a standard, content is currently produced in American English only.

Content Review and Editing

All content is to be reviewed and approved by the respective business/product line management team or manager, and should conform with the guidelines set within this document and other applicable FIS policies, such as Web policies, site policies, style guides and others.

Content Posting

Information, details and events posted on the FIS Client Portal should relate directly to the interests of our client audience. Prior to posting, all content should be approved by responsible management representatives and not, in any way, be considered internal material confidential to only FIS.

File Formats

The following apply to any and all documents, files or attachments displayed on the Client Portal:

- Industry-standard Web formats are to be used, or alternative formats used that do not impose an unnecessary burden on the intended client audience.
- Portable document format (PDF) will be used when there is a clear business need to use this format. For example, a PDF is an appropriate format when it is important to retain the original formatting of a document, such as forms or product information.
- Proprietary file formats that require purchase or licensing of commercial software are to be avoided whenever possible. In every instance we will provide a link to download the appropriate viewer or plug-in, if needed.
- Limit size of attached files to 100 MB. If a file is larger than 100 MB, break it into separate files and name them accordingly (-part-1, -part2).
- Video files should be .wmv and .flv files or other accessible video files.
- Attachments should be correctly named. Name documents so it is clear what the document is about. Be as direct and concise as possible with file names and use a numbering scheme if possible. Avoid special characters; use a hyphen or a period between words, and capitalize proper nouns, for example *BancLine Service Bulletin 12-112801*.
- Include the date the page/document was last updated or reviewed; do not revise the page date for minor grammatical changes.

Text Style and Standards

The following plain language writing standards apply to all content on the Client Portal. Be as clear and concise as possible, and help your client readers understand and complete their tasks with these writing tips:

- Audience - Write for your reader. Don't write for the experts, the lawyers or management, unless they're your intended audience.
- Length, Less Is More! - Be concise. Eliminate unnecessary words. Challenge every word; do you need it?
- Tone - Write in an appropriate tone and style as evident in available templates or existing examples. Please adhere to the FIS Brand Guidelines when writing Portal content, documents or links to downloadable files, such as training course description booklets or training videos.

- Voice - Use active voice with strong verbs. Say, “We mailed your form on May 1,” instead of “Your form was mailed by us on May 1.”
- Word Choice - Use the same words your clients would use when they search for your information on the Portal. Avoid acronyms and jargon.
- Simplify - Use simple, descriptive headings and short paragraphs.
- Links - Never use phrases like "click here" or “more information.” Link language should describe what your reader will get if they click that link. Include keywords to help searches.
- Organization - Put the most important information first, followed by the details.
- Improve Tasks - Organize content around client tasks, not FIS organization. Highlight action items (step 1, step 2, etc.).
- Scanability - Separate content into small chunks. Use lots of white space for easy scanning. In general, write no more than five to seven lines per paragraph. Use lists and bullets; they are easy to scan.
- Separate Topics - Present each topic separately. Keep the information on each page to three (or fewer) levels.
- Context - Don’t assume client readers already know the subject or have read related pages. Each text section, document or Portal page should stand on its own. Put everything in context.
- Test and Evaluate - Test with actual clients or objective others so you can be sure real people understand what you write.
- Train - Encourage all colleagues (lawyers, accountants, researchers, etc.) to use plain language—because all content is potentially Portal content.

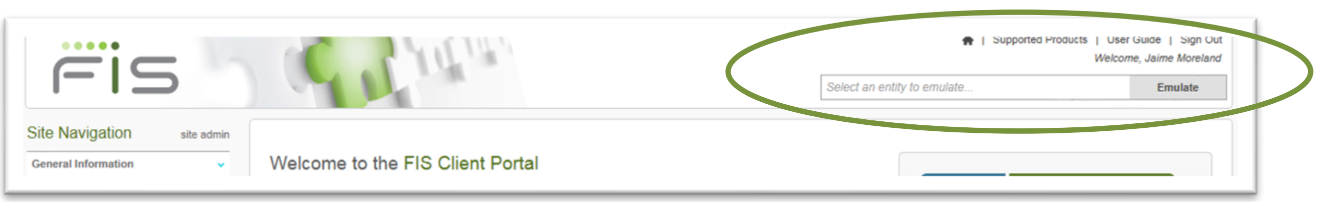
Client Portal Features

Whether a client or an FIS employee, the Client Portal URL, https://clientsupport.fisglobal.com, takes everyone to the same place where all must login with a secure user name and password. If the client has been granted portal access, then FIS supplies the user name and password. Clients can manage their own passwords or a client administrator can help with access and password updates.

Emulate

In the both views, FIS users have *Emulate* capabilities. In the top right corner, FIS users can look for *Supported Products* or enter a client name in the *Emulate* box to see specifically what a client bank sees with regard to the product(s) they’ve purchased. For example, in the navigation site, if the FIS user selects *Projects*, only those projects applicable to the client emulated appear.

As an FIS employee outside the *Emulate* view, access is provided for all FIS products. When making changes, keep in mind whether you are emulating a client or not, as that may affect the content available for view or edit.



Site Admin (Creating Content)

In this view, FIS users have the ability to create, edit or attach content. Content input and formats for *FAQs, Alerts, Contact Us, Client Groups* and *Events* are standardized in the Client Portal in this view. All FIS content creators/users, regardless of product, are required to fill out the same form to enter this referenced information in the application.

In contrast, *Projects, Bulletin and Content Admin* pages allow for text and images to be formatted as desired by the product content managers, and for attachments to be uploaded as needed.

In addition, the *Site Admin* menu will vary based on *Permissions*; therefore your menu may look different from the ones shown in the screenshots embedded here.

Product & Support Admin

CONTACT US

The *Contact Us* feature gives clients quick access to important FIS contact information filtered by product(s), as displayed in *Site Navigation>Support>Contact Us*. *Contact Us* is managed by FIS account managers or product administrators, creating detailed information on who to call, fax or email depending on level of support required.

Content for this section is input in the *Support Area* section, with *Create Support Area* or *Support Area*- Edit options, and is managed through a series of drill-down choices, selecting first the product supported. All FIS products are available to FIS employees, but only purchased products are viewable to clients.

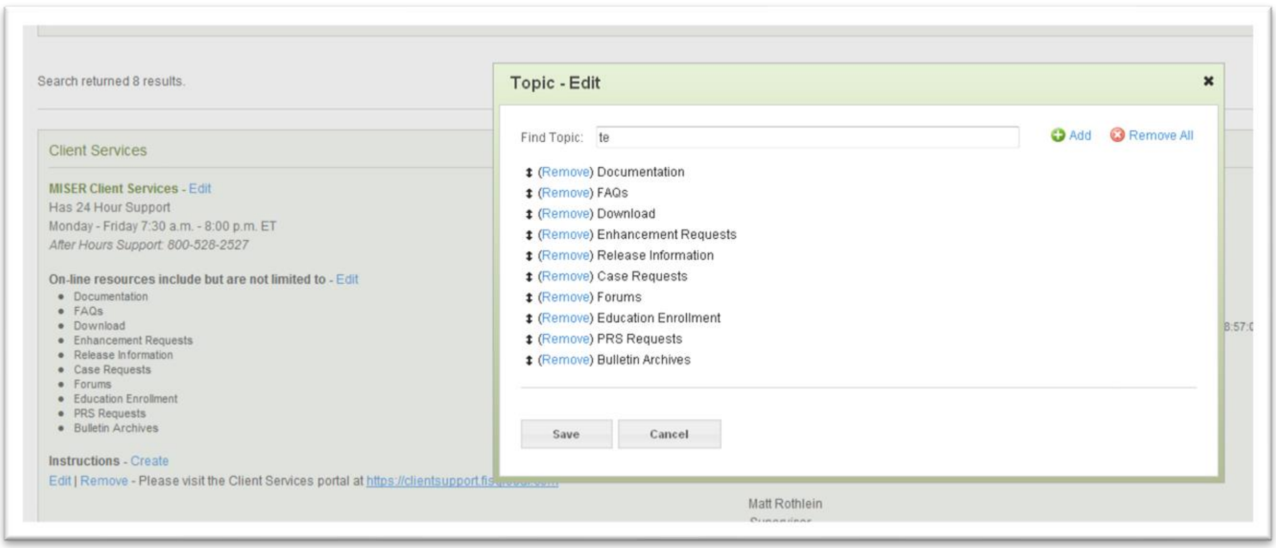
FIS inputs include first the *Support Area*, a *Product* (chosen from a pull-down product menu), a *Category* and *Topic Title* (see more below), then central information, such as a common 800 number and fax number. This section also has check boxes to make the information active, show 24 hour support, and provide *Display Order*.

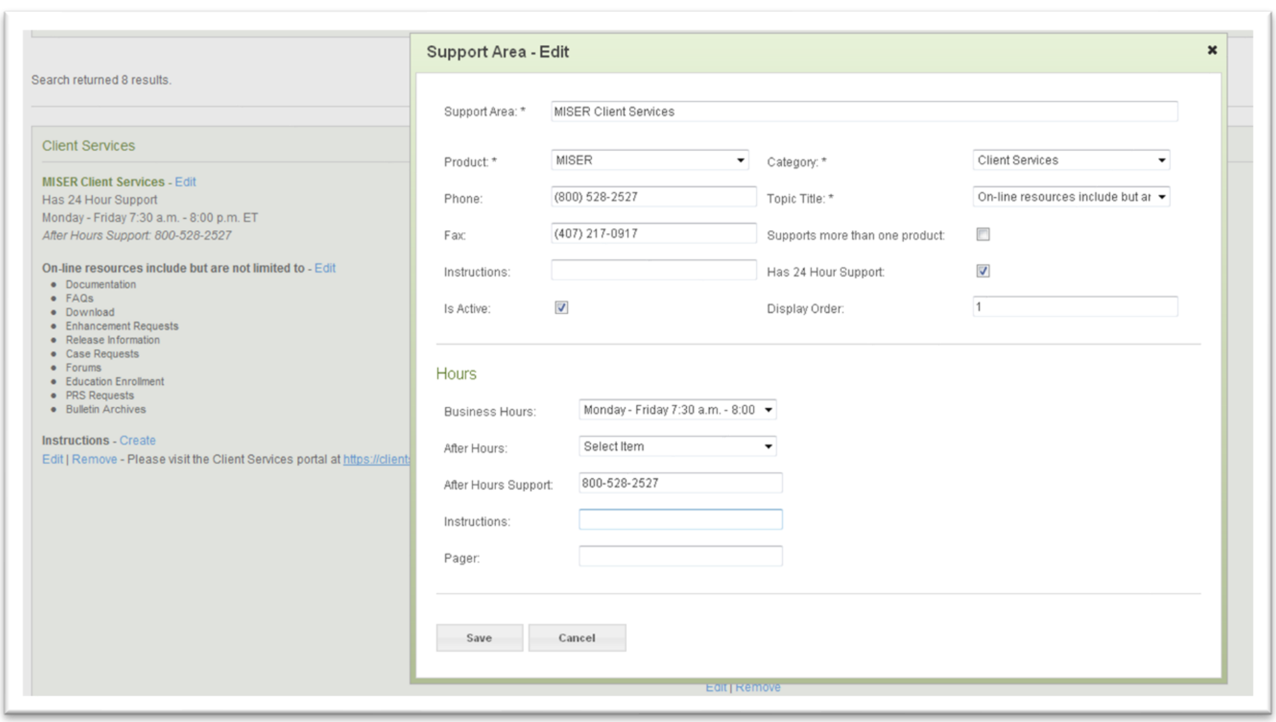
Next, *Hours* of business support may be chosen from a pull-down menu, with after-hours options and free text fields for support number, pager number and *Instructions*, which may be edited, created or removed.

In selecting the *Topic Title*, content providers choose from an existing list of topics displayed from some 400 different topics. Users simply begin typing a topic and the type-ahead function offers text matching from the existing list. This function appears in the *"On-line resources includes but are not limited to"* display area as seen to the left of the dialog box.

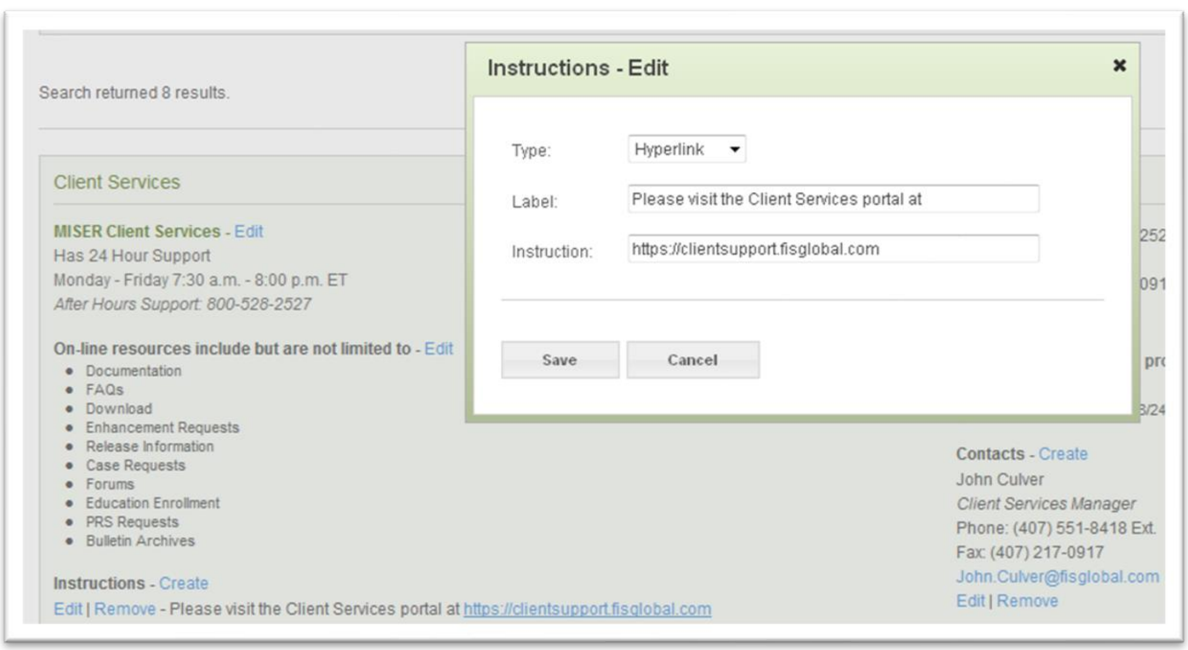
Under *Topic Title*, a *"Find Topic"* option shown below depicts a user who began typing "te." The application function would then bring up options such as, Telephone banking, Teller interface, Teller Plus Integration, etc., and allow the user to select the appropriate choice.

If the topic you seek is not already in the existing *Topic Title* list, content creators may submit a *Ticket* to the Database Administrators to have a new topic added.





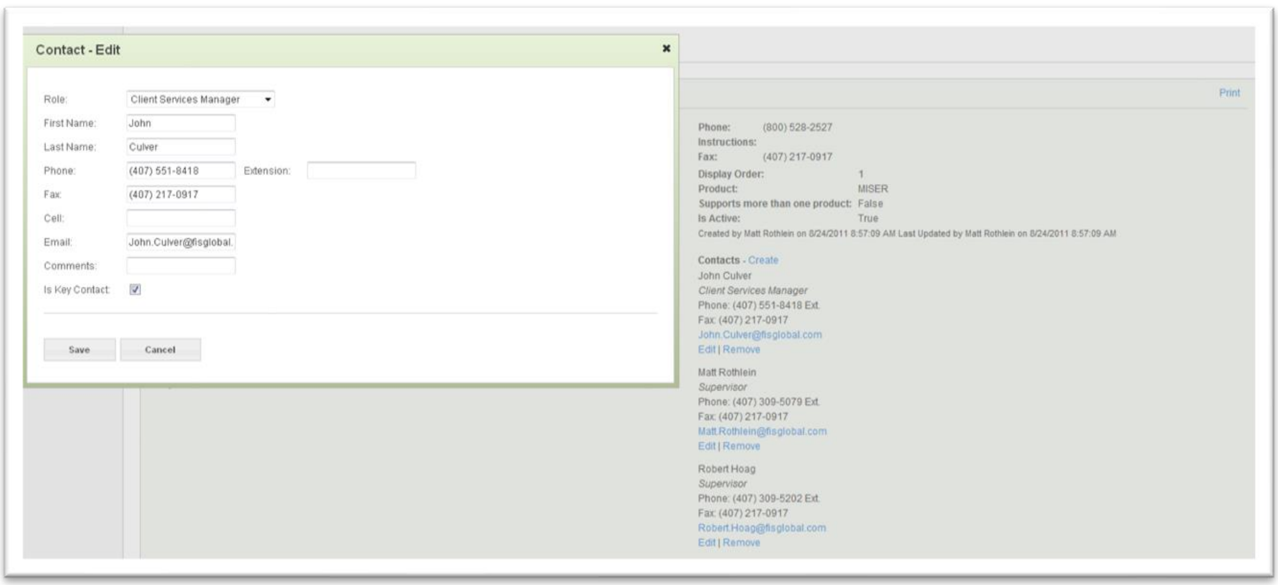
Under the *Instructions* heading, business line administrators have the ability to *Create, Edit* or *Remove* text. Simple instructions are input as text and may include a hyperlink if desired, as well as a label. Content creators may add instruction such as an email address, phone number(s), or any other necessary content. *Instruction* is not a required field, but may be used as desired by the product line managers.



On the right of the same screen, content creators have options to *"Create or Edit - Contact"* thus inputting/editing contact information and instructions per product. In this section, *Role, First Name* and *Last Name* are the only required fields. Phone numbers, fax and emails may be central or individual, though it is highly recommended that some means of contact be made available to clients, if not all options. A general text *"Comments"* line may be added here too. Also, a check box for *"Key Contact"* is used to determine display order.

All contact input will display according to a pre-set format common across all FIS products. Email links, when clicked, directly display an Outlook email dialog box with a pre-populated email URL. Depending on where displayed in the *Site Navigation* view, clients may see slightly differing versions of this contact information. For example, should the business line want to direct clients to a central 800 number, *Contact Us* information would only include a list of names and roles.

For *Key Contacts*, *Executive Team*, *Technical Support*, etc., some information is displayed a bit differently, but is generally created using the same input forms.



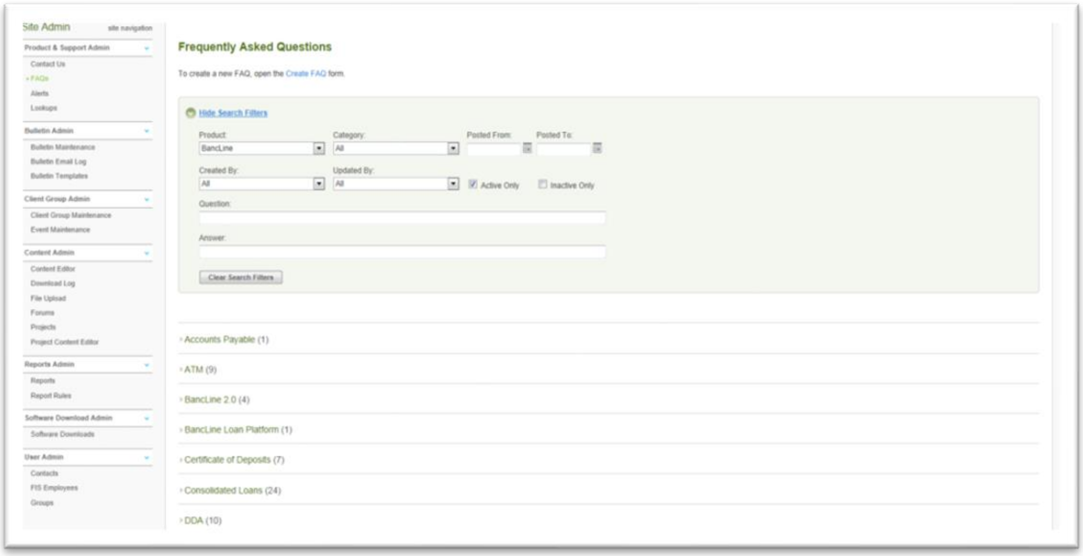
FAQs

Frequently Asked Questions (*FAQs*) allow clients to research their question prior to calling a support area, based on questions and answers displayed in Site Navigation>Product Information> FAQs.

FAQs are managed by FIS employees in a screen-driven format. FIS content creators should consider likely questions, write them in client-friendly language free of jargon, acronyms and FIS internal terminology, and provide answers in a clear, succinct manner. *FAQs* are driven by product managers as each product is expected to have differing topics and reflect each product's unique functions.

Content is created by typing text into a preformatted template, below, where FIS employees simply type in a question and provide an answer in a simple dialog box.

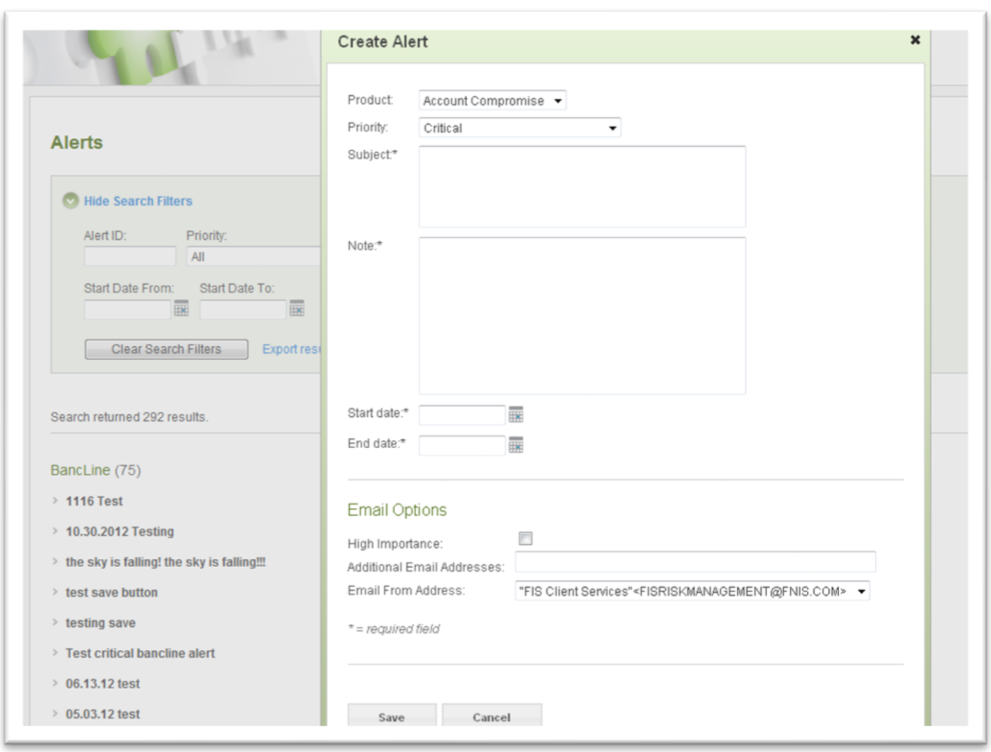
The Client Portal currently has no mechanism for clients to input their own questions, though should a client wish to add a question to FAQs they may submit a *Ticket* with that question request or contact their account manager with an FAQ request.



ALERTS

Information in this section appears on the Site Navigation>Home Page under *Alerts*. Content may cover a wide range of topics, from specific product information, to general FIS close/open dates or holiday greetings. Previous *Alert* content may also be *Searched*.

Product-specific *Alert* content can be added or updated by FIS employees by product and are typically displayed for a limited period of time. Inputs to *Alerts* include an *Alert ID* and selection from pull-down menus for *Product* and *Priority*. *Alert* content is developed in *Create Alert* and should appear as brief text in sentence form, such as a quick note or bullet point list.

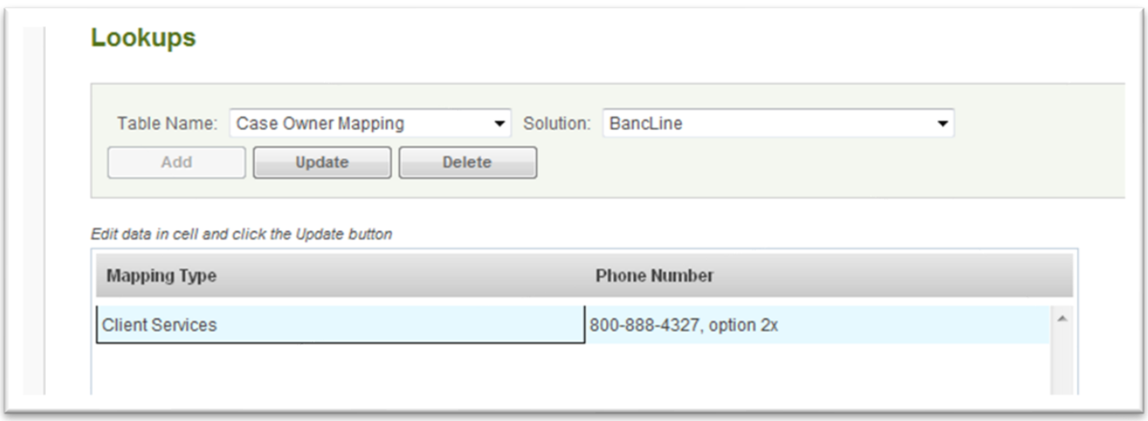


Content in the *Alerts* section is determined by each business unit; therefore content creators should post only *Alert* details pertinent to their respective product. Any information that applies to multiple products or across FIS, such as FIS Conference details, will be created and maintained at the corporate level to ensure client users are not subject to repetitive information displayed differently by each product line.

Should *Alert* details potentially affect more than one product, any business unit content creator may suggest an *Alert* submission to the Council or Database Administrator for consideration.

LOOKUPS

Lookups are unique to the *Site Admin* view, thus are not available on the *Site Navigation* view. This function provides mapping and details needed to display *Tickets*, by product and download categories. There is generally no content creation in this function, only selections and drill-downs by product. For example, should you select download categories for Miser, then you have product upgrades, software print rendering, and product management capabilities. Generally, all selections are made from a short list of existing categories to configure how Software Downloads, Tickets, Release Notes, and other information is displayed.



Bulletin Admin

BULLETIN MAINTENANCE

Bulletins are primarily messages that consist mainly of text with attachments, which can either be posted to the Portal only or posted and emailed to specific clients. *Bulletins* are viewed by clients at Site Navigation>General Information>Bulletins, by product. (Note: Email functionality cannot be used to send emails that are primarily commercial in content, as defined by the CAN-SPAM Act. Any commercial email must be sent via FIS Marketing.)

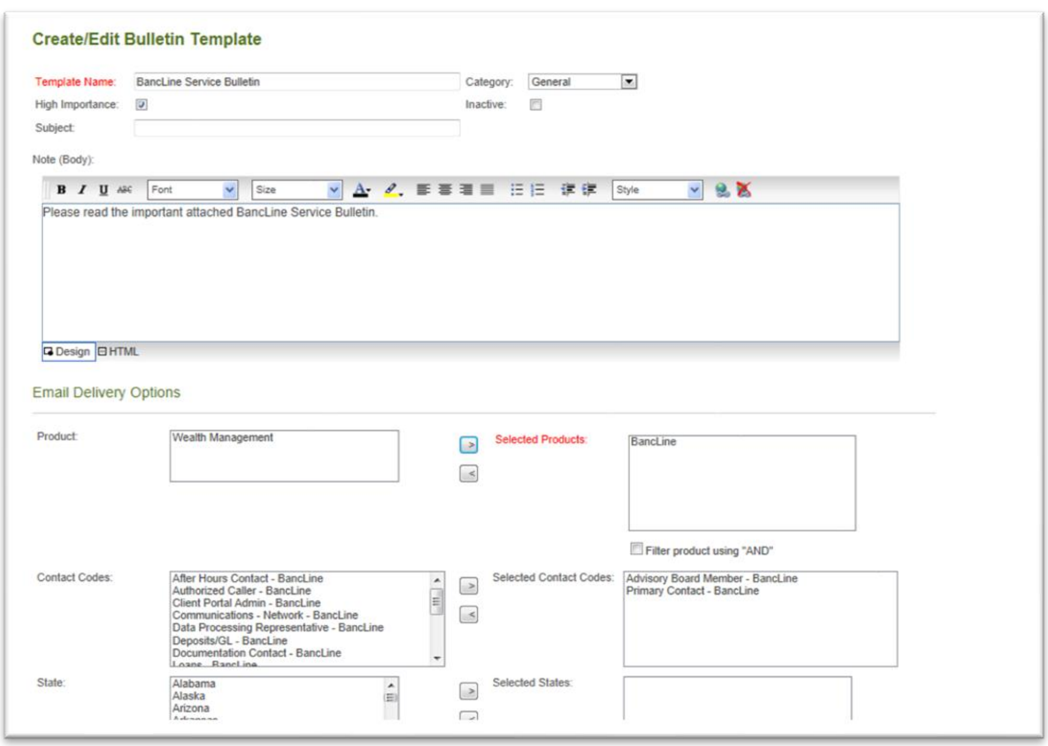
To ensure a cohesive, consistently branded appearance to all FIS Bulletins received by clients, all *Bulletins* must use the *Primary Bulletin Template* provided, see example below. Each business unit should follow a specified numbering scheme to differentiate their product in the *Bulletin* title, i.e. an abbreviation that applies to the product name, and then a number to ensure a unique indicator. For example, BP20187, for a BancPac Bulletin.

Any business units currently using numbers may keep their current numbering system to avoid confusion, but add a product name or abbreviation in front of it. Each business unit must always use the product name in the title of each *Bulletin*.

Primary Bulletin Template
TBD

A Bulletin is created in the dialog box, below, regardless of whether you are creating a new bulletin or generating content from a *Bulletin Template*. If you already have an existing *Bulletin Template*, for holiday closings for example, simply select that template in the *Bulletin Template* drill down. These existing templates differ from the *Primary Bulletin Template*, above, as it defines a common format and structure; existing *Bulleting Templates* provide content examples.

If you are creating new content, first select the applicable *Solution*/Product, and then select *Category* in the pull down menu, choosing from menu options including *General, Critical, Education or Regulatory.*



Draft the message in the text area using the select formatting tools in the *Format Bar*, or simply add your message as an attachment. See [General Content Creation Standards] for more on creating messages. Add in a *Subject* line that is concise, clear and descriptive, and select your start and end dates, as well as *Importance* level.

Once your message is drafted, review to ensure it's clear, complete and accurate. Then select *Email Delivery Options* via the pull-down menu by product, by location/entity and other delivery options.

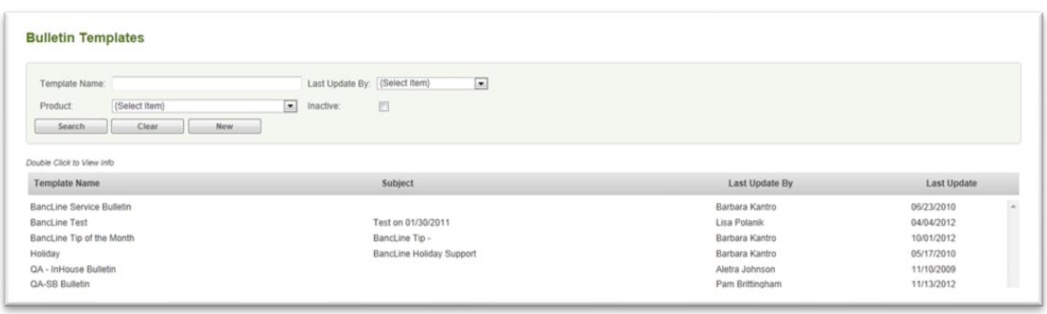
Bulletin attachments vary greatly by product line, but should use the General Content Creation Standards as provided in this document.

BULLETIN EMAIL LOG

The *Bulletin Email Log* records and tracks Bulletins previously sent, with delivery details included. There is no content creation available; it's primarily a search function.

BULLETIN TEMPLATES

Bulletin Templates look much like creating a new *Bulletin*, except any bulletin can be saved as a template. The template can be selected from the *Bulletin Template* drill-down and used to create a new Bulletin. For example, you may want to have a common format for all quarterly software update reminders so they are easily recognizable.



Client Group Admin

CLIENT GROUP MAINTENANCE

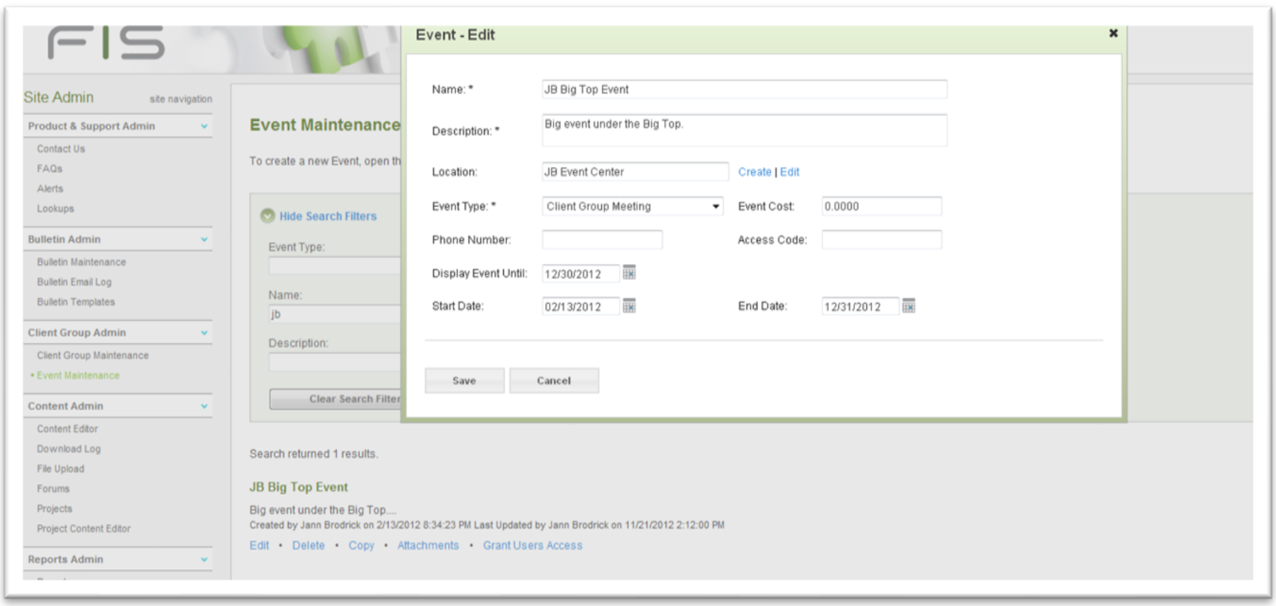
The *Client Group Maintenance* function allows setup of advisory or user groups as displayed in *Site Navigation >Client Groups>>.* It also allows posting of member lists and file sharing to those designated group members, as well as associating Events to display to a specified group.

Administered by FIS employees, this section is screen-driven (i.e. via menu pull-downs, product selections, location choices, etc.) and not necessarily content-driven (i.e. in a text editor). Screen drill-downs allow FIS users to add members to client groups. While this is a basic format, there is a small amount of text users can create and display for description of a given group. Content creation is limited to a few lines of descriptive text. More detail can be provided for *Events* as hyperlinks, as seen in the next section.

EVENT MAINTENANCE

Event Maintenance is a content-driven area and displays in *Site Navigation >Client Groups>>.* This is specified by product or by business-unit-defined client group, as in client groups by geography, by function, etc.

Here FIS business line content creators specify within the *Event Maintenance* screen, the *Event Name*, *Description*, *Location, Type* and various other details associated with the event. Event *Name, Description* and *Type* are the only required fields as indicated by the asterisk.



Within this *Event Maintenance* area, FIS users can associate file attachments, such as maps or directions for example, grant access to group members, and delete the conference one it has taken place.

Content creators can select a start and end date, and the event will not display once concluded if that is the designated end date. If there are presentation materials to post, i.e. meeting minutes, webinar recordings, slides, and other support materials, share them in a timely manner and adjust the end date accordingly. If you do not want the event to continue to display after is it concluded, creators should remove the event.

When naming events, note that events are calendar-driven and can be searched from the *Home* page. Before posting, please double-check facts, dates, times, etc., proofread and spellcheck content (recommend doing both), and have a trusted colleague review before final posting.

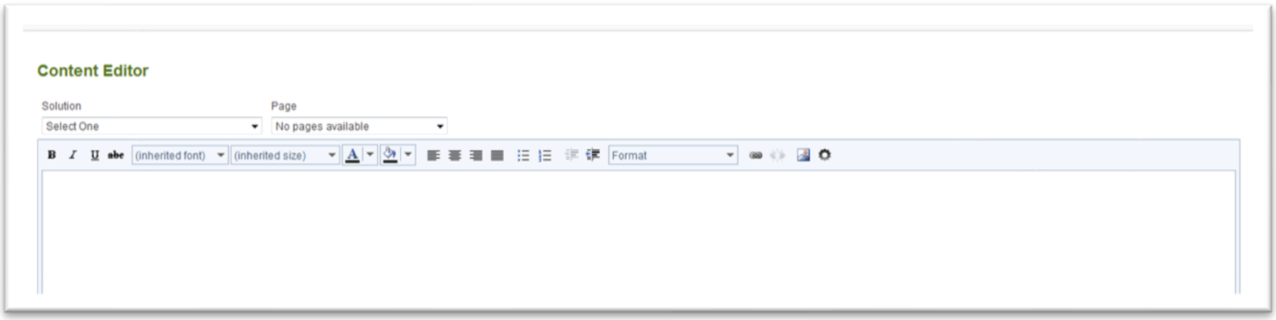
Content Admin

CONTENT EDITOR

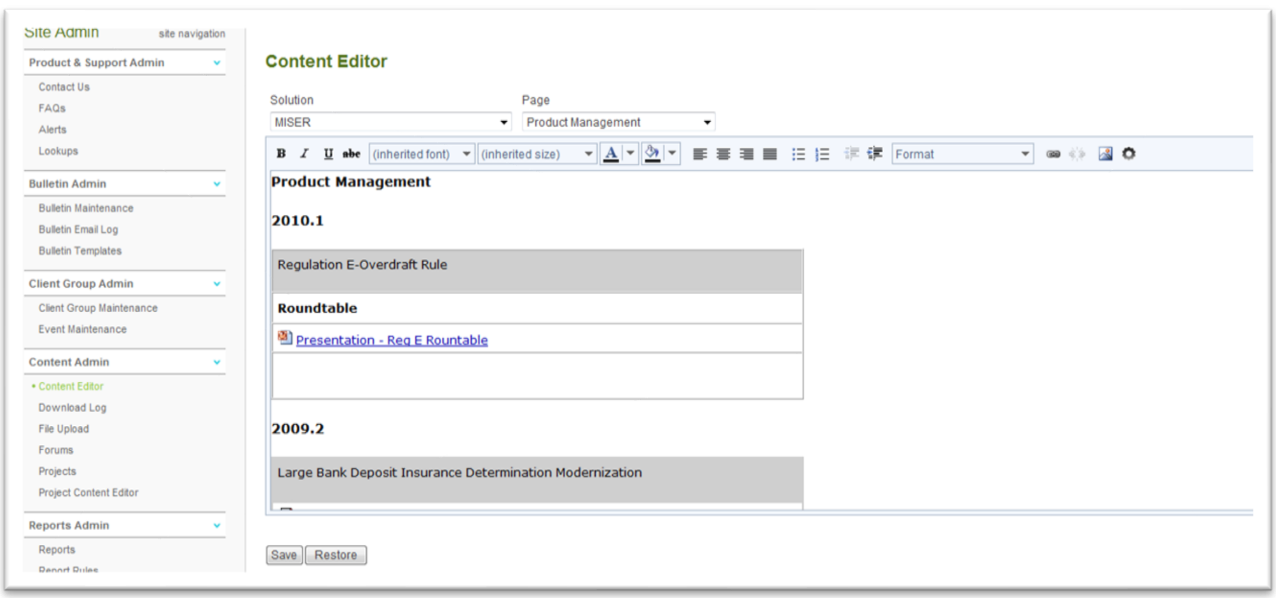
The majority of true Portal content is created in this section. All screens and information shared in the *Site Navigation* menu view for *Product Information* and *Services* are created here for the five areas driven from this *Content Editor*. These include:

> ***Product Information*** *>> Documentation > Product Management*
> ***Services*** *>> Client Services > Education > Professional Services*

To begin, select a specific *Solution* or product, then select one of the above five sections in the *Page* pull-down menu. Content messages for any of the five areas can be typed in the text box area and formatted using the format bar. Text may also be created in a different text editor, i.e. Microsoft Word or HTML editor, and copied here.



Content for each of these five sections is determined by each product's need in terms of message type, detail, format and hyperlinks. Content in each of these five areas is also organized by categories applicable to the specified product. Sample product information can be seen in the *Documentation* section and *Product Management* section.



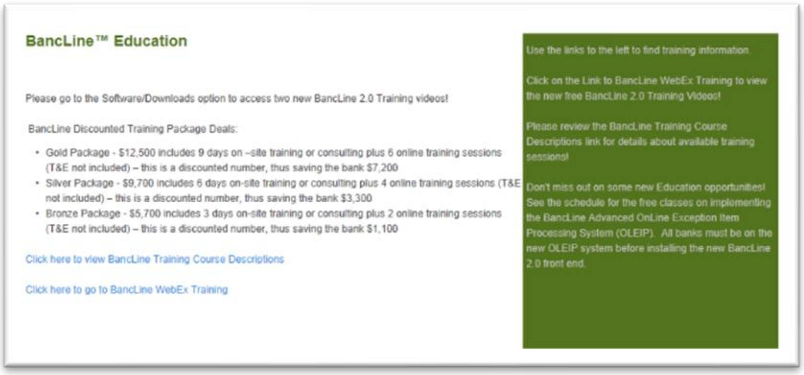
In many cases, content may be grouped and developed in HTML to create columns, text boxes, scrolling text, tables, lists or other formatting. Regardless of the format, all content should be clear, concise, appealing and easy-to-use from a client perspective, as well as compliant with FIS Brand and Style Guidelines.

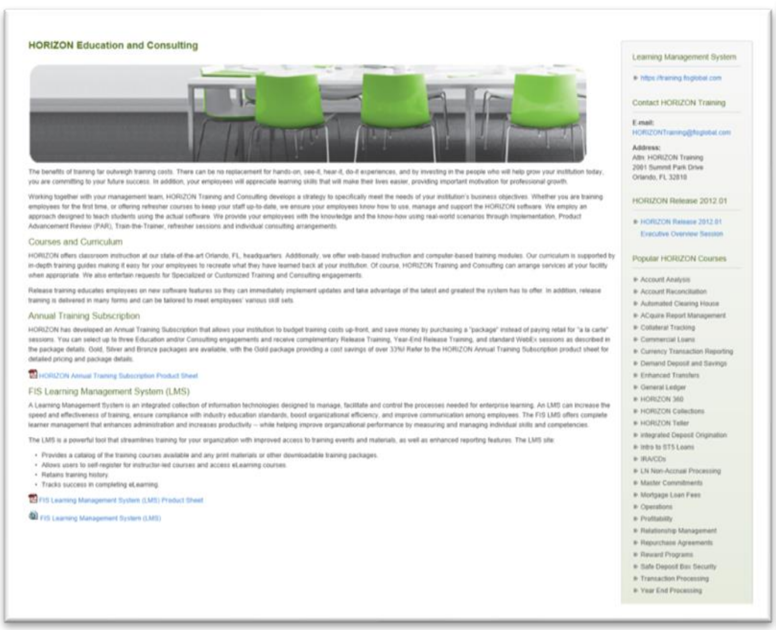
In addition to format, desired detail level is also driven by the respective product management team, therefore content in this area is purposefully varied based on the needs of each product.

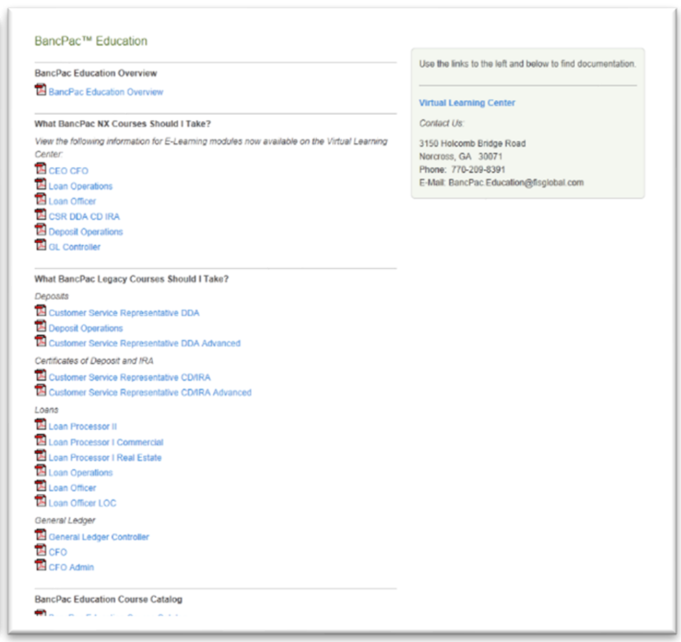
For example, the *Education* pages for Horizon, BancLine and BancPac, shown below, offer different views and organization for similar, yet slightly different, *Education* content.

In many cases, pages include hyperlinks to document attachments or links to downloadable files, such as training course descriptions booklets or training videos. Attached content is driven by the needs of the individual products, and should be reviewed and approved by product management to ensure completeness, appropriateness and accuracy, as well as compliance with [FIS Brand and Style Guidelines](#).

Any logged-in FIS user can access all of the different products in each of these five areas to see different formats and content options.





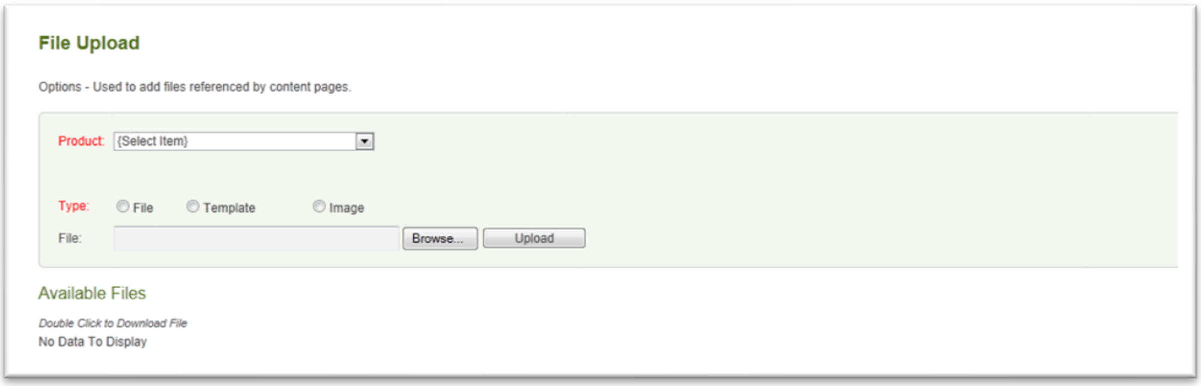


DOWNLOAD LOG

The *Download Log* has no content creation function. It serves as a search tool and record log of software downloads in a grid format.

FILE UPLOAD

FIS users can upload files, templates or images here to be used in the *Content Editor*. This is not a content creating area. Users simply select *Product, Type* of file, or *Browse* to see files to upload into the browser. Files may be software downloads, project content, etc.



FORUMS

The *Forum* feature provides FIS employees with the ability to set up product "talk" sessions with clients and product groups. Forum content is created in the provided dialog box and displayed at *Site Navigation> Collaboration>Forums*.

Content addresses question and answer replies in a format similar to an Internet blog. An FIS employee and/or a client bank employee can reply. Questions and answers go back and forth between two or more people in Forums, typically "talking" about the same subject. Responses by client or FIS employees are generally typed paragraphs into dialog boxes after clicking *Reply.*

FIS managers create *Forum* topics and share access depending on differing permission levels granted. Attachments can also be added to the *Forums*.

FIS employees responding within the Client Portal *Forum* are personally responsible for any online answers and activity that implies the employee is acting on the company's behalf. Note, the rules in the FIS Employee Handbook and FIS Code of Business Conduct and Ethics Policy apply to employee behavior within the Client Portal and other online spaces.

The following basic rules also apply as guidelines to ensure the appropriateness of postings within *Forums*:

- Verifying Information Accuracy - Before posting any online material through the Portal or any other social media outlet, employees should ensure that the material is accurate, truthful and without error. If possible, the employee should provide hyperlinks to credible sources to support his or her comment or position. It is considered proper social media etiquette to strike-through old or corrected materials, or at least conspicuously indicate that a change has been made.
- Identifying Copyrighted and Borrowed Materials - Employees must identify any copyrighted or borrowed material with citations and links. When publishing any online material through the Portal or through other social media that includes another's direct or paraphrased quotes, thoughts, ideas, photos or videos, employees should always use citations and link to the original material where applicable.
- Being Respectful – Employees must always be respectful to FIS, its employees, its clients, its competitors, regulators of FIS' clients and the online audience. Employees should always remain conscious of the tone, context and meaning of their online posts. Speak reasonably and factually, and always try to understand and credit another person's point of view.
- Avoiding Personal Attack - Employees should avoid personal attacks, online fights and hostile personalities. Employees should be mindful to voice opinions, but should refrain from escalating the conversation to a heated, personal argument.

Employees should avoid communicating with hostile personalities in an effort to avoid personal, professional or credibility attacks.

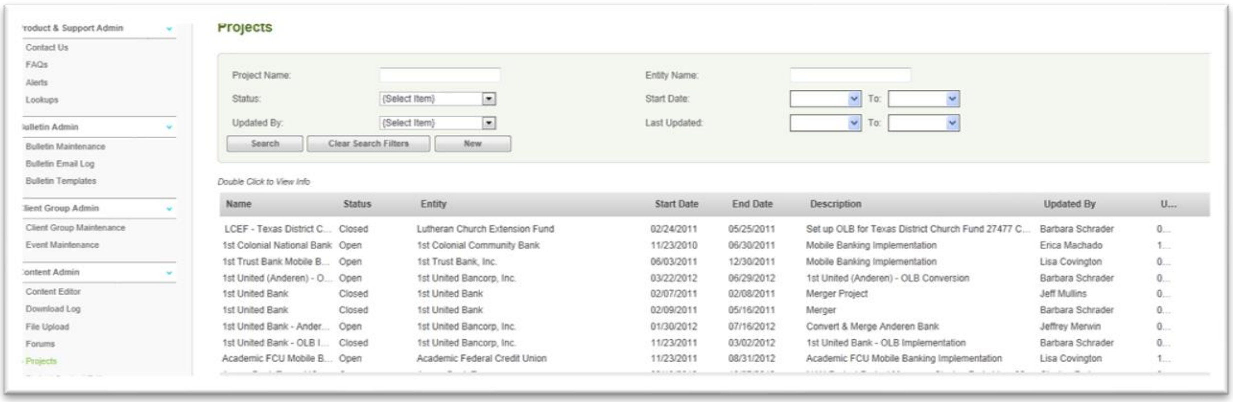
- Building and Maintaining Trust - Employees should strive to build and maintain a reputation of trust. When reaching out to clients or colleagues through the Portal, each employee should take every opportunity to build a reputation of trust and establish his or herself as a credible and transparent professional.

PROJECTS

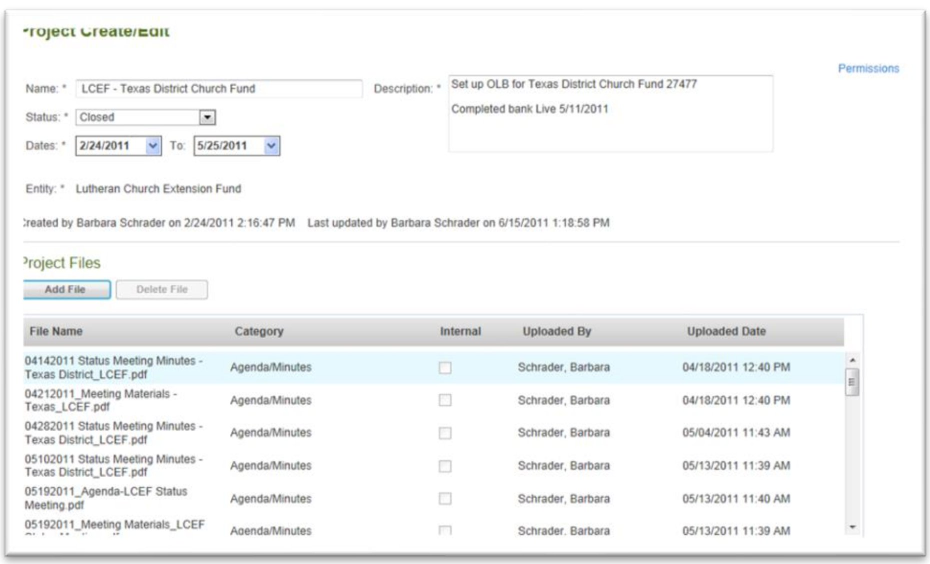
Displayed in *Site Navigation>Collaboration>Projects*, this section offers clients and FIS employees the ability to manage projects and share project information.

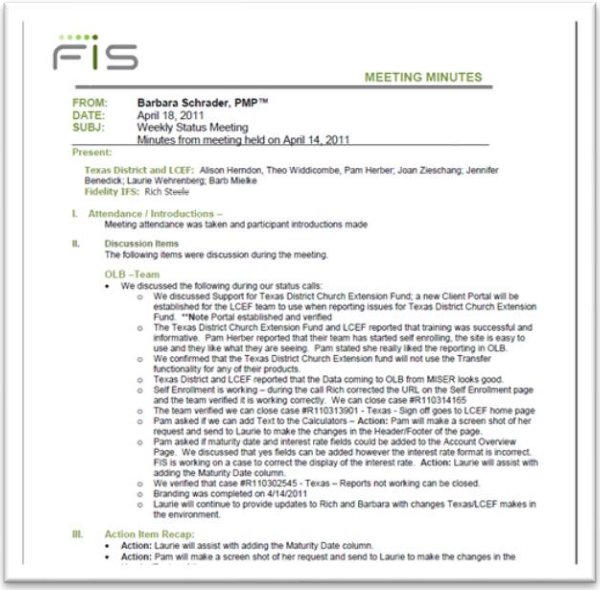
This *Projects* section displays project-specific information and allows secure file uploads related to the project by internal and external users, i.e. both FIS employees and clients. Security is at the user level.

All information shared within *Project*s is subject to the enterprise-wide standards and guidelines of the Enterprise Project Management Methodology (EPMM) with regard to project management, communication, status reports and other general communication.



Projects allows FIS employees to create a new project or edit existing projects by filing the pre-determined format. *Projects* has minor content creation capability in the limited text box *Description* of the project. It also has the ability to view/edit *Permissions* to see who has access to that project and its associated files. FIS employee and client file uploads are based on varying permissions of who can delete a file, depending on who added it.





MEETING MINUTES

FROM: Barbara Schrader, PMP™
DATE: April 18, 2011
SUBJ: Weekly Status Meeting
Minutes from meeting held on April 14, 2011

Present:

Texas District and LCEF: Alison Herndon, Theo Widdicombe, Pam Herber; Joan Zieschang; Jennifer Benedick; Laurie Wehrenberg; Barb Mielke
Fidelity IFS: Rich Steele

I. Attendance / Introductions –
Meeting attendance was taken and participant introductions made

II. Discussion Items
The following items were discussion during the meeting.

OLB –Team

- We discussed the following during our status calls:
  - We discussed Support for Texas District Church Extension Fund; a new Client Portal will be established for the LCEF team to use when reporting issues for Texas District Church Extension Fund. **Note Portal established and verified
  - The Texas District Church Extension Fund and LCEF reported that training was successful and informative. Pam Herber reported that their team has started self enrolling, the site is easy to use and they like what they are seeing. Pam stated she really liked the reporting in OLB.
  - We confirmed that the Texas District Church Extension fund will not use the Transfer functionality for any of their products.
  - Texas District and LCEF reported that the Data coming to OLB from MISER looks good.
  - Self Enrollment is working – during the call Rich corrected the URL on the Self Enrollment page and the team verified it is working correctly. We can close case #R110314165
  - The team verified we can close case #R110313901 - Texas - Sign off goes to LCEF home page
  - Pam asked if we can add Text to the Calculators – **Action:** Pam will make a screen shot of her request and send to Laurie to make the changes in the Header/Footer of the page.
  - Pam asked if maturity date and interest rate fields could be added to the Account Overview Page. We discussed that yes fields can be added however the interest rate format is incorrect. FIS is working on a case to correct the display of the interest rate. **Action:** Laurie will assist with adding the Maturity Date column.
  - We verified that case #R110302545 - Texas – Reports not working can be closed.
  - Branding was completed on 4/14/2011
  - Laurie will continue to provide updates to Rich and Barbara with changes Texas/LCEF makes in the environment.

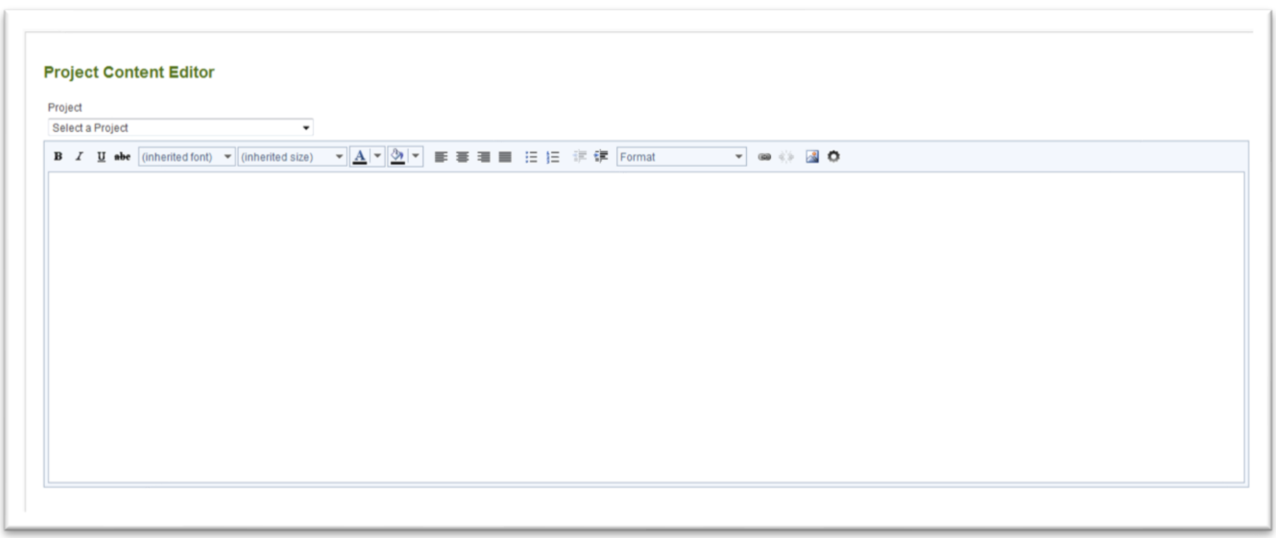
III. Action Item Recap:

- **Action:** Laurie will assist with adding the Maturity Date column.
- **Action:** Pam will make a screen shot of her request and send to Laurie to make the changes in the

Attached *Project* files can be any document, identified clearly as an FIS document, as seen above in this sample.

PROJECT CONTENT EDITOR

Projects has its own content editor with the content displayed at *Site Navigation>Collaboration>Projects*. *Projects* content is based on pre-selection of an FIS *Solution*. Project pages are formatted based on skill and capability of the product content developer. Content for *Projects* is created in the *Project Content Editor* or can be pasted here after development in another editor.



This content editor provides the ability to edit just the project descriptive text. *Project Content Editor* is only slightly different than the other *Content Editor* in that this editor includes applications and the other *Content Editor* doesn't.

Reports Admin

REPORTS

Reports Admin does not include any content creation capability. Its function is to upload various reports and make them accessible to clients. The reports are intended to be PDF files.

REPORT RULES

This section does not include any content creation capability. It lists rules for automating the loading of reports. To upload reports, you may use report rules to automate loading or you may manually upload a report.

Compliance Reports Admins

Not yet in production.

Software Download Admin

SOFTWARE DOWNLOADS

In this section FIS product mangers or account managers upload the software and/or the file that enables a client to download necessary software based on their permissions, accessible in *Site Navigation>Product Information>Software Downloads*. There is no content creation capability in this section. These Guidelines do not apply in any way to Software content.

User Admin

CONTACTS

This is not a content creation area. This section includes administrative contacts for bank clients. FIS employees can search contacts by organization. Banks manage their own users and contacts.

FIS EMPLOYEES

This is not a content creation area. In this section, an FIS employee can manage banks users, including which bank employees have access to use the Client Portal based on select permissions.

Policy for access and permissions provided to external users of the FIS Client Portal is not provided in this document. Subsequent to these guidelines, a process will be developed by the governance Council for developing and implementing a process to facilitate the review of access privileges for external users.

Site Navigation (Display Content)

General Information

HOME

This page includes a welcome message, a navigation menu (on the left), and a sidebar (on the right) that lists *Supported and Coming Soon* products. Products listed in the *Supported Products* section are currently available on the Portal to clients according to the FIS product(s) they purchase; those listed in the *Coming Soon* section are in the process of being set up.

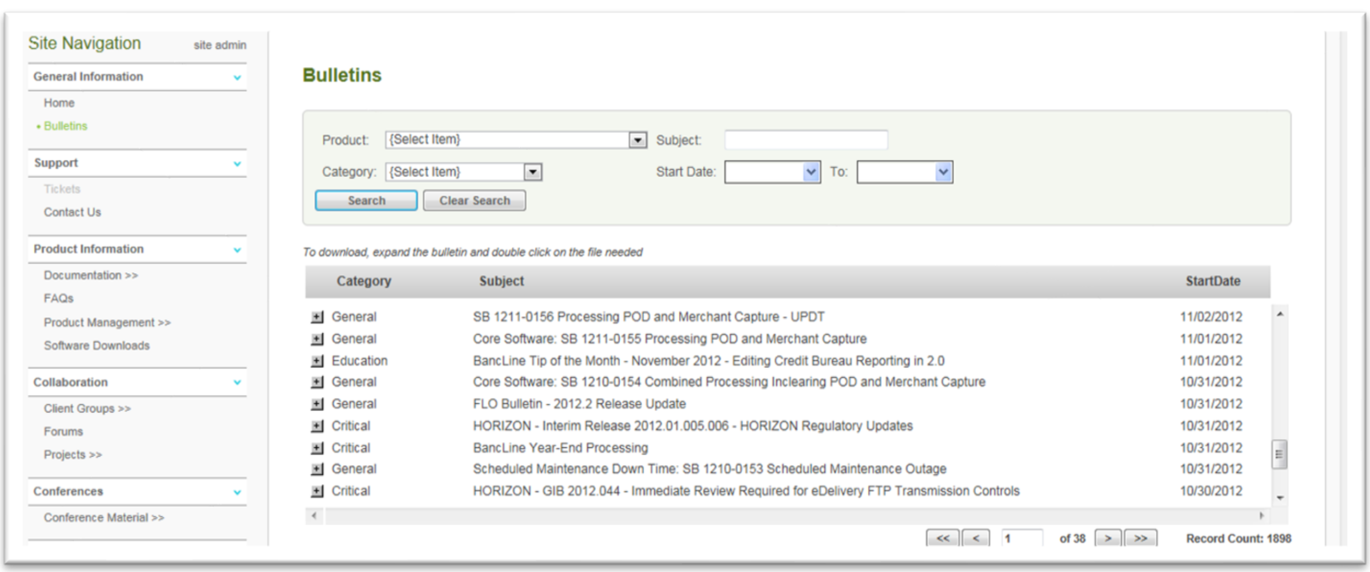
The center area of the home page displays *Alerts* driven by an FIS product or account manager in the *Alerts* content menu. The area also displays *Important Links* and *Upcoming Conferences,* if available. Users may also access *User Guide* as a Client Administrator or *Sign Out* here.

This is the *Home* page for all users when they log in. At the top, passwords can be updated and bank client administrators can be viewed. There's also a small amount of information about the person logged in and the bank/entity they represent. Users can also set a limited number of preferences here.

BULLETINS

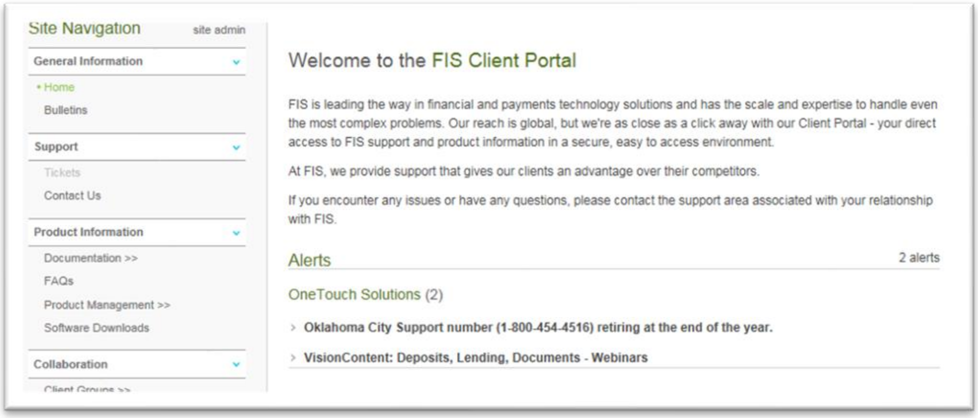
Bulletins are accessible to clients as communications from FIS support groups. Some bulletins are sent via email as well as posted to the Portal. Bulletin content is created using a *Primary Bulletin Template* (TBD) and posted/sent out by FIS employees, i.e. account managers, product managers. Thus, *Bulletin* content differs significantly by product.

Clients can only access a bulletin, not create it. Clients can also search prior bulletins as reference material.



ALERTS

Alerts are short messages from FIS displayed by product on the Client Portal *Home Page*. *Alerts* are typically available for a limited period of time. *Alert* content is created by FIS account manager as text within *Site Admin* navigation.



INVOICES

The *Invoices* feature allows users with appropriate credentials to view invoices and supporting materials. Note*, Invoices* are not available to all organizations. There is no content creation capability in this section. These Guidelines do not apply in any way to invoice content developed outside of this application.

Support

TICKETS

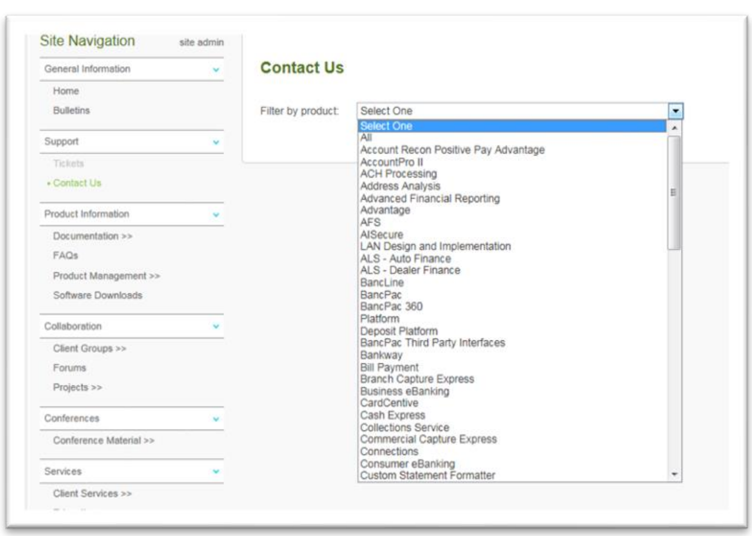
Clients use the *Tickets* feature to submit *Tickets* to FIS and to review previously created *Tickets*. Clients can create tickets only if they are exposed, i.e. if the *Ticket* process is exposed on Client Portal. Not all FIS clients create tickets.

Clients fill in pre-set form templates created in the CMS system. Therefore, *Ticket* content and *Ticket* management is done with the CMS system.

For an existing *Ticket*, clients can see limited information and can add notes and attachments after the *Ticket* is created. Clients use this area to follow the progress of *Tickets*, using the *Search* screen.

CONTACT US

The *Contact Us* section gives clients quick access to necessary FIS contact information. Clients can filter the information by product, or choose to see the data for all of their FIS products. The *Contact Us* content is managed by FIS account managers within the client portal.

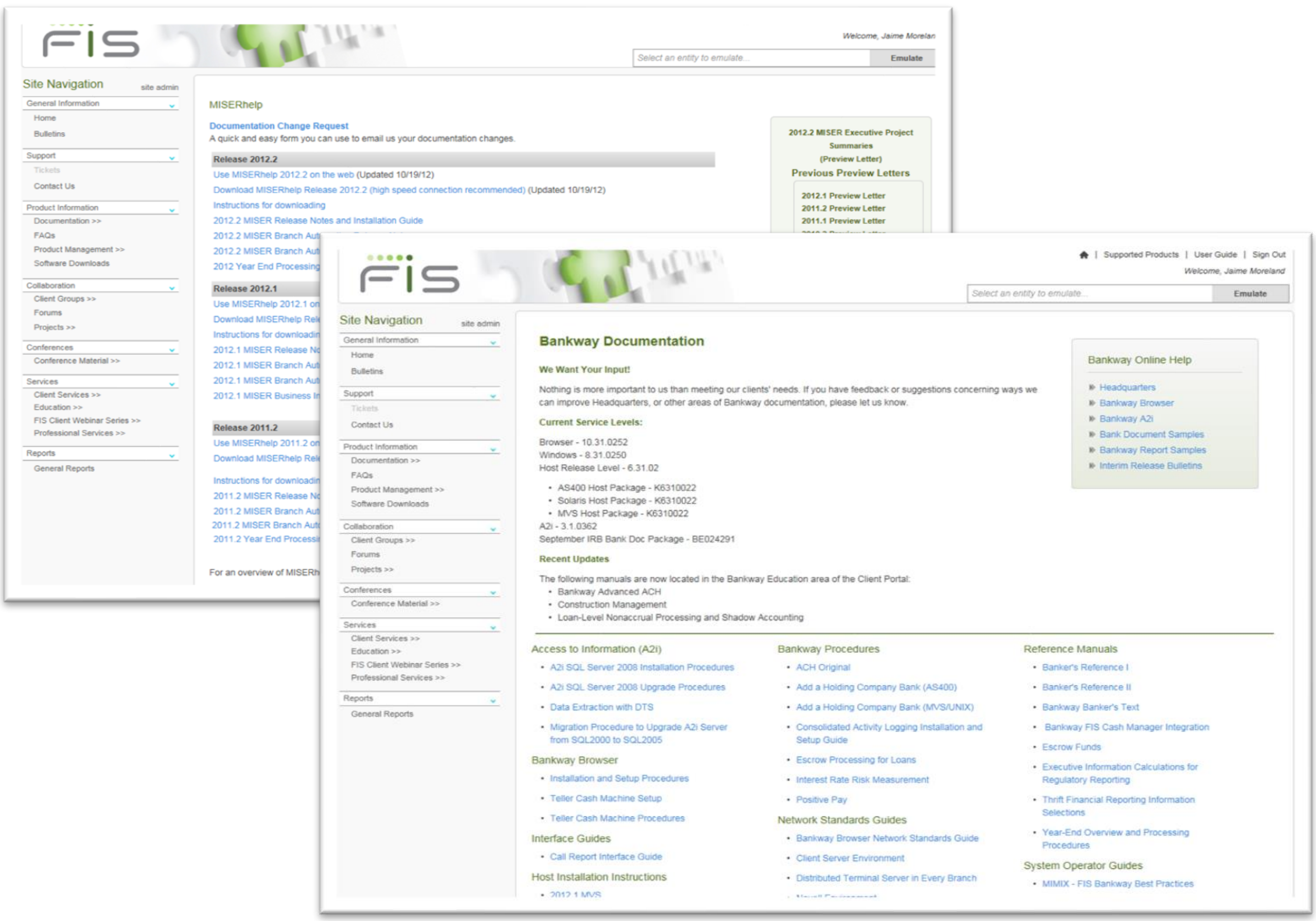


Product Information

DOCUMENTATION

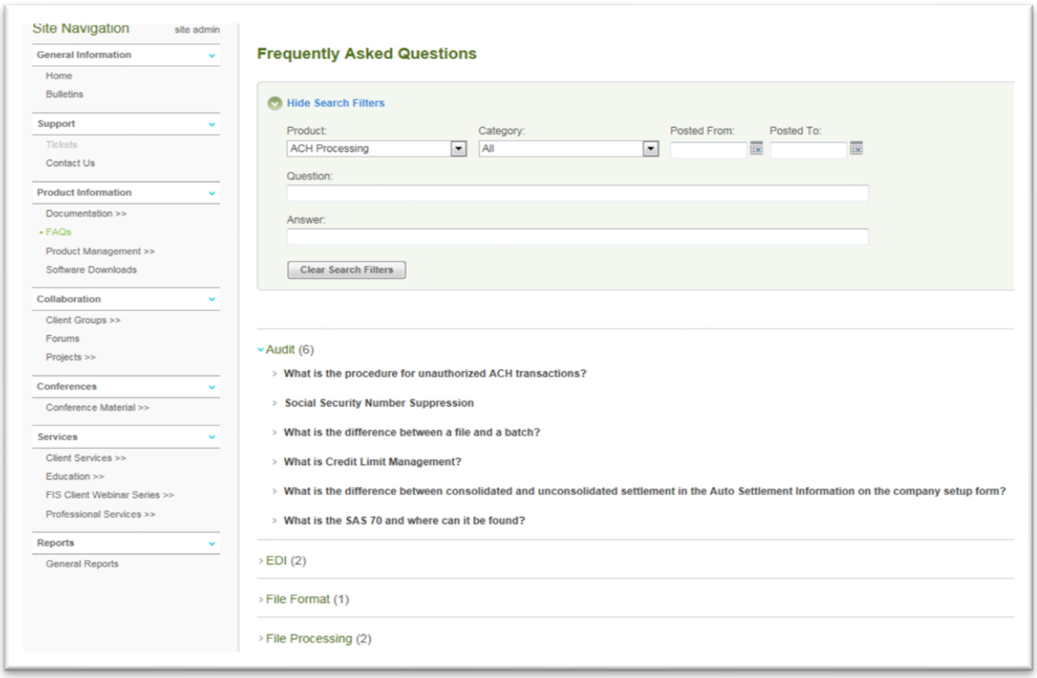
Documentation contains any number of attachments and links to user manuals, course catalogs, process manuals, reference guides, quarterly updates and other important publications, by product, grouped, as determined by each product's respective content or account manager.

FIS and client users access this information by clicking on the *Documentation* menu item and then selecting a specific *Product*. *Product information* and *Documentation* is a [content development](#) screen enabling clients to view all pertinent product information, including Help Guides, Release Information, Fee Schedules, Downloads and more. Samples of differing *Documentation* pages are below.



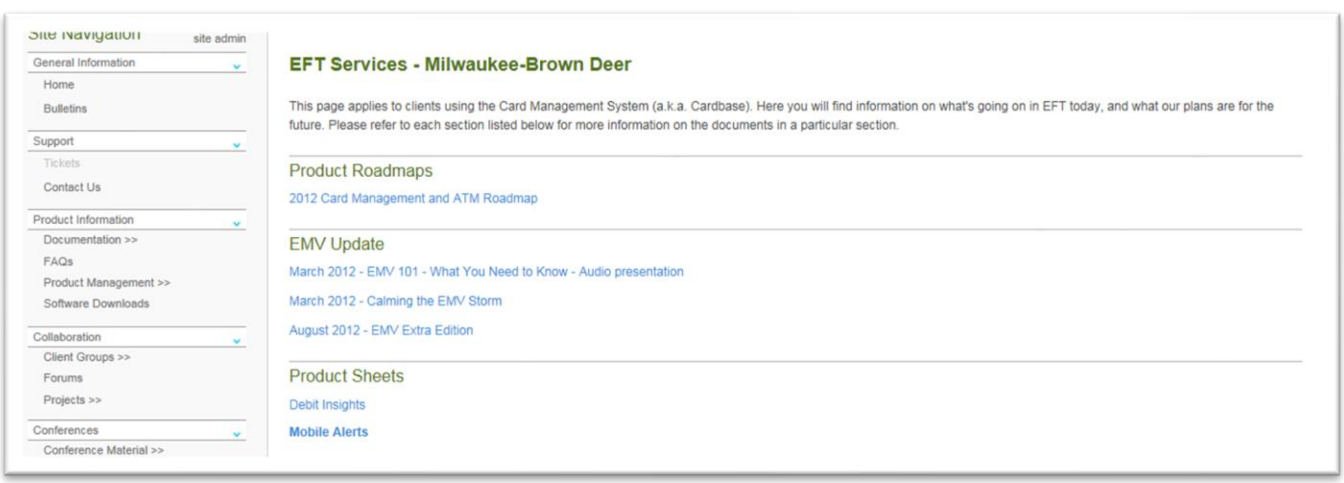
FAQS

Frequently Asked Questions allows clients to research questions prior to calling an FIS support area. *FAQ content* is managed by FIS employees providing answers to potential client questions. Clients can search key terms or link to different types of questions or categories per FIS product purchased. Clients can also print FAQs as needed. Clients do not create questions as content.



PRODUCT MANAGEMENT

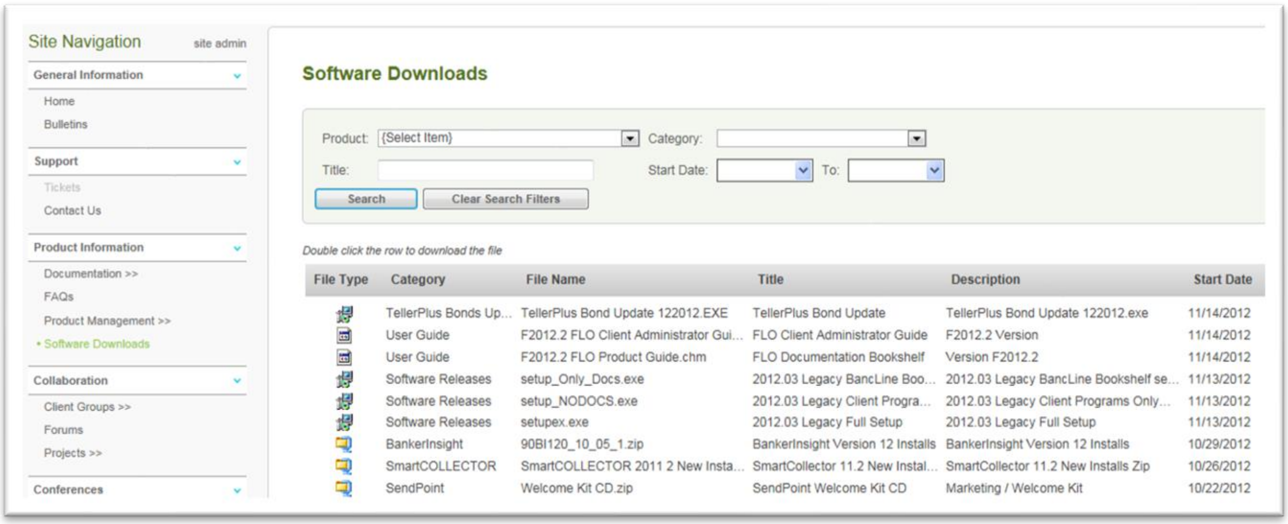
Product Management offers clients insight into future plans to grow FIS products including enhancements and delivery timelines. Product Management content is created in the Content Editor. This section shows only projects specific to FIS products purchased by that client.



SOFTWARE DOWNLOADS

Software Downloads offers up-to-date product releases, patches, and other downloadable files that clients can access 24/7.

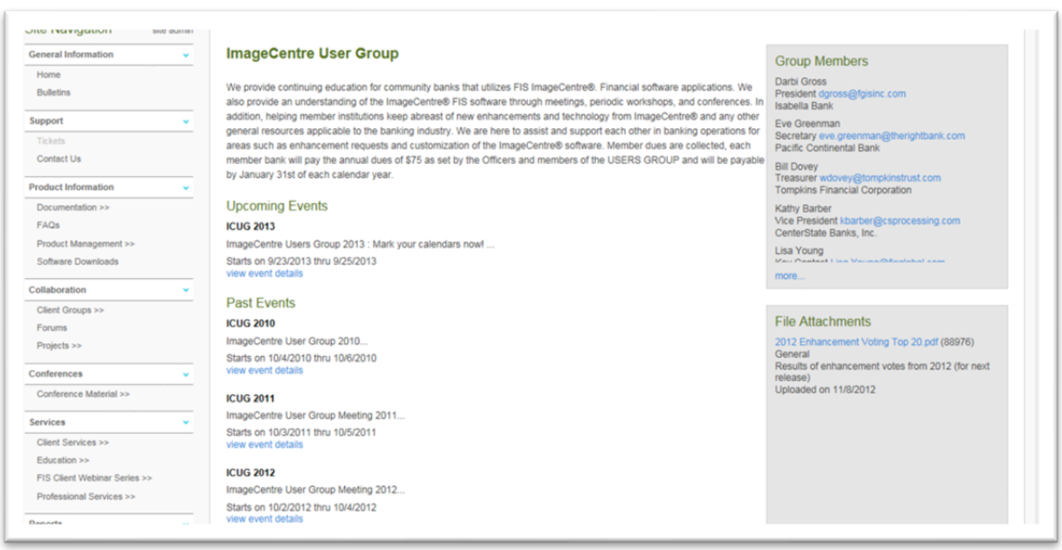
This area is not content-driven, although account mangers or administrators may upload software within the *Site Admin* menu. Software available for download is driven by the product manager or other FIS employee.



Collaboration

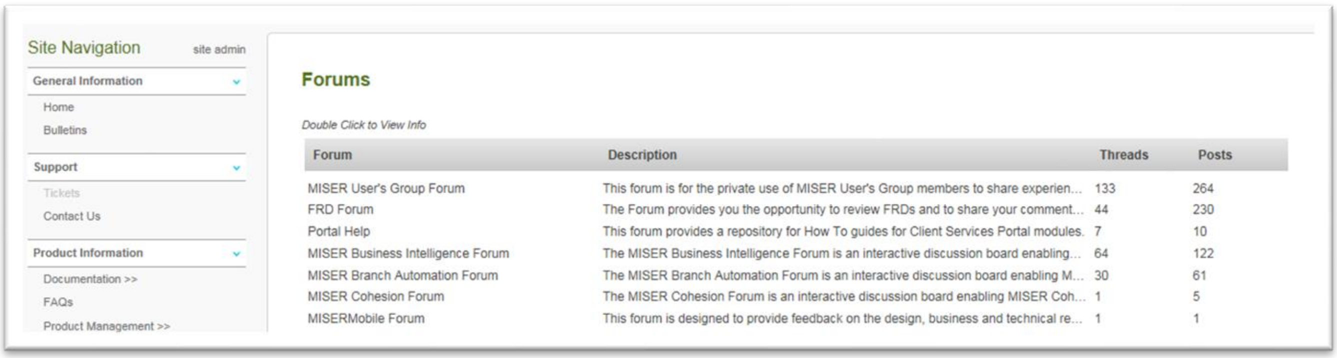
CLIENT GROUPS

The *Client Groups* feature allows setup of advisory or user groups for posting events, member lists, and sharing files via *Site Admin>Client Group Maintenance*. *Client Groups* include some descriptive content for client group, displayed as seen below.



FORUMS

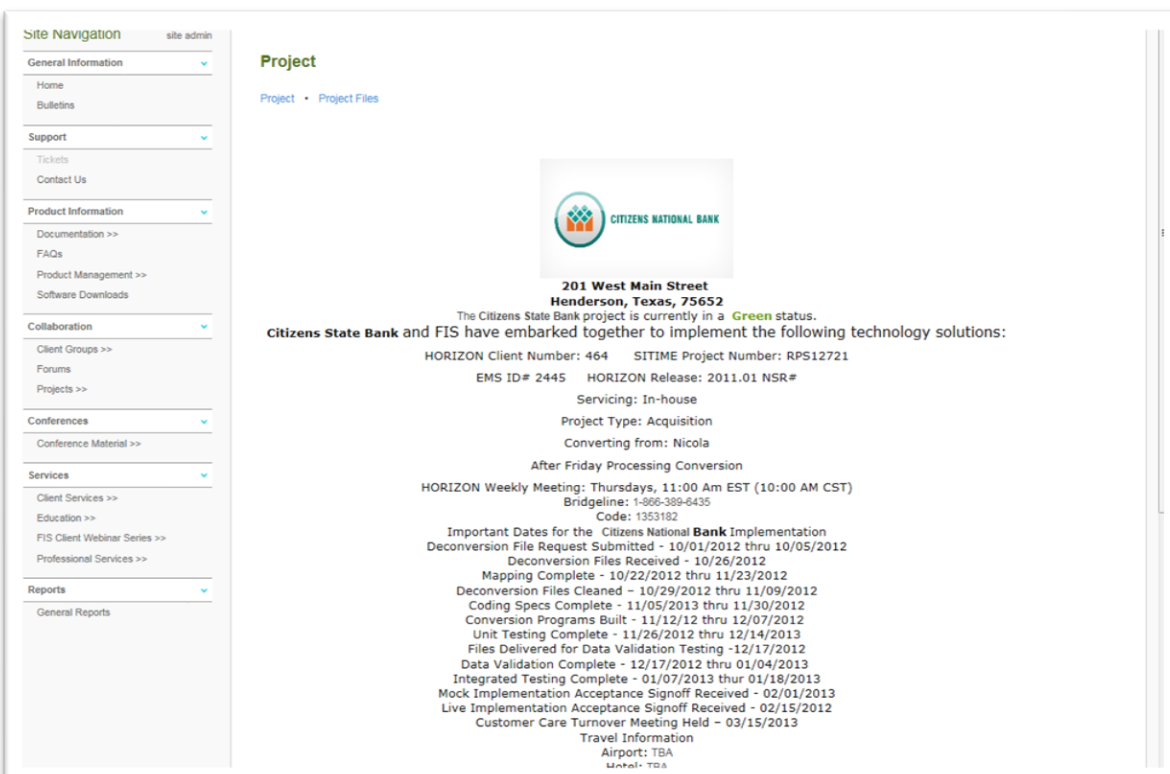
The *Forums* feature provides clients with the ability to interact in product “talk” sessions and FIS product groups. In the interactive format, clients can ask or reply to questions, but can only respond back and forth to pre-set topics. Clients cannot create content as an original or new topic in *Forums*.



PROJECTS

The *Projects* feature provides the ability to manage projects with FIS. This feature can display project-specific information, and allow secure file uploads by internal and external users.

Some of *Project* pages are formatted more extensively or graphically than others, as content and format is created in the *Project Content Editor* and driven by product and project need, as displayed in the sample below. Projects also allow hyperlinks and attachments.

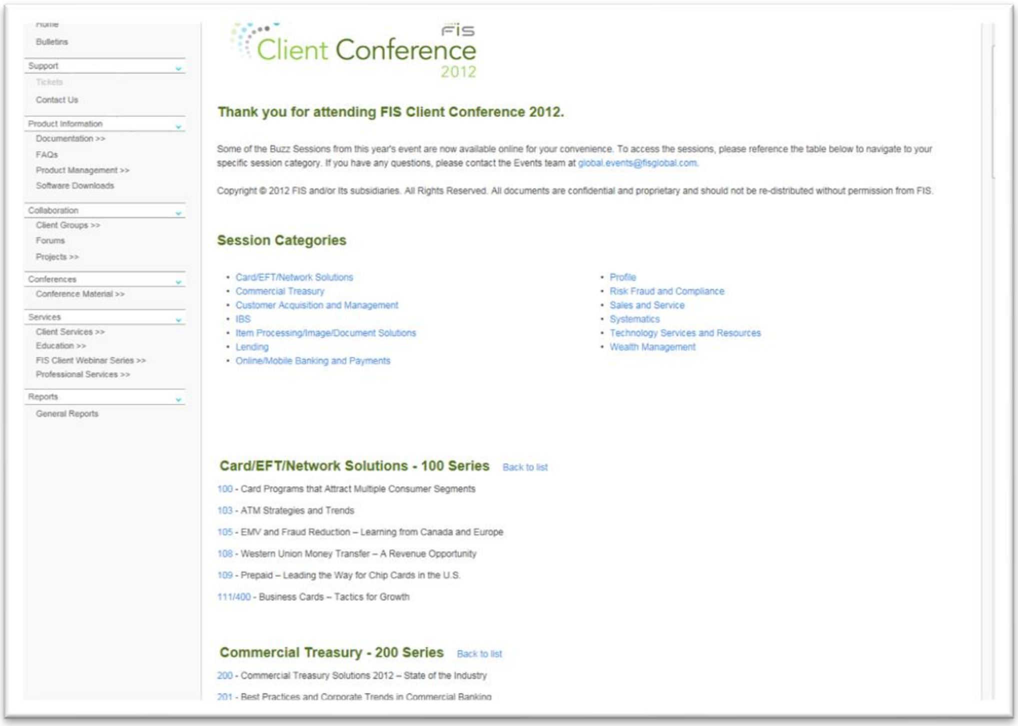


Conferences

CONFERENCE MATERIAL

The *Conference Material* link only displays for organizations that registered for and attended one of FIS' annual client conferences. The link provides access to PDF versions of the session presentations.

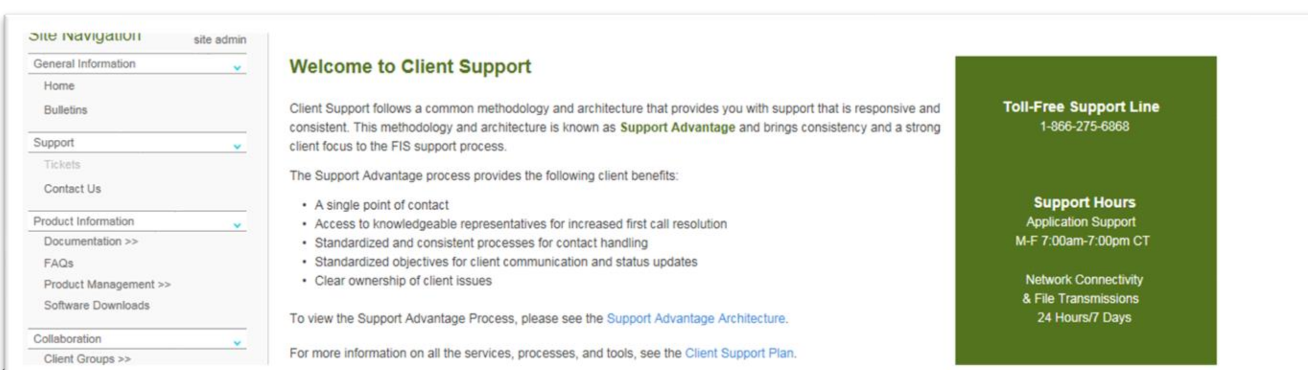
Information displayed in the *Conference* area is created centrally by Corporate Marketing. For information or content creation regarding *Conferences* please contact Dawn.Engle@fisglobal.com.



Services

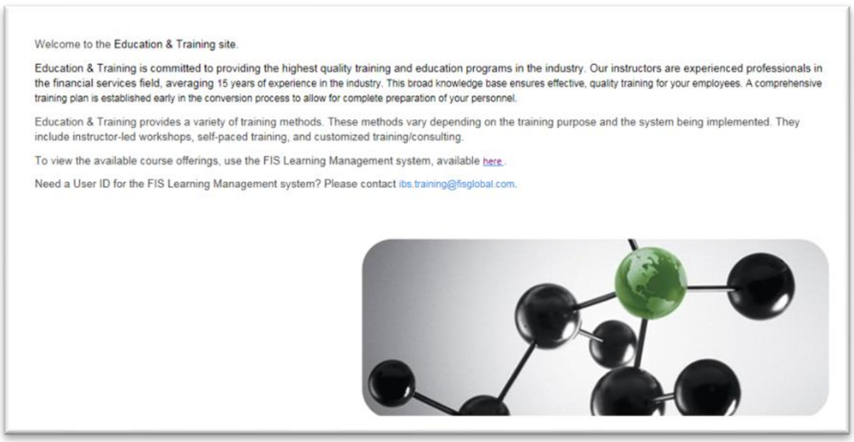
CLIENT SERVICES

The *Client Services* pages, available by product, display support information such as contact numbers and hours of service. *Client Services*, *Education* and *Professional Services* content are all determined by each product area and driven by the *Content Editor*.



EDUCATION

Education provides access to a variety of training materials for specified products, such as class schedules, training fees and available openings. *Client Services*, *Education* and *Professional Services* content are all determined by each product area and driven by the *Content Editor*.



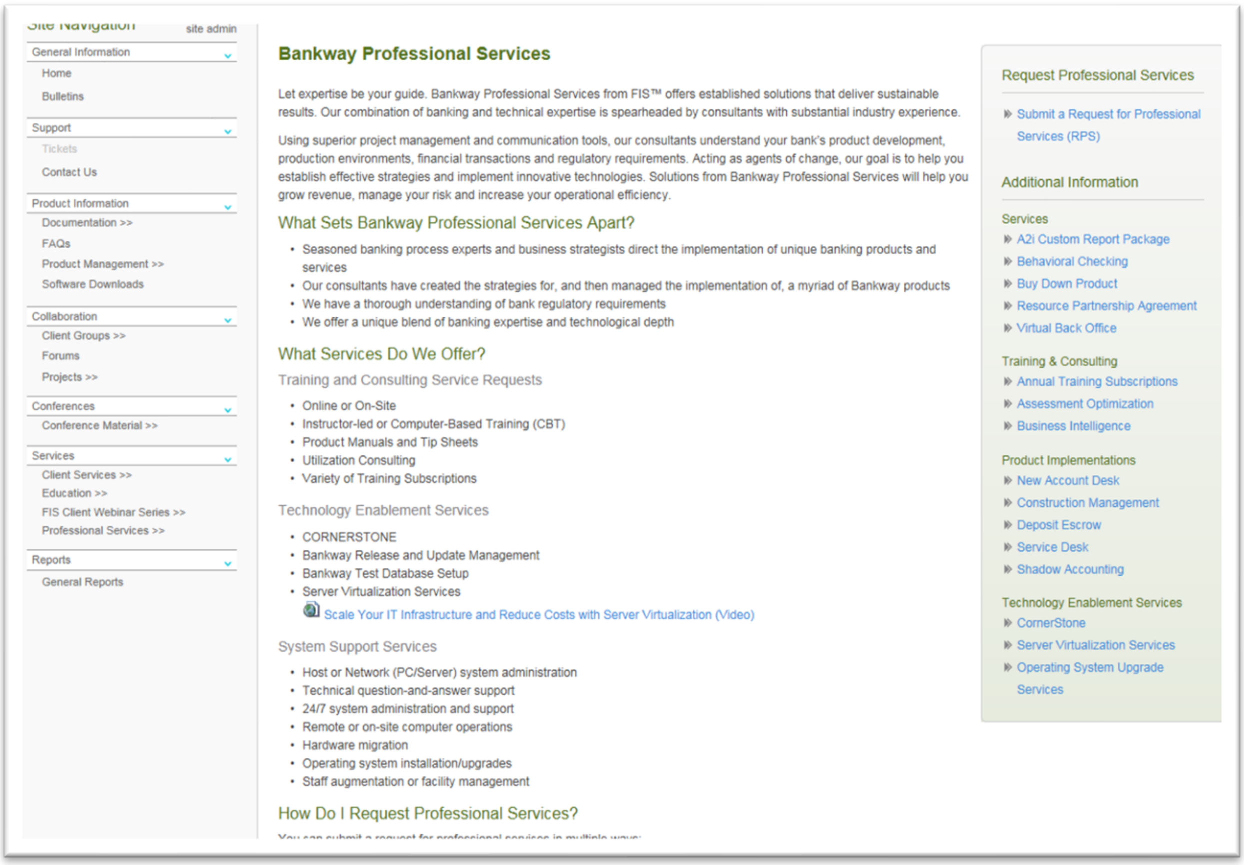
FIS CLIENT WEBINAR SERIES

The *FIS Client Webinar Series* accesses an archive of thought leadership webinars hosted by FIS for clients on a monthly basis. These webinars are recorded and published in the Client Portal, which offers a secured area where only clients with valid and unique login credentials can access information. The Webinar area is open for all clients with Client Portal access.

Webinar information is typically provided centrally by Corporate Marketing with additions added to the UAT (User Acceptance Testing) site then once approved, duplicated over to the Client Portal site. This work can be done at any time and does not require an outage window.

PROFESSIONAL SERVICES

Professional Services includes information on how to engage the appropriate teams to develop customized solutions for an organization. *Client Services*, *Education* and *Professional Services* content are all determined by each product area and driven by the [Content Editor](#).



Reports

GENERAL REPORTS

This section includes a variety of reports specific to a client organization.