



Client Portal Guidelines, Version 2.0



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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

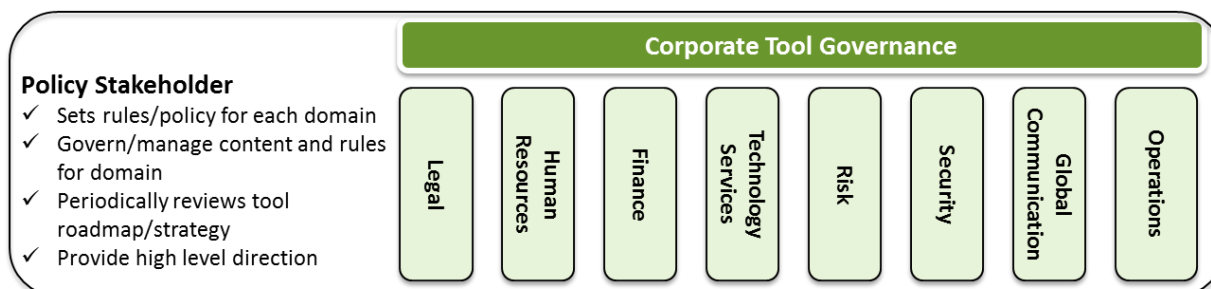
All FIS employees and subcontractors are required to adhere to established policies and standards. Violation of FIS policies and standards may result in disciplinary action up to and including termination. Any suspected violation of an FIS policy or standard should be reported to a supervisor, management 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.

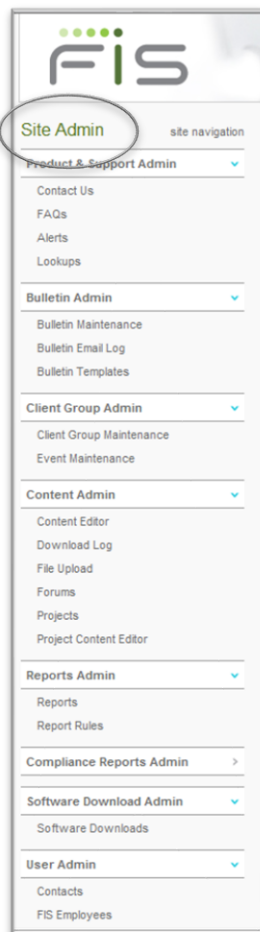
Site Admin View

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.



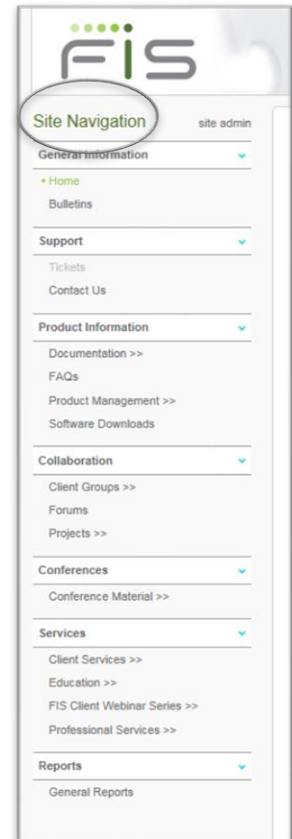
Site Navigation View

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.

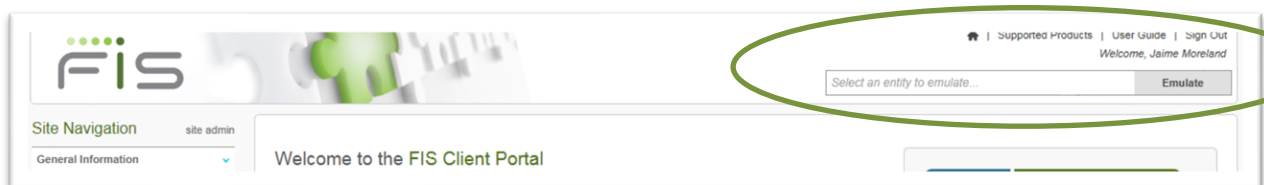
Client Portal Features

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.

The screenshot shows the 'Topic - Edit' dialog box. On the left, the 'Client Services' section is visible, showing 'MISER Client Services - Edit' with support hours and a list of 'On-line resources include but are not limited to' such as Documentation, FAQs, Download, Enhancement Requests, Release Information, Case Requests, Forums, Education Enrollment, PRS Requests, and Bulletin Archives. The dialog box has a 'Find Topic' field with 'te' entered. Below it is a list of topics with '(Remove)' links: Documentation, FAQs, Download, Enhancement Requests, Release Information, Case Requests, Forums, Education Enrollment, PRS Requests, and Bulletin Archives. There are 'Add' and 'Remove All' buttons. At the bottom are 'Save' and 'Cancel' buttons. The user 'Matt Rothlein' is logged in.

The screenshot shows the 'Support Area - Edit' dialog box. On the left, the 'Client Services' section is visible, showing 'MISER Client Services - Edit' with support hours and a list of 'On-line resources include but are not limited to' such as Documentation, FAQs, Download, Enhancement Requests, Release Information, Case Requests, Forums, Education Enrollment, PRS Requests, and Bulletin Archives. The dialog box has fields for 'Support Area' (MISER Client Services), 'Product' (MISER), 'Category' (Client Services), 'Phone' ((800) 528-2527), 'Fax' ((407) 217-0917), 'Topic Title' (On-line resources include but are not limited to), 'Instructions', 'Has 24 Hour Support' (checked), 'Is Active' (checked), 'Display Order' (1), 'Business Hours' (Monday - Friday 7:30 a.m. - 8:00), 'After Hours' (Select Item), 'After Hours Support' (800-528-2527), 'Instructions', and 'Pager'. There are 'Save' and 'Cancel' buttons. The user 'Matt Rothlein' is logged in.



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.

The screenshot displays a web application interface. On the left, a search bar indicates 'Search returned 8 results.' Below this, a section titled 'Client Services' contains the following text: 'MISER Client Services - Edit', 'Has 24 Hour Support', 'Monday - Friday 7:30 a.m. - 8:00 p.m. ET', and 'After Hours Support: 800-528-2527'. A link 'On-line resources include but are not limited to - Edit' is followed by a bulleted list: Documentation, FAQs, Download, Enhancement Requests, Release Information, Case Requests, Forums, Education Enrollment, PRS Requests, and Bulletin Archives. At the bottom of this section, there is a link 'Instructions - Create' and a line of text: 'Edit | Remove - Please visit the Client Services portal at <https://clientsupport.fisglobal.com>'. On the right, a modal window titled 'Instructions - Edit' is open. It contains three input fields: 'Type:' with a dropdown menu set to 'Hyperlink', 'Label:' with the text 'Please visit the Client Services portal at', and 'Instruction:' with the URL 'https://clientsupport.fisglobal.com'. At the bottom of the modal are 'Save' and 'Cancel' buttons. To the right of the modal, partially visible, is a 'Contacts - Create' section with contact information for John Culver, Client Services Manager, including phone, fax, and email addresses, and links for 'Edit | Remove'.



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.

Lookups

Table Name: Solution:

Edit data in cell and click the Update button

Mapping Type	Phone Number
Client Services	800-888-4327, option 2x

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*.

Create/Edit Bulletin Template

Template Name:
Category:

High Importance: ☒
Inactive: ☐

Subject:

Note (Body):

B **I** **U** **ABC**
Font **Size**
Style

Please read the important attached BanLine Service Bulletin.

☒ Design
☐ HTML

Email Delivery Options

Product:
☒ **Selected Products:**

☐ **Filter product using "AND"**

Contact Codes:

☒ **Selected Contact Codes:**

State:

☒ **Selected States:**



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.

Template Name	Subject	Last Update By	Last Update
BancLine Service Bulletin		Barbara Kantro	05/23/2010
BancLine Test	Test on 01/30/2011	Lisa Polanik	04/04/2012
BancLine Tip of the Month	BancLine Tip -	Barbara Kantro	10/01/2012
Holiday	BancLine Holiday Support	Barbara Kantro	05/17/2010
QA - InHouse Bulletin		Aletra Johnson	11/10/2009
QA-SB Bulletin		Pam Brittingham	11/13/2012

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.

The screenshot displays the FIS Client Portal interface. On the left is a 'Site Admin' sidebar with a 'site navigation' menu. The main content area is titled 'Event Maintenance' and includes a 'To create a new Event, open the' link. A search filter is visible, showing 'Event Type: JB' and 'Name: JB'. A search result for 'JB Big Top Event' is displayed. Overlaid on this is the 'Event - Edit' modal form. The form contains the following fields: 'Name: *' (JB Big Top Event), 'Description: *' (Big event under the Big Top), 'Location: *' (JB Event Center), 'Event Type: *' (Client Group Meeting), 'Event Cost' (0.0000), 'Phone Number', 'Access Code', 'Display Event Until' (12/30/2012), 'Start Date' (02/13/2012), and 'End Date' (12/31/2012). 'Save' and 'Cancel' buttons are at the bottom of the modal.

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 once 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 it is 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



Client Portal Content Guidelines



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.

BancLine™ Education

Please go to the Software/Downloads option to access two new BancLine 2.0 Training videos!

BancLine Discounted Training Package Deals:

- Gold Package - \$12,500 includes 9 days on-site training or consulting plus 6 online training sessions (T&E not included) – this is a discounted number, thus saving the bank \$7,200
- Silver Package - \$8,700 includes 6 days on-site training or consulting plus 4 online training sessions (T&E not included) – this is a discounted number, thus saving the bank \$3,300
- Bronze Package - \$5,700 includes 3 days on-site training or consulting plus 2 online training sessions (T&E not included) – this is a discounted number, thus saving the bank \$1,100

[Click here to view BancLine Training Course Descriptions](#)

[Click here to go to BancLine WebEx Training](#)

Use the links to the left to find training information.

Click on the Link to BancLine WebEx Training to view the new free BancLine 2.0 Training Videos!

Please review the BancLine Training Course Descriptions link for details about available training sessions!

Don't miss out on some new Education opportunities! See the schedule for the free classes on implementing the BancLine Advanced OnLine Exception Item Processing System (OLEIP). All banks must be on the new OLEIP system before installing the new BancLine 2.0 front end.

HORIZON Education and Consulting

The benefits of training for software training costs. There can be no replacement for hands-on, week 4, hour 6, do it experience, and by involving in the people who will now give your institution better, you are controlling your future success. In addition, your employees will appreciate training tools that will make their lives easier, providing important education for professional growth.

Working together with your management team, HORIZON Training and Consulting develops a strategy to specifically meet the needs of your institution's business objectives. Whether you are training employees for the first time, or offering refresher courses to keep your staff up-to-date, we ensure your employees know how to use, manage and support the HORIZON software. We employ an approach designed to teach students using the actual software. We provide your employees with the knowledge and the know-how using real-world scenarios through implementation. Product Advancement Review (PAR), Train the Trainer, refresher sessions and individual consulting arrangements.

Courses and Curriculum

HORIZON offers classroom instruction at our state of the art Orlando, FL headquarters. Additionally, we offer web-based instruction and computer-based training modules. Our curriculum is supported by in-depth training guides making it easy for your employees to recreate what they have learned back at your institution. Of course, HORIZON Training and Consulting can arrange services at your facility when appropriate. We also entertain requests for Specialized or Customized Training and Consulting engagements.

Release training educates employees on new software features so they can immediately implement updates and take advantage of the latest and greatest the system has to offer. In addition, release training is delivered in many forms and can be tailored to meet employee's various skill sets.

Annual Training Subscription

HORIZON has developed an Annual Training Subscription that allows your institution to budget training costs up-front, and save money by purchasing a "package" instead of paying retail for "a la carte" sessions. You can select up to three Education and Consulting engagements and receive complimentary Release Training, Year-End Release Training, and standard Week 6 sessions as described in the package details. Gold, Silver and Bronze packages are available, with the Gold package providing a cost savings of over 33%! Refer to the HORIZON Annual Training Subscription product sheet for detailed pricing and package details.

[HORIZON Annual Training Subscription Product Sheet](#)

FIS Learning Management System (LMS)

A Learning Management System is an integrated collection of information technologies designed to manage, facilitate and control the processes needed for enterprise learning. An LMS can increase the speed and effectiveness of training, ensure compliance with industry education standards, boost organizational efficiency, and improve communication among employees. The FIS LMS offers complete learner management that enhances administration and increases productivity – while helping improve organizational performance by measuring and managing individual skills and competencies.

The LMS is a powerful tool that streamlines training for your organization with improved access to training events and materials, as well as enhanced reporting features. The LMS also:

- Provides a catalog of the training courses available and any print materials or other downloadable training packages.
- Allows users to self-register for instructor-led courses and access eLearning courses.
- Relates training history.
- Tracks success in completing eLearning.

[FIS Learning Management System \(LMS\) Product Sheet](#)

[FIS Learning Management System \(LMS\)](#)

Learning Management System

[https://training.fisglobal.com](#)

Contact HORIZON Training

E-mail:
HORIZONTraining@fisglobal.com

Address:
Attn: HORIZON Training
2881 Tunnel Park Drive
Orlando, FL 32818

HORIZON Release 2012.01

• [HORIZON Release 2012.01](#)
[Education Overview Session](#)

Popular HORIZON Courses

- Account Analysis
- Account Reconciliation
- Automated Clearing House
- Account Based Management
- Customer Training
- Commercial Loans
- Currency Transaction Reporting
- Demand Deposit and Savings
- Enhanced Training
- General Ledger
- HORIZON 360
- HORIZON Collections
- HORIZON Teller
- Integrated Deposit Origination
- Intro to DTS Loans
- JAC/ON
- US Non-Accrual Processing
- Master Commitments
- Mortgage Loan Fees
- Operations
- Profitability
- Relationship Management
- Repurchase Agreements
- Reward Programs
- Safe Deposit Box Security
- Transaction Processing
- Year End Processing

BancPac™ Education

BancPac Education Overview

[BancPac Education Overview](#)

What BancPac NX Courses Should I Take?

View the following information for E-Learning modules now available on the Virtual Learning Center:

- CEO CFO
- Loan Operations
- Loan Officer
- CSR DDA CD IRA
- Deposit Operations
- Oil Controller

What BancPac Legacy Courses Should I Take?

Deposits

- Customer Service Representative DDA
- Deposit Operations
- Customer Service Representative DDA Advanced

Certificates of Deposit and IRA

- Customer Service Representative CD/IRA
- Customer Service Representative CD/IRA Advanced

Loans

- Loan Processor II
- Loan Processor I Commercial
- Loan Processor I Real Estate
- Loan Operations
- Loan Officer
- Loan Officer LOC

General Ledger

- General Ledger Controller
- CFO
- CFO Admin

BancPac Education Course Catalog

Use the links to the left and below to find documentation.

Virtual Learning Center

Contact Us:

3150 Holcomb Bridge Road
Norcross, GA 30071
Phone: 770-209-8391
E-Mail: BancPac.Education@fisglobal.com

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 *Projects* 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.

Name	Status	Entity	Start Date	End Date	Description	Updated By	U...
LCEF - Texas District Church Fund	Closed	Lutheran Church Extension Fund	02/24/2011	05/25/2011	Set up OLB for Texas District Church Fund 27477 C...	Barbara Schrader	0...
1st Colonial National Bank	Open	1st Colonial Community Bank	11/23/2010	06/30/2011	Mobile Banking Implementation	Erica Machado	1...
1st Trust Bank Mobile B...	Open	1st Trust Bank, Inc.	06/03/2011	12/30/2011	Mobile Banking Implementation	Lisa Covington	0...
1st United (Andersen) - O...	Open	1st United Bancorp, Inc.	03/22/2012	06/29/2012	1st United (Andersen) - OLB Conversion	Barbara Schrader	0...
1st United Bank	Closed	1st United Bank	02/07/2011	02/08/2011	Merger Project	Jeff Mullins	0...
1st United Bank	Closed	1st United Bank	02/09/2011	05/16/2011	Merger	Barbara Schrader	0...
1st United Bank - Ander...	Open	1st United Bancorp, Inc.	01/30/2012	07/16/2012	Convert & Merge Andersen Bank	Jeffrey Merven	0...
1st United Bank - OLB I...	Closed	1st United Bancorp, Inc.	11/23/2011	03/02/2012	1st United Bank - OLB Implementation	Barbara Schrader	0...
Academic FCU Mobile B...	Open	Academic Federal Credit Union	11/23/2011	08/31/2012	Academic FCU Mobile Banking Implementation	Lisa Covington	1...

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.

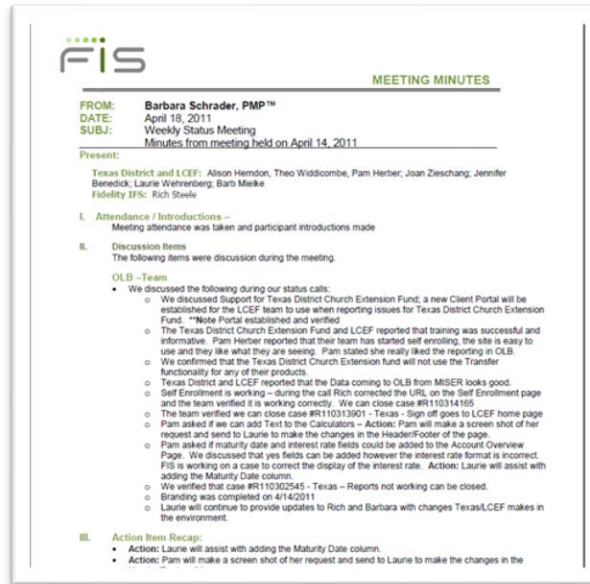
Project Create/Edit

Name: * LCEF - Texas District Church Fund Description: * Set up OLB for Texas District Church Fund 27477
Status: * Closed Completed bank Live 5/11/2011
Dates: * 2/24/2011 To: 5/25/2011
Entity: * Lutheran Church Extension Fund
Created by Barbara Schrader on 2/24/2011 2:16:47 PM Last updated by Barbara Schrader on 6/15/2011 1:18:58 PM

Project Files

Add File Delete File

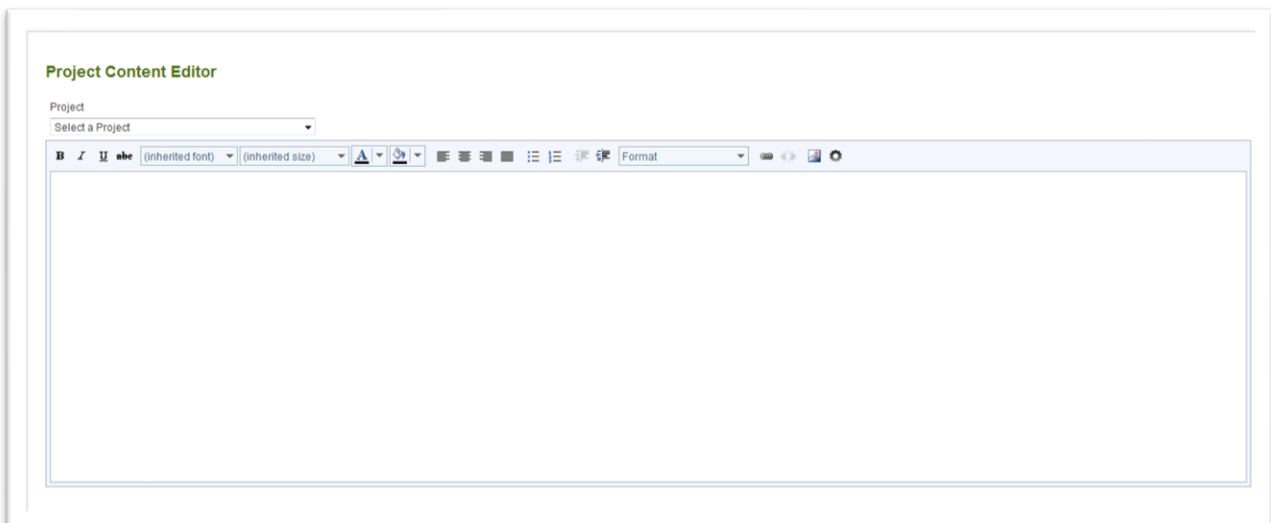
File Name	Category	Internal	Uploaded By	Uploaded Date
04142011 Status Meeting Minutes - Texas District_LCEF.pdf	Agenda/Minutes	<input type="checkbox"/>	Schrader, Barbara	04/18/2011 12:40 PM
04212011_Meeting Materials - Texas_LCEF.pdf	Agenda/Minutes	<input type="checkbox"/>	Schrader, Barbara	04/18/2011 12:40 PM
04282011 Status Meeting Minutes - Texas District_LCEF.pdf	Agenda/Minutes	<input type="checkbox"/>	Schrader, Barbara	05/04/2011 11:43 AM
05102011 Status Meeting Minutes - Texas District_LCEF.pdf	Agenda/Minutes	<input type="checkbox"/>	Schrader, Barbara	05/13/2011 11:39 AM
05192011_Agenda-LCEF Status Meeting.pdf	Agenda/Minutes	<input type="checkbox"/>	Schrader, Barbara	05/13/2011 11:40 AM
05192011_Meeting Materials_LCEF	Agenda/Minutes	<input type="checkbox"/>	Schrader, Barbara	05/13/2011 11:39 AM



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 managers 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.

Site Navigation site admin

General Information ▾

- Home
- Bulletins

Support ▾

- Tickets
- Contact Us

Product Information ▾

- Documentation >>
- FAQs
- Product Management >>
- Software Downloads

Collaboration ▾

- Client Groups >>
- Forums
- Projects >>

Conferences ▾

- Conference Material >>

Bulletins

Product: (Select Item) Subject:

Category: (Select Item) Start Date: To:

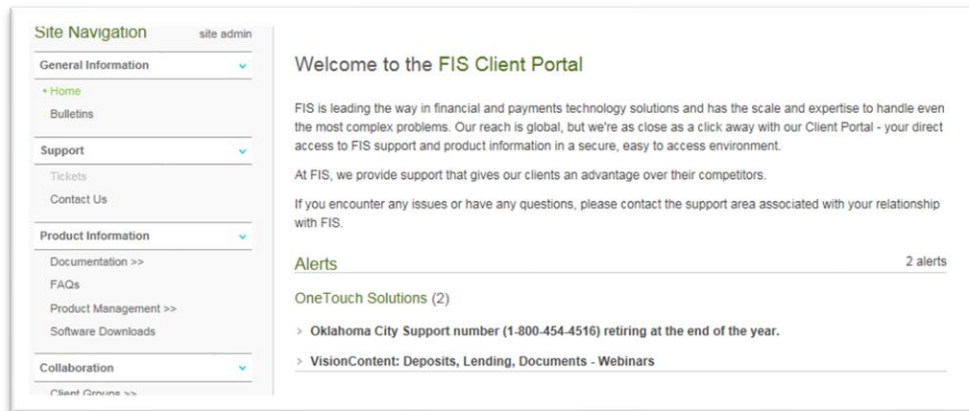
To download, expand the bulletin and double click on the file needed

Category	Subject	StartDate
General	SB 1211-0156 Processing POD and Merchant Capture - UPDT	11/02/2012
General	Core Software: SB 1211-0155 Processing POD and Merchant Capture	11/01/2012
Education	BancLine Tip of the Month - November 2012 - Editing Credit Bureau Reporting in 2.0	11/01/2012
General	Core Software: SB 1210-0154 Combined Processing Inclearing POD and Merchant Capture	10/31/2012
General	FLO Bulletin - 2012.2 Release Update	10/31/2012
Critical	HORIZON - Interim Release 2012.01.005.006 - HORIZON Regulatory Updates	10/31/2012
Critical	BancLine Year-End Processing	10/31/2012
General	Scheduled Maintenance Down Time: SB 1210-0153 Scheduled Maintenance Outage	10/31/2012
Critical	HORIZON - GIB 2012.044 - Immediate Review Required for eDelivery FTP Transmission Controls	10/30/2012

<< < 1 of 38 > >> Record Count: 1698

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

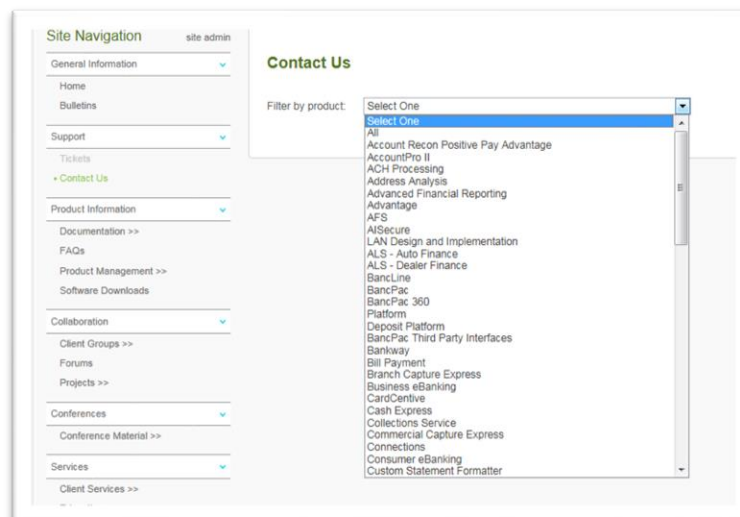
Clients use the *Tickets* feature to submit *Tickets* to FIS and to review previously created *Tickets*. Clients can create tickets only if they are exposed, i.e. if the *Ticket* process is exposed on Client Portal. Not all FIS clients create tickets.

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.

The top screenshot displays the 'MISERhelp' documentation page. It features a sidebar with a 'Site Navigation' menu including 'General Information', 'Support', 'Product Information', 'Collaboration', 'Services', and 'Reports'. The main content area is titled 'MISERhelp' and includes a 'Documentation Change Request' section, a 'Release 2012.2' section with links to download and instructions, and a 'Release 2012.1' section. A '2012.2 MISER Executive Project Summaries' box is also visible.

The bottom screenshot displays the 'Bankway Documentation' page. It has a similar sidebar navigation menu. The main content area is titled 'Bankway Documentation' and includes a 'We Want Your Input!' section, 'Current Service Levels' for various operating systems, 'Recent Updates', and a list of 'Access to Information (A2i)' documents. It also features sections for 'Bankway Browser', 'Interface Guides', 'Host Installation Instructions', 'Bankway Procedures', 'Network Standards Guides', 'Reference Manuals', and 'System Operator Guides'.



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.

Site Navigation site admin

- General Information
 - Home
 - Bulletins
- Support
 - Tickets
 - Contact Us
- Product Information
 - Documentation >>
 - FAQs
 - Product Management >>
 - Software Downloads
- Collaboration
 - Client Groups >>
 - Forums
 - Projects >>
- Conferences
 - Conference Material >>
- Services
 - Client Services >>
 - Education >>
 - FIS Client Webinar Series >>
 - Professional Services >>
- Reports
 - General Reports

Frequently Asked Questions

[Hide Search Filters](#)

Product: Category: Posted From: Posted To:

Question:

Answer:

[Clear Search Filters](#)

Audit (6)

- > What is the procedure for unauthorized ACH transactions?
- > Social Security Number Suppression
- > What is the difference between a file and a batch?
- > What is Credit Limit Management?
- > What is the difference between consolidated and unconsolidated settlement in the Auto Settlement Information on the company setup form?
- > What is the SAS 70 and where can it be found?

EDI (2)

- > File Format (1)

File Processing (2)

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.

Site Navigation site admin

- General Information
 - Home
 - Bulletins
- Support
 - Tickets
 - Contact Us
- Product Information
 - Documentation >>
 - FAQs
 - Product Management >>
 - Software Downloads
- Collaboration
 - Client Groups >>
 - Forums
 - Projects >>
- Conferences
 - Conference Material >>

EFT Services - Milwaukee-Brown Deer

This page applies to clients using the Card Management System (a.k.a. Cardbase). Here you will find information on what's going on in EFT today, and what our plans are for the future. Please refer to each section listed below for more information on the documents in a particular section.

Product Roadmaps

2012 Card Management and ATM Roadmap

EMV Update

- March 2012 - EMV 101 - What You Need to Know - Audio presentation
- March 2012 - Calming the EMV Storm
- August 2012 - EMV Extra Edition

Product Sheets

- Debit Insights
- Mobile Alerts



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 managers or administrators may [upload software](#) within the *Site Admin* menu. Software available for download is driven by the product manager or other FIS employee.

File Type	Category	File Name	Title	Description	Start Date
EXE	TellerPlus Bonds Up...	TellerPlus Bond Update 122012.EXE	TellerPlus Bond Update	TellerPlus Bond Update 122012.exe	11/14/2012
PDF	User Guide	F2012.2 FLO Client Administrator Gui...	FLO Client Administrator Guide	F2012.2 Version	11/14/2012
PDF	User Guide	F2012.2 FLO Product Guide.chm	FLO Documentation Bookshelf	Version F2012.2	11/14/2012
EXE	Software Releases	setup_Only_Docs.exe	2012.03 Legacy BancLine Boo...	2012.03 Legacy BancLine Bookshelf se...	11/13/2012
EXE	Software Releases	setup_NODOCS.exe	2012.03 Legacy Client Progra...	2012.03 Legacy Client Programs Only...	11/13/2012
EXE	Software Releases	setupepx.exe	2012.03 Legacy Full Setup	2012.03 Legacy Full Setup	11/13/2012
ZIP	BankerInsight	90BI120_10_05_1.zip	BankerInsight Version 12 Installs	BankerInsight Version 12 Installs	10/29/2012
ZIP	SmartCOLLECTOR	SmartCOLLECTOR 2011 2 New Insta...	SmartCollector 11.2 New Instal...	SmartCollector 11.2 New Installs Zip	10/26/2012
ZIP	SendPoint	Welcome Kit CD.zip	SendPoint Welcome Kit CD	Marketing / Welcome Kit	10/22/2012

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.

ImageCentre User Group

We provide continuing education for community banks that utilizes FIS ImageCentre®. Financial software applications. We also provide an understanding of the ImageCentre® FIS software through meetings, periodic workshops, and conferences. In addition, helping member institutions keep abreast of new enhancements and technology from ImageCentre® and any other general resources applicable to the banking industry. We are here to assist and support each other in banking operations for areas such as enhancement requests and customization of the ImageCentre® software. Member dues are collected, each member bank will pay the annual dues of \$75 as set by the Officers and members of the USERS GROUP and will be payable by January 31st of each calendar year.

Upcoming Events

ICUG 2013
ImageCentre Users Group 2013 : Mark your calendars now! ...
Starts on 9/23/2013 thru 9/25/2013
[view event details](#)

Past Events

ICUG 2010
ImageCentre User Group 2010...
Starts on 10/4/2010 thru 10/6/2010
[view event details](#)

ICUG 2011
ImageCentre User Group Meeting 2011...
Starts on 10/3/2011 thru 10/5/2011
[view event details](#)

ICUG 2012
ImageCentre User Group Meeting 2012...
Starts on 10/2/2012 thru 10/4/2012
[view event details](#)

Group Members

Darbi Gross
President [dgross@fisin.com](#)
Isabella Bank

Eve Greenman
Secretary [eve.greenman@theightbank.com](#)
Pacific Continental Bank

Bill Dovey
Treasurer [wdovey@tomlintrust.com](#)
Tomlin Financial Corporation

Kathy Barber
Vice President [kbarber@csprocessing.com](#)
CenterState Banks, Inc.

Lisa Young
Vice President [l.young@fisin.com](#)
[more...](#)

File Attachments

2012 Enhancement Voting Top 20.pdf (88976)
General
Results of enhancement votes from 2012 (for next release)
Uploaded on 11/8/2012



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*.

Site Navigation

site admin

General Information

Home

Bulletins

Support

Tickets

Contact Us

Product Information

Documentation >>

FAQs

Product Management >>

Forums

Double Click to View Info

Forum	Description	Threads	Posts
MISER User's Group Forum	This forum is for the private use of MISER User's Group members to share experien...	133	264
FRD Forum	The Forum provides you the opportunity to review FRDs and to share your comment...	44	230
Portal Help	This forum provides a repository for How To guides for Client Services Portal modules.	7	10
MISER Business Intelligence Forum	The MISER Business Intelligence Forum is an interactive discussion board enabling ...	64	122
MISER Branch Automation Forum	The MISER Branch Automation Forum is an interactive discussion board enabling M...	30	61
MISER Cohesion Forum	The MISER Cohesion Forum is an interactive discussion board enabling MISER Coh...	1	5
MISERMobile Forum	This forum is designed to provide feedback on the design, business and technical re...	1	1

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](#).

Site Navigation

site admin

General Information

Home

Bulletins

Support

Tickets

Contact Us

Product Information

Documentation >>

FAQs

Product Management >>

Software Downloads

Collaboration

Client Groups >>

Forums

Projects >>

Conferences

Conference Material >>

Services

Client Services >>

Education >>

FIS Client Webinar Series >>


Professional Services >>

Reports

General Reports

Project

Project • Project Files



**201 West Main Street
Henderson, Texas, 75652**

The Citizens State Bank project is currently in a **Green** status.

Citizens State Bank and FIS have embarked together to implement the following technology solutions:

HORIZON Client Number: 464 SITIME Project Number: RPS12721

EMS ID# 2445 HORIZON Release: 2011.01 NSR#

Servicing: In-house

Project Type: Acquisition

Converting from: Nicola

After Friday Processing Conversion

HORIZON Weekly Meeting: Thursdays, 11:00 Am EST (10:00 AM CST)

Bridgeline: 1-866-389-6435

Code: 1353182

Important Dates for the Citizens National Bank Implementation

Deconversion File Request Submitted - 10/01/2012 thru 10/05/2012

Deconversion Files Received - 10/26/2012

Mapping Complete - 10/22/2012 thru 11/23/2012

Deconversion Files Cleaned - 10/29/2012 thru 11/09/2012

Coding Specs Complete - 11/05/2013 thru 11/30/2012

Conversion Programs Built - 11/12/12 thru 12/07/2012

Unit Testing Complete - 11/26/2012 thru 12/14/2013

Files Delivered for Data Validation Testing - 12/17/2012

Data Validation Complete - 12/17/2012 thru 01/04/2013

Integrated Testing Complete - 01/07/2013 thur 01/18/2013

Mock Implementation Acceptance Signoff Received - 02/01/2013

Live Implementation Acceptance Signoff Received - 02/15/2012

Customer Care Turnover Meeting Held - 03/15/2013

Travel Information

Airport: TBA

Hotel: TBA

CONFIDENTIAL

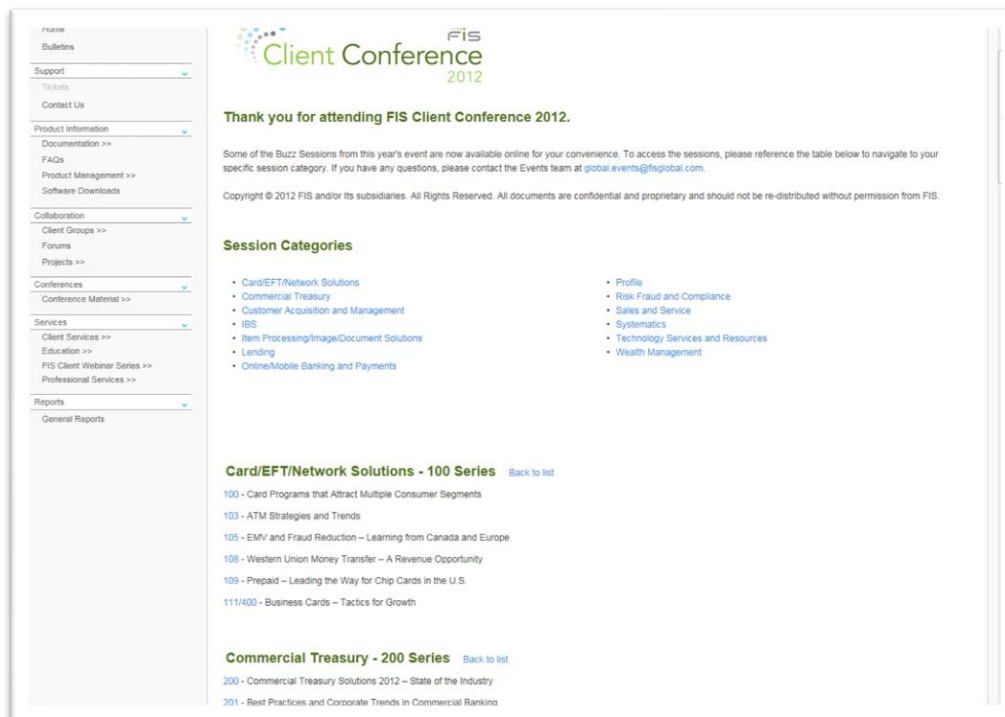


Conferences

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.

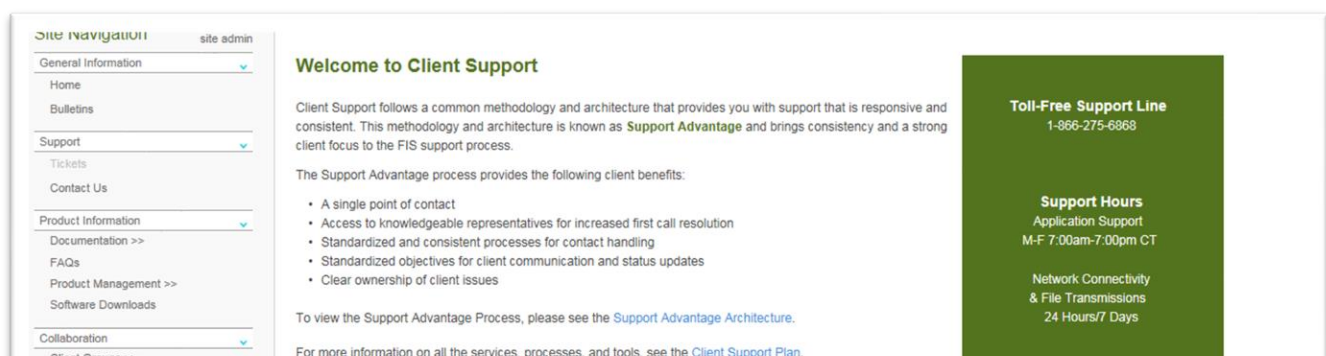
Information displayed in the *Conference* area is created centrally by Corporate Marketing. For information or content creation regarding *Conferences* please contact Dawn.Engle@fisglobal.com.



Services

CLIENT SERVICES

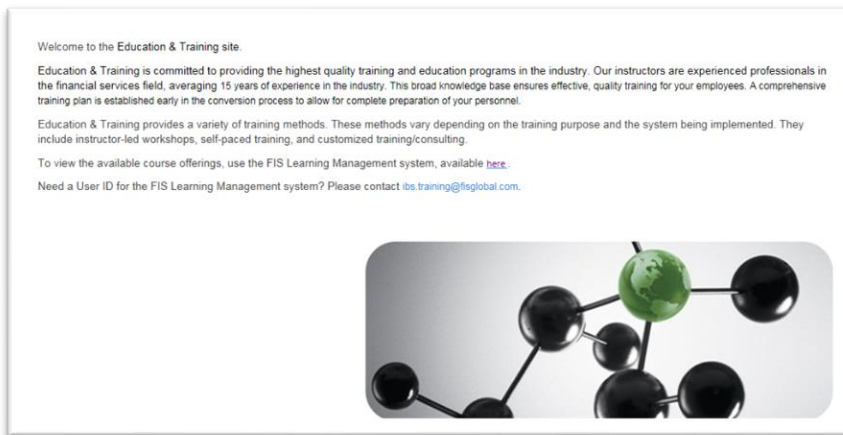
The *Client Services* pages, available by product, display support information such as contact numbers and hours of service. *Client Services*, *Education* and *Professional Services* content are all determined by each product area and driven by the [Content Editor](#).





EDUCATION

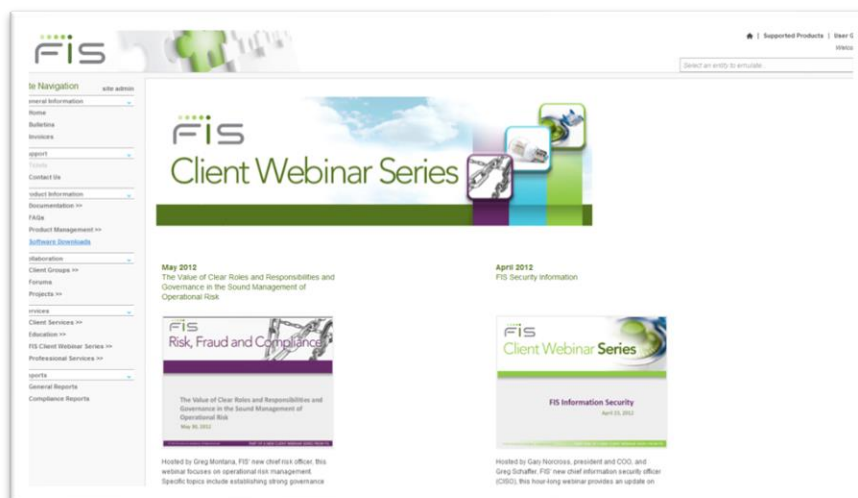
Education provides access to a variety of training materials for specified products, such as class schedules, training fees and available openings. *Client Services*, *Education* and *Professional Services* content are all determined by each product area and driven by the [Content Editor](#).



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](#).

The screenshot shows a web page titled "Bankway Professional Services". On the left is a navigation menu with categories like General Information, Support, Product Information, Collaboration, Services, and Reports. The main content area has a heading "Bankway Professional Services" followed by a paragraph about FIS's expertise. Below this are sections: "What Sets Bankway Professional Services Apart?" (listing seasoned experts, regulatory knowledge, and a blend of expertise), "What Services Do We Offer?" (subdivided into Training and Consulting, Technology Enablement, and System Support), and "How Do I Request Professional Services?". On the right side, there is a sidebar with links to "Request Professional Services" (including a link to submit a request), "Additional Information" (listing various services like A2i Custom Report Package, Behavioral Checking, etc.), and "Training & Consulting" (listing annual training subscriptions, assessment optimization, etc.).

Reports

GENERAL REPORTS

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

The screenshot shows a web page titled "Reports". On the left is a navigation menu similar to the one in the previous screenshot. The main content area has a heading "Reports" followed by a search form. The form includes fields for "Name:", "Product:" (a dropdown menu), "Report Type:" (a dropdown menu with a search button), "Report Sub Type:" (a dropdown menu), and "Report Permissions:" (a dropdown menu). Below the search form is a "Search Results" section. It shows a table with two columns: "Name" and "Description". The table contains one row with the text "Request Desk" and "Risk Management / Compliance". Below the table, it says "No Data To Display".