Premier® Education Seminar 2018

Agenda and Breakout Session Descriptions

May 2018

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Agenda

The agenda and topics are subject to change.

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11:00 a.m. – Noon	**Breakout Session 2** • Deposits: Account Closing Procedures • Loans: Common Procedures • Online Banking New Release Update
Noon – 1:00 p.m.	**Lunch**
1:00 – 2:00 p.m.	**Breakout Session 3** • Deposits: Deposit & Related Enhancements • Loans: Be Your Own Detective • Online Banking Specifications
2:15 – 3:15 p.m.	**Breakout Session 4** • Deposits: Charge Offs • Loans: Loan & Related Enhancements • Online Banking Specifications
3:30 – 4:30 p.m.	**Breakout Session 5** • Deposits: Peer Networking & Knowledge Exchange • Loans: Peer Networking & Knowledge Exchange
4:30 – 6:00 p.m.	**Social Hour**

Day 2

8:30 – 9:15 a.m.	**Premier and Related Solutions Roadmap**
9:30 – 10:45 a.m.	**Breakout Session 6** • All about the CIF • Loans: Specifications 101 • Business Process Manager Administrator: Management, Products & Reports
11:00 – 12:15 p.m.	**Breakout Session 7** • Deposits: Specifications 101 • Loans: All about Fees • Business Process Manager: Wizards & Workflows
12:15 – 1:00 p.m.	**Lunch**

Session Descriptions

Breakout Session 1: 9:45 – 10:45 a.m.

Session:	**Help Me, Help You**
Overview:	No matter if you work in Loans, Deposits, or Operations, there are times where you get "stuck". We will share ideas to help you resolve situations on your own and gain valuable information at your fingertips. This hour-long discussion will focus on topics such as: Premier Help/Documentation, Knowledge Central, Learning Management System and much more.
Audience:	Loans, Operations, Deposits personnel; applicable to both in-house and service center clients.
Session:	**Loans: Did You Know**
Overview:	Is your financial institution using all of the time-saving features available within the loan system? Would you like to make your job easier and become more efficient? If so, then this session is for you! Attend this session to learn about helpful features, options, and tips and tricks, followed by some frequently asked questions to help you navigate and use the Premier software to its fullest potential. Now is the time to make better use of the tools at your fingertips and make your work life easier!
Audience:	Loan personnel responsible for managing customer relationships and servicing note accounts.
Session:	**Director: Advanced Configuration**
Overview:	Director makes information easy to store, organize, protect and share, providing immediate access as soon as documents and data are captured. The Advanced Configuration session focuses on Administrative functions that can enhance the product functionality, including User Groups, Password Policies, Document Types, and Keyword Types.
Audience:	Director users and operations personnel; applicable to both in-house clients and also service center clients who either currently have access to Configuration or have requested access to Configuration.

Breakout Session 2: 11:00 – Noon

Session:	**Deposits: Account Closing Procedures**
Overview:	This course will review the process required to close non-termed demand deposits and savings accounts. The course will then move to termed accounts, reviewing how to close for the entire balance, deduct forfeiture, use the Modeling Calculator to adjust forfeiture and perform partial withdrawals. Throughout the course the Fiserv standard transaction codes recommended for use when closing accounts will be utilized.
Audience:	Staff responsible for posting closing transactions, calculating withdrawal amounts on termed accounts, or who wish to better understand the closing process.
Session:	**Loans: Common Procedures**
Overview:	You have reached a comfort level with the Premier core Loan application and the available features affecting your institution. Where do you go from there? This session details a variety of common procedures that can be performed in the Premier LAS application. We will explore the step by step instructions of how these procedures are accomplished. In addition, we will provide helpful job aids to assist you when you return to work, or to be used as helpful training tools when you add new users. These common procedures and job aids can be used to simplify the end user experience when creating and managing different aspects of the loan application.
Audience:	Personnel familiar with, and responsible for, loan maintenance in Navigator for Premier; applicable to both in-house and service center clients.
Session:	**Online Banking New Release Update**
Overview:	Business Online 6.0 will include major changes, primarily to the end user look, feel, and navigation. This release contains the addition of Business Online Profiles which allow you to manage additional information in the Theme and add messages to the Business Online end user screens, thereby eliminating the need to contact Fiserv to make the desired changes. Additionally, enhancements to the online enrollment to CheckFree Small Biz eliminates the need for the Batch Enrollment process. Funds Transfer templates will be optional and no longer required.
Audience:	Clients currently using or interested in using Online Banking; applicable to both in-house and service center clients.

Breakout Session 3: 1:00 – 2:00 p.m.

Session: **Deposits: Deposit & Related Enhancements**

Overview: To make the most efficient use of your software, it's important to stay current on the latest enhancements. Learn about the Premier deposit, CIF/ CIS and security enhancements that were included in the 9.2, 9.3 and 9.4 Releases.

Audience: Personnel responsible for Premier core applications; applicable to both in-house and service center clients.

Session: **Loans: Be Your Own Detective**

Overview: A day in the life of managing lending relationships includes interpreting and resolving non-posts, note exceptions, and transaction exceptions. This course will review exception reasons and resolutions. This will include a review of the LAS/3200 exception reports, non-post reasons, transaction processing guidelines and lastly, an explanation of note and transaction exceptions.

Audience Loan personnel responsible for resolving loan non-posts as well as account and transaction exceptions.

Session: **Online Banking Specifications – Part 1**

Overview: Do you know all the options available in the Retail & Business Online (RO/BO) Banking specifications? Learn how the Access Manager specifications control the defaults and report options of these important client connections to your financial institution. Join us for Part 1 of 2 sessions to review and discuss Institution, Transaction Options & Plans, and Business Online Product and Client Default specifications.

Audience: Clients currently using, or interested in, using Online Banking; applicable to both in-house and service center clients.

Breakout Session 4: 2:15 – 3:15 p.m.

Session:	**Deposits: Automating Charge Offs**
Overview:	Monitoring, closing, and recovering overdrawn deposit accounts manually can be an incredibly time consuming task. In this session, we explore the options Premier offers for automating this process – right in the core software. We will look at how to set up automatic notifications and account charge offs that align with your institution's policies and timelines. We'll also discuss options for automatic credit bureau reporting and recovery processing. By the end of this session, you will have all the information you need to start automating your deposit charge off process.
Audience:	Personnel responsible for managing deposit account charge offs; applicable to both in-house and service center clients.
Session:	**Loans: Loan & Related Enhancements**
Overview:	Are you taking full advantage of the software and staying up-to-date on all the features and functionality? To make the most efficient use of the software, it's important to understand and implement the latest enhancements. Attend this session to learn about the Premier loan, collateral, CIF/CIS, and security enhancements that are included in the 9.2, 9.3, and 9.4 releases.
Audience:	Personnel responsible for Premier core applications; applicable to both in-house and service center clients.
Session:	**Online Banking Specifications – Part 2**
Overview:	Do you know all the options available in the Retail & Business Online (RO/BO) Banking specifications? Learn how the Access Manager specifications control the defaults and report options of these important client connections to your financial institution. Join us for Part 2 of 2 sessions to review and discuss ACH Manager, Wire Manager, and Role permissions.
Audience:	Clients currently using, or interested in, using Online Banking; applicable to both in-house and service center clients.

Breakout Session 5: 3:30 – 4:30 p.m.

Session:	**Deposits: Peer Networking & Knowledge Exchange**
Overview:	Looking for ways to streamline your processes? Need some additional ideas on how to reduce expenses and increase revenue? Join your Deposit peers for an open hour of networking and knowledge exchange on a wide variety of topics that you can control! This session will allow you to visit with your peers based on asset size. Bring your questions and comments on processes, procedures and efficiencies to see what else you can learn and share with each other.
Audience:	Deposit and Operations personnel; applicable to both in-house and service center clients.
Session:	**Loans: Peer Networking & Knowledge Exchange**
Overview:	Looking for ways to streamline your processes? Need some additional ideas on how to reduce expenses and increase revenue? Join your Loan peers for an open hour of networking and knowledge exchange on a wide variety of topics that you can control! This session will allow you to visit with your peers based on asset size. Bring your questions and comments on processes, procedures and efficiencies to see what else you can learn and share with each other.
Audience:	Loan and Operations personnel; applicable to both in-house and service center clients.

Premier and Related Solutions Road Map: 8:30 – 9:15 a.m.

Fiserv realizes you need to be aware of upcoming releases and new products in development so you can formulate the proper strategic plans. This session provides both a holistic and detailed view of the planned rollout of upcoming releases and new solutions. You will learn about Active Releases (scheduled for completion within the next 0-6 months), Scheduled Releases (scheduled for completion within the next 7-12 months), and Strategic Releases (planned, but not yet scheduled or started). Having a firm understanding of this information can help you set priorities and focus your institution's energy and resources. Additionally, this is an opportunity for you to collaborate with the product analyst team for the Premier bank platform, allowing you to share your opinions and ideas on product release processes.

Breakout Session 6: 9:30 – 10:45 a.m.

Session:	**All about the CIF**
Overview:	This session will focus on Name and Address maintenance. We will begin with a discussion of the Address Change Management wizard for changing mailing addresses. We will then focus on the benefits of maintaining a single customer name and address record and the efficiency of using the Name Merge and Address Merge Wizards. We will sum up our discussion with a look at fields at the name level affected by the Beneficial Ownership ruling.
Audience:	All bank employees responsible for maintaining customer information as well as those seeking better understanding of CIF structure
Session:	**Loans: Specifications 101**
Overview:	Understanding how Premier loan specifications support daily loan activities is critical to maximizing Premier features and functionalities. This session includes an overview of Premier loan specifications and how the specifications support lending operations.
Audience:	Loan personnel responsible for establishing and maintaining loans specifications, or those seeking a better understanding of how specifications affect the daily processing of loan accounts.
Session:	**Business Process Manager Administrator: Management, Products & Reports**
Overview:	Are you looking to develop more knowledge of the basic features of Business Process Manager Administrator? Attend this course which focuses on the Management, Products and Reports categories. Gain the insight you need to be confident with options in these categories ranging from Management Specifications, Tasks, Workgroups and Comparisons to Products to Reports Specifications and Audits.
Audience:	Personnel familiar with Business Process Manager Administrator; applicable to both in-house and service center clients.

Breakout Session 7: 11:00 – 12:15 p.m.

Session:	**Deposits: Specifications 101**
Overview:	Understanding how Premier deposit specifications support daily activities is critical to maximizing Premier features and functionalities. This session includes an overview of Premier DDA, SAV and COD specifications and how the specifications support deposit operations.
Audience:	Deposit personnel responsible for establishing and maintaining DDA, SAV and COD specifications, or those seeking a better understanding of how specifications affect the daily processing of deposit accounts.
Session:	**Loans: All about Fees**
Overview:	Do you want a better understanding and more control over the assessment of fees? If so, then this session is for you! This session will focus on all aspects of placing fees on loans using the Premier Loan application; including fee specifications, defaulting fees onto new loans, both financed and prepaid, and income deferral. Learn from Fiserv experts how to make your work life easier!
Audience:	Loan personnel responsible for booking loans, assessing fees, and maintaining the note account; applicable to in-house and service center clients
Session:	**Business Process Manager: Wizards & Workflows**
Overview:	Wizards and Workflows are used in Business Process Manager to gather information and define the steps in a process. In this session we will look at ways to create new Wizards and update existing Wizards with techniques to maximize their effectiveness and efficiency in gathering information. In addition we will look at the components of Workflows and how using Transitions and Actions can streamline processes.
Audience:	Personnel familiar with Business Process Manager Administrator; applicable to both in-house and service center clients.

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