UNITI · EAST

PEAK CONSULTING

2-Day Pre-Conference Training — April 29-30th, 2024

Monday 4/29/24	Deposits *(Connecticut Room)*	Loans *(Rhode Island Room)*	Business Analytics/ Automation *(Cumberland Room)*
8:30-9:00	Introduction - *(Cumberland Room)* — In this session we will introduce the Peak team and review the session topics that will be covered over the next 2 days. This will allow members of your team to set themselves up for success, getting the most value from the conference.		
9:00-10:20	**Exception Item Module: Decision Plan Workshop** — *Decision plans can create consistency when making NSF decisions by taking the guess work out of when to pay or return and whether a charge should be assessed. Join us for an interactive session where we will discuss how to set up various decision plans for different class codes and exception accounts. Bring your DDA Class specs, SAV Class specs and EIM specs to practice building these decision plans for your institution.*	**Credit Bureau Coding, Error Resolution, and SBA Reporting** — *This session offers everything you need to know about credit bureau reporting and all the resources that help ensure you are reporting properly. We'll discuss Fiserv Premier® specific considerations and discuss how you can best understand errors on the system. We'll also have a round table around reporting SBA and other Commercial loans to D&B and how to address these loans in your normal credit file. In this session receive a tip sheet on Credit Bureau reporting that will help you better understand the available resources that will enable you to report accurately and successfully.*	**Taming the Data Jungle: Monitoring File Maintenance with Business Analytics** — *Struggling to track file maintenance changes and identify inconsistencies? This session guides you through leveraging Business Analytics as a powerful audit tool. Learn how to structure usable file maintenance reports containing only the changes you want to review.*
10:20-10:40	Break		
10:40-12:00	Deposit Roundtable	Loan Roundtable	Business Analytics/Automation Roundtable
12:00-1:00	Lunch - *(New Hampshire Room)*		

1:00-2:20	**Trancodes, IES Specs, and Transaction Reporting in BA - (Cumberland Room)** *In this session we will discuss IES setup, transaction reporting and everything in between. We will talk through the process to setup or request a new trancode and all things to consider such as posting order and transaction restriction codes. We'll also talk through descriptions and how to know which description will be posting to the customer account. Finally, we'll show you how to properly pull transactions through Business Analytics that will eliminate reversal transactions and other erroneous data.*
2:20-2:40	**Break**

2:40-4:00	**TMS: Efficiency, Accuracy and Security in Transactions (Rhode Island Room)** *In this session you'll learn about the efficiencies and security around TMS but you'll also learn so much more. Well discuss how to optimize Templates, Trancode Groups, and Security. We'll have an interactive session and go through building a template, what the different settings mean, and even how to attach a template at the account level so you can launch straight into a template from an account. Ever have large amounts of trans to post at once? We'll also discuss how an IF3 file can be used to import transactions into a block from a spreadsheet.*	**Unleash the Power of Combined Data: Mastering Joins & Unions in Business Analytics** *Feeling limited by single datasets? This session unlocks the true potential of Business Analytics by diving into the world of Joins and Unions. Discover how to seamlessly combine data from multiple applications, revealing deeper insights and unlocking hidden stories while avoiding those pesky cross-join errors.*

Tuesday 4/30/24	**Deposits (Connecticut Room)**	**Loans (Rhode Island Room)**	**Business Analytics/ Automation (Cumberland Room)**

8:30-9:30	**General Roundtable - (Cumberland Room)** *In this Q & A session we will take topics from all areas with everyone together as a group. We often benefit from hearing about pain points and feedback from other areas of the bank, in addition to our own. Bring your roundtable topics to this session that may not have been previously addressed or if you desire to address a larger audience.*
9:30-9:40	**Break**
9:40-10:50	**Data Descriptions, Flex Fields & Reporting - (Cumberland Room)** *In this session you'll learn how to create efficiencies to adding information to the system in a consistent way that will improve efficiency and reporting. But what about when the system doesn't have the field I'm looking for? We'll discuss Flex Fields and where all Flex Fields can be defined. We'll even discuss the different types of Flex Field data and have a working session on setting up new Flex Fields, Data Descriptions, and building BA reports around this data. Have struggles with items on the core that do not have Data Descriptions (Like loan Payment Recalc Codes)? We'll discuss how you can add descriptions through your reporting to make more meaningful data. Attend this session and receive a tip sheet with everything you need to know on Data Descriptions, Flex Fields, and reporting on this data.*
10:50-11:00	**Break**

	Security Meets Efficiency: Utilize SCM for Consistent User Creation	**Loan Critical Codes Structuring and Considerations for Future Growth**	**From Data to Dialogue: Craft Personalized Letters with Business Analytics**
	Excited to get new employees, but dread setting up their core access? In this session we will review SCM Functions and discuss how security groups can assist in setting up future users. We'll have a group discussion to understand how others are setting up their security groups and point out best practices and considerations when taking this approach.	*Ever wonder about the various codes on the Fiserv Premier® system and how to best leverage them? Would you like to make Call Reporting easier and have more granularity around Loan Concentration reporting? We'll discuss Class Codes, Product Codes, Collateral Codes, Status Codes, Risk Rating loans, Audit Pull Files, and more! Be ready to share with the group what has worked for your institution and what challenges you still face. We will have some round table time to share thoughts and attendees will receive a tip sheet with information on the various codes on the system and how they may be best used.*	*Tired of generic, impersonal communications? This session empowers you to leverage Business Analytics to generate custom, data-driven letters with the use of Page Sets. Learn how to seamlessly pull information from the Core and weave it into individualized messages targeting your customers.*
11:00-12:00			
12:00-1:00	**Lunch - *(New Hampshire Room)***		