

Course Descriptions

and

Class Schedules

July - September 2010



Bank Tutor



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BankTutor is the free education service offered to FSI clients via Citrix GoTo Meeting. Client training of existing products, new product introductions and upgrades are the primary focus of BankTutor classes. Private and on-demand classes are available to all clients at a nominal cost.

How can I sign up for a class?

Registration for each class is required as seating is limited. To register for a class, contact Chris Sharpe at ext. 317 or send an e-mail to BankTutor@insideFSI.net.

A confirmation e-mail along with instructions will be sent to each attendee alerting him or her to event, time, and date.

ACH Processing (Thrift)

Class Description:

This class will take the attendee through the EFTACH processing flow, locating and identifying all FSI reports relating to EFTACH, adjustments processing for all applications, stops, returns and corrections and the creation of outgoing ACH transactions for loan payments via the FSI transfer system.

Prerequisite:

Knowledge of Windows and Thrift system

Who should take this class:

Accounting clerks, anyone responsible for ACH back office posting functions.

Class Available:

Tuesday, July 13	9:30 - 10:15 am
Tuesday, August 10	9:30 - 10:15 am
Tuesday, September 14	9:30 - 10:15 am

Accounts Payable

Accounts Payable (Thrift)

Class Description:

This class will take the attendee through a product overview. Topics include equipment and hardware requirements, system concepts and options: capture, maintenance, payments, history, document review and reports.

Prerequisite:

FSI General Ledger system knowledge and accounting background.

Who should attend this session:

Accounting staff or accounts payable clerks.

Class Available:

Thursday, July 8	10:45 - 11:30 am
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Accounts Payable (Bankway)

Class Description:

Simple review of the Accounts Payable System developed by FSI for processing in conjunction with Bankway. Review of setup of vendors, processing of checks creation of files and interface to account reconciliation system.

Prerequisite:

Knowledge of accounting.

Who should take this class:

Accounting Department employee or responsibility for bill payment.

Class Available:

Monday, August 9 1:30 - 2:15 pm

BankInfo (Bankway)

Class Description:

This class is an overview of the BankInfo/MS Access environment. Users will be introduced to the various customer and account data files available and will learn how to create basic queries.

Prerequisite:

Some Microsoft Access experience preferred but not necessary.

Class Available:

Wednesday, July 7 10:45 - 11:30 am
Wednesday, August 18 1:30 - 2:15 pm
Wednesday, September 22 1:30 - 2:15 pm

BankInfo (Thrift)

Class Description:

This class is an overview of the BankInfo/MS Access environment. Users will be introduced to the various customer and account data files available and will learn how to create basic queries.

Prerequisite:

Some Microsoft Access experience preferred but not necessary.

Who should take this class:

All current Info users. Marketing department employees regardless of BankInfo experience may find this presentation enlightening as well.

Class Available:

Tuesday, July 20	9:30 - 10:15 am
Tuesday, August 24	9:30 - 10:15 am
Tuesday, September 14	1:30 - 2:15 am

BankView Admin (Thrift and Bankway)

Class Description:

This class covers basic daily functions such as signing on, report downloads, viewing and printing as well as basic screen navigation.

Prerequisite: Knowledge of BankView.

Who should attend this session:

BankView Administrators and users.

Class Available:

Wednesday, July 14	10:45 - 11:30 am
Wednesday, August 11	1:30 - 2:15 pm
Tuesday, September 28	1:30 - 2:15 pm

BankWatch Basics (Thrift and Bankway)

Class Description:

This class offers an introduction into adding and maintaining user IDs/passwords, modifying search policies, Accept List handling and reviewing activity reports.

Prerequisite:

Knowledge of BankWatch.

Who should attend this class:

All who routinely uses BankWatch.

Class Available:

Monday, July 26	1:30 - 2:15 pm
Monday, August 23	1:30 - 2:15 pm
Wednesday, September 15	1:30 - 2:15 pm

Basic Security (Bankway)

Class Description:

An overview of how Bankway Security works. Adding, deleting and granting permissions to users of all security levels.

Prerequisite:

Basic knowledge of security profiles and parameters.

Who should take this class:

Those responsible for bank security - administrators.

Class Available:

Wednesday, July 14	1:30 - 2:15 pm
Wednesday, August 25	1:30 - 2:15 pm
Wednesday, September 8	9:30 - 10:15 am

File Transfer Wizard (Bankway)

Class Description:

The FSI File Transfer Wizard is a browser accessible utility to assist in the transfer of files to and from FSI. Uploaded files will be processed by the FSI core system. The system also supports file downloads to the client. A status section provides for a useful, real-time picture of the last 7 days activity. A security log is also being generated capturing all valid and in-valid access attempts and actions taken.

Prerequisite:

Basic knowledge of Microsoft Windows and ACH Processing

Who Should Attend:

Administrators, Accounting Dept., Supervisors.

Class Available:

Thursday, July 15	9:30 - 10:15 am
Thursday, August 12	1:30 - 2:15 pm
Wednesday, September 29	1:30 - 2:15 pm

IRA

IRA (Bankway)

Class Description:

This class will take the attendee through the processing of plan type, automatic distribution, withholding, plan limits, adjustments to monetary amounts, death distribution and federal reporting.

Prerequisite:

Knowledge of Bankway System

Who should attend this session:

Those responsible for servicing IRA accounts

Class Available:

Tuesday, July 13	1:30 - 2:15 pm
Tuesday, August 17	1:30 - 2:15 pm
Tuesday, September 21	10:45 - 11:30 am

IRA (Thrift)

Class Description:

This class will take the attendee through group/plan/participant setup, account types and categories, account linkage and TDC's, age and watch limits, distributions, forecast reports and more.

Prerequisite:

Knowledge of 2020 Banking System

Who should attend this session:

Those responsible for servicing IRA accounts

Class Available:

Tuesday, July 20	10:45 - 11:30 am
Tuesday, August 10	10:45 - 11:30 am
Thursday, September 9	10:45 - 11:30 am

Loans

Loans (Bankway)

Class Description:

This class is a basic overview of the loan system via Bankway. It will show the various loan inquires necessary or everyday duties. Transaction processing for back office personnel will also be reviewed.

Prerequisite:

None

Who should attend this session:

Those responsible for servicing a loan on the system and performing back office duties.

Class Available:

Thursday, July 8	1:30 - 2:15 pm
Thursday, August 26	2:45 - 3:30 pm
Monday, September 13	1:30 - 2:15 pm

Loans (Bankway) - Adding New Loans

Class Description:

This class will cover the preliminary steps to add a loan to the system via Bankway. .

Prerequisite:

Having previously added loans in the banking system

Who should attend this session:

Those responsible for booking new loans.

Class Available:

Friday, July 16	10:45 - 11:30 am
Friday, August 20	1:30 - 2:15 pm
Thursday, September 23	10:45 - 11:30 am

Escrow Analysis (Bankway)

Class Description:

This class will step the attendee through the initial loan set-up and required maintenance to the point of the system generating an escrow analysis.

Prerequisite:

Basic knowledge of how a loan works, what escrow is and why a bank would use escrow.

Who should take this class:

Those responsible for loan transactions and escrow analysis.

Class Available:

Monday, July 19	2:45 - 3:30 pm
Friday, August 27	9:30 - 10:15 am
Monday, September 27	2:45 - 3:30 pm

Escrow Analysis (Thrift)

Class Description:

Ordering and reviewing preliminary escrow analysis reports, making corrections and ordering final reports.

Prerequisite:

A full understanding of the purpose of escrow analysis and a comprehensive knowledge of the Loan System's escrow disbursement and escrow analysis functions.

Who should take this class:

Those responsible for escrow analysis.

Class Available:

Friday, August 20	9:30 - 10:15 am
Friday, September 10	9:30 - 10:15 am

Loan History and Transaction Reversals (Thrift)

Class Description:

Overview of procedures for transaction reversals and review of the various Loan History screens.

Prerequisite:

Requires a comprehensive understanding of the Loan System fields and loan transaction processing.

Who should take this class:

Persons responsible for processing loan maintenance and payments.

Class Available:

Wednesday, August 25	9:30 - 10:15 am
Tuesday, September 15	9:30 - 10:15 am

Retail Banking Back Office Intro (Thrift)

Class Description:

Overview of operation procedures, signing on to the system, changing sign-on password, adding customer files, account opening, account maintenance, customer information maintenance and account inquiry.

Prerequisite:

General Banking and Back Office knowledge

Who should take this class:

Tellers and Teller trainees.

Class Available:

Friday, July 30	9:30 - 10:15 am
Tuesday, August 10	1:30 - 2:15 am
Friday, September 9	9:30 - 10:15 am

Teller Intro (Bankway)

Class Description:

Overview of procedures and transaction processing including signing on to the system, security, utilizing the function keys, navigating through teller menus, selecting transactions, repairing off-line transactions, changing sign-on password, changing the processing date, processing off-line transactions, balancing cash drawer and signing off the system.

Prerequisite:

None.

Who should take this class:

Tellers and Teller trainees.

Class Available:

Tuesday, July 20	1:30 - 2:15 pm
Thursday, August 19	9:30 - 10:15 am
Wednesday, September 29	9:30 - 10:15 am

Spectrum

Spectrum Security (Thrift)

Class Description:

An overview of how security works and how to add and delete users and grant access to different modules within Spectrum.

Prerequisite:

Knowledge of Spectrum.

Who should attend this session:

Administrators and supervisors.

Class Available:

Monday, July 12	10:45 - 11:30 am
Wednesday, August 18	10:45 - 11:30 am
Wednesday, September 8	10:45 - 11:30 am

Spectrum New Accounts Intro (Thrift)

Class Description:

This class will take the attendee through the various new account opening processes including document printing and uploading customer data to the host.

Prerequisite:

Knowledge of Windows and Spectrum.

Who should attend this session:

Open to all who use Spectrum.

Class Available:

Tuesday, July 6	9:30 - 10:15 am
Monday, August 16	9:30 - 10:15 am
Monday, September 20	9:30 - 10:15 am

Spectrum EJ Intro (Thrift)

Class Description:

This class will take the attendee through the various options and functions of the Electronic Journal including re-entry, searches and more.

Prerequisite:

Knowledge of Windows and Spectrum.

Who should attend this session:

Open to all who use Spectrum.

Class Available:

Friday, July 23 10:45 - 11:30 am

Thursday, August 5 10:45 - 11:30 am

Friday, September 10 10:45 - 11:30 am

Spectrum System Options (Thrift)

Class Description:

This class will give the attendee a better understanding of the various options and settings of Spectrum.

Prerequisite:

Knowledge of Windows and Spectrum.

Who should attend this session:

Spectrum system and branch administrators.

Class Available:

Friday, July 30 10:45 - 11:30 am

Friday, August 27 10:45 - 11:30 am

Monday, September 20 10:45 - 11:30 am

Updating Spectrum (Thrift)

Class Description:

This session will explain in detail how changes are distributed for security, teller and new account databases, BankView, program updates and bank rates for the new account application.

Prerequisite:

Knowledge of Windows and Spectrum.

Who should attend this session:

Spectrum system and branch administrators.

Class Available:

Wednesday, July 28	1:30 - 2:15 pm
Tuesday, August 17	10:45 - 11:30 am
Wednesday, September 15	10:45 - 11:30 am

SuperCIF Intro (Thrift)

Class Description:

This class covers a wide range of information relative to the new customer information file. The class consists of a detailed description of SuperCIF and all the new routines that it includes. Each routine is discussed in length and demonstrations are done for each.

Prerequisites:

There are no prerequisites for this class.

Who should take this class:

Those responsible for customer file maintenance, tellers and platform personnel.

Class Available:

Monday, July 19	1:30 - 2:15 pm
Friday, August 20	10:45 - 11:30 am
Monday, September 27	10:45 - 11:30 am

Windows Financial Information (Bankway)

Class Description:

This will show the benefits and uses of the Windows version of Bankway. Particular emphasis is on analytical tools used in Financial Reporting (Reports and Graphs). A brief discussion of Bank Standards (SAGL records, etc.) is included. Also includes use of Bank Marketing tools. No processing is included.

Prerequisite:

Prerequisite is system knowledge on BankNet (DOS version).

Who should attend this class:

Persons responsible for financial reporting and financial analysis.

Class Available:

Wednesday, August 25 10:45 - 11:30 pm



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