

S1 PRODUCT TRAINING 2006/2007

# S1 Enterprise 3.5 Personal & Business Banking

Available courses

- Using S1 Enterprise 3.5 Personal and Business Banking
- S1 Enterprise 3.5 Personal and Business Banking Administration
- S1 Enterprise 3.5 Personal and Business Banking Installation and Configuration
- S1 Enterprise 3.5 Personal and Business Banking Customization

## USING S1 ENTERPRISE 3.5 PERSONAL & BUSINESS BANKING

### Duration

1 day

### Goal

Participants will learn how to provide customer service using the S1 Application Manager (SAM) and will become familiar with the end-user functionality of both Personal and Business Banking in order to be able to perform on-behalf-of transactions.

### Audience

Primary: CSR (and CSR Manager)

Secondary: Implementers and Operations personnel

### Delivery

Instructor-led, practical (lab-based)

### Courseware

- Participant workbook
- Instructor Guide
- Presentation
- Configuration data/databases

## Course outline

SUBJECT TO CHANGE WITHOUT NOTICE AS COURSE DEVELOPS

### Module 1: Overview

- Overview of Enterprise Platform architecture and functionality
- Introduction to the functionality of Personal and Business Banking

### Module 2: Customer Service

- S1 Application Manager functionality relevant to CSRs
- Adding new customers and companies
- Maintaining existing customer and company information
- Overview of real-time processes
- Account association process
- Performing functions on behalf of customers (the actual functionality is, in effect, dealt with in modules 3 and 4)
- Trouble-shooting common errors

### Module 3: End-user Personal Banking

- Viewing and working with accounts
- Performing transfers between accounts
- Working with external accounts
- Using banking services

### Module 4: End-user Business Banking

- Creating payments (direct Deposit Payroll and Collections)
- Administering commercial end-users
- Uploading ACH and issue files to the financial institution
- Ordering coin and currency

## S1 ENTERPRISE 3.5 PERSONAL & BUSINESS BANKING ADMINISTRATION

### Duration

1 day

### Goal

Participants will learn how to use the S1 Administration (SAM) and Banking Administration tools to administer user access, configure the Personal and Business Banking applications and perform operational tasks.

### Audience

Primary: System Administrators (hosted and on-premises)

Secondary: Implementers, Operations personnel (and CSR Managers)

### Delivery

Instructor-led, practical (lab-based)

### Courseware

- Participant workbook
- Instructor Guide
- Presentation
- Configuration data/databases

## Course outline

SUBJECT TO CHANGE WITHOUT NOTICE AS COURSE DEVELOPS

### Module 1: Overview

- Overview of Enterprise Platform architecture and functionality
- Introduction to the functionality of Personal and Business Banking

### Module 1: User Administration

- Adding back office and customer service users
- Assigning user access permissions
- Performing audits of user activity
- Configuring notices and alerts
- Creating classes of service

### Module 2: Configuration

- Setting system and display parameters
- Defining product types and subtypes
- Configuring product subtype display parameters
- Impact of configuration settings on applications
- Configuration settings that require recycling the online banking system
- Impact of ACH settings on payments

### Module 3: System Operations

- Viewing daily and monthly reports
- Creating and sending marketing messages
- Setting up the processing schedule
- Setting the holiday schedule

## S1 ENTERPRISE 3.5 PERSONAL & BUSINESS BANKING INSTALLATION & CONFIGURATION

### Duration

1 day

### Goal

Participants will learn how to install and configure an initial S1 Enterprise Personal and Business Banking installation as well as perform upgrades and maintenance.

### Audience

Primary: Implementers

Secondary: Systems Administrators (on-premises) and S1 operations personnel

### Delivery

Instructor-led, practical (lab-based)

### Courseware

- Participant workbook
- Instructor Guide
- Presentation
- Configuration data/databases

## Course outline

SUBJECT TO CHANGE WITHOUT NOTICE AS COURSE DEVELOPS

- S1 Enterprise Banking Solutions overview
- Understanding the installation process
- Installation prerequisites
- Installation procedure
- Using the Eclipse S1 Environment Manager
- Configuring and deploying the database server
- Configuring and deploying the application server

Courses	Audience					
	General Personnel	CSR	CSR Manager	System Administrator (hosted)	System Administrator (on premises) & S1 operators	Implementers
Using S1 Enterprise Personal & Business Banking	½ day (Overview only)	1 day	1 day			
S1 Enterprise Personal & Business Banking Administration				1 day	1 day	1 day
S1 Enterprise Personal & Business Banking Installation & Configuration					1 day	1 day
<b>Total days</b>	½ day	1 day	1 day	1 day	2 days	2 days
<b>Certification</b>	None	Certified CSR	Certified CSR Manager	Administrator (hosted)	Administrator (on-premises)	Implementer

## S1 ENTERPRISE 3.5 PERSONAL & BUSINESS BANKING CUSTOMIZATION

### Duration

Varies according to options selected

### Goal

This course prepares participants to undertake customization and extension of Enterprise Personal and Business Banking, which use a TOM based presentation layer.

### Audience

Developers

### Delivery

Instructor-led, practical (lab-based) and demonstration

### Courseware

- Presentation
- Instructor Guide
- Participant Guide (includes Technical Publications)

*For prerequisites and module content, see our brochure*  
**S1 Enterprise 3.5 Customization Courses**

**S1 Corporation** is a leading global provider of integrated front-office applications for more than 3,000 banks and insurance providers around the world. Comprised of applications that address virtually every market segment and delivery channel, S1 solutions help integrate and optimize an institution's entire front office, resulting in increased operational efficiencies, revenue opportunities and overall customer satisfaction.



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