

Precision Power Hour The New Fiserv Xchange

Learning & Client Performance
04/30/2020

Agenda

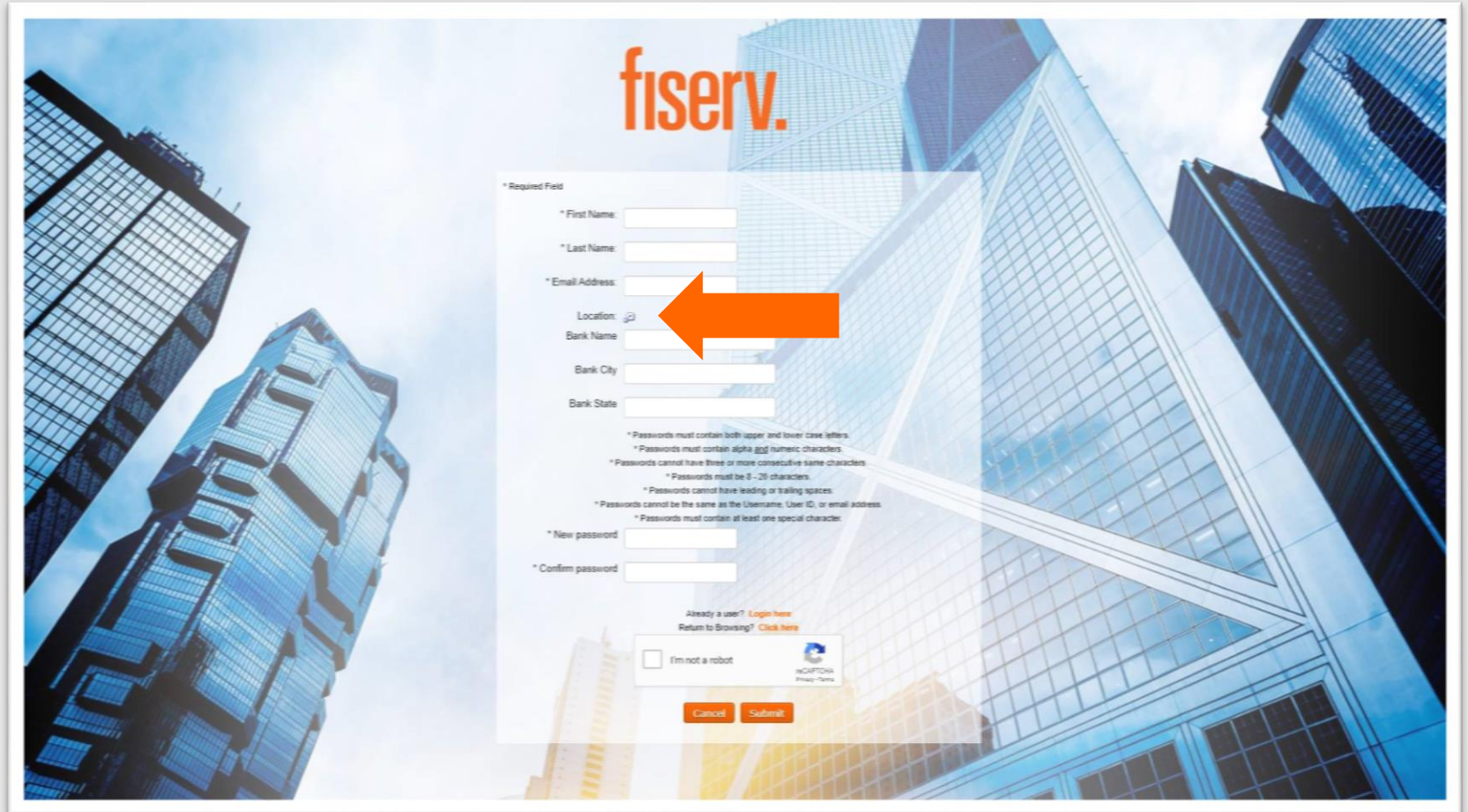
- Welcome
- Benefits of the New Xchange
- Client Registration & Log-In
- Client Welcome Page
- Helpful Terms
- Xchange Demo
- Q&A

Client Benefits of the New Xchange

- Role-based (e.g. Teller, Loan Officer) customizable learning paths (Playlists)
- Enhanced registration approval process
- Dashboard reporting
- Printable events calendar
- Improved password resets

Client Self-Registration (New Users)

- New users will complete a one-time self-registration
- NOTE: New users should enter the Location to ensure the system recognizes the local time zone
- Fiserv Admin team will approve the self-registration (usually takes several hours to be active)



The image shows a screenshot of the Fiserv self-registration form. The form is overlaid on a background image of modern skyscrapers. The Fiserv logo is at the top left. The form fields include: First Name, Last Name, Email Address, Location (with a location pin icon), Bank Name, Bank City, and Bank State. Below these fields are several password requirements: passwords must contain both upper and lower case letters, alpha and numeric characters, cannot have three or more consecutive same characters, must be 8-20 characters, cannot have leading or trailing spaces, cannot be the same as the Username, User ID, or email address, and must contain at least one special character. There are input fields for 'New password' and 'Confirm password'. At the bottom, there is a 'Return to browsing?' link, a CAPTCHA 'I'm not a robot' checkbox, and 'Cancel' and 'Submit' buttons. An orange arrow points to the 'Location' field.

Client Log-In (Existing Users)

- Existing Users will log-in to the new Xchange
- All existing Xchange users were migrated from the old platform
- Existing users will use Learning2020* for initial log-in

Welcome to the **Xchange** @ Fiserv



Email

Password

[Forgot Password? Click Here](#)

If you do not have a login and are a Fiserv client, please contact your Fiserv Business Partner, Client Partner, or Service Partner for assistance.

Client Welcome Page

- Shortcut buttons created to direct clients to the pages they should use most often
- Important information appears in the widgets below the shortcut buttons
 - My Training
 - Your Inbox
 - Training Resources

Virtual Trainer

My Transcript

Learning Search

Events Calendar

Need Assistance

My Training

No Training Available

Your Inbox

[View transcript](#)
(0 approved training selection(s))
(Registered for 0 training selection(s))

Welcome to Fiserv Xchange

Looking to gain valuable, professional insights and training? Fiserv is here for you.

Fiserv Xchange is a comprehensive, easy-to-navigate, learning management tool that allows users to register for courses and complete learning objectives. Whether you are looking to review your learning history, register for upcoming courses, or print certificates of completion, Xchange is a conduit to creating a rewarding knowledge experience.

Connect today and leverage all of the training Fiserv Xchange has to offer.

For assistance, please contact learningandclientperformance@fiserv.com

Pending Evaluations

No Pending Evaluations

Training Resources

End User Training:

- [Learner Tutorial](#)
- [Learner Guide](#)

Org Manager Training:

- [Reporting Org Manager Tutorial](#)
- [Assigning Org Manager Tutorial](#)
- [Approver Tutorial](#)
- [Reporting Org Manager Learner Guide](#)

Helpful Terms—General

Current Xchange	New Xchange	Definition
Dashboard	Welcome Page	The Landing page for all users. Includes the shortcut buttons to Virtual Trainer, My Transcript, Learning Search, Events Calendar, & Needs Assistance pages.
Course	Event	An instructor-led training course.
Class	Session	A single instance of an Event.
eLearning	On-Line Class	An electronic, self-paced course in the Virtual Trainer Library.
Categories	Subjects	How learning is classified. This is the primary way to sort and filter training.
	Playlist	An informal curriculum of courses created by users or Organization Managers that can be shared with others. A solution to custom, role-based curriculum in the LMS.

Helpful Terms—Organization Managers

Current Xchange	New Xchange	Definition
	Learning Assignment Tool	Allows an Org Manager to create learning assignments to assign multiple trainings at one time to any group of users within their organization. The LAT allows Org Managers to circumvent required approvals and automatically register users for training, set up training to be assigned in the future, and assign due dates to training.
	Dashboard	A list of small reports which are all displayed on the same page. Generally smaller in size and include graphs or charts.
Organization Manager	Organization Manager, Reporter	Most basic role. Gives the user reporting and visibility into enrollments and completions for all users at the financial institution. (unlimited number)
	Organization Manager, Assigner	Gives the user reporting authority and access to the Learning Assignment Tool which allows them to assign training and circumvent any approval process. (unlimited number)
	Organization Manager, Approver	Most elevated role. Gives the user reporting and assigning authority as well as the responsibility to approve self-enrollments for all users at the institution. (limited to 2 users)

Xchange Links & Support

- New Users Self-Registration Page Link:
<https://fiserv.csod.com/selfreg/register.aspx?c=banksolutions>
- Existing Users Log-In Page Link:
<https://fiserv.csod.com/Default.aspx>
- For Xchange support, contact the Learning & Client Performance Team at:
learningandclientperformance@Fiserv.com

Q&A

Thank You!