Fiserv

Fiserv Xchange

Organization Manager, Reporter Guide

April 2020

Contents

Introduction

This guide is intended for Organization Managers with a Reporter role within the Xchange Learning Management System. As a Reporter for your financial institution, you are able to complete many tasks on behalf of your team members.

Use this guide in conjunction with the Learner Guide that introduces basic navigation and functions for individual users in Fiserv Xchange.

Icon Key

Icons	What the Icons Represent in the Learning Guide
	Performance Statements
	Practice Activity
	Real World Examples and Stories
	Advanced Practices
	Important Things to Remember
	Tips and Tricks the experts use
	Pitfalls experts try to avoid

Where Are We Going?

Linda is the new Learning Manager at MyFinancial. She is responsible for maintaining records for MyFinancial’s employees. You’ll follow Linda as she learns to use Fiserv Xchange to monitor and report on the employees’ learning.

After completing this course, you will be able to:

- Run and view reports.

How Are We Going to Get There?

The course uses real-world scenarios and step-by-step instructions accompanied by screen captures.

Reporting

Linda can get different information from the various reports available on Fiserv Xchange.

Performance Statements

After completing this module, you will be able to:

- Access the report dashboards.
- View standard reports.
- View pre-built reports.

Notes

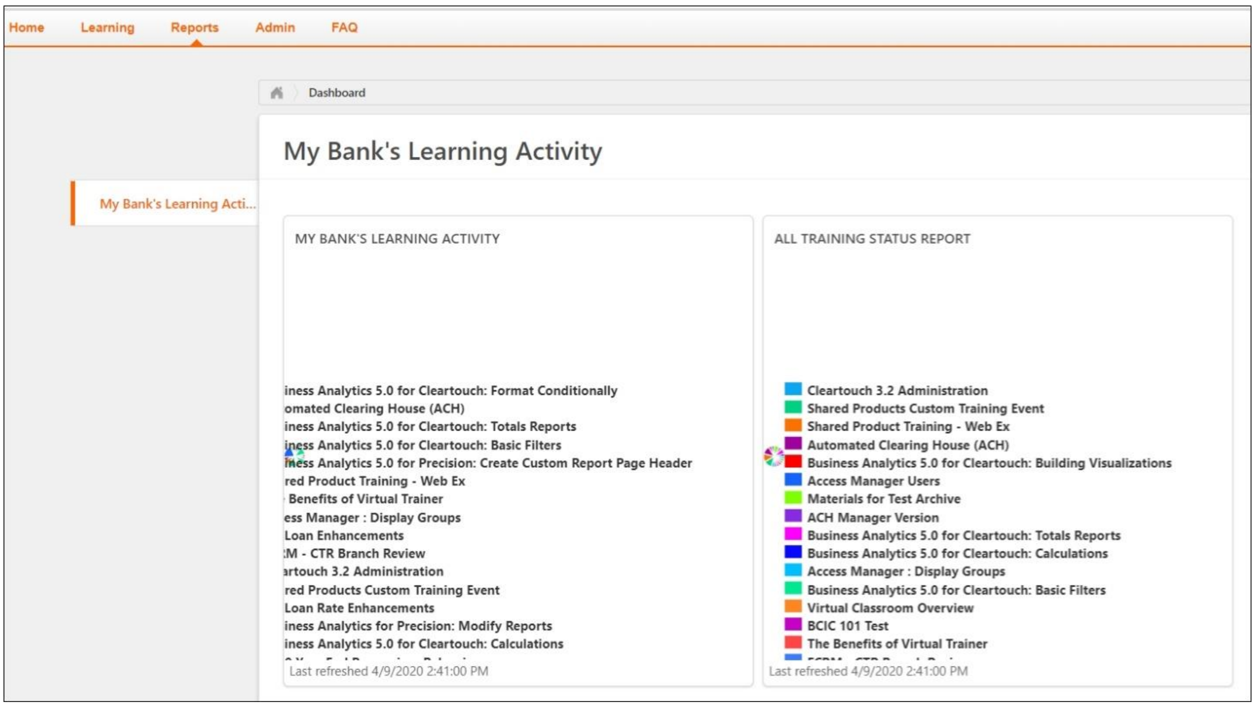
Access Report Dashboards

The first thing Linda Learning Manager needs to do is get a general idea of the learning progress at MyFinancial. She can do that with the report dashboards.

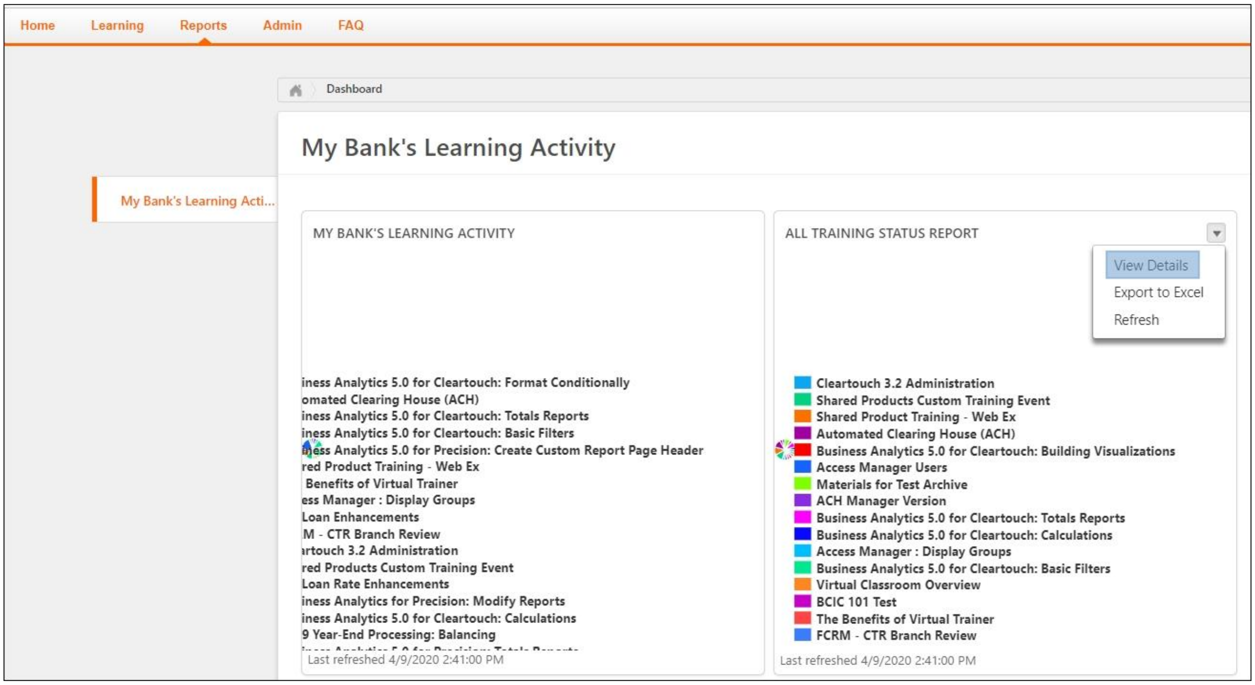
The report dashboards show the reports that have been shared with you. You can see a brief overview of all your training statuses and learning activities here.

How To:

1. From the Welcome page, hover over **Reports** in the toolbar.
2. Select **Dashboards**.
3. You'll see two report lists. The system automatically includes the information listed under each report type. Click on an item in the list to remove it from the report.



4. Open the options menu in the upper right-hand corner of the of the report lists. Select **View Details** to open the report summary.



Home
Learning
Reports
Admin
FAQ
Dashboard
My Bank's Learning Activity
My Bank's Learning Acti...
MY BANK'S LEARNING ACTIVITY
iness Analytics 5.0 for Cleartouch: Format Conditionally
omated Clearing House (ACH)
iness Analytics 5.0 for Cleartouch: Totals Reports
iness Analytics 5.0 for Cleartouch: Basic Filters
ess Analytics 5.0 for Precision: Create Custom Report Page Header
red Product Training - Web Ex
Benefits of Virtual Trainer
ess Manager : Display Groups
Loan Enhancements
M - CTR Branch Review
rtouch 3.2 Administration
red Products Custom Training Event
Loan Rate Enhancements
iness Analytics for Precision: Modify Reports
iness Analytics 5.0 for Cleartouch: Calculations
9 Year-End Processing: Balancing
Last refreshed 4/9/2020 2:41:00 PM
ALL TRAINING STATUS REPORT
View Details
Export to Excel
Refresh
Cleartouch 3.2 Administration
Shared Products Custom Training Event
Shared Product Training - Web Ex
Automated Clearing House (ACH)
Business Analytics 5.0 for Cleartouch: Building Visualizations
Access Manager Users
Materials for Test Archive
ACH Manager Version
Business Analytics 5.0 for Cleartouch: Totals Reports
Business Analytics 5.0 for Cleartouch: Calculations
Access Manager : Display Groups
Business Analytics 5.0 for Cleartouch: Basic Filters
Virtual Classroom Overview
BCIC 101 Test
The Benefits of Virtual Trainer
FCRM - CTR Branch Review
Last refreshed 4/9/2020 2:41:00 PM

View Standard Reports

Linda needs to know if any employees have not completed their training. She can use standard reports to find detailed information about the employees' training progress.

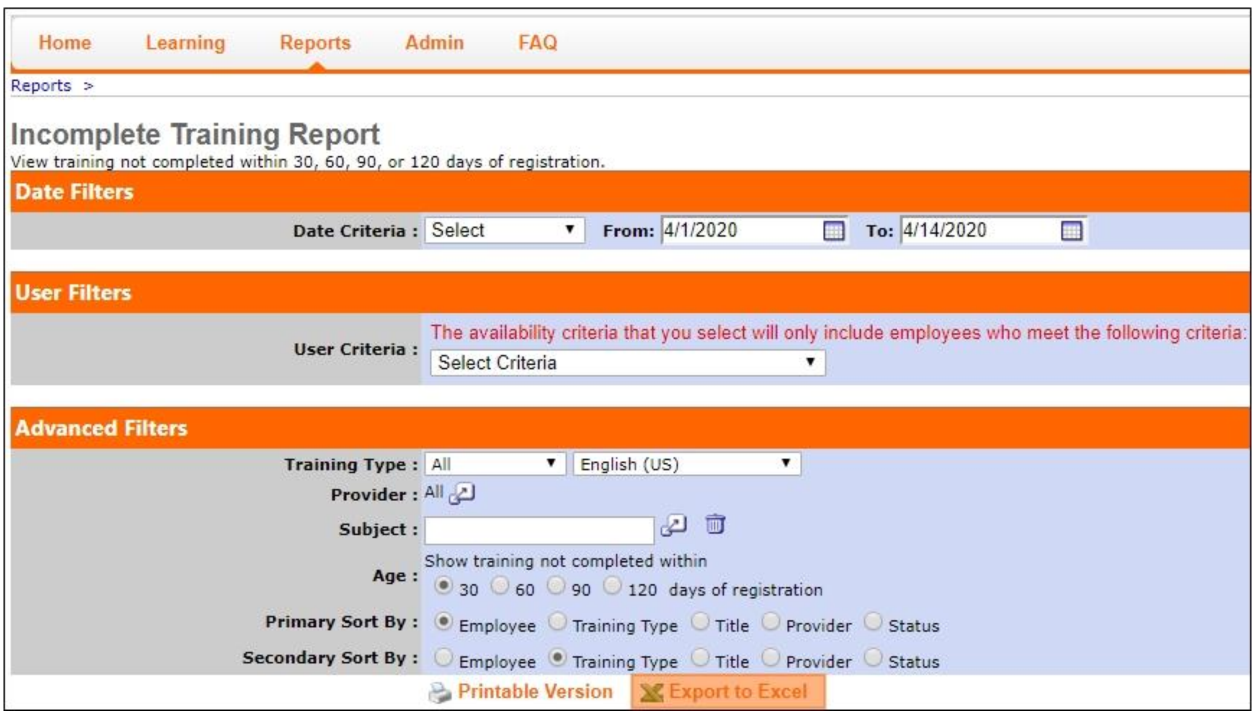
Standard reports provide access to the data sets you need most often.

How To

1. From the Welcome page, hover over **Reports** in the toolbar.
2. Select **Standard Reports**.
3. There are three categories of reports: Track Employees, ILT, and Training. Select a category to view different report groups.
4. Select the report you'd like to run.

To read detailed descriptions of each report, visit [Recommended Standard Reports - Learning].

5. Use the filter options to create a more targeted report. Each report has its own set of filter options.



6. Run the report.
   a. For some reports, you must export the report to view the information. In this case, click **Export to Excel** at the bottom of the filter options.
   b. For some reports, you can view the information within Fiserv Xchange without needing to export it. In this case, click **Search** at the bottom of the filter options.

View Prebuilt Reports with Reporting 2.0

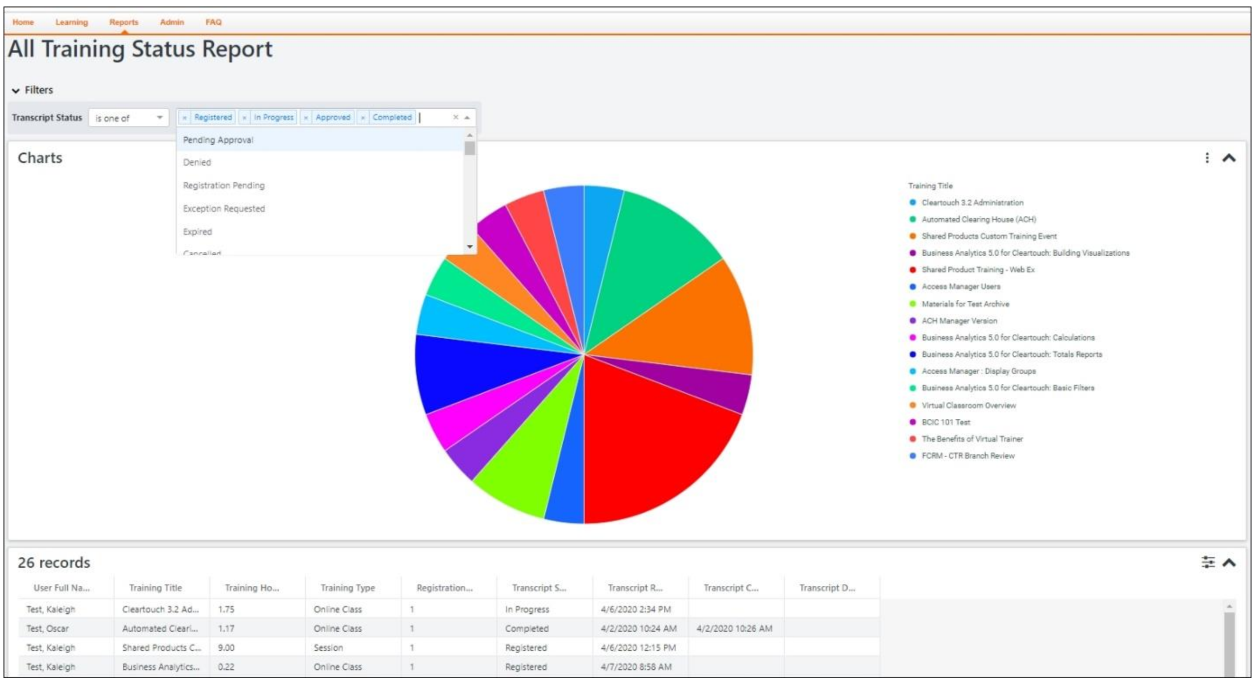
Linda needs a list of all the training that has been completed, sorted by date. She can use one of the prebuilt reports in Reporting 2.0 to get the specific information that she needs.

How To

1. To access Reporting 2.0, hover over **Reports** in the toolbar.
2. Select **Reporting 2.0**.
3. To see the list of prebuilt reports that you have access to, from the list on the left, select **Shared With Me**.

These reports are created by Fiserv. You do not have the option to build your own reports.

4. Select the report you would like to run.
5. Use the filters at the top of the window to create a more targeted report.



6. The report refreshes automatically. At the bottom of the window, you can see all the records for the filters you applied.

Module Summary

Performance Statements

Now you can:

- Access the report dashboards.
- View standard reports.
- View pre-built reports.

Important Things to Remember

- Fiserv creates all the reports found in Reporting 2.0. You do not have the option to create your own custom reports.

Module Summary: What did you learn? How will you use it day to day?

Course Summary

Summary

Linda can now monitor training and report on the learning progress of employees at MyFinancial.

Where Are We Now?

By now, you can:

- Run and view reports.

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