

Viewing and Modifying CIS Fields in GOLDTeller



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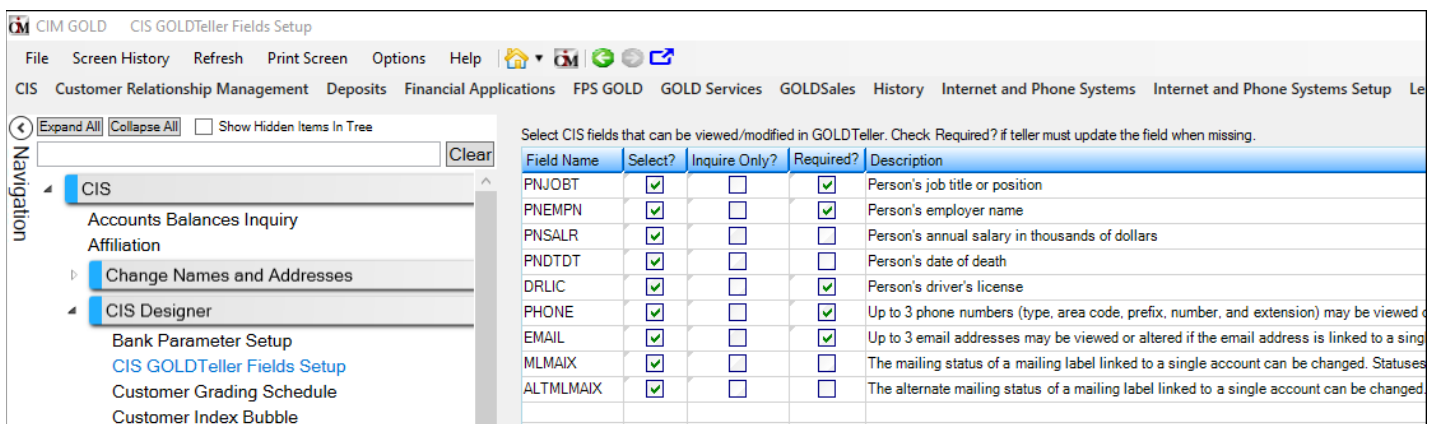
Based on Advisory Board recommendations, FPS GOLD has created a pop-up screen in GOLDTeller so tellers can change some non-critical CIS fields and statuses. The pop-up will automatically open when the system detects information the bank deems important but is not present so the teller can ask for the information while the customer is at the window. The teller can also initiate the pop-up to view and update the fields the bank deems important.

The Board also requested the following:

- A list of fields or statuses the teller could safely update without having file maintenance security settings.
- A secured setup screen with fields banks want to allow the tellers to modify. Suggested fields included occupation, phone numbers, email addresses, “do not mail” indicator, deceased indicator, bad address indicator, and other possible solutions to handle incorrect addresses.

CIS GOLDTeller Fields Setup Screen

In response to these requests, a new screen has been added to the CIS > CIS Designer navigation tree in CIM GOLD that allows bank employees to select which CIS fields tellers can modify in GOLDTeller. See the example below.



CIS > CIS Designer > CIS GOLDTeller Fields Setup Screen

Mnemonics for the fields the system supports are shown at the left of the list view. Check the appropriate check boxes to indicate which fields the bank will allow and how they will be presented (Select, Inquiry only, or Required). The columns in the list view are explained below.

- **Field Name** – This is the name of the CIS field or group of fields that is available to be presented to the teller for viewing and/or updating.
- **Select?** – When this box is checked, this field will be made available to the teller.
- **Inquiry only?** – When this box is checked, the teller can view the field but cannot make changes.
- **Required?** – When this box is checked, the CIS information will open automatically if this field is blank so the teller can gather the missing information. If the customer cannot or will not provide the missing information, the teller can continue with the transaction. In this sense, the word “required” means the system is required to notify the teller automatically to ask for missing information and be able to enter it at the teller window. It does not mean that the teller is required to gather the information or else the transaction cannot run.
- **Description** – This is a long description of the field or group of fields to which this **Field Name** refers.

Some fields cannot be required fields, such as Person’s annual salary, date of death, and mailing statuses. Fields that can be required have a small gray triangle in the upper-left corner of the cell containing the check box.

Checking the **Inquiry only?** or the **Required?** check boxes will automatically check the **Select?** check box and uncheck the other. For example, if **Inquiry only?** is checked, **Required?** will be unchecked, and **Select?** will be checked automatically. Unchecking **Select?** will automatically uncheck **Inquire?** and **Required?**

Once all fields are selected in the desired mode, click the <Save> button at the bottom of the screen to make these selections available in GOLDTeller. The options will display the next time the teller signs on to GOLDTeller. Or, if the teller is already signed on, the options will display the next time GOLDTeller is refreshed. Changes may not take place immediately.

GOLDTeller

In GOLDTeller, if the bank has chosen to allow the teller to view and/or modify any fields in the setup screen, a small grey circle with a white “i” means that CIS fields are available. This indicator will be displayed in the Personal Information section of the GOLDTeller transaction screen. See the example below.

The screenshot shows the GOLDTeller interface. At the top, there are menu items: Functions, Speed Keys, Options, CIS Search (F9), and Multiple Tra. Below this, the user ID 'STEVEC' and a numeric value '0899' are displayed. A list of transaction types is shown on the left, including Deposits, Travelers check, Loans, Names/Address, G/L Debit/Credit, Teller/Vault, Cashiers Checks etc, FASTRAK, Account# Inq, Check Digit Inq, Safe Deposit Boxes, Miscellaneous, and Teller Over/Short. The 'Personal Information' section is highlighted, containing fields for Customer Number, Home Phone Number, Birth Date, and Mother's Maiden Name. A small grey circle with a white 'i' is located in the top right corner of this section, enclosed in a red box.

When a name is selected, the indicator color changes to blue, as shown below.

This screenshot shows the 'Personal Information' section after a name has been selected. The fields now contain: Customer Number: 987-65-4321, Home Phone Number, Birth Date: 08/01/1973, and Mother's Maiden Name. The small grey circle with the white 'i' is now blue and is enclosed in a red box.

Click on the blue circle to open the window that shows the requested CIS fields, as shown below. If required fields are missing, this window is automatically displayed when the name is selected.

The dialog box titled 'View and/or Modify CIS Fields' is shown. It has a red 'X' in the top right corner. On the left, there is a text input field labeled 'Job Title or Position'. On the right, under 'Name and Account Information', the following details are displayed: Name: Black Smithy, Number: 987-65-4321, and Account: (empty). At the bottom, there are 'Close' and 'Save' buttons. A red asterisk followed by the text '* Please provide missing information' is located at the bottom left of the dialog.

The example above shows the screen when only the **Job Title or Position** field is selected and it is marked as “Required.” The teller is asked to provide the missing information but may close the screen without entering the data.

The following example shows the screen when all available fields are selected and all possible fields are required.

View and/or Modify CIS Fields

Job Title or Position:

Employer:

Salary in Thousands:

Deceased? Date of Death:

Driver's License

ID Number	State	Issued	Expires
<input type="text" value="14211WWW222"/>	<input type="text" value="HI"/>	<input type="text" value="01/01/2020"/>	<input type="text" value="01/01/2025"/>

Phone Numbers

Type	Area Code	Prefix	Number	Extension	Delete?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Email Addresses

Address	Delete?
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>

Name and Account Information

Name: **Black Smithy**

Number: **987-65-4321**

Account:

* Please provide missing information

Close Save

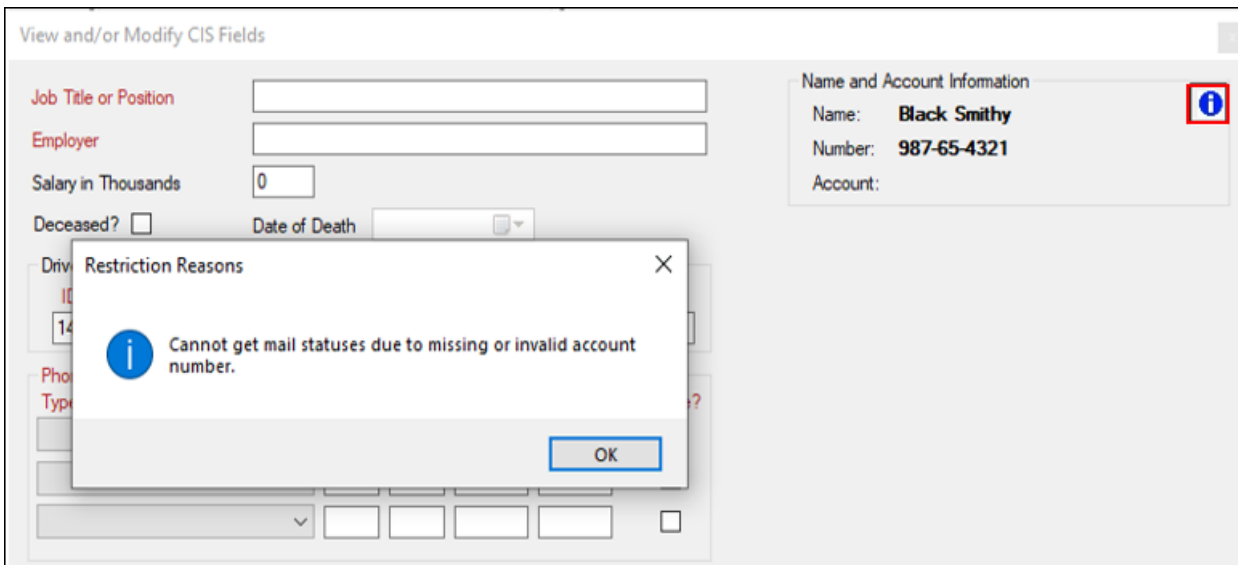
Possible fields that can be viewed and altered are shown above. Remember, only fields selected on the setup screen will be shown in this window.

- **Job Title or Position** – Only available when the selected name is a person.
- **Employer** – Only available when the selected name is a person.
- **Salary in Thousands** – Only available when the selected name is a person.
- **Deceased and Date of Death** – When a person is deceased, checking the check box allows the date to be changed. Unchecking the box clears the date. The window requires that you enter a valid death date if the box is checked.
- **Driver's License** – Although in CIS a user can enter several forms of ID to verify identity, we have chosen to support only the driver's license to keep data entry here simple and fast. For this and other fields later, if the data does not fit into the fields displayed, tellers should refer the changes to bank personnel using the procedures that were in place before the release of this feature.
 - **ID Number** – The driver's license number.
 - **State** – State abbreviation of the state where the license was issued.
 - **Issued** – Date the driver's license was issued. (**Note:** This field label is not red, meaning it is not required. We have noticed that many of our banks don't collect the issued date.)
 - **Expires** – Date the driver's license will expire.
- **Phone Numbers** – The teller can view and collect up to three different phone numbers. Phone numbers must not be linked to multiple names or multiple accounts. When that condition occurs, the phone numbers will be displayed as "inquiry only," and information about why the phone numbers cannot be altered will be provided. See the paragraph following the bullet points below. GOLDTeller only supports USA phone numbers. Foreign phone numbers or phones with extra restrictions should be entered or modified in the CIS screens.
 - **Type** – Select the type of phone from the drop-down list, such as Home Phone.
 - **Area Code** – The three-digit area code of the phone number.
 - **Prefix** – The three-digit prefix of the phone number.
 - **Number** – The four-digit number of the phone number.
 - **Extension** – Up to six-digit extension number.
 - **Delete** – Check the box to remove the phone from CIS.

- **Email Addresses** – The teller can view and collect up to three different email addresses. Email addresses must not be linked to multiple names or multiple accounts. When that condition occurs, the email addresses will be displayed as “inquiry only,” and information about why the email addresses cannot be altered will be provided. See the paragraph following these bullet points. GOLDTeller only supports the email address. When extra settings or restrictions for email addresses are needed, they should be entered or modified in the CIS screens.
 - Address – the email address.
 - Delete – check the box to delete an email address.
 - Please note that when no email address is on file, and one is added it is added as the primary email address. You cannot delete the primary email address here.

Items Not Available for Change

The blue circled “i” in the corner of the name and account information box indicates that some fields may not be available for change on this screen and gives the reasons why. Click it to display the reasons. See the example below.



In this example, the message is telling us that, since no account has been selected, we cannot display or update the mail statuses. It requires an account to find its mailing label to update statuses.

Changes made in GOLDTeller to CIS are shown in CIS history as seen below:

Link History Results Found

Entity	Date	Time	User Name	User Number	Action	Description			
Person	03/10/2023	07:06:37	*FPS EMP	*899	Updated	Black Smithy	987-65-4321	Born: 08/01/1973	ID Not Checked
Phone	03/10/2023	07:06:38	*FPS EMP	*899	Added	(801) 555-3456	No Restrictions		
Phone	03/10/2023	07:06:54	*FPS EMP	*899	Added	(801) 555-4141	No Restrictions		
Phone	03/10/2023	07:06:54	*FPS EMP	*899	Updated	(801) 555-4141	No Restrictions		
E-Mail	03/10/2023	07:06:38	*FPS EMP	*899	Added	For Person: Black Smithy	junk@stuff.com Seq:0		
E-Mail	03/10/2023	07:06:54	*FPS EMP	*899	Added	For Person: Black Smithy	coward@stuff.com Seq:1		
E-Mail	03/10/2023	07:07:14	*FPS EMP	*899	Dropped	For Person: Black Smithy	Seq:1		
E-Mail	03/10/2023	07:07:59	*FPS EMP	*899	Added	For Person: Black Smithy	coward@stuff.com Seq:1		

Fields	Previous Value	New Value	Mnemonic
Email Address		junk@stuff.com	E0EMAD
OK To Send Alerts		Y	E0DOAT
Primary Email		Y	E0PRIA
Date Last Updated		03/10/2023	E0DTLU
Employee Number		899	E0EMPX
Terminal User Name		stevec	E0TUNM