Slide 1


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A DIVISION OF JACK HENRY & ASSOCIATES INC®
Xperience Release 2015
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Slide 3


Presenter: Shannon Street
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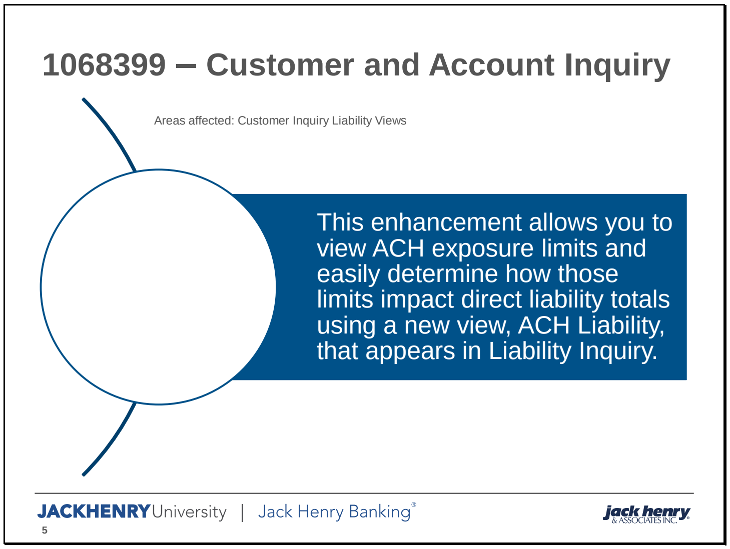
Slide 4

# CIF

Slide 5


1068399 – Customer and Account Inquiry
Areas affected: Customer Inquiry Liability Views
This enhancement allows you to view ACH exposure limits and easily determine how those limits impact direct liability totals using a new view, ACH Liability, that appears in Liability Inquiry.
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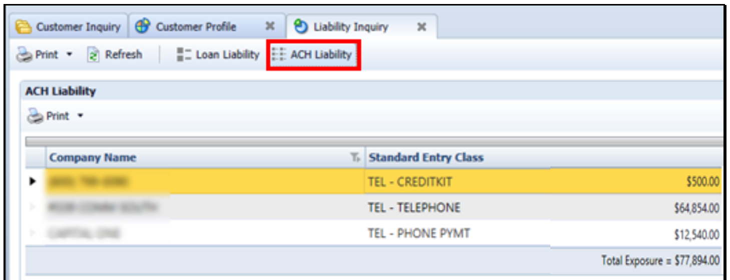


- The **ACH Liability** view includes the **Company Name**, the **Standard Entry Class**, and the **Exposure Amount**.
- The total ACH exposure appears at the end of the **Exposure Amount** items.
- Also, you can print the *ACH Liability* information if necessary.

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# DEPOSITS

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## 1074627 – Deposits

Areas affected: Addenda Records in Checking, Savings and Club account inquiries

This enhancement allows you to be able to control the number of ACH addenda records that display on the account level for Demand Deposit Accounts.

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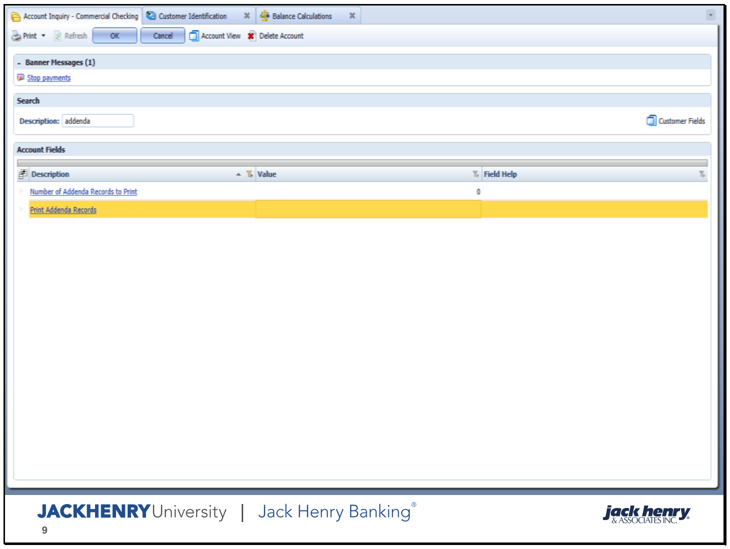


**Number of Addenda Records to Print**
This field allows you to set how many records to print. You can edit this field at the account level. The minimum value for this field is **3**. The maximum value is **98**. The value corresponds to the number of lines in the addenda that print.
Values can only be entered when the **Print Addenda Records** field is set to **Yes, print addenda records**. If the **Print Addenda Records** field is not **Yes, print addenda records**, the **Number of Addenda Records to Print** value is *0* or blank.
These fields also now appear when you edit a Checking, Savings, or Club account **Service Charge Code**.

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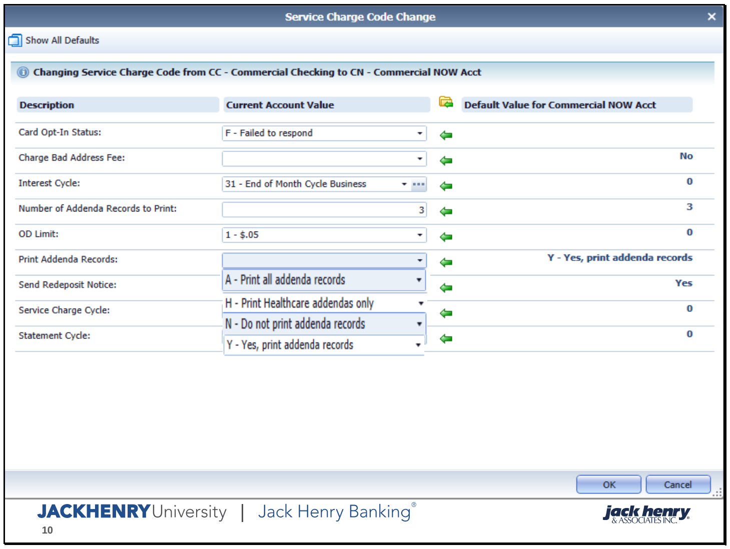


These fields can be edited at the account level. When you edit the **Print Addenda Records** field, a dropdown appears with the following options:

**Do not print addenda records**
**Print all addenda records**
**Print Healthcare addenda only**
**Yes, print addenda records**

If you set the **Print Addenda Records** field to **Yes, print addenda records**, you can also set how many records to print in the **Number of Addenda Records to Print** field. The minimum value for this field is **3**.
The maximum value is **98**. The value corresponds to the number of lines in the addenda that print.

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## jhaPASSPORT

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# 90142 jhaPassport Inquiry Tabs

Areas affected: jha Passport Inquiry

This enhancement has created new table that are available in jhaPassport account Inquiry. Foreign Country Exemptions, Transaction Blocking Rules and PPCG Travel and Phone are the new tabs.

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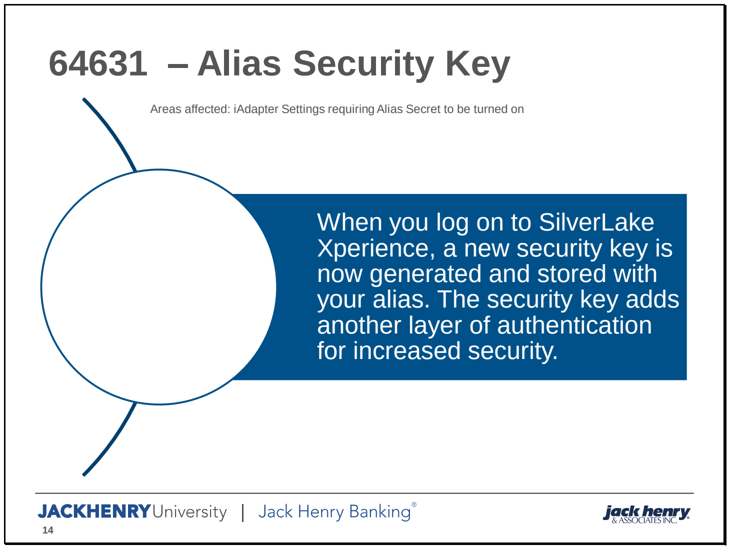
## MISCELLANEOUS

Slide 14


64631 – Alias Security Key
Areas affected: iAdapter Settings requiring Alias Secret to be turned on
When you log on to SilverLake Xperience, a new security key is now generated and stored with your alias. The security key adds another layer of authentication for increased security.
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## 81061- Forward Account

Areas affected: Xperience Client Agent installed on the computer you are sending the link to.

The Forward Account related function now has expanded and allows you to email the Customer or Account Inquiry link to another user or to copy/ paste an account to another user.

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# 89151- Add Current Time to Document Templates

Areas affected: Document Merge Settings

You can now have the ability to add the current time to document templates in Microsoft Word.

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# 89993- Automated Performance Tests

Areas affected: Support User

Users with support profiles can now run automated performance tests that log the time SilverLake Xperience takes to access accounts

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## 1085185- Allow Different Stop Payment Expiration Dates

Areas affected: Stops / Holds

You now have the ability to define a range of months for ACH stop/ hold calculations.

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## 1075146-Maintenance History

Areas affected: Maintenance History

Comments can be added to a customer or account from the Maintenance History related function. This comment is used to explain any maintenance that was performed, or to add a general comment.

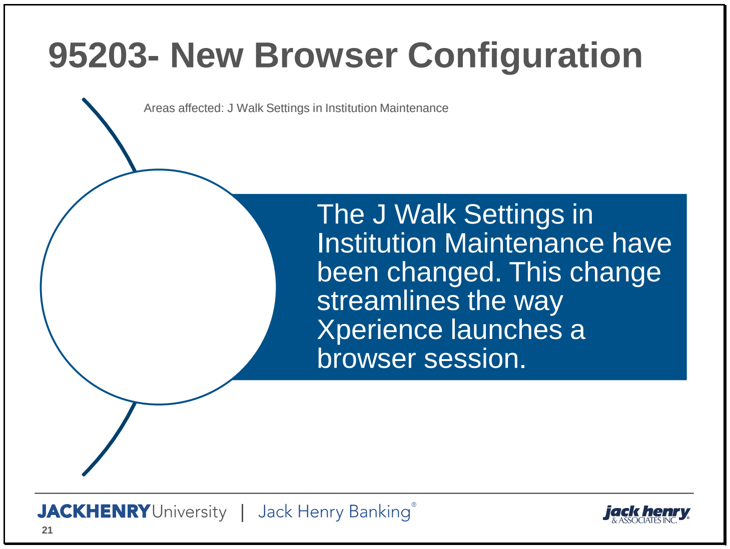
Slide 20

# 94177- Synergy eSign

Areas affected: Document Merge Settings

Merge Document has been integrated with Synergy eSign. This allows you to have customers electronically sign documents enabled with eSign. Documents with eSign enabled can be seen in Institution Maintenance on the Document Merge Settings tab in the Miscellaneous are.

Slide 21




When Xperience launches browser, the system accesses the Browser.ini file and looks for the **INI File Bank Identifier** for your institution. The **INI File Bank Identifier** settings are used to configure your browser session.

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# 97279- Test Connection Button Added to jXchange

Areas affected: jXchange Web Service Settings

- A Test Connection Button has been added to jXchange Web Service Settings in Institution Maintenance.
- The Test Connection button is disabled when fields, such as Service URL, have not been established or during a ping test.
- When a test completes, you receive a dialog box either reporting success or listing the errors that occurred.

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# 98204- PowerOn SDK changes

Areas affected: PowerOn

For SilverLake Xperience 2015.1, there is a change to the PowerOn SDK that breaks current PowerOns. The name of the business objects .dll has been changed from JackHenry.Enterprise.BusinessObjects.v2013.1.1.dll to JackHenry.Enterprise.BusinessObjects.dll, which allows future available contracts to grow without recreating the issue.

To update your institution's current PowerOns, replace theJackHenry.Enterprise.BusinessObjects.v2013.1.1.dll reference withJackHenry.Enterprise.BusinessObjects.dll and rebuild the PowerOn.

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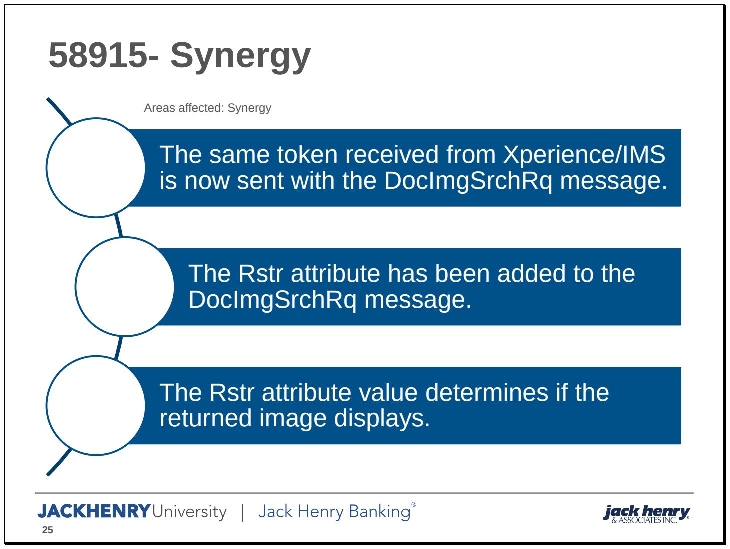
## INTEGRATIONS

Slide 25

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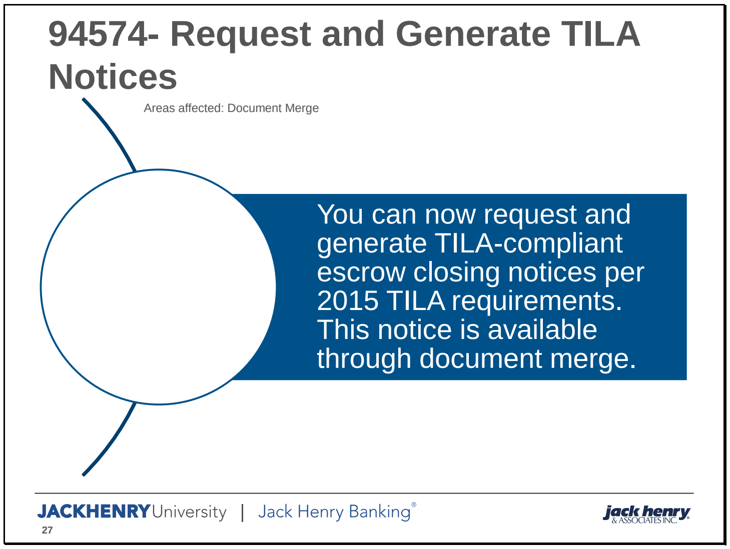
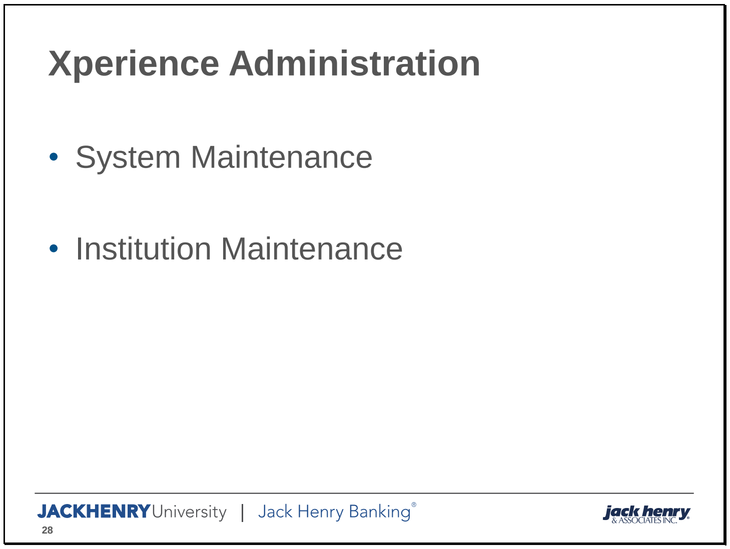
# REGULATORY UPDATES

Slide 27




When Xperience launches browser, the system accesses the Browser.ini file and looks for the **INI File Bank Identifier** for your institution. The **INI File Bank Identifier** settings are used to configure your browser session.

Slide 28




For this session on Xperience Administration, we'll begin with an in-depth review of System Administration, then conclude with Institution Maintenance.

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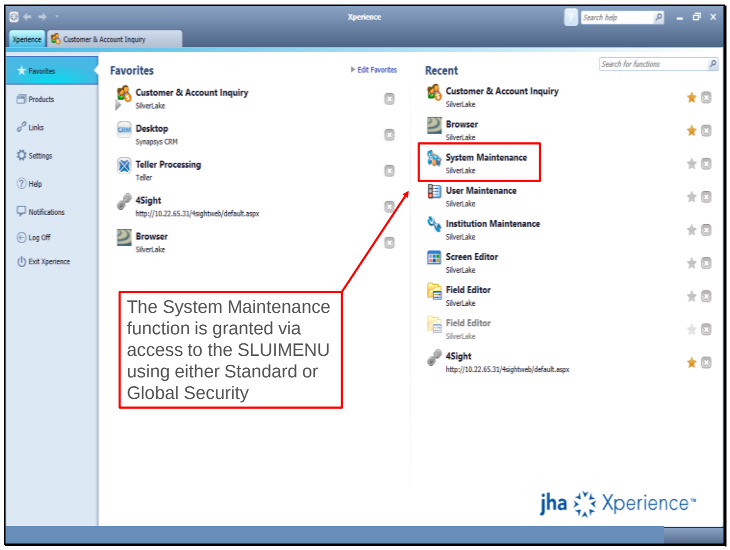
## System Maintenance

- System Maintenance allows bank administration to establish system settings and server connections.
- Please contact Jack Henry Support before changing any fields especially if you are unsure how they will affect Xperience!

Slide 30




System maintenance is found on the Xperience menu under your Core product, and is controlled by access to the SLUIMENU in either Standard or Global Security.

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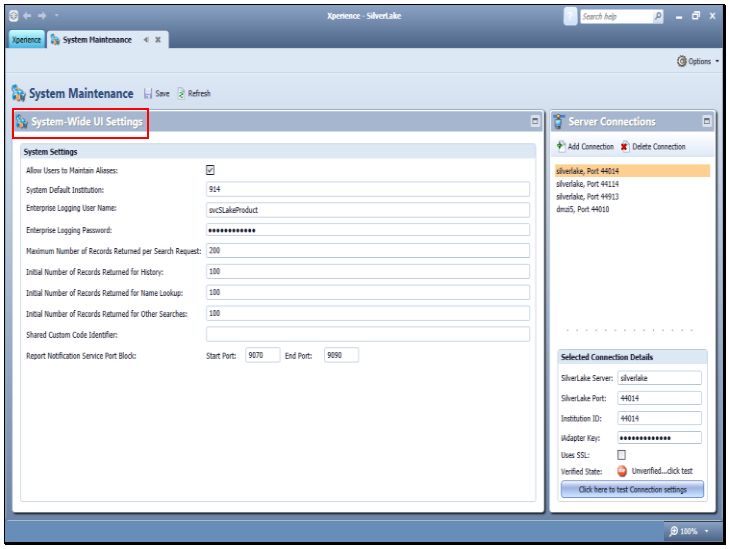
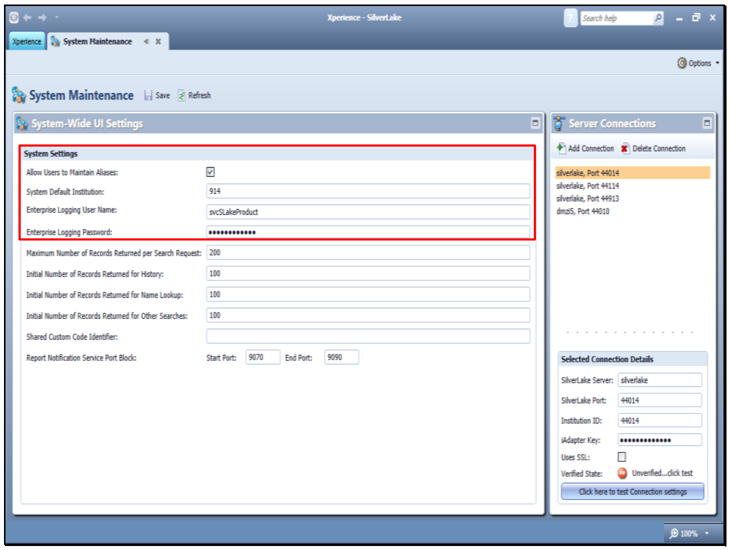


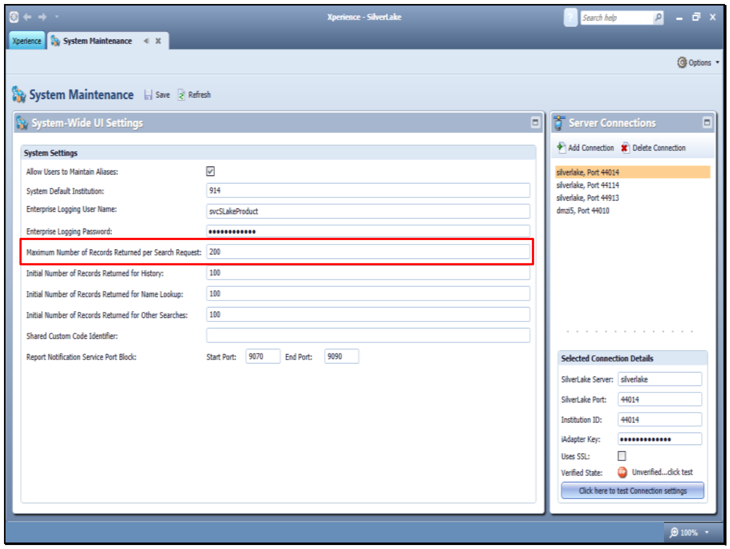

Under System-Wide UI settings are established for your institution along with any search results limits for the various search functions.

Slide 32




Allow Users to Maintain Aliases lets you decide if you want your users to maintain multiple aliases. If so, your users can have multiple signons. You might use this if you have employees that have access to multiple banks, and signons are different, or they may have 2 signons due to different levels of security. The next field is for the default institution's bank number. The Enterprise Logging User Name and Password is set by JHA. Do not touch these fields unless advised by JHA

Slide 33




The next four parameters control the number of records returned in each search message from IBM i to Xperience. Changing the values can result in degraded performance. Setting this value too high will cause delays in receiving messages due to the large size of the message. These values are determined by the JHA install team at the time of your install and should not be altered without contacting Support.

The maximum number of records returned per search request has a suggested value of a minimum of 100 and a maximum of 500. This is the Maximum number of records for all searches.

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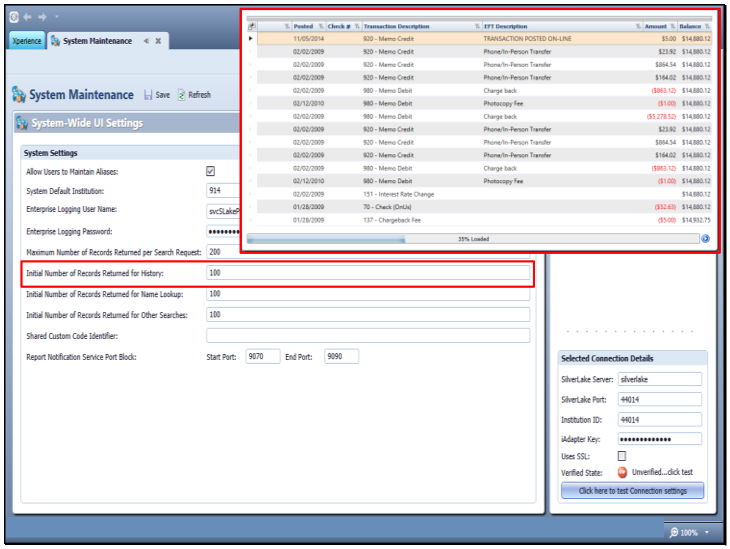


The Initial Number of Records Returned for History; for example, transaction history on deposits, loans, time deposits, and PassPort. The suggested values for this parameter are a minimum of 100 and a maximum of 1000. When this maximum number is reached, the play/pause progress bar is displayed at the bottom of the history grid as shown in the inset.

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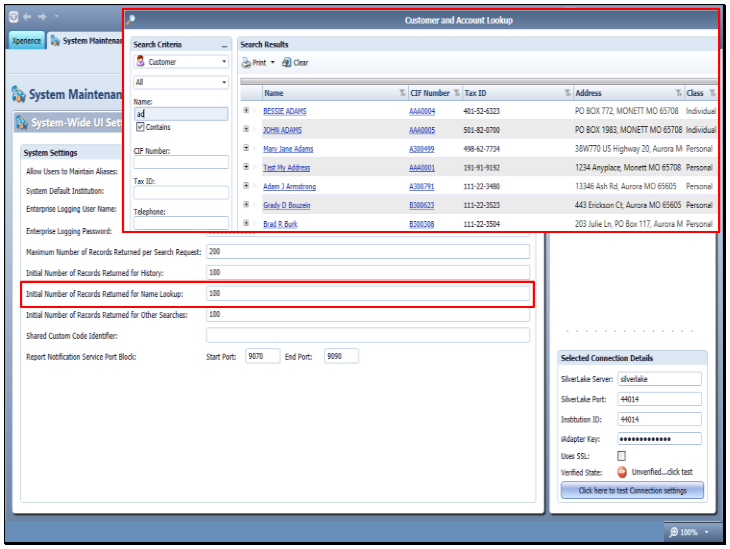
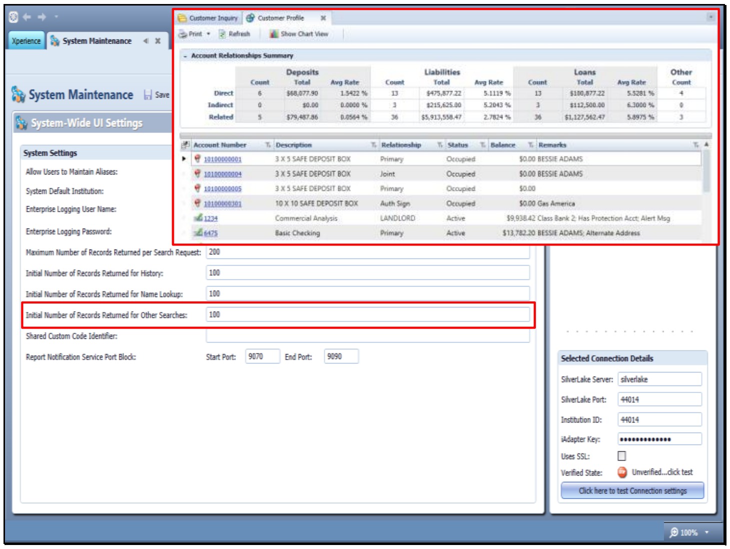


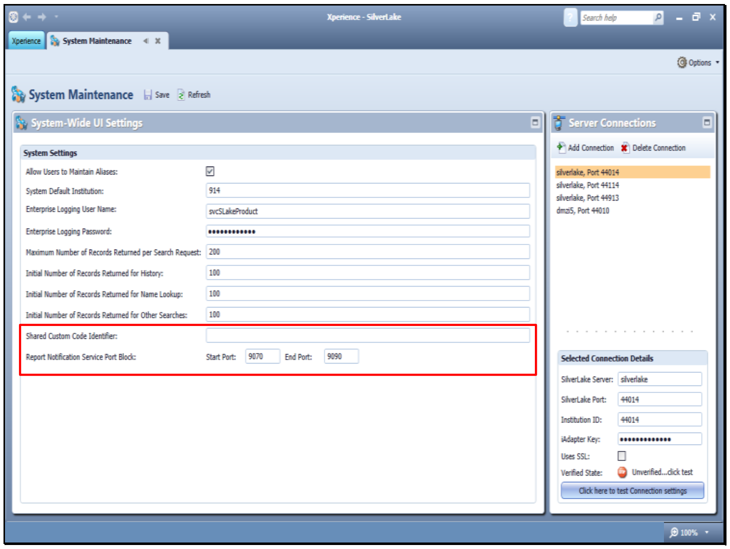

The initial number of records returned for name lookup from the Customer and Account Inquiry search. The suggested values for this parameter are a minimum of 100 and a maximum of 1000. Again, when this maximum number is reached, the play/pause progress bar is displayed at the bottom of the grid.

Slide 36




The initial number of records returned for other search requests. For example, stop payments or account relationships. The suggested values for this parameter are a minimum of 100 and a maximum of 1000. The inset shows an example of account relationships listed on the Customer Profile tab.

Slide 37




The shared custom code identifier is used to identify custom code that is used for all banks on your financial institution's system. This parameter should not be changed without instructions from JHA. The last field should only be maintained by Jack Henry personnel. It lists the Service Port block that should receive Report Notifications.

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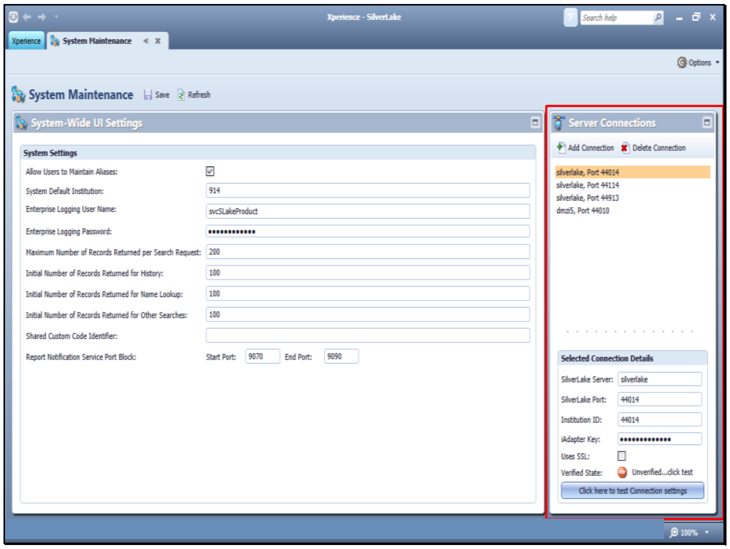


The Server Connections panel is used to Add or delete connections from the Xperience core application to the Jack Henry & Associates servers. The connection details display in the Selected Connection Details section. Modifying these settings can cause the core application to stop working. Please contact JHA support if you have any questions on Server Connections or if a new connection needs to be added.

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## Institution Maintenance

- Institution Maintenance allows you to establish the settings for each institution within your system.

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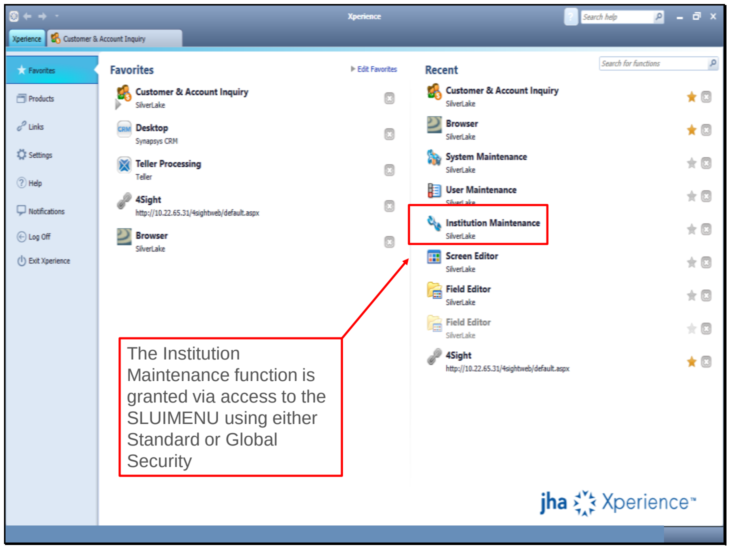
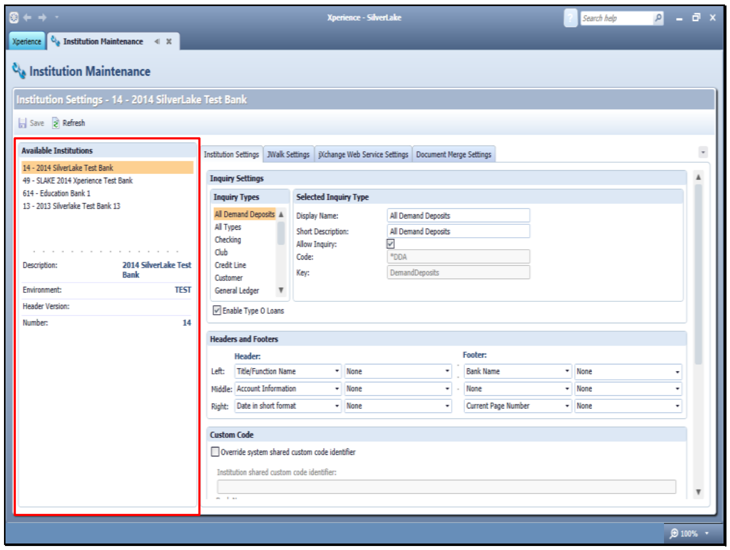


Xperience
Customer & Account Inquiry
Favorites
Products
Links
Settings
Help
Notifications
Log Off
Exit Xperience
Favorites
Edit Favorites
Customer & Account Inquiry
SilverLake
Desktop
Synapsys CRM
Teller Processing
Teller
4Sight
Browser
SilverLake
Recent
Customer & Account Inquiry
SilverLake
Browser
SilverLake
System Maintenance
SilverLake
User Maintenance
Institution Maintenance
SilverLake
Screen Editor
SilverLake
Field Editor
SilverLake
Field Editor
SilverLake
4Sight
The Institution Maintenance function is granted via access to the SLUIMENU using either Standard or Global Security
jha Xperience

Slide 41




The panel on the left shows a list of institutions in your banking enterprise with some basic details in below.

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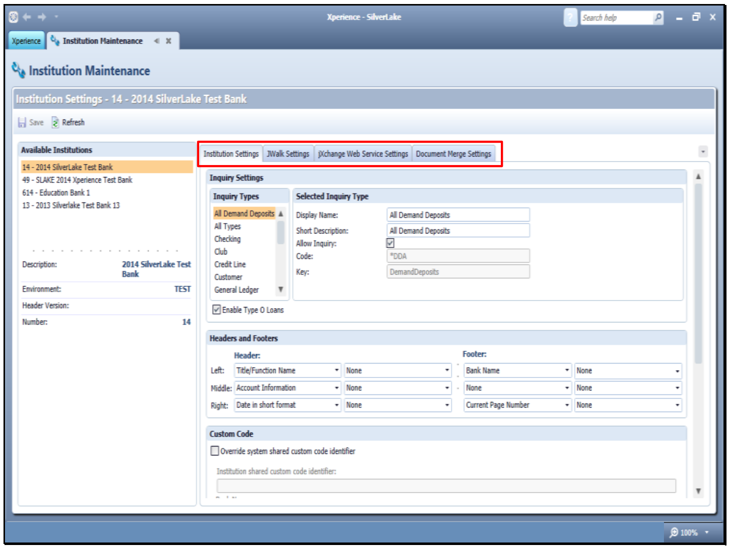


The panel on the right shows the tabs available to change your settings. Tabs are: Institution Settings, JWalk Settings, jXchange Web Service Settings, and Document Merge Settings.

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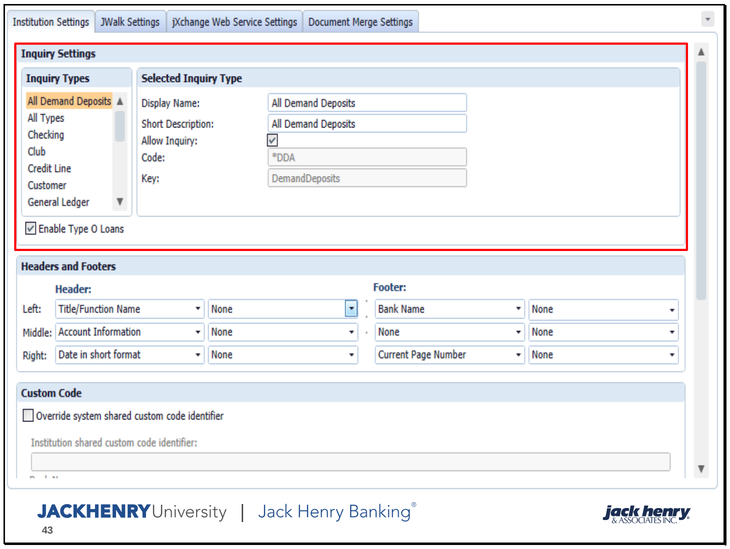


Under the Institution Settings tab, you can change the Inquiry Settings to mirror what your institution uses. Select an Inquiry Type to make changes. In this example, Checking is selected. You have the ability to change the Display Name, which shows in the Search Type drop-down list on the Customer and Account Inquiry. This allows you to use the terms your bank customers are used to seeing. Typically the short description field is the same as the display name. The Allow Inquiry field lets you choose to exclude a type in the Search Type drop-down list. You might want to use this functionality if you don't offer a particular account type. For example, if you don't have NetTeller or don't offer loan products, the Allow Inquiry field can be cleared, so that the account type does not display in the Search Type down list. The Code and Key fields are system defined fields and cannot be maintained.

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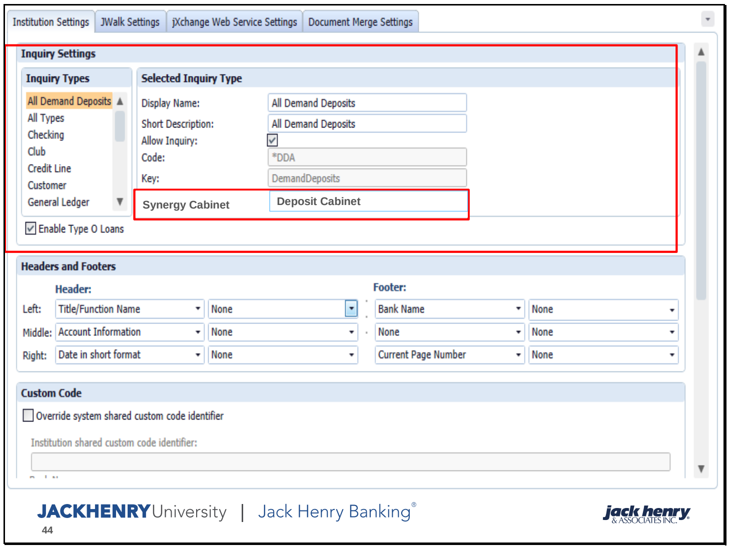


The Synergy Cabinet field lets you set up Synergy archive documents for the selected inquiry type. All cabinets you have defined are available in the drop-down list. If you are using Synergy to archive your Document Merge items and no cabinet is selected, the cabinet will be determined at either the document level under the Document Merge Settings tab, or as a prompt for the user when merging a document. The Synergy Cabinet drop-down list is available for any Inquiry Types except: All Types, All Demand Deposits, LIP, Shareholder, and Vendor

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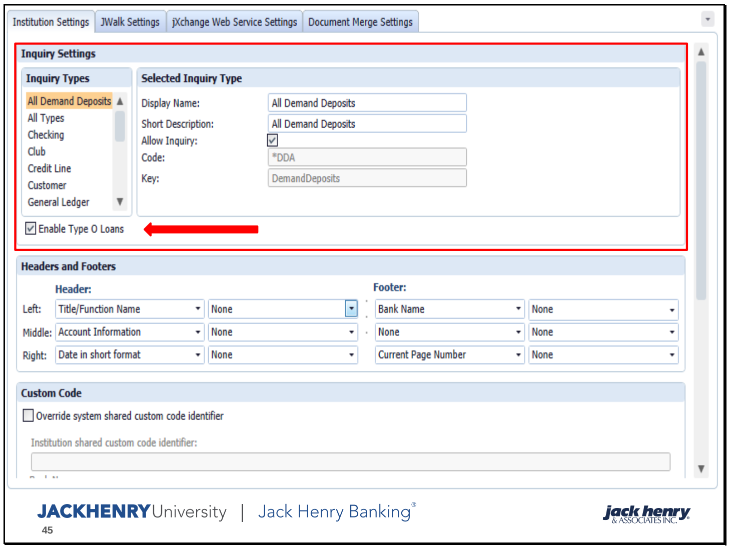


If you still have active type O loans, you can check the Enable Type O Loans field. If included, they are combined with other loans and are listed under Loans in the drop-down list.  This enables you to view them in Inquiry. By default, the box is not selected. The inset shows you an example of the Search Criteria types and how they display on your Customer and Account Lookup screen.

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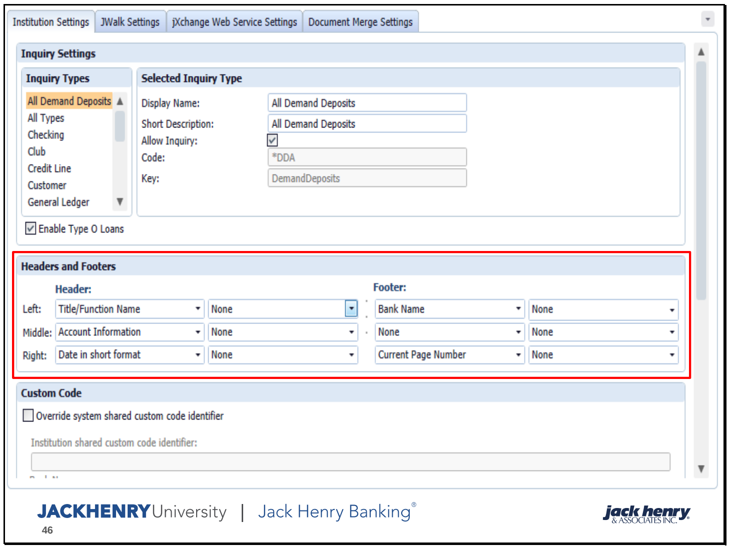


The next section is Headers and Footers. This section allows you to decide what to print on a document when using the Print option on the session toolbar of any Xperience core entry point, such as Customer and Account Inquiry. These headers and footers are not associated with a standard report. Use the dropdown boxes to select one of the six items available. The second field allows you to choose from several font styles, such as bold, italic, underline or none.

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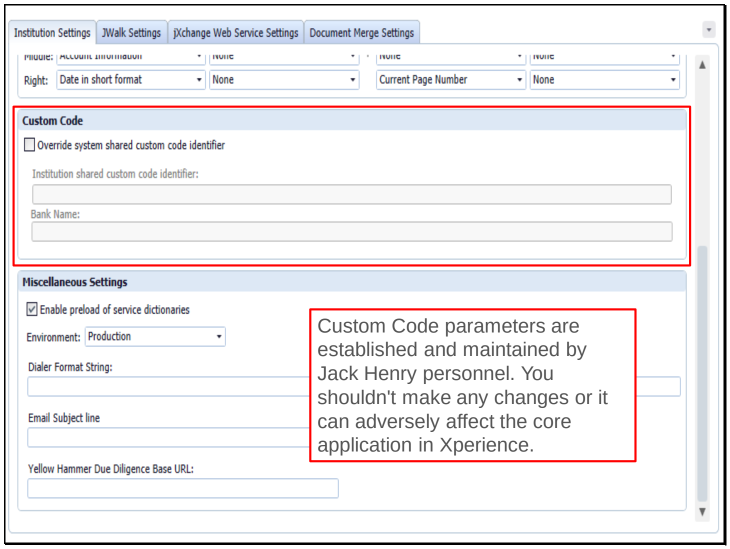


Custom Code parameters are established and maintained by Jack Henry personnel. You shouldn't make any changes or it can adversely affect the core application in Xperience.

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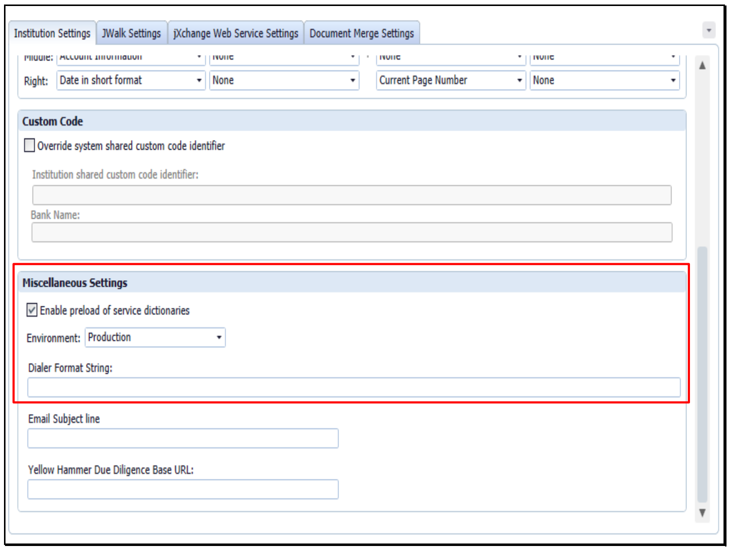


Under Miscellaneous Settings the Enable Preload of Service Dictionaries allows you to enable the pre-fetch for service dictionary items.

The Environment field allows you to set the institution to either Production or Test to identify whether that institution is using live data or test data. Setting the environment can be useful when you want to set up institution theming for a particular Routing ID and Environment when configuring themes on your server.

Depending on the phone system you are using at your institution, refer to the documentation for that phone system to determine the dialer format needed for your application that you would enter into the Dialer Format String field.

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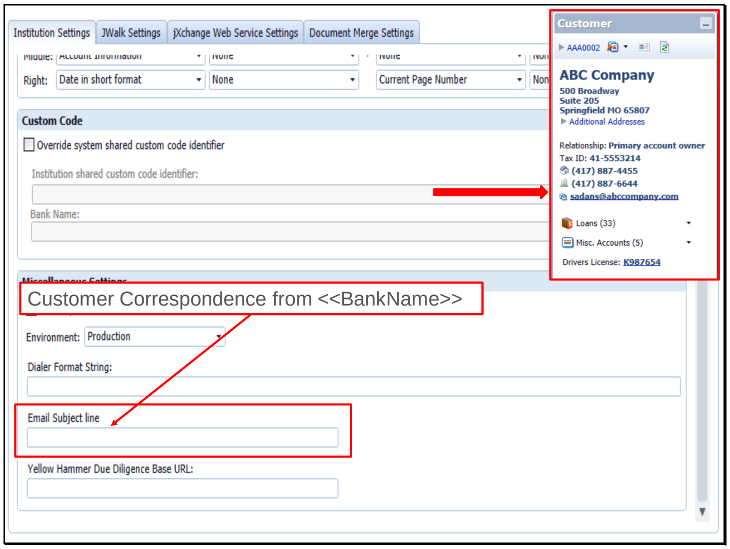


Under the Email Subject Line enter the default text that you want to appear in the subject line of an email you send to customers. You can use the bank name variable to include your institution's name in the subject line. When you select the email address link available in the CIF panel, as you can see in the insert, the text you enter in the Email Subject Line automatically displays in the subject line.

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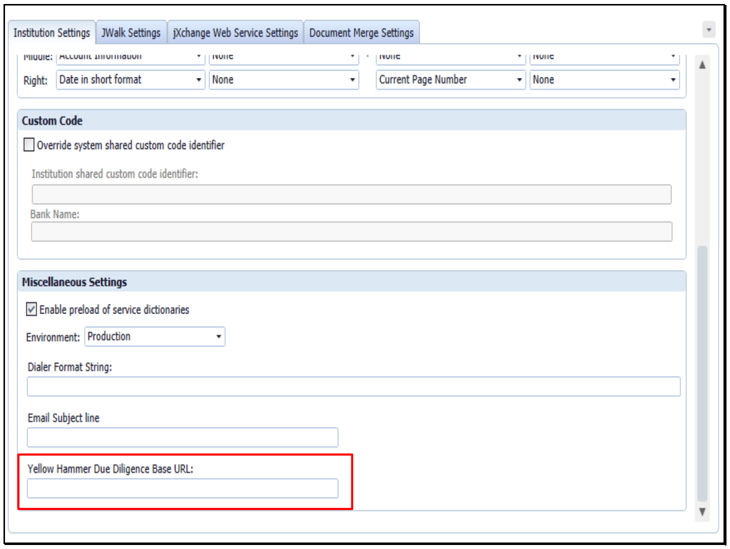


If you are using the Yellow Hammer Customer Due Diligence related function in Customer Inquiry you must enter the Yellow Hammer Due Diligence Base URL in the Miscellaneous Settings.

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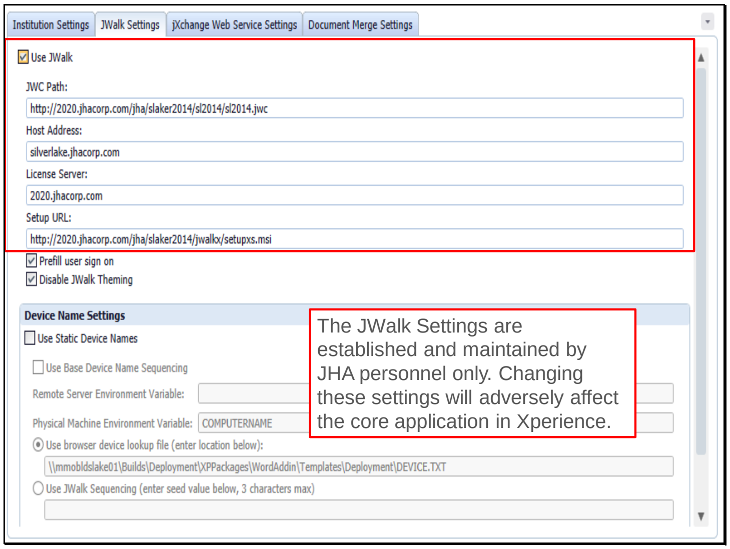


The JWalk Settings are established and maintained by JHA personnel only. Changing these settings will adversely affect the core application in Xperience.

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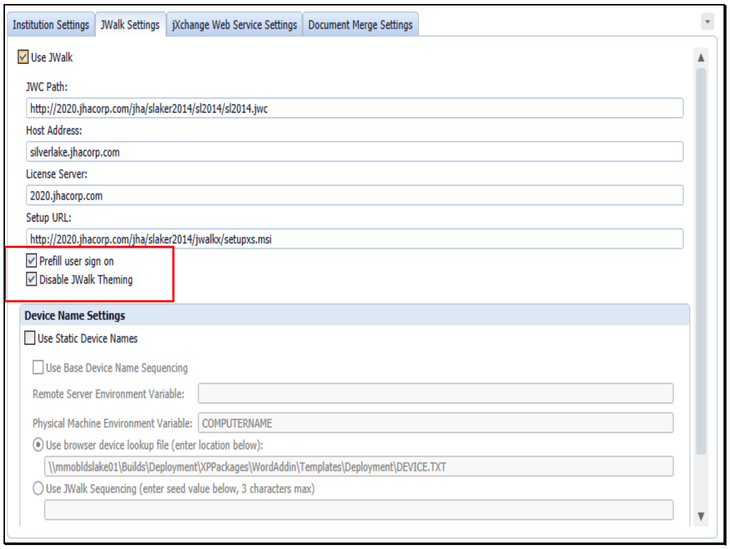


If your bank uses Biodentify®, you can un-select the Prefill User Sign On option to turn off the username prefill when a user signs into a browser or browser transition session.
The Disable JWalk Theming option can be selected to turn off any theme settings established in Xperience that would apply to a browser session so that you can use the default theme for a browser session.

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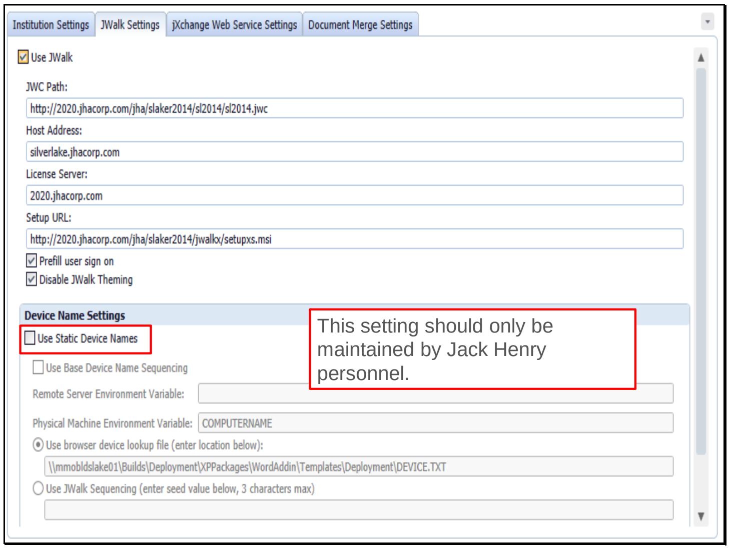


Under the Device Name Settings, the Use Static Device Names option allows the fields to be used and maintained. These settings should only be maintained by Jack Henry personnel.

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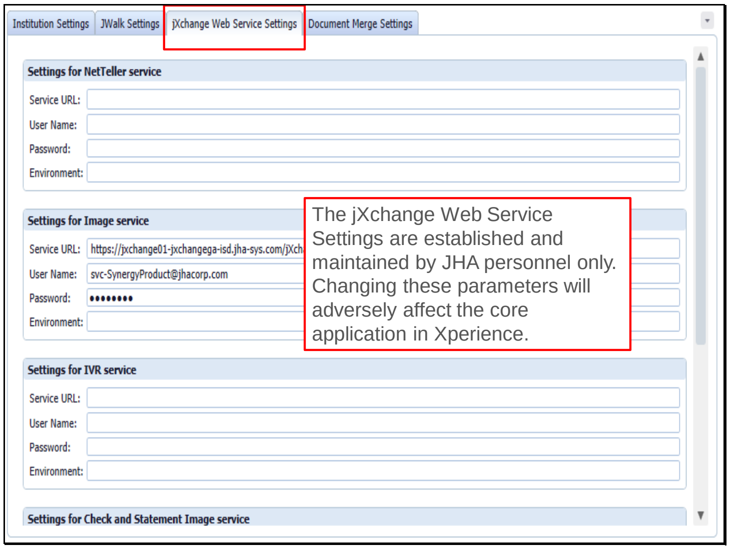


The jXchange Web Service Settings are established and maintained by JHA personnel only. Changing these parameters will adversely affect the core application in Xperience.

Services can be set up for Image, NetTeller, IVR, Check and Statement Image, and iPay.

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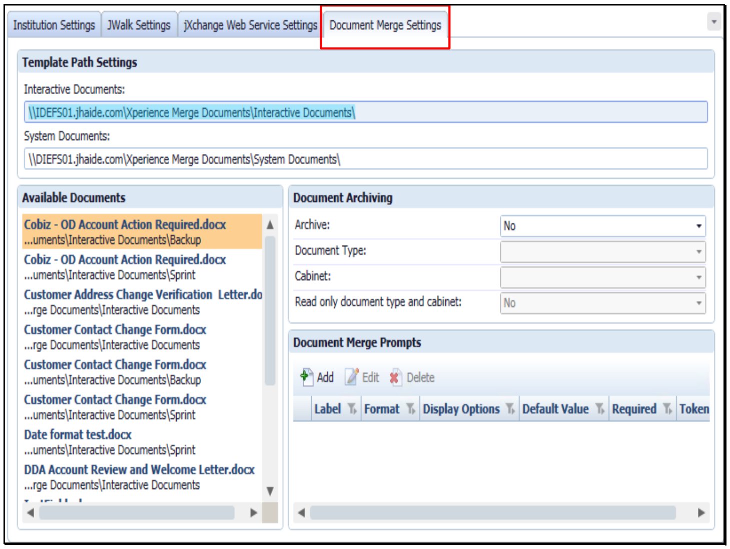


The Document Merge Settings tab allows you to specify the paths to the folders where your document templates are stored, either locally or on a network drive. Also on this tab, you can set up archiving for a document or statement that you have edited and/or produced for your customer using the Document Merge functionality. Archiving can be used if your institution has a content management system, such as Synergy, integrated with the core application in Xperience. You can also add institution-defined fields to a prompt that lets you add those fields to a document created using the Document Merge functionality.

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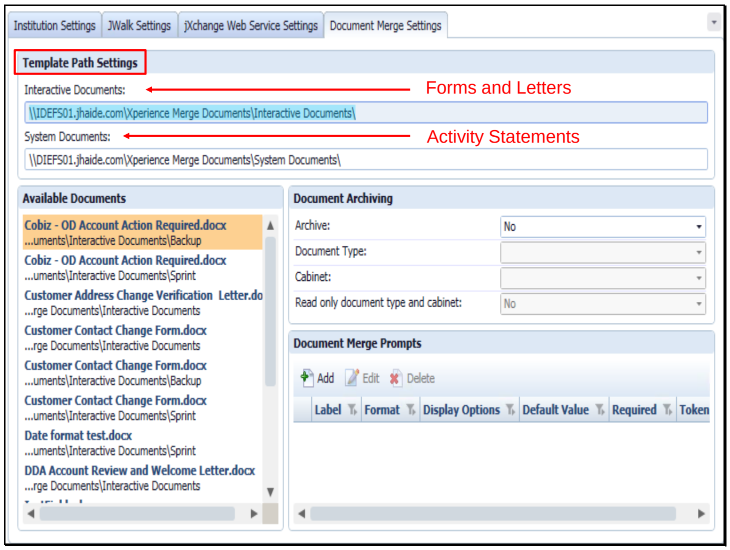


The Interactive Documents merge option specifies the location in which all templates for letters and forms are stored locally. If your templates are stored in several sub-folders, specify the parent folder that contains them. Your Users can then navigate to the sub-folder using the Windows Explorer that appears when they click the Merge Document button.

The System Documents merge option is for activity statements only. Enter the network path where those documents are stored so they can be used when creating an activity statement.

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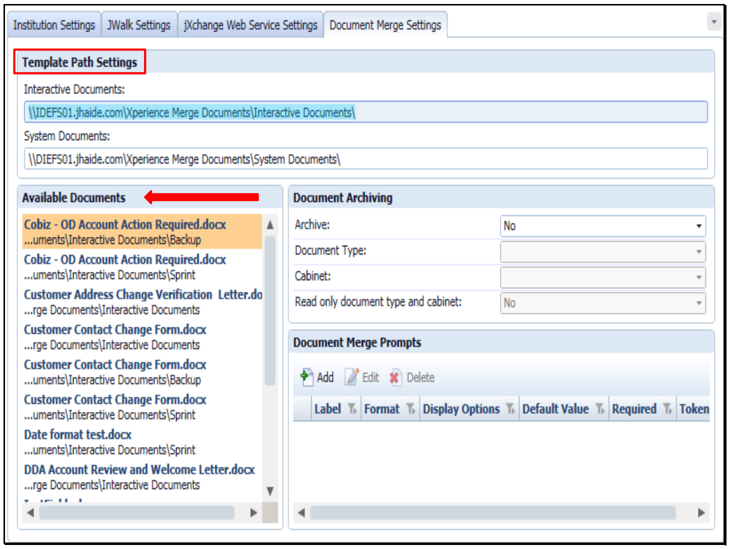


The documents listed in the Available Documents section are the document templates available in your institution for Document Merge. These documents are stored in the template path locations that are specified in the Template Path Settings section.

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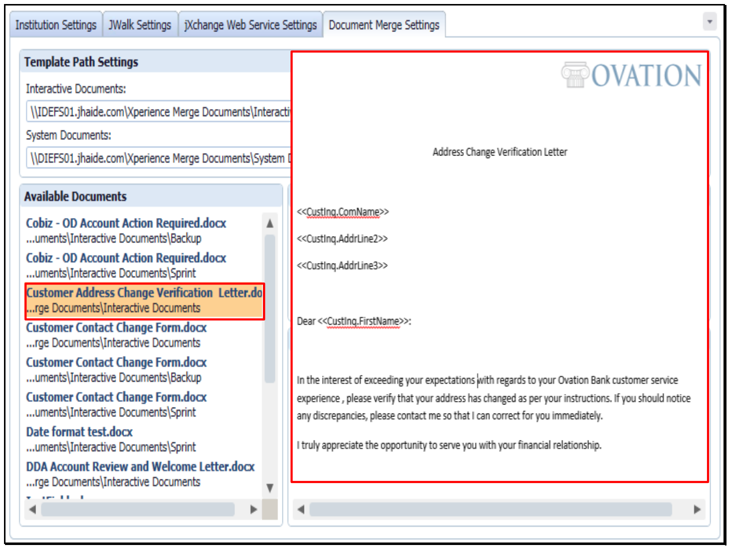


You can double-click these document templates to view and edit them in the document viewer used by your institution, such as Microsoft Word. This is helpful when adding institution-defined field tokens to document templates that have been created in the Document Merge Prompts section.

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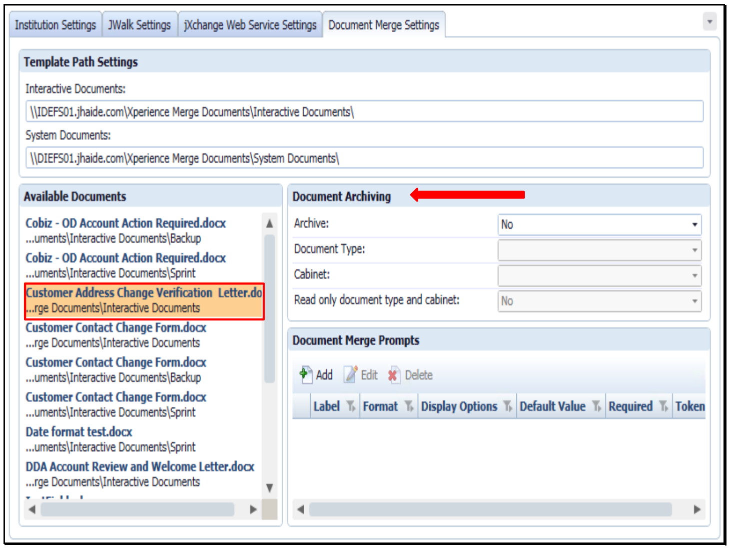


The document selected in the Available Documents section displays the archiving options if any have been entered. You can establish archive settings for merge documents if your institution uses a content management system, such as Synergy.

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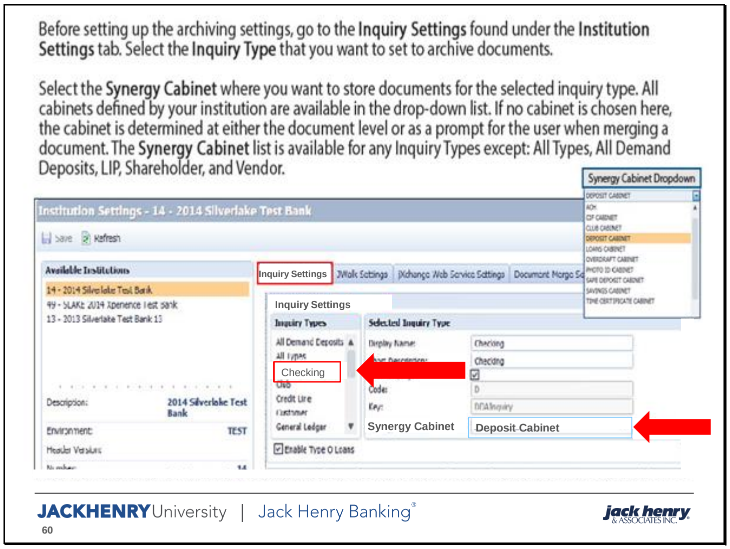
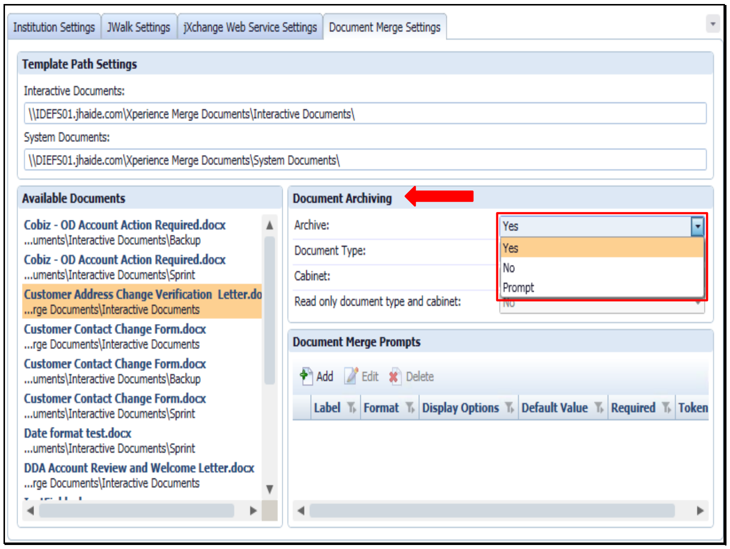



Before setting up your archiving settings, go to the Inquiry Settings under the Institution Settings tab. Select the Inquiry Type you want to set to archive documents. Then choose the Synergy Cabinet where you want to store the documents for the selected inquiry type. All cabinets defined by your institution are available in the drop-down list. If no cabinet is chosen here, the cabinet is determined at either the document level or as a prompt for the user when merging a document. The Synergy Cabinet list is available for any Inquiry Types except: All Types, All Demand Deposits, LIP, Shareholder, and Vendor

Slide 61

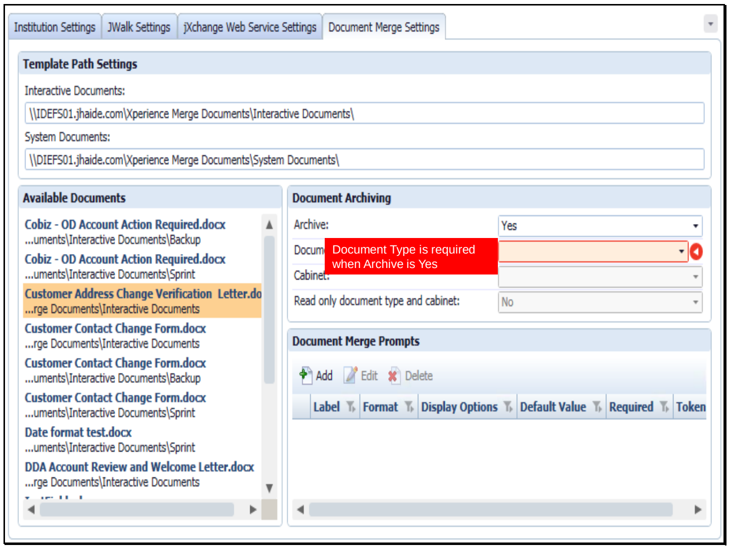



The Archive field lets you choose whether you want to archive the document selected from the Available Documents list. The archive prompt defaults to No. Available options are: Yes, No, and Prompt.

When Yes is selected the document is archived after using the Merge Document or Activity Statement button. If you use the Edit Merge Document button, the Archive Document prompt appears so you can save the document in a different Output Document Path.

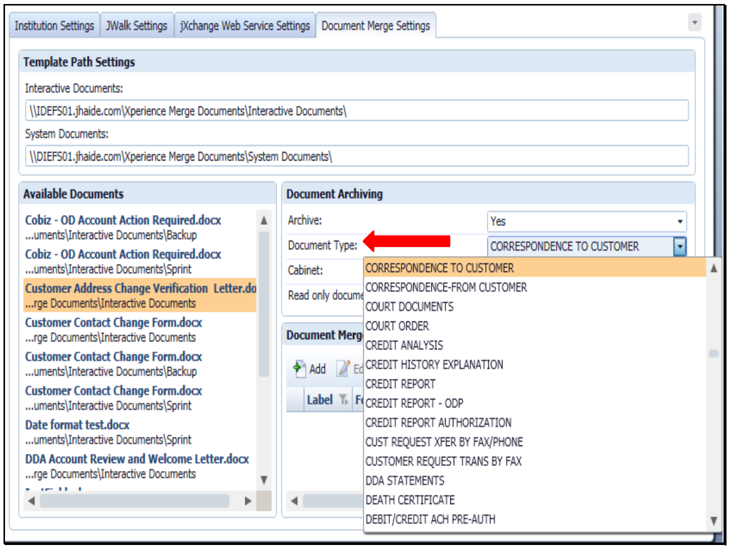
When Prompt is selected the Archive Document, prompt appears asking the user to archive the document. Both the Document Type and Cabinet fields are optional, but defaults can be selected. A cabinet may not need to be selected if the cabinet has been established for the inquiry type in Institution Settings. If you use the Edit Merge Document and select a document, an Archive Document prompt appears so you can save the document in a different Output Document Path.

Slide 62



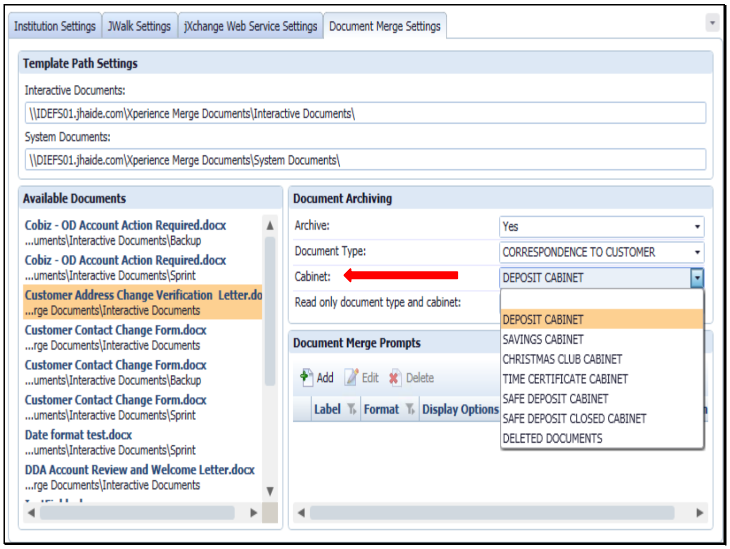

Once you've selected Yes or Prompt in the Archive field, the Document Type field shows red, indicating that a Document Type is required. If you hover over the red button, a message displays explaining why the field is red.

Slide 63



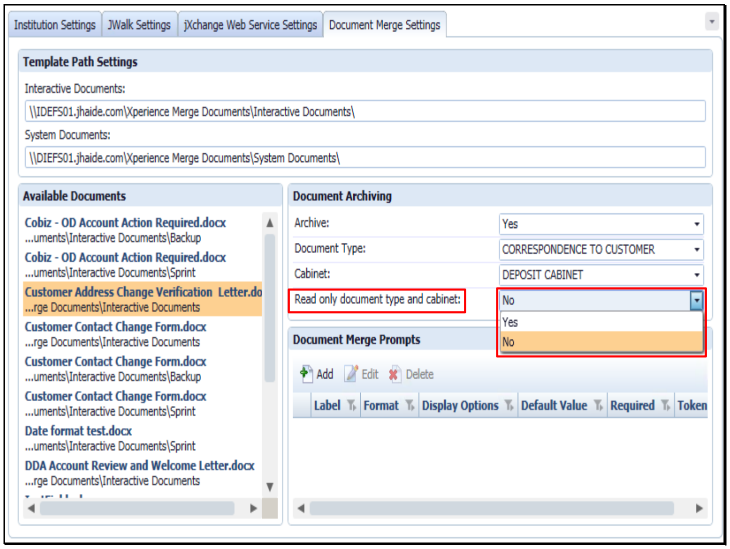

Use the dropdown box to select an available Document Type to be archived.

Slide 64



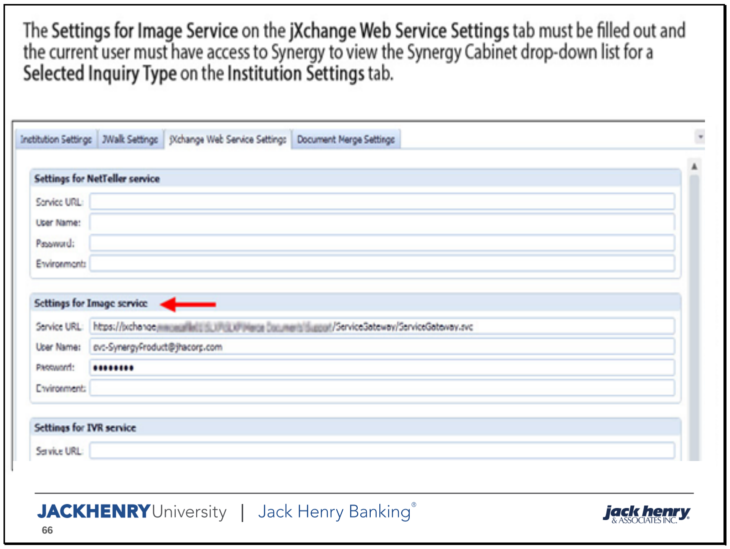

The Cabinet field is optional if selected in the Inquiry Settings. The cabinets displayed are based on the document type selected. Keep in mind that a document could belong to multiple cabinets, which would need to be determined by the user. For example, the Application document type could belong to either the Deposit Cabinet or the Loans Cabinet.

Slide 65



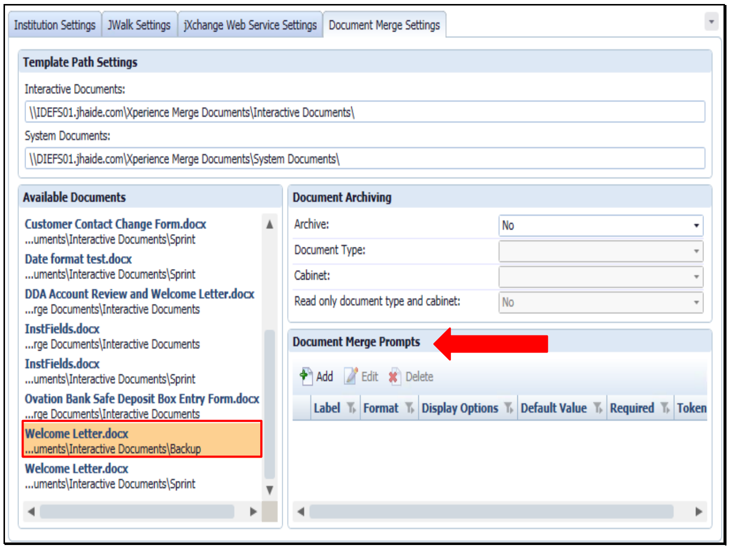

The Read Only Document Type and Cabinet field allows you to set the document to Read Only by selecting Yes or No. When set to No, users cannot change the Document Type or Cabinet. If the Document Type and Cabinet fields are not established for a document at this level, they are required via a prompt when clicking Merge Document on an inquiry tab or the Activity Statement button on the History tab. Documents are then added to the cabinets and indexed with information gathered from the account or customer, such as the account number, account type, customer number, or tax ID.

Slide 66



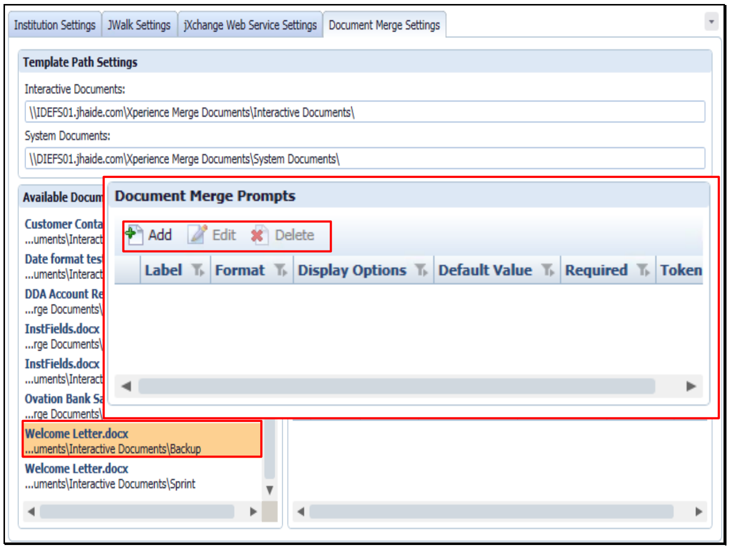

The Settings for Image Service on the jXchange Web Service Settings tab must be filled out and the current user must have access to Synergy to view the Synergy Cabinet drop-down list for a Selected Inquiry Type on the Institution Settings tab.

Slide 67



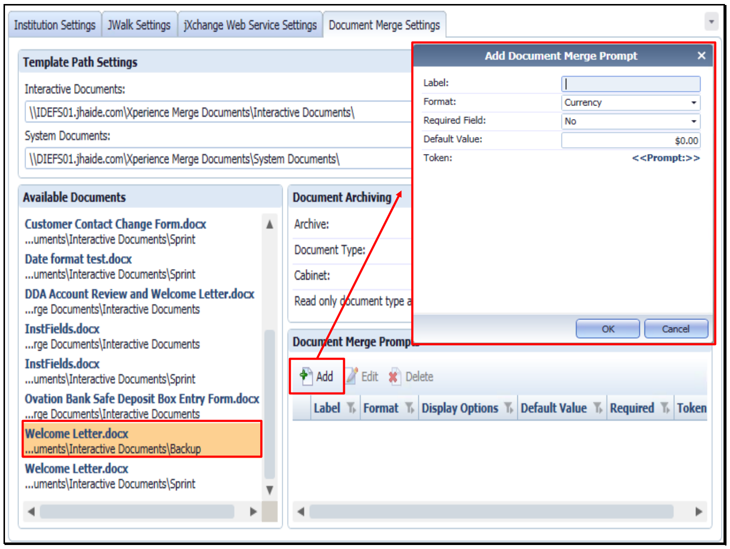

Document Merge Prompts can be set up to allow your users to input data prior to printing and saving merge documents. Select the document from the Available Documents list to create the Prompt.

Slide 68



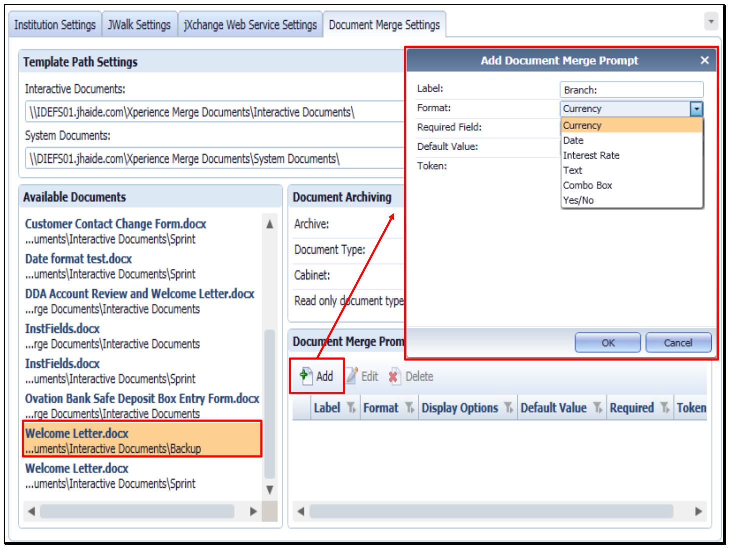

You can use the toolbar options in this section to Add, Edit, or Delete any fields in a prompt for adding institution-defined information to a document template during merging.

Slide 69




When you select Add a pop-up box is provided to create the Prompt. First, enter an identifying Label.

Slide 70




The Format field allows you to select the type of format to be used. The dropdown list provides the available selections to choose from.

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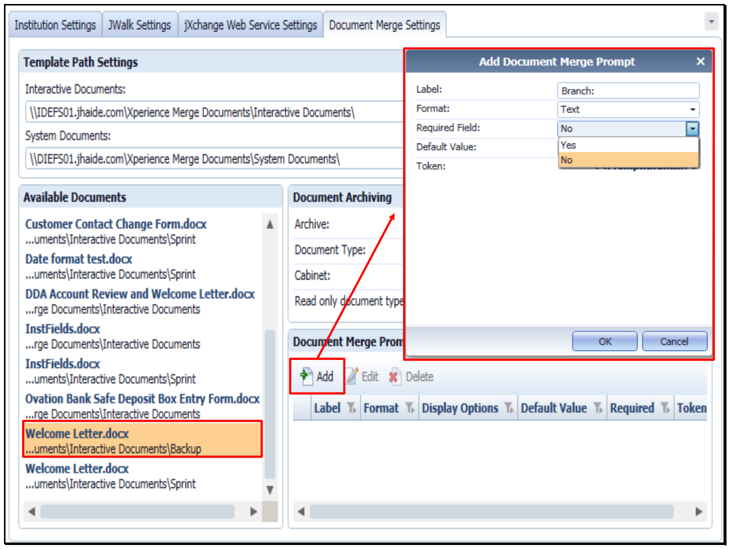


The Required field allows you to make a field required or optional by selecting Yes or No.

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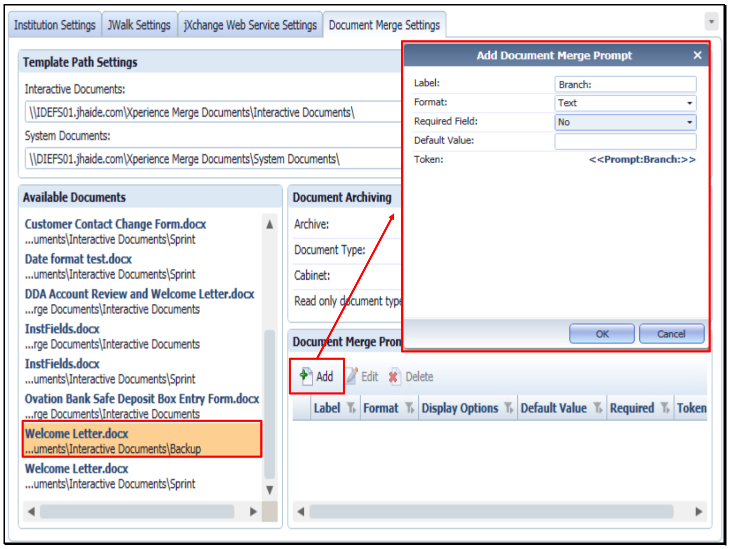


The Token you are entering automatically displays as you create it. Select OK to complete your entry.

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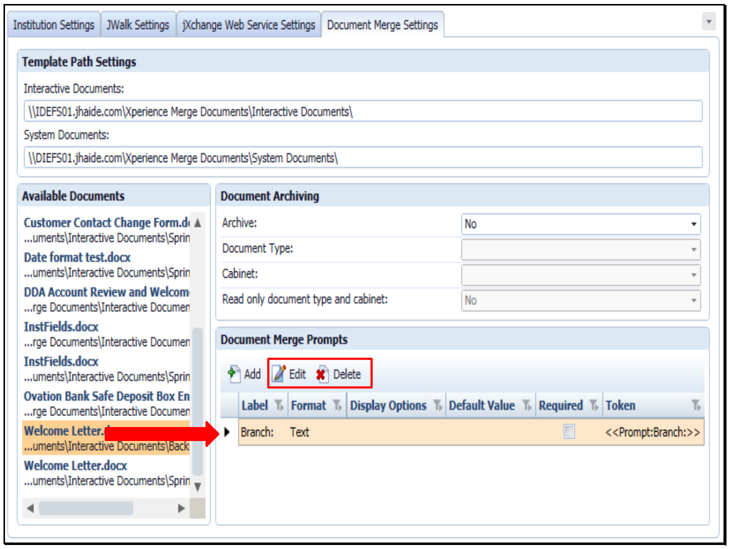


The new Token displays and can be selected to Edit or Delete.

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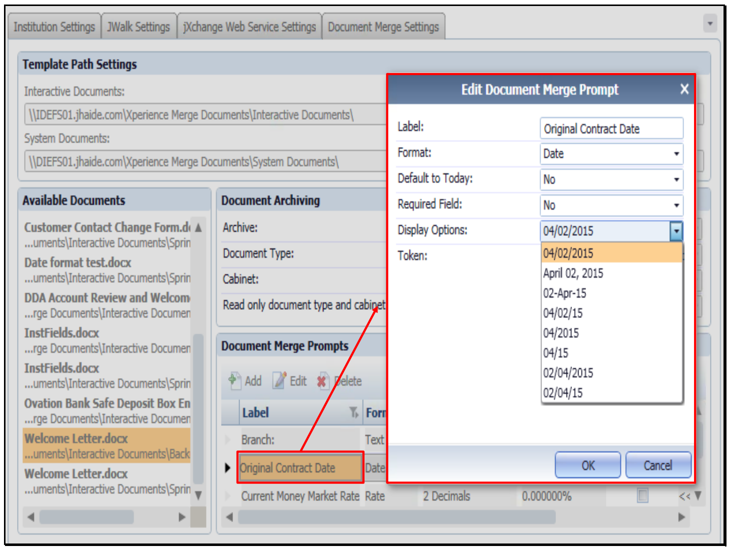
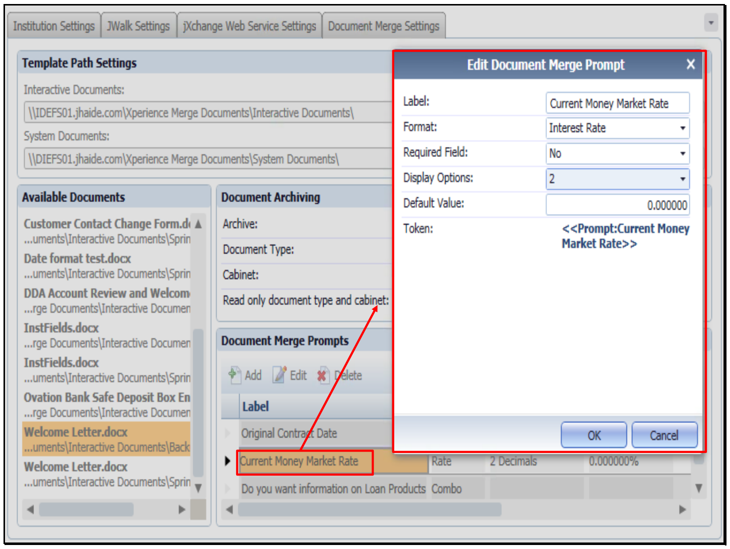



If the format selected is Date, additional fields are available to default the current date and how the date is displayed.

Slide 75




If the format selected is for an Interest Rate, additional fields are available to display the number of decimal places and a default value.

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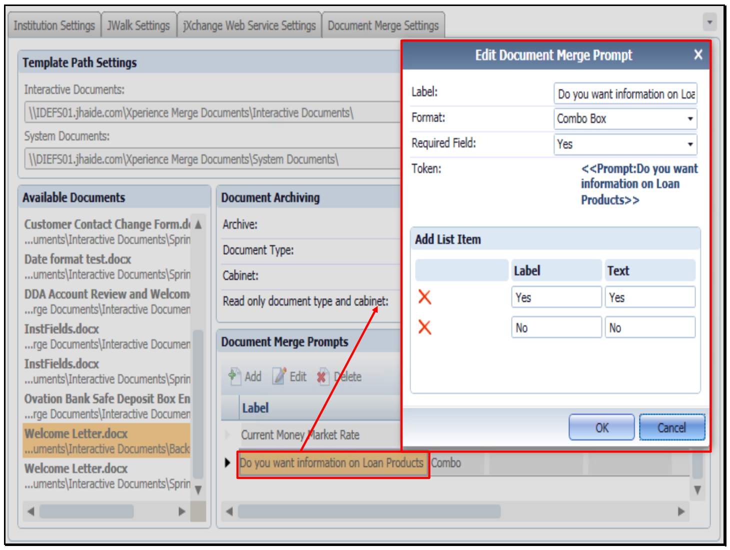


If the Combo Box is the selected format, an additional Add List Item field is provided to enter the choices you want users to select from.

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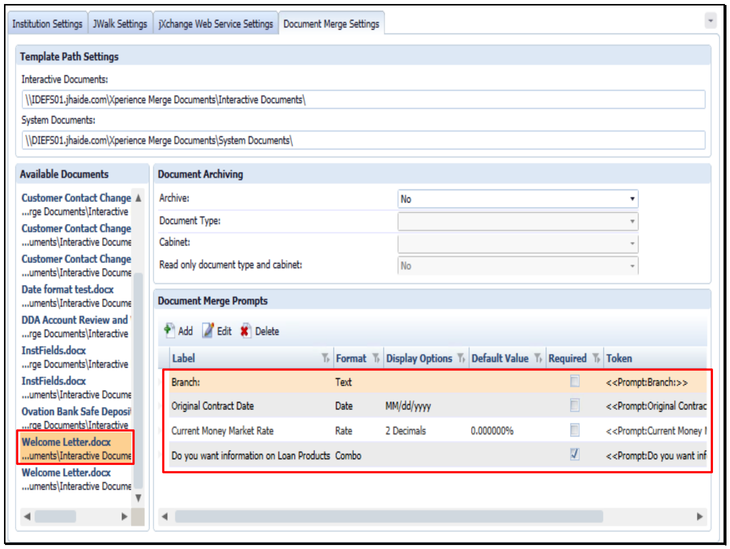


Once your field tokens are created, you are ready to add them to the document template you have selected in the Available Documents.

Double-click on the document to open it in your document viewer.

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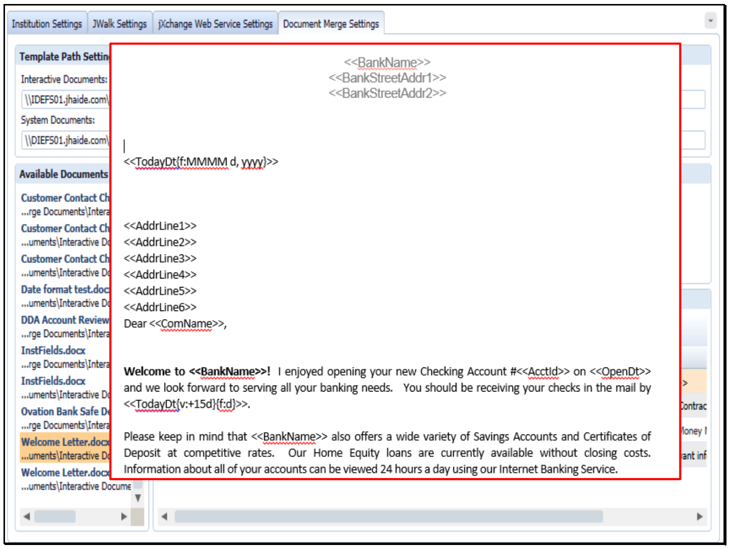


The document opens for you to edit in your document viewer.

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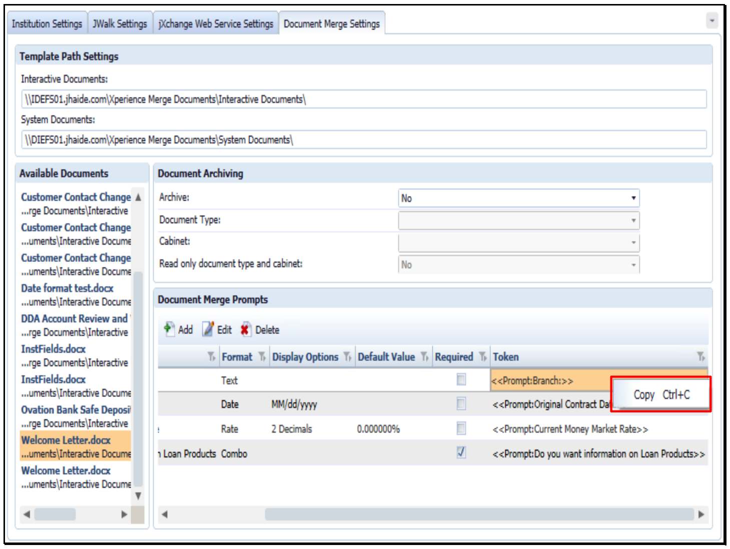


Select the Token for the field you want to add to the document template for merging and right-click to copy it.

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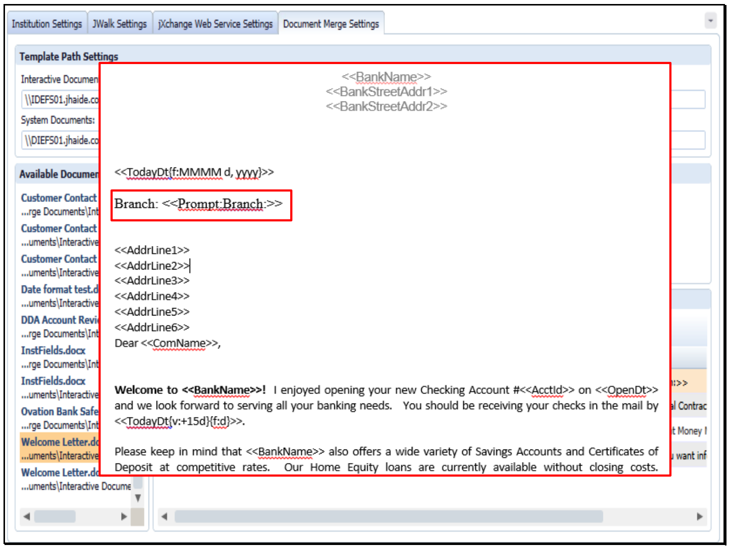


Then paste the token into the document template where you want it to show on the document.

In this example, Branch: was entered before the token on the document to describe the field.

Once you have added all tokens to the document, be sure and select Save before closing.

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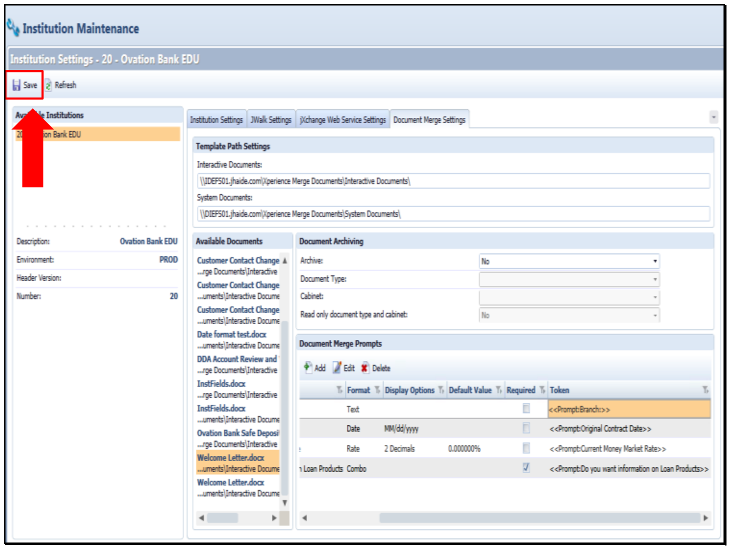


Be sure and click “Save” on the Institution Settings panel toolbar when changes are made, before closing Institution Maintenance.

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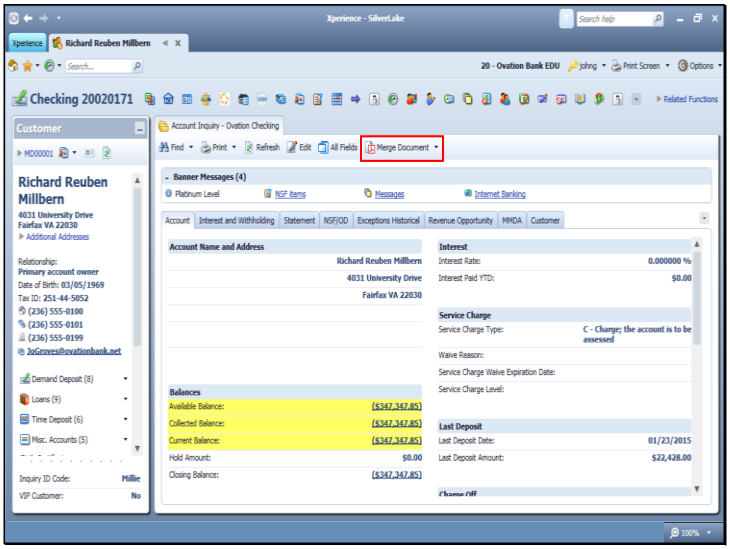
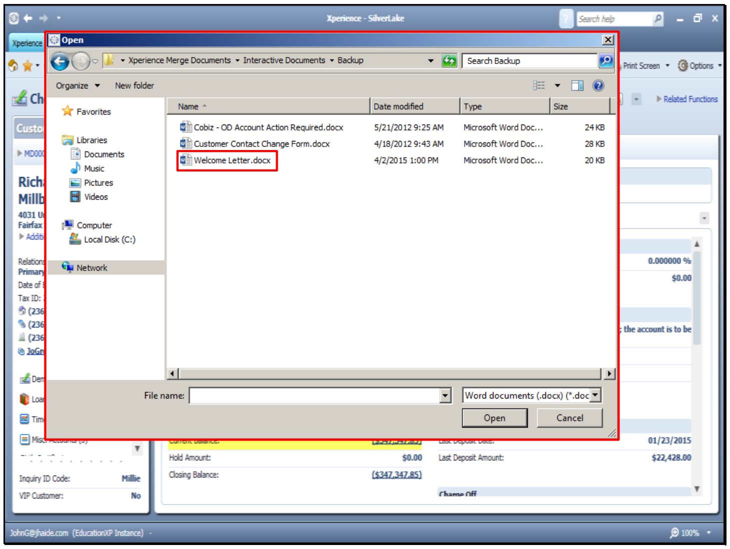


Once Merge Prompts have been created, select the Merge Document button from inquiry.

Slide 83



Select the document to print and click Open.

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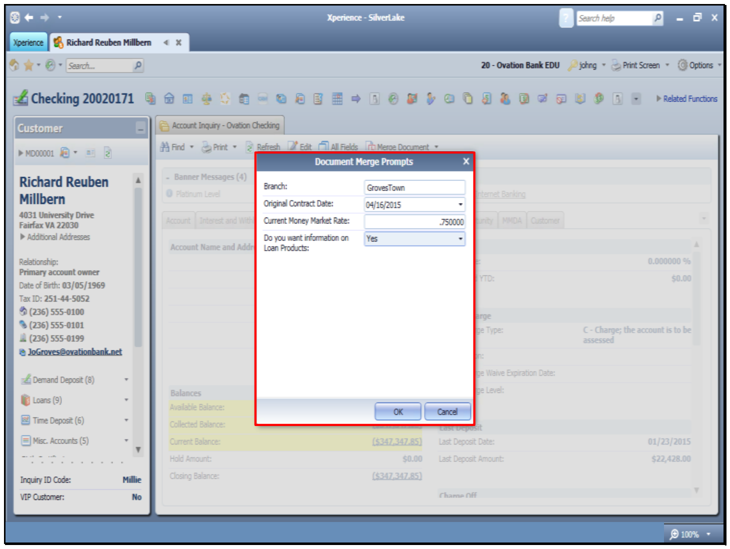


A pop up box is displayed with the Document Merge Prompts that were entered on the document in the Institution Maintenance parameters.

You can enter the information or change any default values and click OK.

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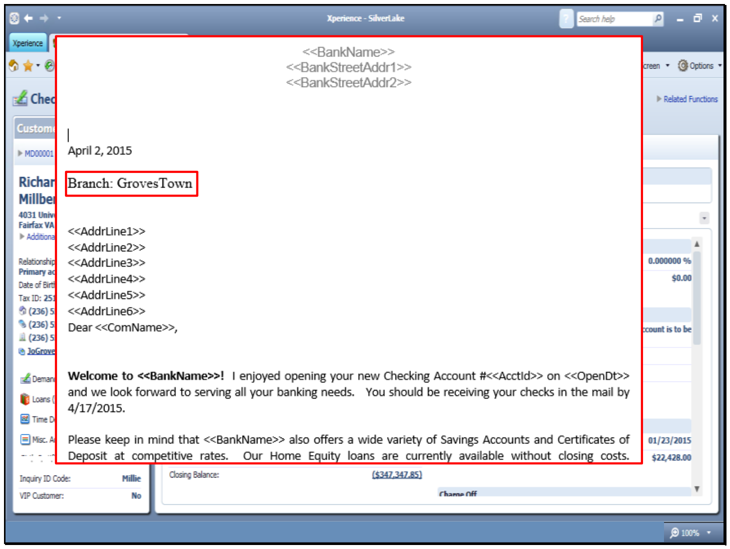


The document opens in your document viewer.

Notice in the example, the letter is showing the information entered in the Document Merge Prompt.

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## QUESTIONS

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The Jack Henry Education team needs your help! If you are willing to lend your assistance by volunteering your knowledge in one of our "Best Practices" Sessions for the upcoming 2015 Banking Educational Conference, you will receive $100 off of your registration fee. Please contact one of our trainers or email: LMSadmins@jackhenry.com.