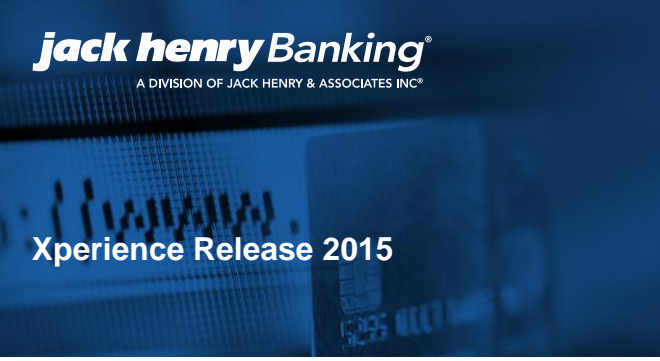


Slide 1

JACKHENRYUniversity



jack henry Banking[®]
A DIVISION OF JACK HENRY & ASSOCIATES INC.[®]

Xperience Release 2015

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The slide features a dark blue background with a blurred image of a server rack. The text is white and positioned in the upper and lower portions of the slide.

Slide 3



Presenter: Shannon Street

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jack henry
UNIVERSITY

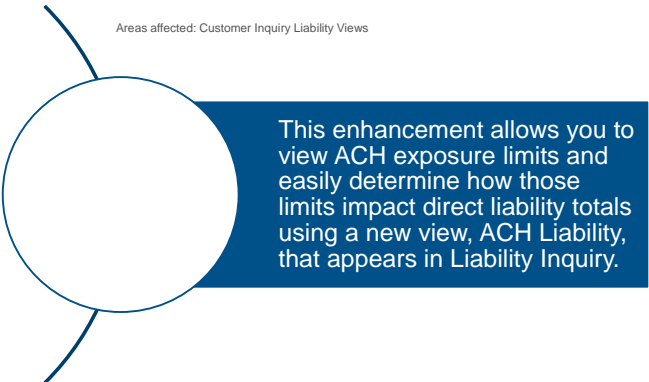
3

CIF

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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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Slide 6

Company Name	Standard Entry Class	Exposure Amount
TEL - CREDITKIT	TEL - CREDITKIT	\$500.00
TEL - TELEPHONE	TEL - TELEPHONE	\$64,854.00
TEL - PHONE PYMT	TEL - PHONE PYMT	\$12,540.00
		Total Exposure = \$77,894.00

- 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.

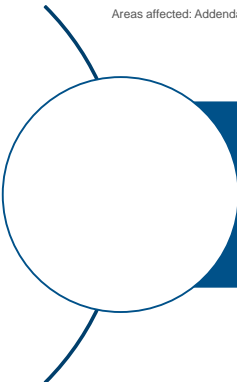
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DEPOSITS

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1074627 – Deposits

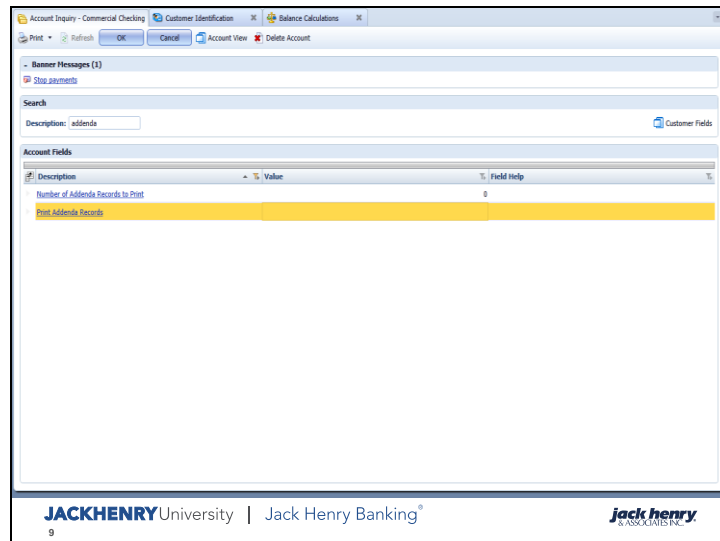
Areas affected: Addenda Records in Checking, Savings and Club account inquiries



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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Slide 9



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**.

Slide 10

Description	Current Account Value	Default Value for Commercial NOW Acct
Card Opt-In Status:	F - Failed to respond	
Charge Bad Address Fee:		No
Interest Cycle:	31 - End of Month Cycle Business	0
Number of Addenda Records to Print:	3	3
OD Limit:	1 - \$.05	0
Print Addenda Records:	A - Print all addenda records	Y - Yes, print addenda records
Send Redeposit Notice:	H - Print Healthcare addendas only	Yes
Service Charge Cycle:	N - Do not print addenda records	0
Statement Cycle:	Y - Yes, print addenda records	0

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**.

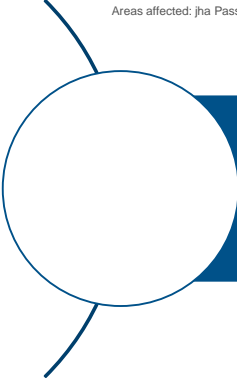
The maximum value is **98**. The value corresponds to the number of lines in the addenda that print.

jhaPASSPORT

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90142 jhaPassport Inquiry Tabs

Areas affected: jha Passport Inquiry



This enhancement has created new tabs 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

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13

64631 – Alias Security Key

Areas affected: iAdapter Settings requiring Alias Secret to be turned on



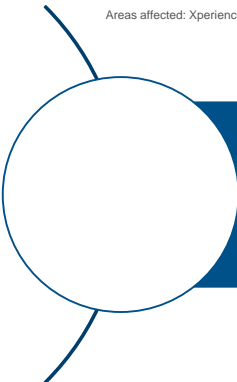
When you log on to SilverLake Xperience, a new security key is now generated and stored with your alias. The security key adds another layer of authentication for increased security.

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81061- Forward Account

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



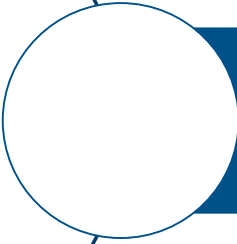
The Forward Account related function now has expanded and allows you to email the Customer or Account Inquiry link to another user or to copy/ paste an account to another user.

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89151- Add Current Time to Document Templates

Areas affected: Document Merge Settings



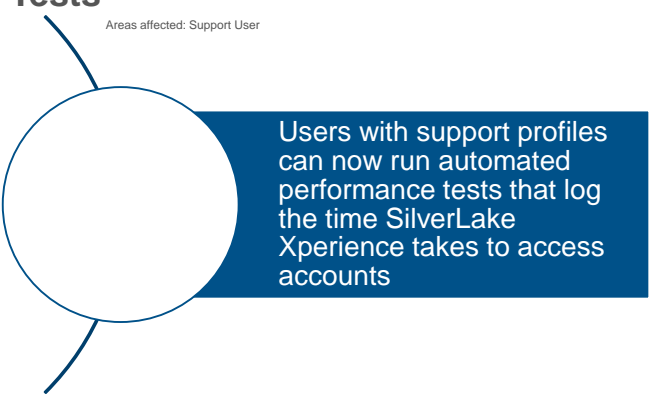
You can now have the ability to add the current time to document templates in Microsoft Word.

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89993- Automated Performance Tests

Areas affected: Support User



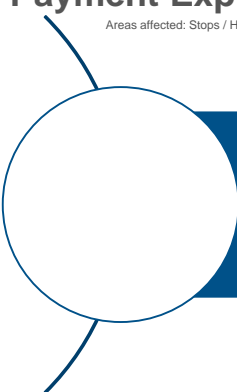
Users with support profiles can now run automated performance tests that log the time SilverLake Xperience takes to access accounts

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1085185- Allow Different Stop Payment Expiration Dates

Areas affected: Stops / Holds



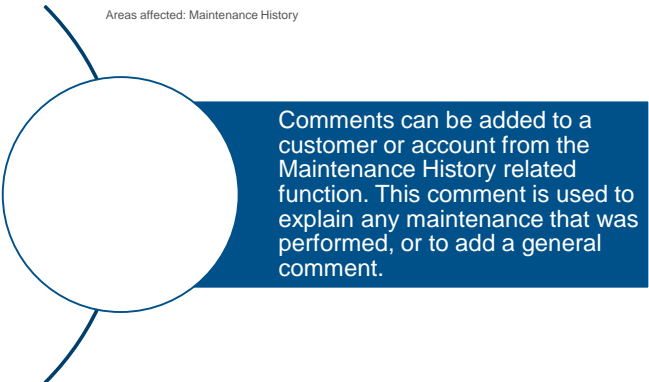
You now have the ability to define a range of months for ACH stop/ hold calculations.

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1075146-Maintenance History

Areas affected: Maintenance History

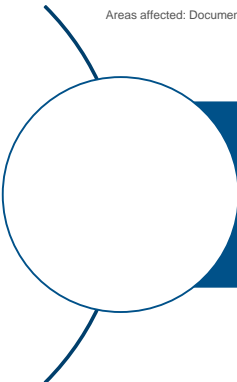


Comments can be added to a customer or account from the Maintenance History related function. This comment is used to explain any maintenance that was performed, or to add a general comment.

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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.

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95203- New Browser Configuration

Areas affected: J Walk Settings in Institution Maintenance

The J Walk Settings in Institution Maintenance have been changed. This change streamlines the way Xperience launches a browser session.

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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.

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 the `JackHenry.Enterprise.BusinessObjects.v2013.1.1.dll` reference with `JackHenry.Enterprise.BusinessObjects.dll` and rebuild the PowerOn.

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INTEGRATIONS

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58915- Synergy

Areas affected: Synergy

- The same token received from Xperience/IMS is now sent with the DocImgSrchRq message.
- The Rstr attribute has been added to the DocImgSrchRq message.
- The Rstr attribute value determines if the returned image displays.

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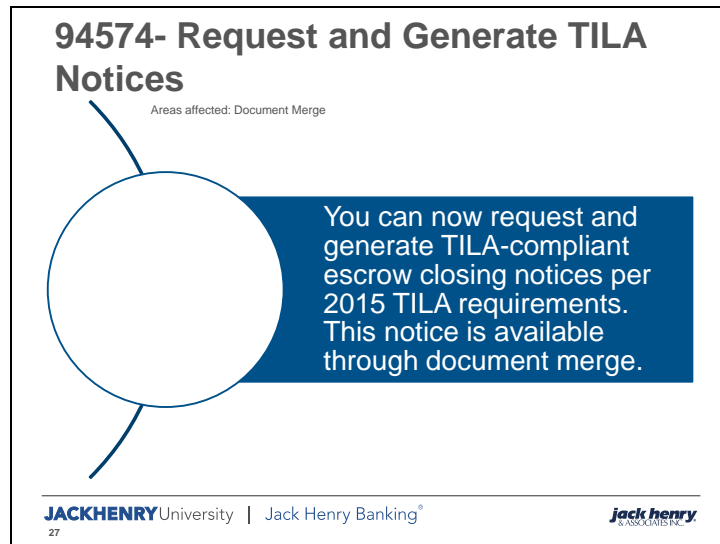
25

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.

REGULATORY UPDATES

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94574- Request and Generate TILA Notices

Areas affected: Document Merge


You can now request and generate TILA-compliant escrow closing notices per 2015 TILA requirements. This notice is available through document merge.

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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.

Xperience Administration

- System Maintenance
- Institution Maintenance

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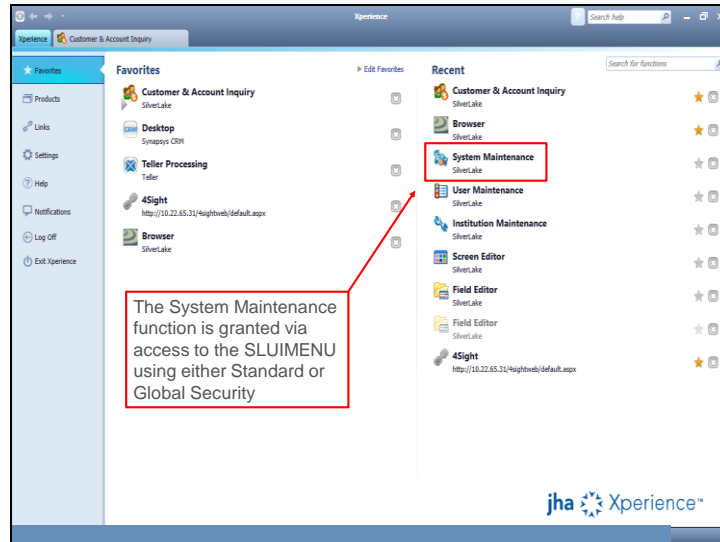
28

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

System Maintenance

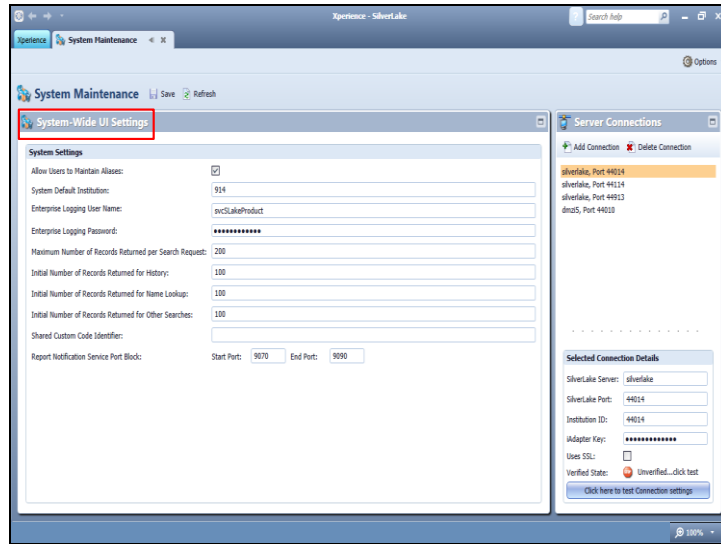
- System Maintenance allows bank administration to establish system settings and server connections.
- Please contact Jack Henry Support before changing any fields especially if you are unsure how they will affect Xperience!

Slide 30



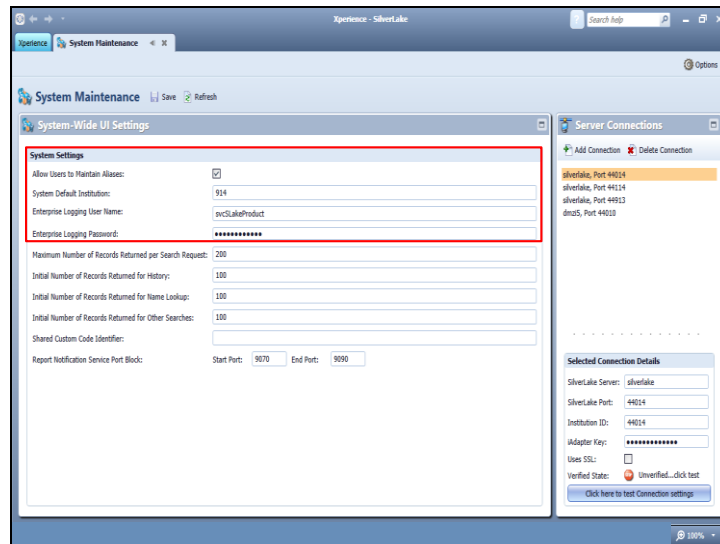
System maintenance is found on the Xperience menu under your Core product, and is controlled by access to the SLUIMENU in either Standard or Global Security.

Slide 31



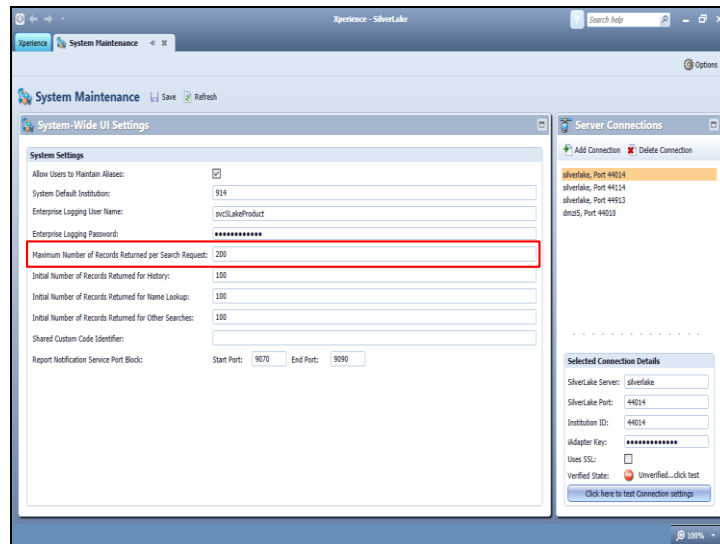
Under System-Wide UI settings are established for your institution along with any search results limits for the various search functions.

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

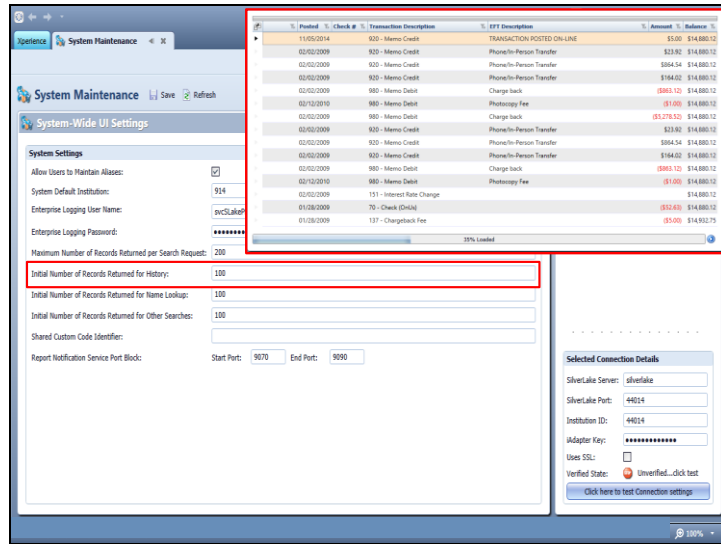
Slide 33



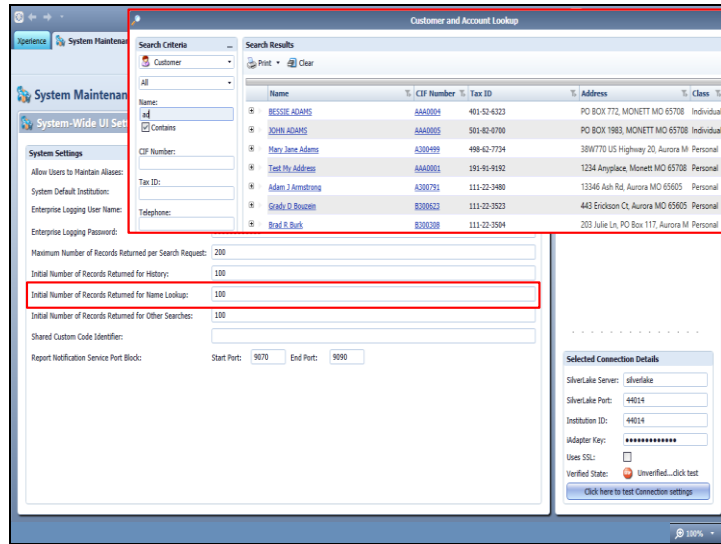
The next four parameters control the number of records returned in each search message from IBM i to Xperience. Changing the values can result in degraded performance. Setting this value too high will cause delays in receiving messages due to the large size of the message. These values are determined 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.

Slide 34



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.



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

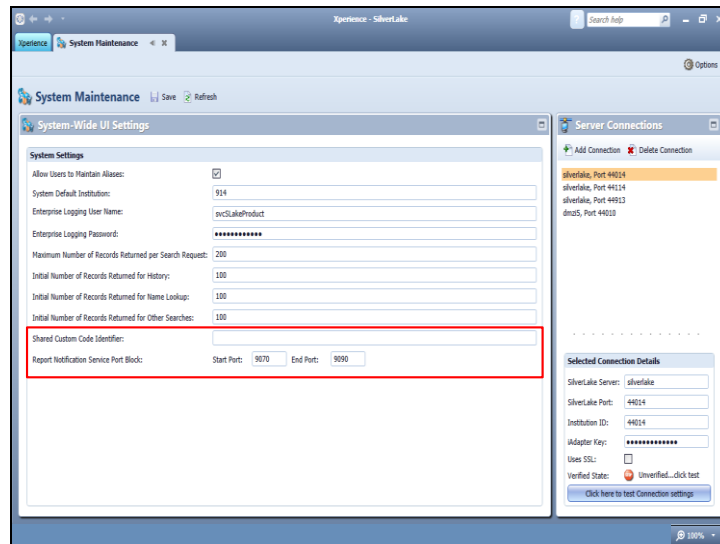
The screenshot displays a financial system interface with two main sections. The top section, titled 'Account Relationships Summary', contains a table with columns for Deposits, Liabilities, Loans, and Other, each with sub-columns for Count, Total, and Avg Rate. The bottom section, 'System Settings', includes various configuration options such as 'Allow Users to Maintain Aliases', 'System Default Institution', and 'Enterprise Logging User Name'. A red box highlights the 'Initial Number of Records Returned for Other Searches' field, which is set to 100. Another red box highlights a table of account relationships with columns for Account Number, Description, Relationship, Status, Balance, and Remarks.

Account Relationships Summary										
	Deposits			Liabilities			Loans			Other
	Count	Total	Avg Rate	Count	Total	Avg Rate	Count	Total	Avg Rate	Count
Direct	6	\$68,077.80	1.9422 %	12	\$475,897.22	5.1119 %	12	\$100,897.22	5.5381 %	4
Indirect	0	\$0.00	0.0000 %	2	\$215,625.00	5.2942 %	2	\$112,500.00	6.2000 %	0
Related	5	\$79,487.85	0.0564 %	36	\$5,913,308.47	2.7824 %	36	\$1,127,543.47	5.8975 %	3

Account Number	Description	Relationship	Status	Balance	Remarks
101000000001	3 X 5 SAFE DEPOSIT BOX	Primary	Occupied	\$0.00	BESSIE ADAMS
101000000002	3 X 5 SAFE DEPOSIT BOX	Joint	Occupied	\$0.00	BESSIE ADAMS
101000000003	3 X 5 SAFE DEPOSIT BOX	Primary	Occupied	\$0.00	
101000000004	10 X 10 SAFE DEPOSIT BOX	Auth Sign	Occupied	\$0.00	Clie America
1275	Commercial Analysis	LANDLORD	Active	\$0.00	Class Bank 2: Has Protection Acct; Alert Msg
6475	Basic Checking	Primary	Active	\$13,782.20	BESSIE ADAMS Alternate Address

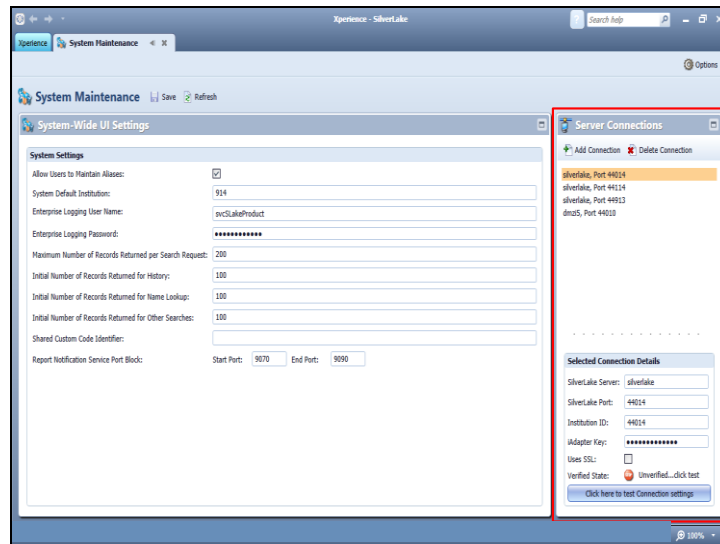
The initial number of records returned for other search requests. For example, stop payments or account relationships. The suggested values for this parameter are a minimum of 100 and a maximum of 1000. The inset shows an example of account relationships listed on the Customer Profile tab.

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.

Slide 38

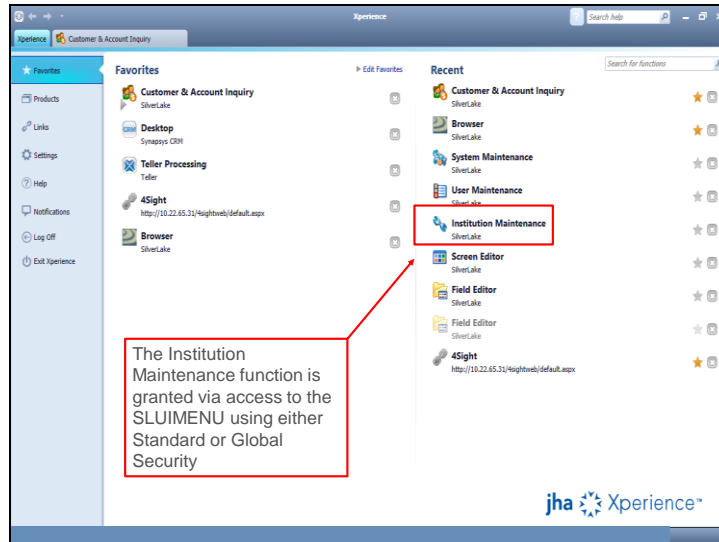


The Server Connections panel is used to Add or delete connections from the Xperience core application to the Jack Henry & Associates servers. The connection details display in the Selected Connection Details section. Modifying these settings can cause the core application to stop working. Please contact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

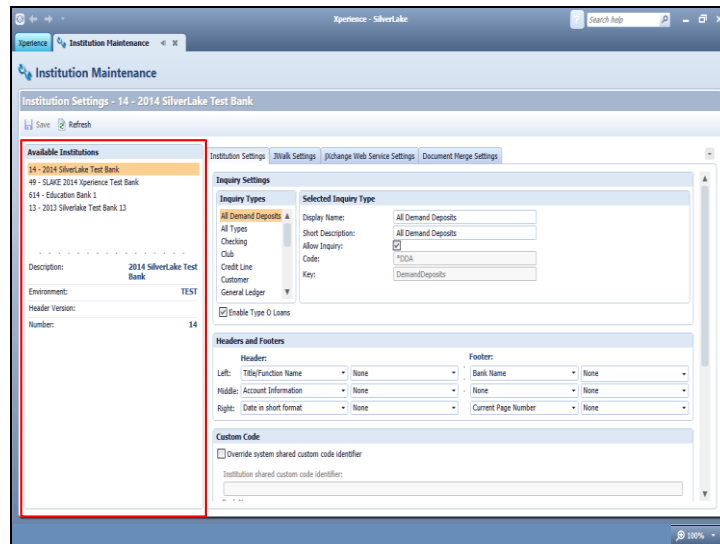
Institution Maintenance

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

Slide 40

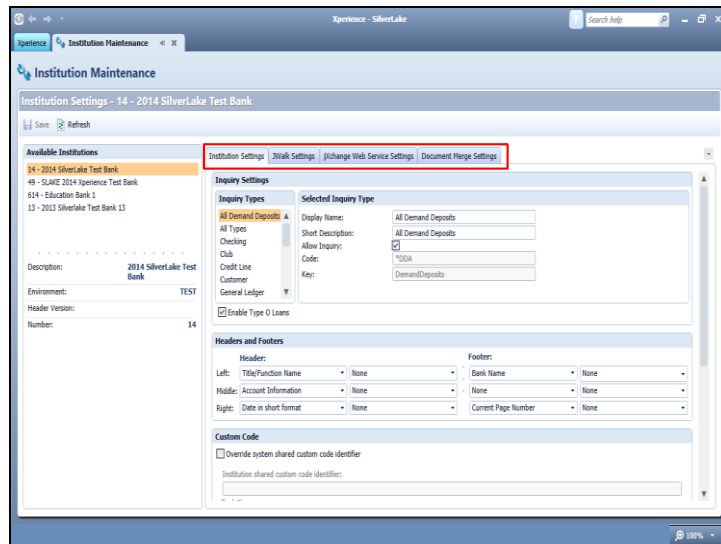


Slide 41



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

Slide 42



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.

The screenshot shows the 'Inquiry Settings' configuration page. The 'Selected Inquiry Type' section is highlighted with a red box. It contains the following fields:

- Display Name: All Demand Deposits
- Short Description: All Demand Deposits
- Allow Inquiry:
- Code: *DDA
- Key: DemandDeposits

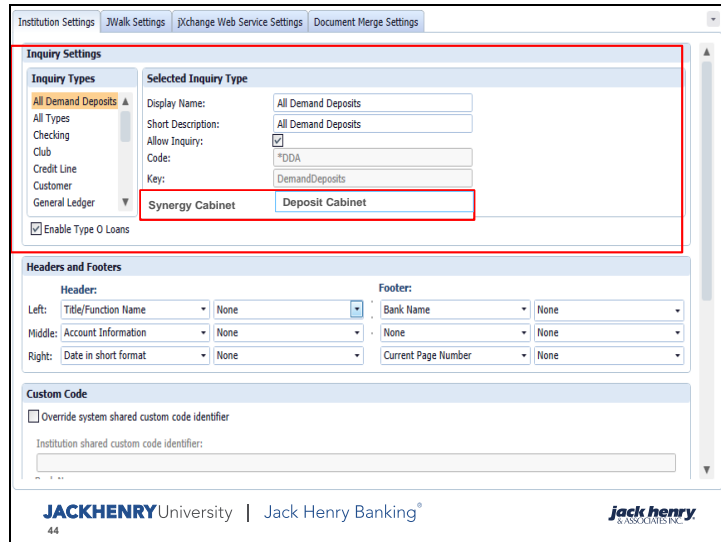
The 'Headers and Footers' section contains the following dropdown menus:

Header:		Footer:	
Left:	Title/Function Name	Bank Name	None
Middle:	Account Information	None	None
Right:	Date in short format	Current Page Number	None

The 'Custom Code' section includes an 'Override system shared custom code identifier' checkbox and a text input field for the 'Institution shared custom code identifier'.

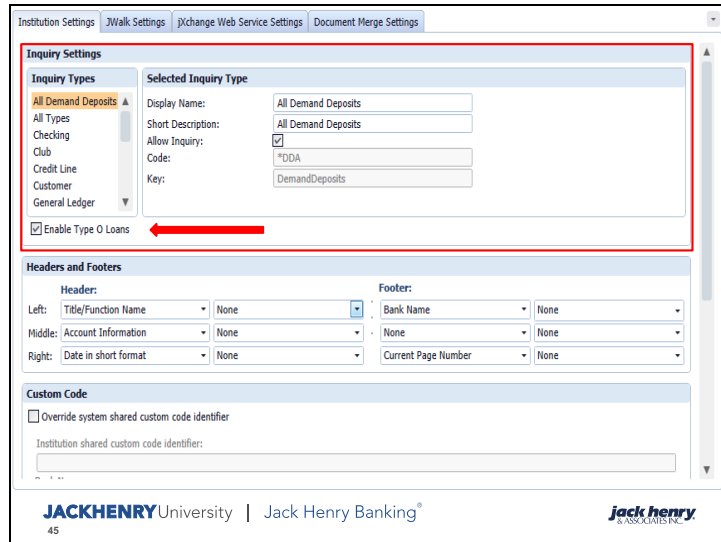
Under the Institution Settings tab, you can change the Inquiry Settings to mirror what your institution uses. Select an Inquiry Type to make changes. In this example, Checking is selected. You have the ability to change the Display Name, which shows in the Search Type drop-down list on the Customer and 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.

Slide 44



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

Slide 45



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.

Slide 46

The screenshot shows the 'Inquiry Settings' configuration page. At the top, there are tabs for 'Institution Settings', 'JWalk Settings', 'JExchange Web Service Settings', and 'Document Merge Settings'. The main content area is titled 'Inquiry Settings' and contains the following sections:

- Inquiry Types:** A list of inquiry types on the left, with 'All Demand Deposits' selected. The 'Selected Inquiry Type' section on the right shows fields for 'Display Name' (All Demand Deposits), 'Short Description' (All Demand Deposits), 'Allow Inquiry' (checked), 'Code' (*DDA), and 'Key' (DemandDeposits). There is also a checkbox for 'Enable Type O Loans'.
- Headers and Footers:** This section is highlighted with a red box. It is divided into 'Header' and 'Footer' columns. The 'Header' column has three rows: 'Left' (Title/Function Name, None), 'Middle' (Account Information, None), and 'Right' (Date in short format, None). The 'Footer' column has three rows: 'Bank Name' (None), 'None' (None), and 'Current Page Number' (None).
- Custom Code:** A section with a checkbox 'Override system shared custom code identifier' and a text input field for 'Institution shared custom code identifier'.

The footer of the page contains the 'JACKHENRY University | Jack Henry Banking' logo and the 'jack henry' logo.

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.

Slide 47

The screenshot shows a settings page with tabs for 'Institution Settings', 'JWalk Settings', 'JXchange Web Service Settings', and 'Document Merge Settings'. The 'JWalk Settings' tab is active. At the top, there are dropdown menus for 'Region', 'Timezone', 'Currency', and 'Language'. Below these are 'Right:' settings for 'Date in short format', 'None', 'Current Page Number', and 'None'. The 'Custom Code' section is highlighted with a red border and contains an unchecked checkbox 'Override system shared custom code identifier', followed by text input fields for 'Institution shared custom code identifier' and 'Bank Name:'. The 'Miscellaneous Settings' section below it includes a checked checkbox 'Enable preload of service dictionaries', an 'Environment' dropdown set to 'Production', and text input fields for 'Dialer Format String:', 'Email Subject line', and 'Yellow Hammer Due Diligence Base URL:'. A red-bordered text box is overlaid on the 'Miscellaneous Settings' section, containing the text: '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.'

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.

Slide 48

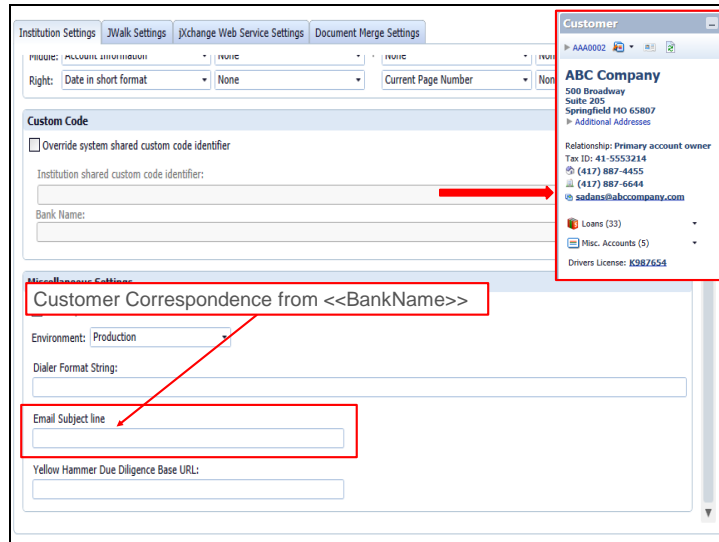
The screenshot shows a web-based settings interface with several tabs at the top: 'Institution Settings', 'JWalk Settings', 'jXchange Web Service Settings', and 'Document Merge Settings'. Below the tabs, there are several dropdown menus for 'Right' settings, including 'Date in short format', 'None', 'Current Page Number', and 'None'. The main content area is divided into sections. The 'Custom Code' section includes a checkbox for 'Override system shared custom code identifier' and two text input fields for 'Institution shared custom code identifier' and 'Bank Name'. The 'Miscellaneous Settings' section, which is highlighted with a red border, contains a checked checkbox for 'Enable preload of service dictionaries', a dropdown menu for 'Environment' set to 'Production', and a text input field for 'Dialer Format String'. Below this section are two more text input fields for 'Email Subject line' and 'Yellow Hammer Due Diligence Base URL'.

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.

Slide 49



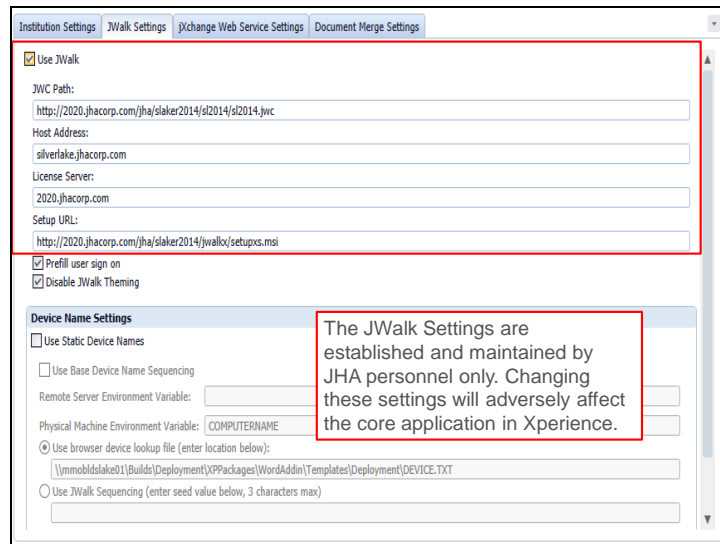
Under the Email Subject Line enter the default text that you want to appear in the subject line of an email you send to customers. You can use the bank name variable to include your institution's name in the subject line. When you select the email address link available in the CIF panel, as you can see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

Slide 50

The image shows a screenshot of a web-based settings application. At the top, there are tabs for 'Institution Settings', 'JWalk Settings', 'jXchange Web Service Settings', and 'Document Merge Settings'. Below the tabs, there are several dropdown menus for 'Region', 'Country', 'Language', and 'Currency'. A 'Right:' section contains three dropdown menus: 'Date in short format', 'None', and 'Current Page Number'. The main content area is divided into two sections: 'Custom Code' and 'Miscellaneous Settings'. The 'Custom Code' section has a checkbox for 'Override system shared custom code identifier' and two text input fields for 'Institution shared custom code identifier' and 'Bank Name'. The 'Miscellaneous Settings' section has a checked checkbox for 'Enable preload of service dictionaries', a dropdown for 'Environment' set to 'Production', a text input for 'Dialer Format String', a text input for 'Email Subject line', and a text input for 'Yellow Hammer Due Diligence Base URL'. This last input field is highlighted with a red rectangular box.

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.

Slide 51



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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Institution Settings | JWALK Settings | Exchange Web Service Settings | Document Merge Settings

Use JWALK

JWC Path:

Host Address:

License Server:

Setup URL:

Prefill user sign on

Disable JWALK Theming

Device Name Settings

Use Static Device Names

Use Base Device Name Sequencing

Remote Server Environment Variable:

Physical Machine Environment Variable:

Use browser device lookup file (enter location below):

Use JWALK Sequencing (enter seed value below, 3 characters max)

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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The screenshot shows a configuration window with tabs for 'Institution Settings', 'JWalk Settings', 'Exchange Web Service Settings', and 'Document Merge Settings'. The 'JWalk Settings' tab is active. It contains several fields and checkboxes:

- Use JWALK
- JWC Path:
- Host Address:
- License Server:
- Setup URL:
- Prefill user sign on
- Disable JWALK Theming

The 'Device Name Settings' section is highlighted with a blue header and contains:

- Use Static Device Names (This checkbox and its label are enclosed in a red box)
- Use Base Device Name Sequencing
- Remote Server Environment Variable:
- Physical Machine Environment Variable:
- Use browser device lookup file (enter location below):
- Use JWALK Sequencing (enter seed value below, 3 characters max)

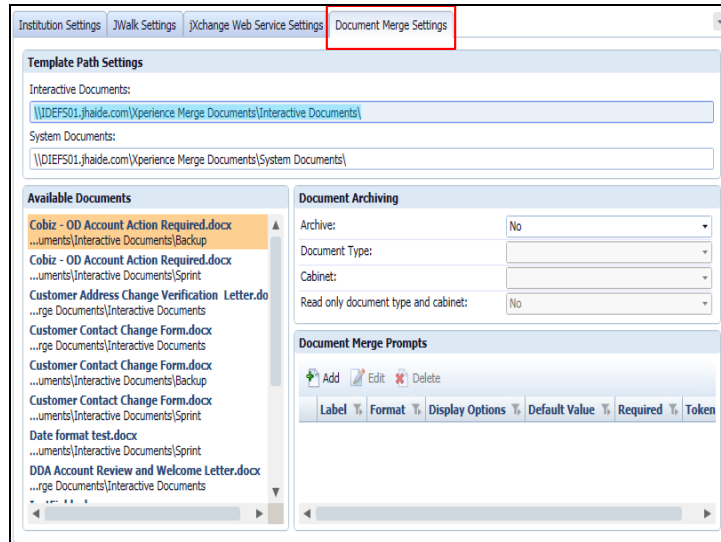
A red-bordered text box is overlaid on the 'Device Name Settings' section, containing the text: "This setting should only be maintained by Jack Henry personnel."

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.

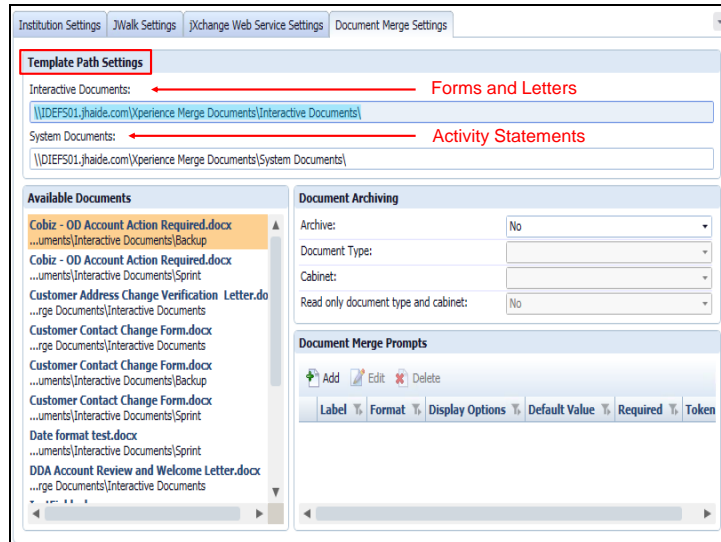
Slide 54

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.



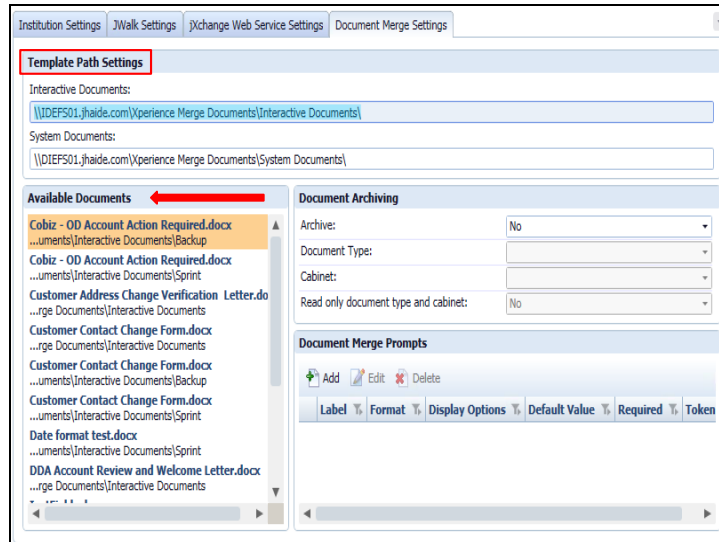
The Document Merge Settings tab allows you to specify the paths to the folders where your document templates are stored, either locally or on a network drive. Also on this tab, you can set up archiving for a document or statement that you have edited and/or produced for your customer using the Document 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.



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.

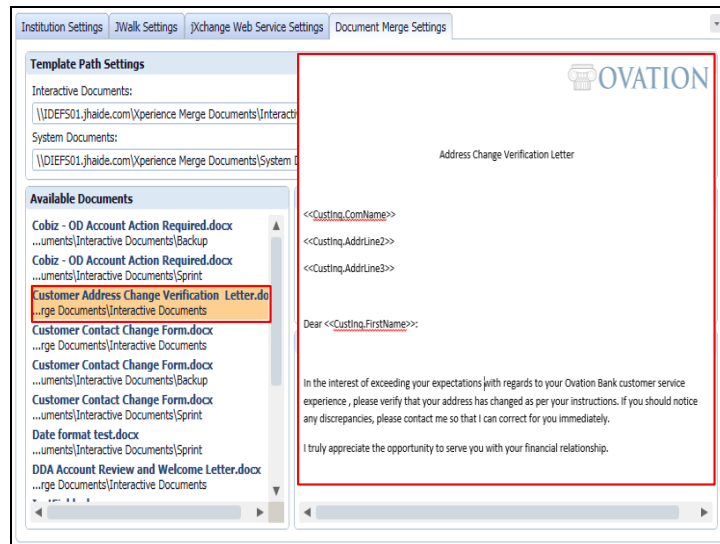
The System Documents merge option is for activity statements only. Enter the network path where those documents are stored so they can be used when creating an activity statement.

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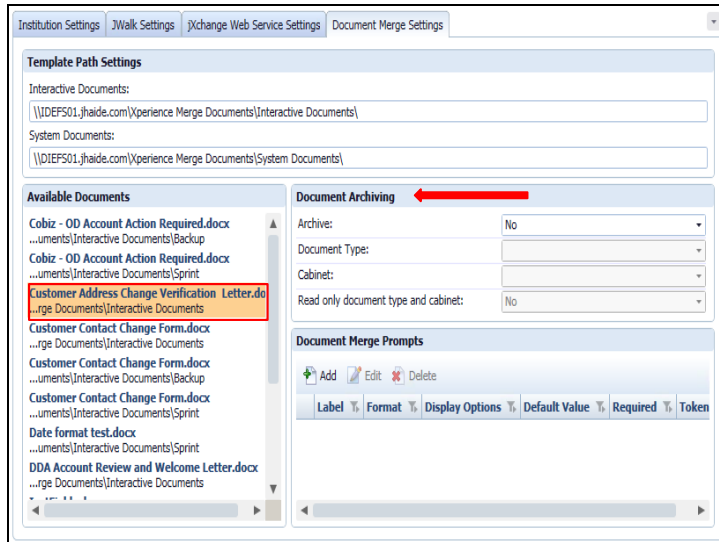


The documents listed in the Available Documents section are the document templates available in your institution for Document Merge. These documents are stored in the template path locations that are specified in the Template Path Settings section.

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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.



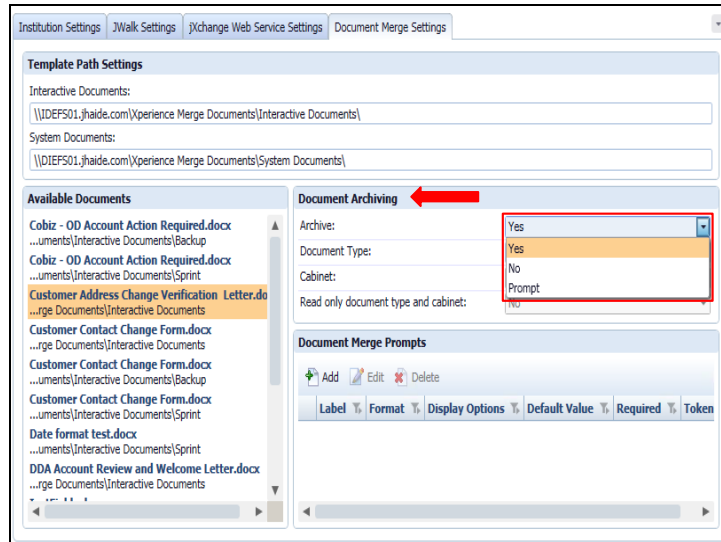
The document selected in the Available Documents section displays the archiving options if any have been entered. You can establish archive settings for merge documents if your institution uses a content management system, such as Synergy.

Before setting up the archiving settings, go to the Inquiry Settings found under the Institution Settings tab. Select the Inquiry Type that you want to set to archive documents.

Select the Synergy Cabinet where you want to store 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.

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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

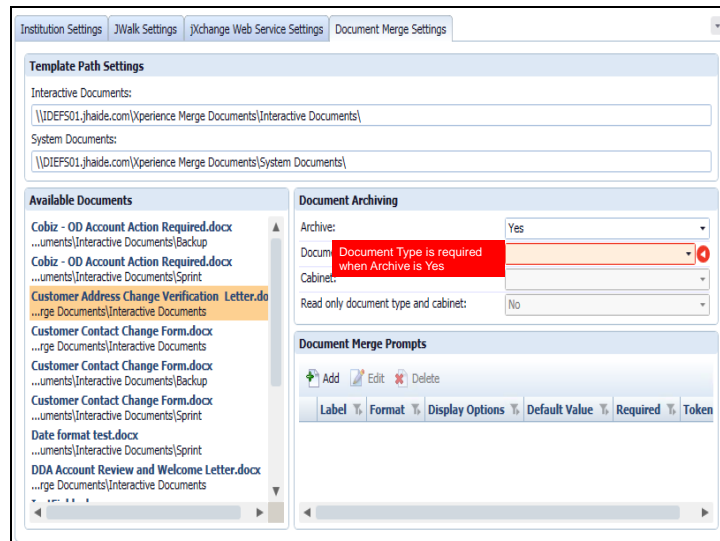


The Archive field lets you choose whether you want to archive the document selected from the Available Documents list. The archive prompt defaults to No. Available options are: Yes, No, and Prompt.

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.

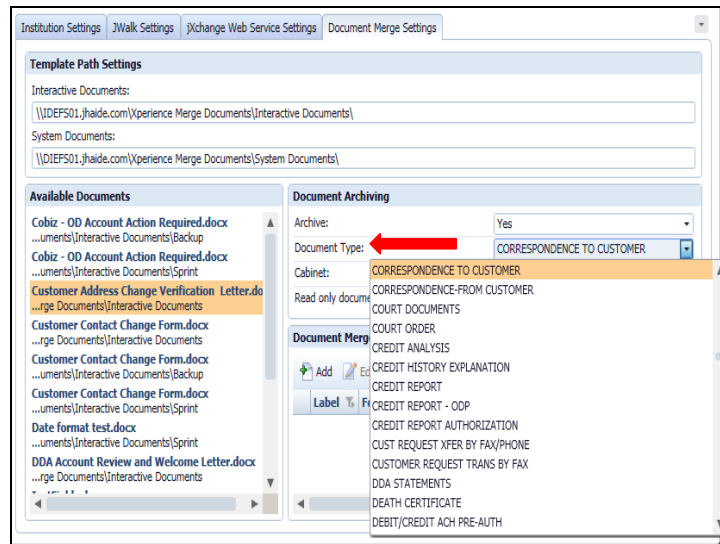
When Prompt is selected the Archive Document, prompt appears asking the user to archive the document. Both the Document Type and Cabinet fields are optional, but defaults can be selected. A cabinet may not need to be selected if the cabinet has been established for the inquiry type in Institution Settings. 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.

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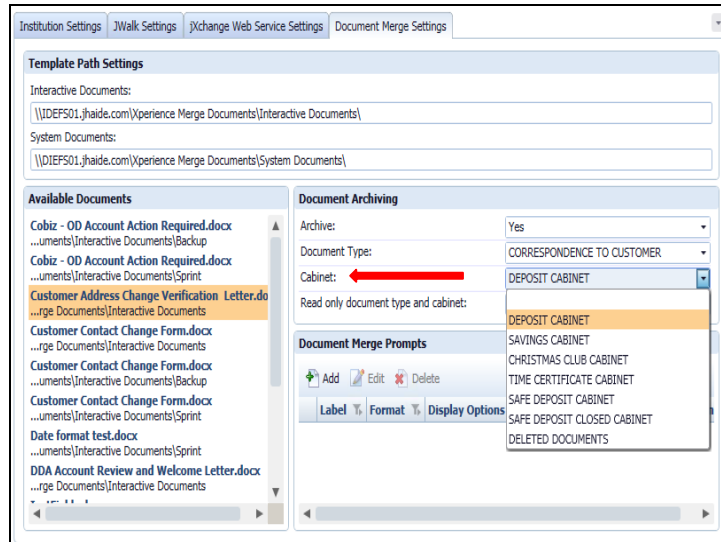


Once you've selected Yes or Prompt in the Archive field, the Document Type field shows red, indicating that a Document Type is required. If you hover over the red button, a message displays explaining why the field is red.

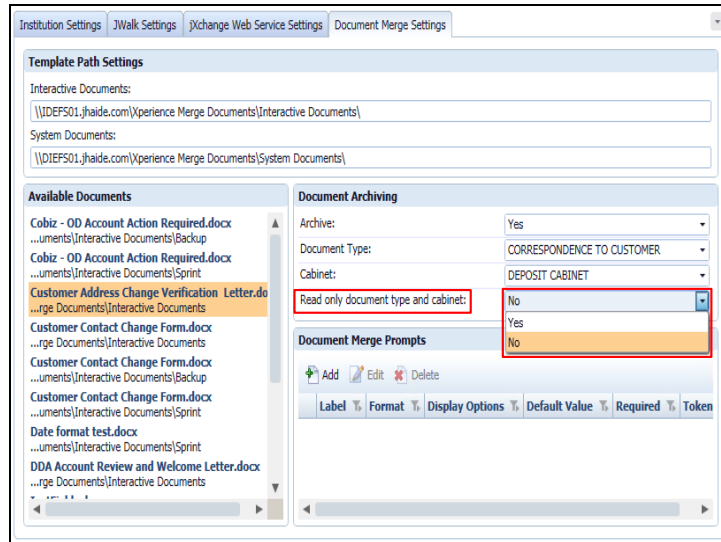
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Use the dropdown box to select an available Document Type to be archived.

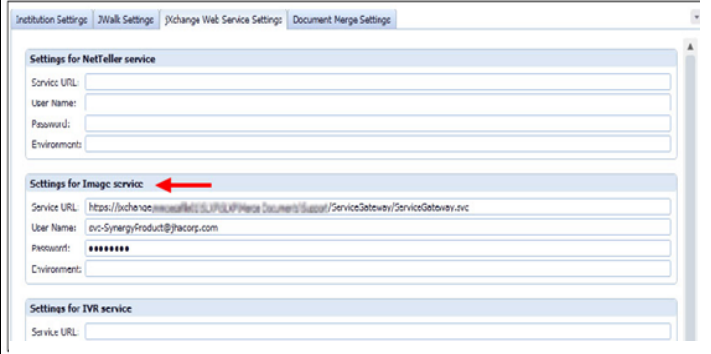


The Cabinet field is optional if selected in the Inquiry Settings. The cabinets displayed are based on the document type selected. Keep in mind that a document could belong to multiple cabinets, which would need to be determined by the user. For example, the Application document type could belong to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



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.

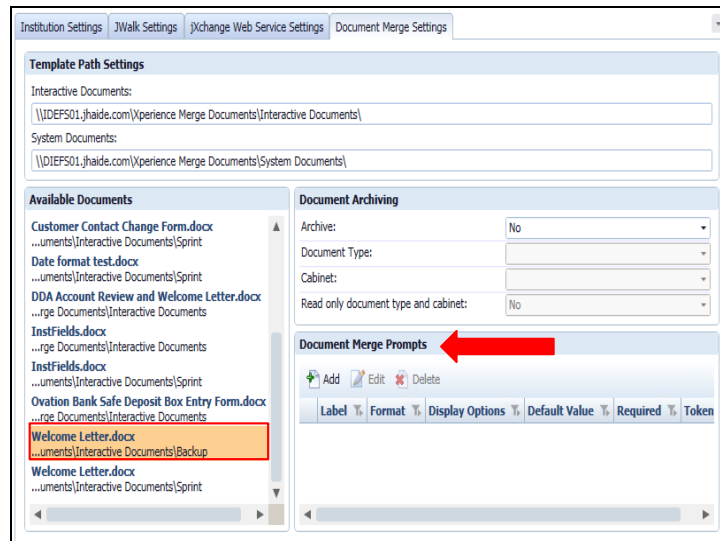
The Settings for Image Service on the jXchange Web Service Settings tab must be filled out and the current user must have access to Synergy to view the Synergy Cabinet drop-down list for a Selected Inquiry Type on the Institution Settings tab.



The screenshot displays a web interface with four tabs: 'Institution Settings', 'Walk Settings', 'jXchange Web Service Settings', and 'Document Merge Settings'. The 'jXchange Web Service Settings' tab is active. It contains three sections: 'Settings for Neteller service' with fields for Service URL, User Name, Password, and Environment; 'Settings for Image service' with fields for Service URL (containing a long URL), User Name (cvc-SynergyProduct@jacorp.com), Password (masked with asterisks), and Environment; and 'Settings for IVR service' with a Service URL field. A red arrow points to the 'Settings for Image service' section. At the bottom, there is a footer with 'JACKHENRY University | Jack Henry Banking' and the 'jack henry' logo.

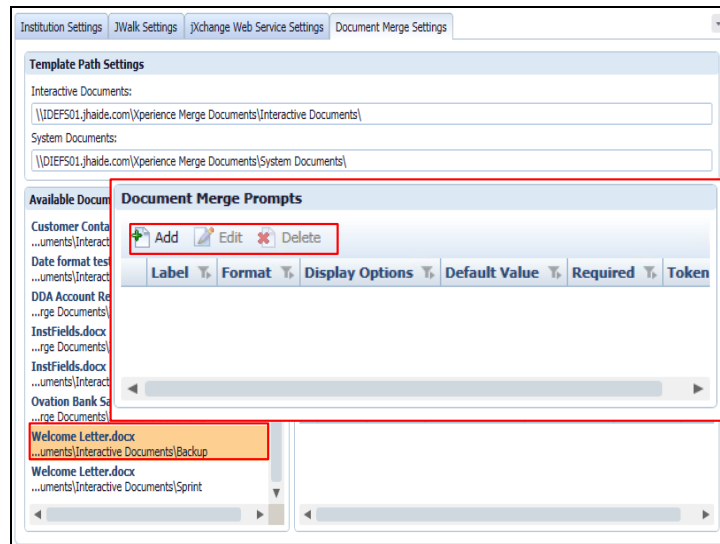
The Settings for Image Service on the jXchange Web Service Settings tab must be filled out and the current user must have access to Synergy to view the Synergy Cabinet drop-down list for a Selected Inquiry Type on the Institution Settings tab.

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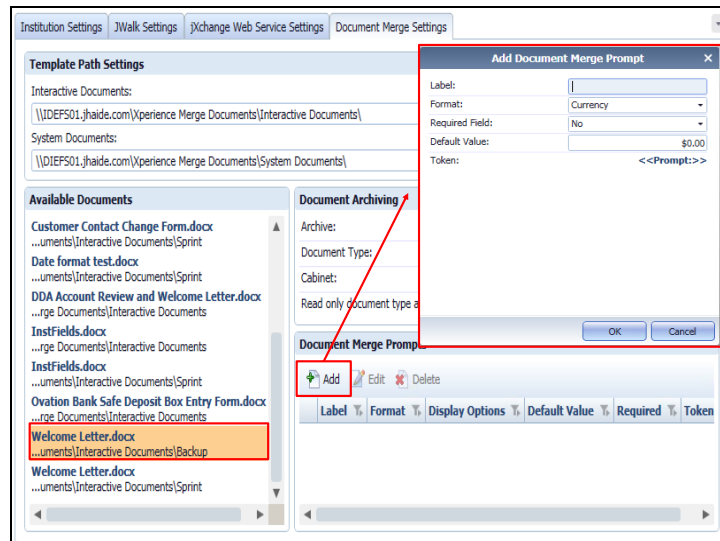


Document Merge Prompts can be set up to allow your users to input data prior to printing and saving merge documents. Select the document from the Available Documents list to create the Prompt.

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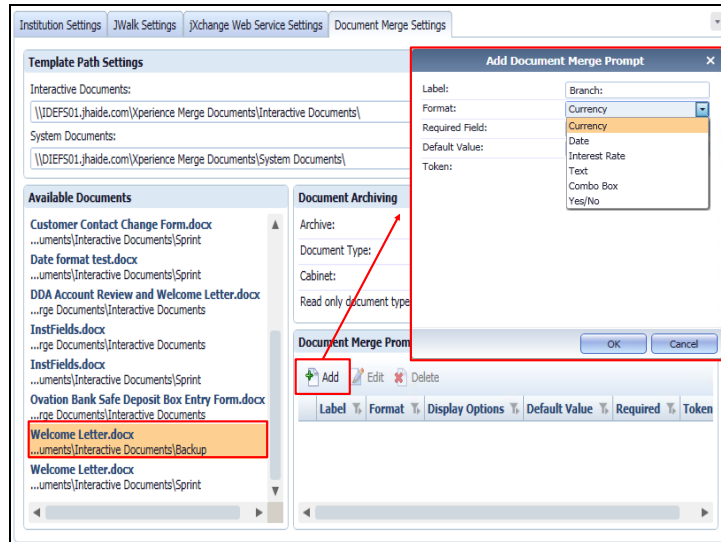


You can use the toolbar options in this section to Add, Edit, or Delete any fields in a prompt for adding institution-defined information to a document template during merging.



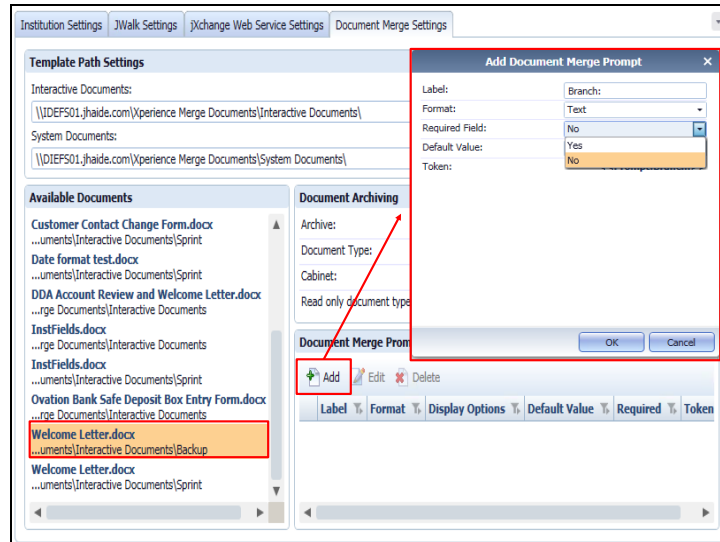
When you select Add a pop-up box is provided to create the Prompt. First, enter an identifying Label.

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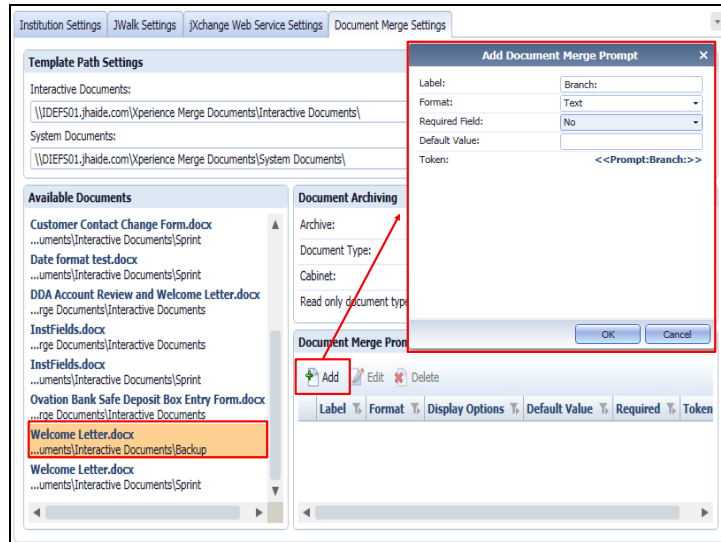
The Format field allows you to select the type of format to be used. The dropdown list provides the available selections to choose from.

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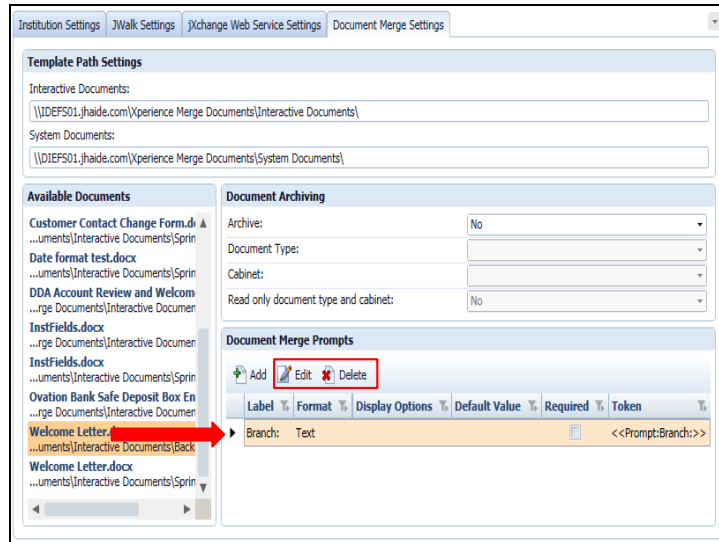
The Required field allows you to make a field required or optional by selecting Yes or No.

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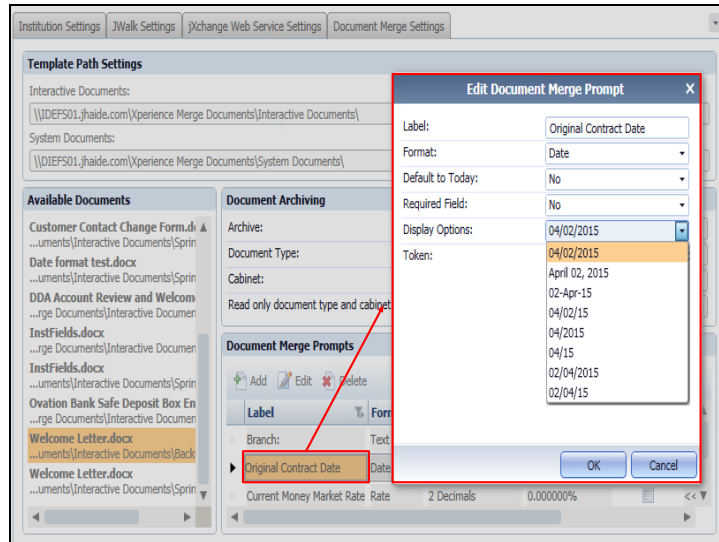
The Token you are entering automatically displays as you create it. Select OK to complete your entry.

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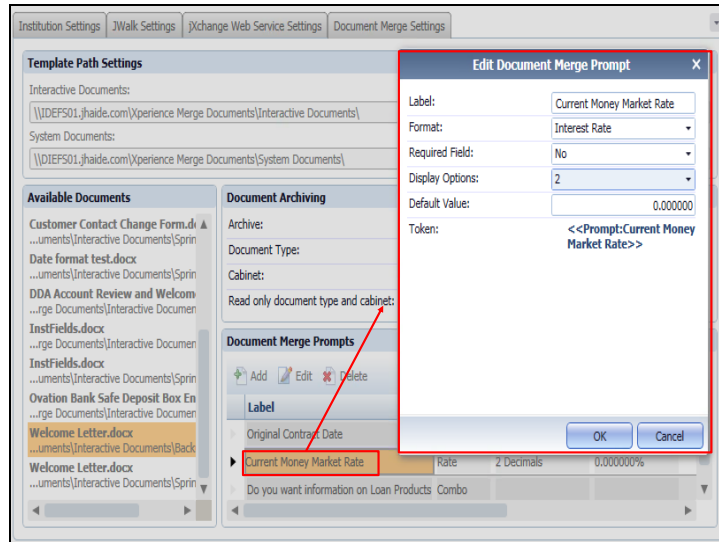


The new Token displays and can be selected to Edit or Delete.

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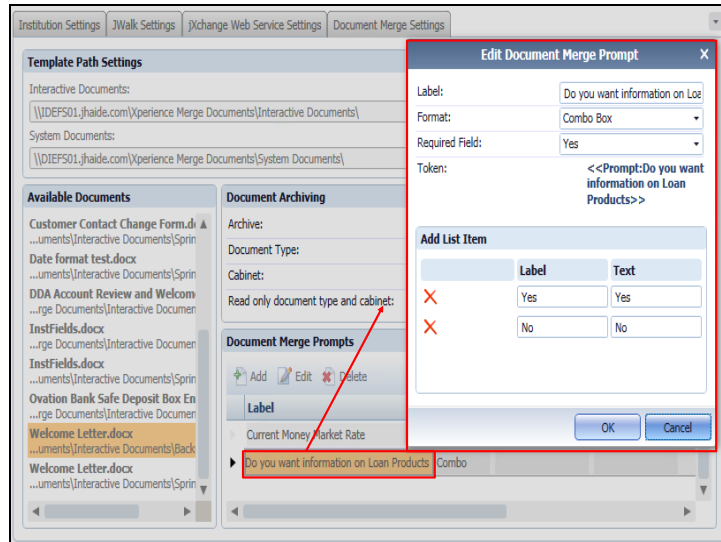


If the format selected is Date, additional fields are available to default the current date and how the date is displayed.



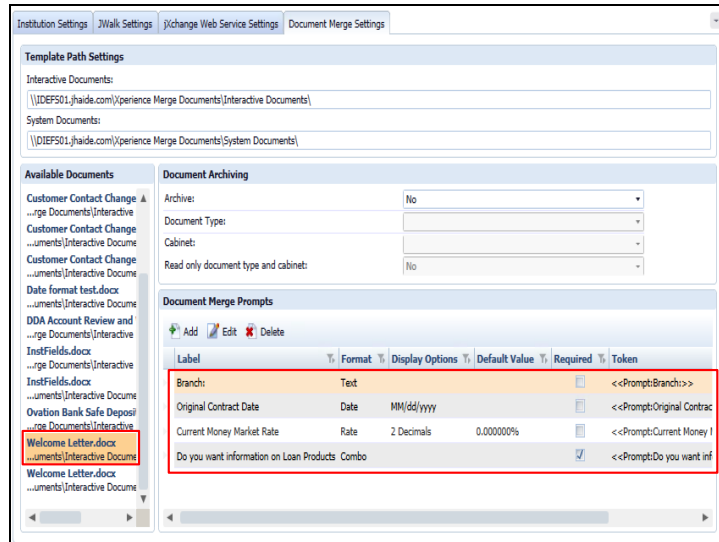
If the format selected is for an Interest Rate, additional fields are available to display the number of decimal places and a default value.

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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.

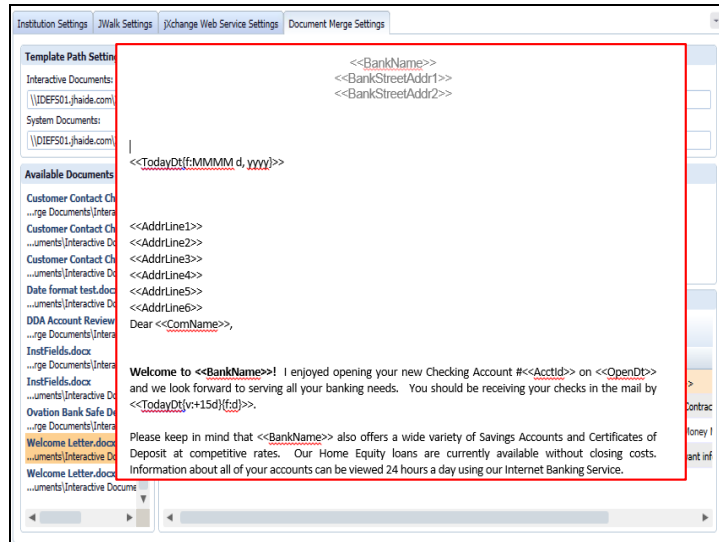
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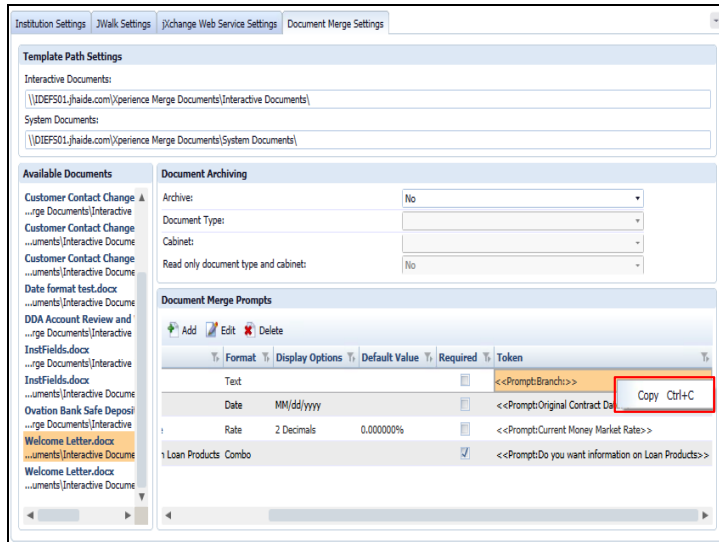
Once your field tokens are created, you are ready to add them to the document template you have selected in the Available Documents.

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

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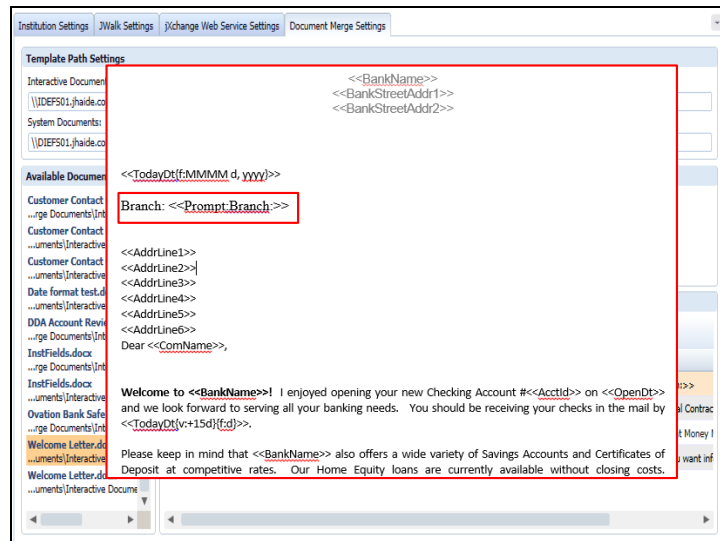


The document opens for you to edit in your document viewer.



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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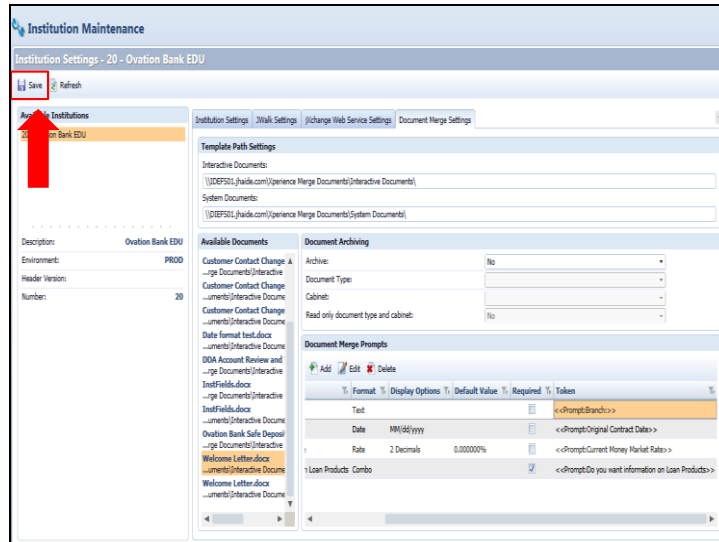


Then paste the token into the document template where you want it to show on the document.

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

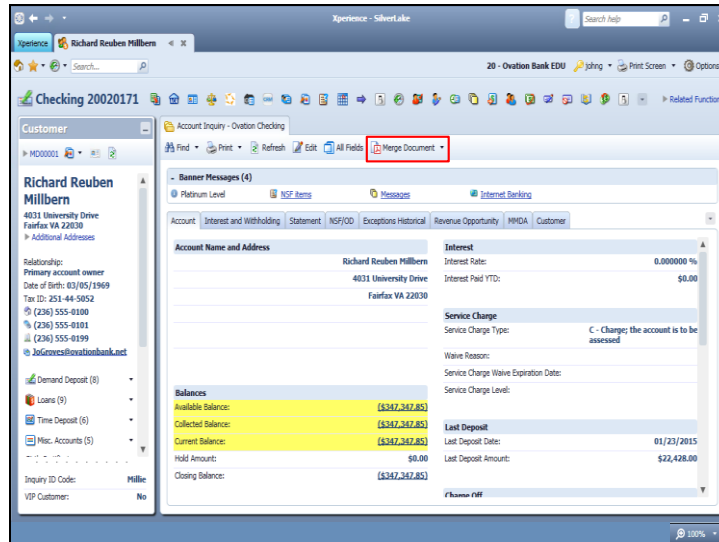
Once you have added all tokens to the document, be sure and select Save before closing.

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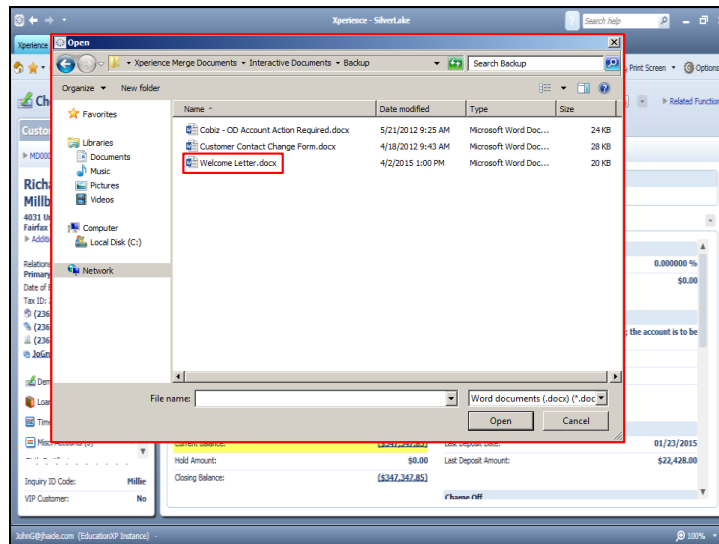
Be sure and click “Save” on the Institution Settings panel toolbar when changes are made, before closing Institution Maintenance.

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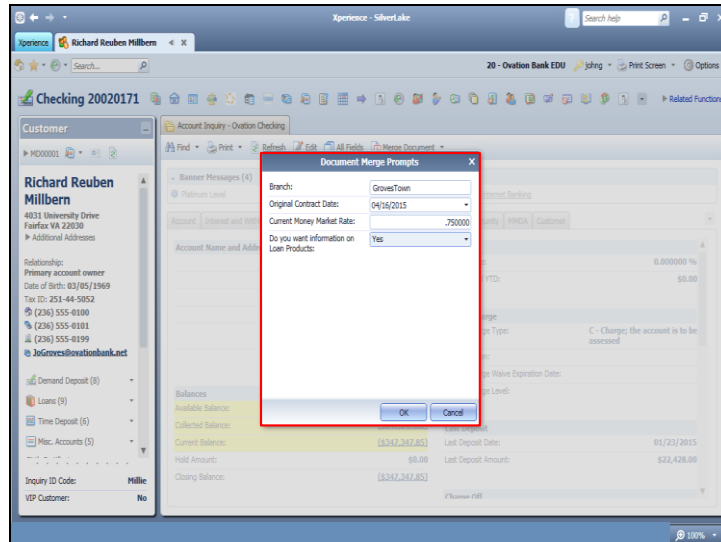
Once Merge Prompts have been created, select the Merge Document button from inquiry.

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Select the document to print and click Open.

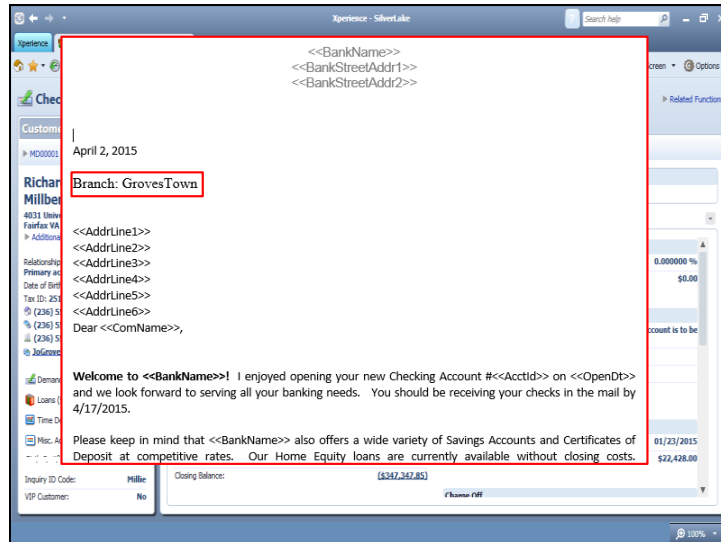
Slide 84



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.

Slide 85



The document opens in your document viewer.

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

QUESTIONS



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ASSOCIATES

Best Practices volunteers needed!!



\$100 off BEC registration fee!!

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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.