JACKHENRY University

SilverLake System®

Release 2017

Getting Started Navigation Guide

Know-It-All Education™

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Xperience Users

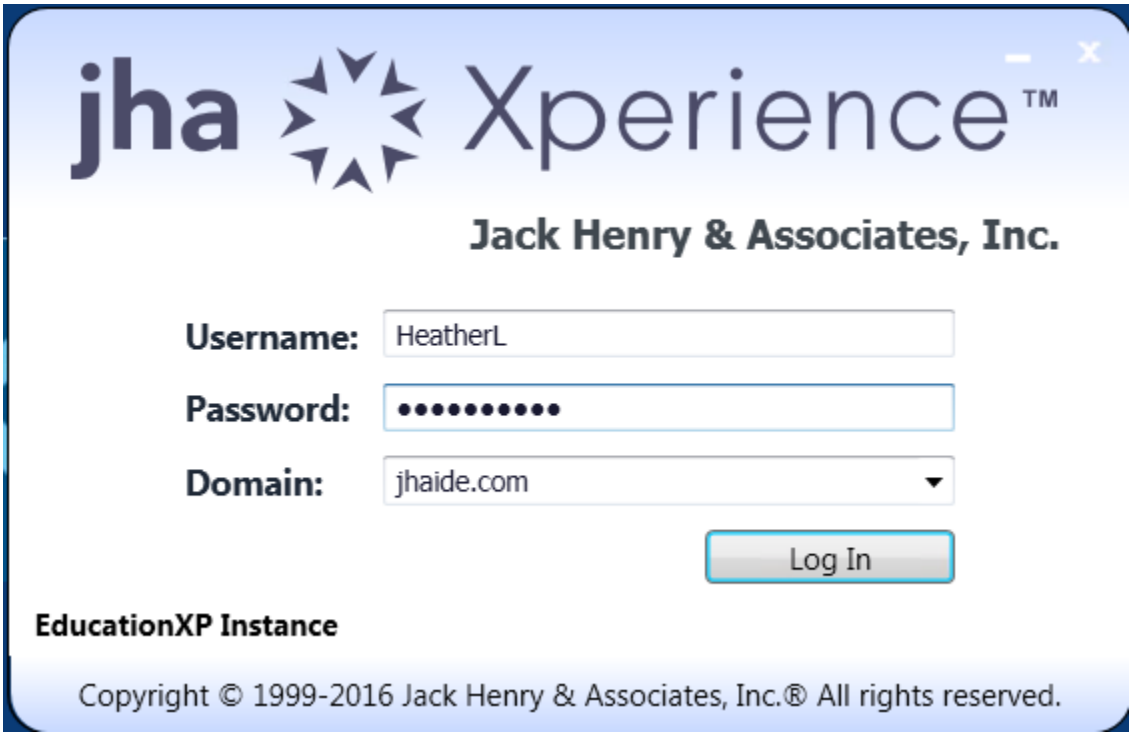
Welcome to SilverLake Xperience training. This documentation has been designed to help you navigate through SilverLake Xperience.

Launching Xperience

To launch Xperience, select the Xperience icon on your desktop.

Xperience offers two authentication methods, **Username** or **Windows**.

- **Windows** – the system uses the credentials of the Windows® user that is currently logged on to the computer.
- **Username** – a login popup prompts for the username, password, and domain. Here is an example of the username login window.



Enter your network **Username** and **Password,** select your **Domain,** and then click **Log In.**

Once your user information has been verified, you will be presented with the Xperience home screen.

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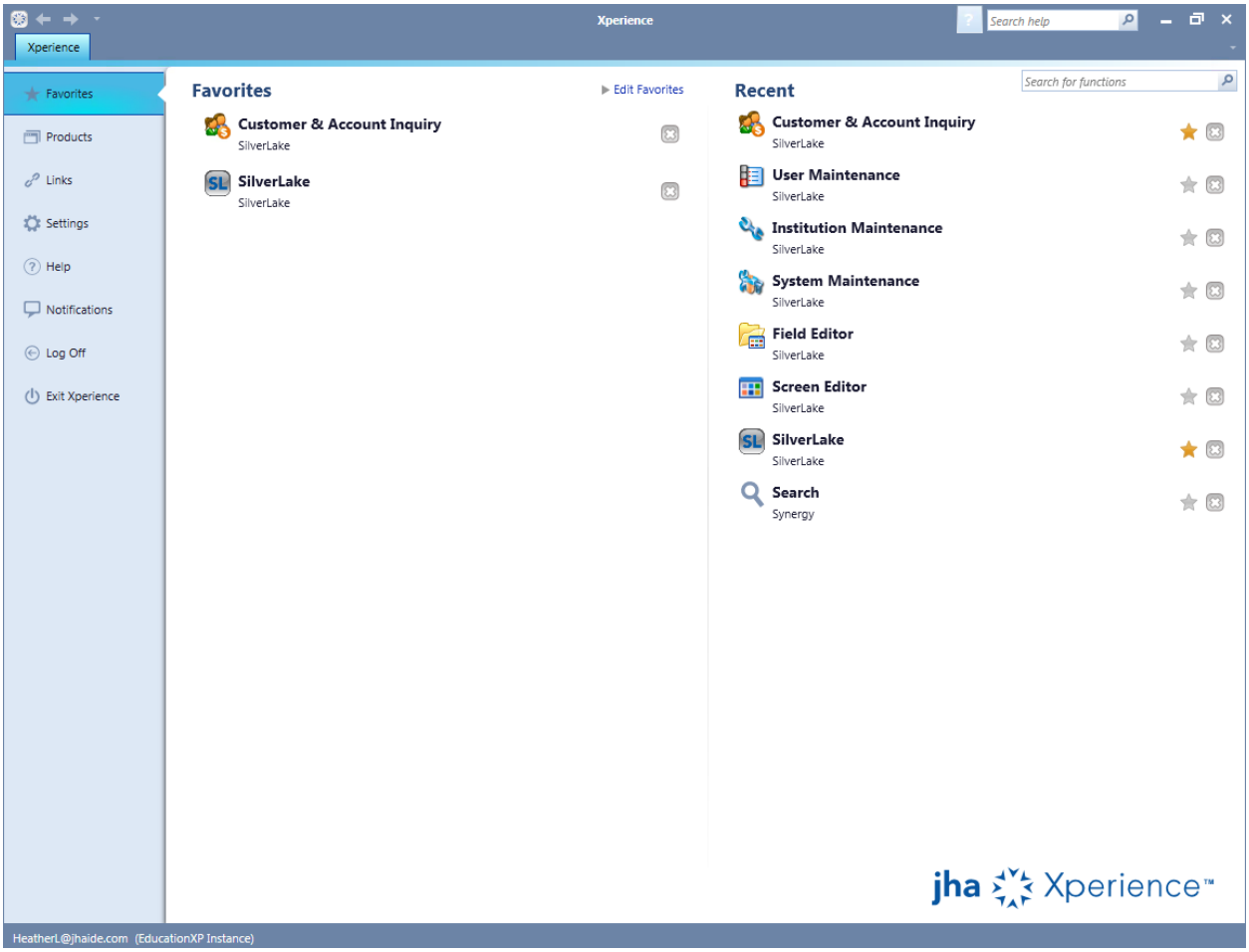
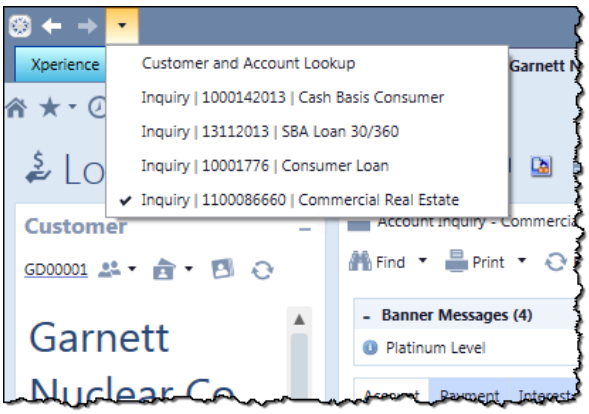


Xperience Home Screen Navigation

- **Back/Forward/History** - The left, right, and down arrows in the upper left corner of the screen allow navigation between screens that have been viewed for the **Customer & Account Inquiry** tab.



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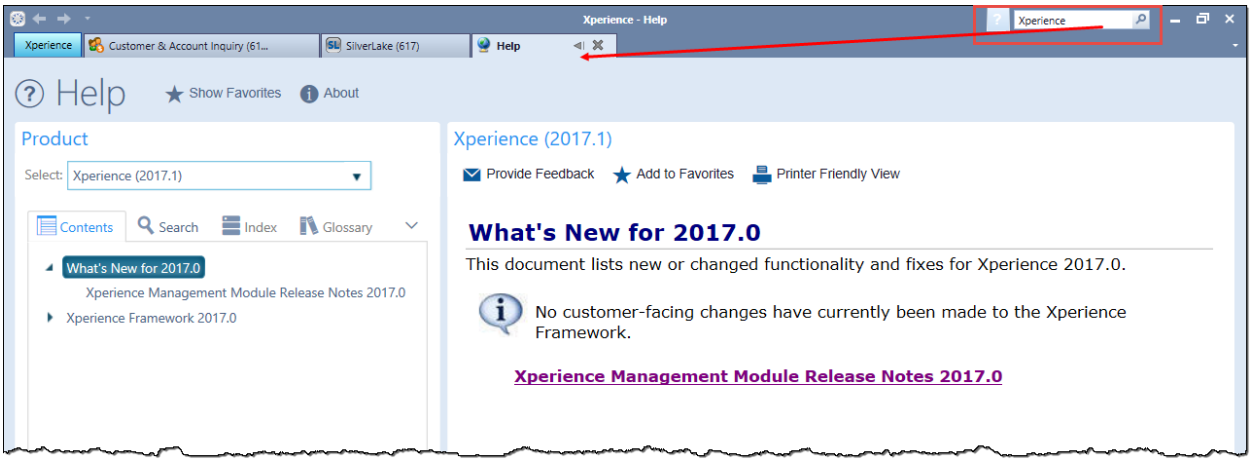
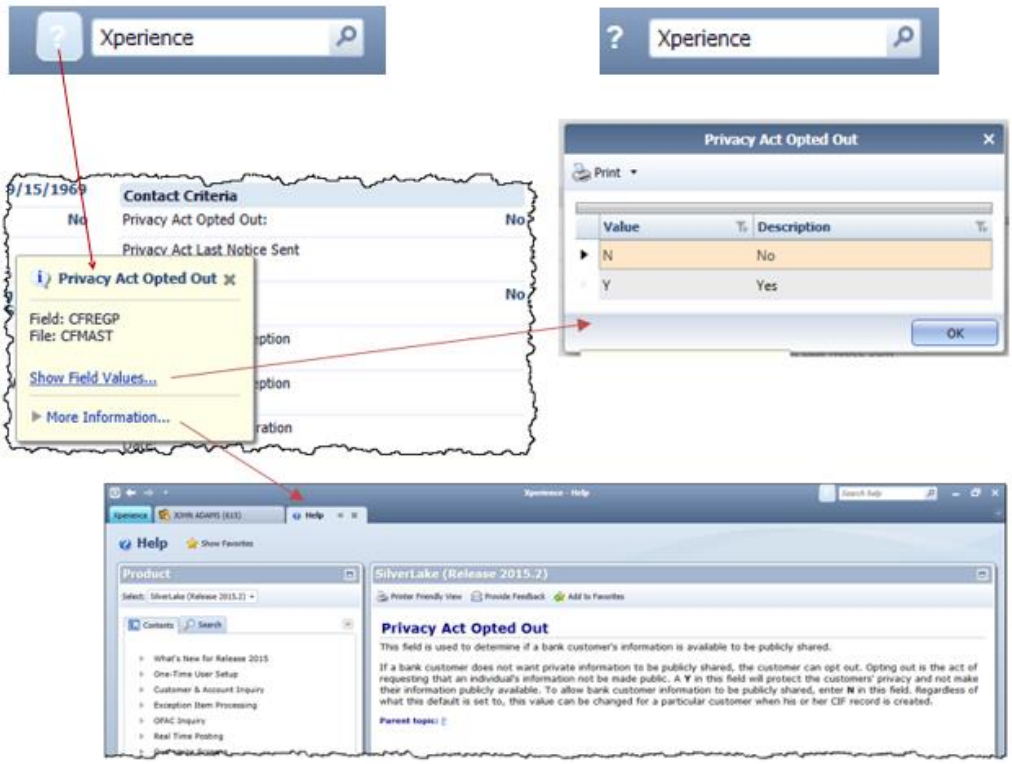
- **Xperience Help System** – The help system is available in the upper right corner of the screen. You can perform a search of the help topics by entering text in the search box and then clicking the search icon or pressing **Enter**. A new **Help** tab opens.



- The ? to the left of the help search box controls the interactive help. When the ? is highlighted, the interactive help is on. When it is not, the interactive help is disabled. When the help option is active, you can view more information for a field by hovering over the field to display the help window. The help window contains the field name and field and file variables. **Show Field Values** and **More Information** options are available in the help window. **More Information** opens a help tab displaying the help definition for the field.



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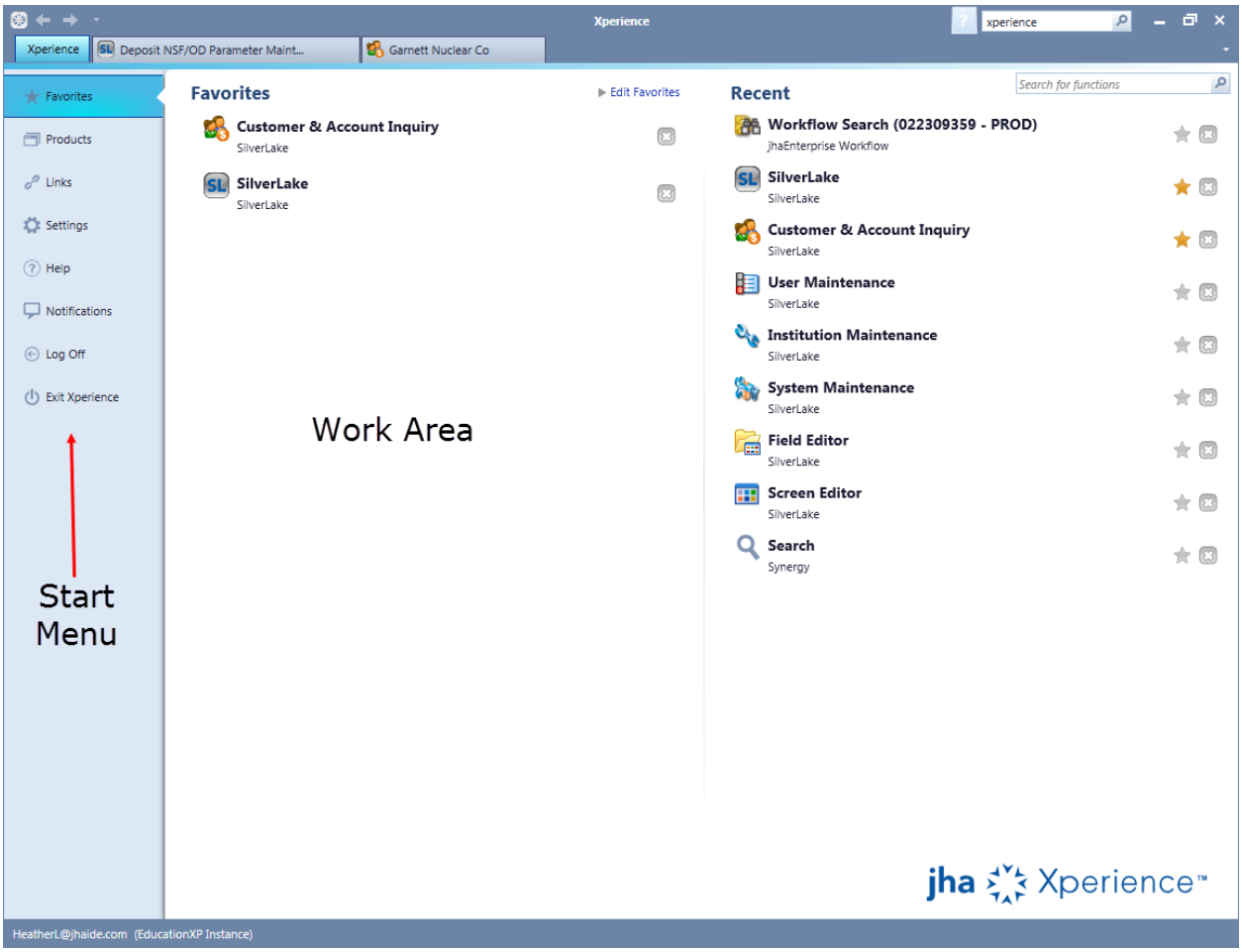
- **Xperience Start Menu & Work Area** - Lists the options that are part of the Xperience framework. When an option is selected from the start menu, details for that option appear in the work area.



Selections in Xperience open in separate tabs in the work area. You can right-click a tab to get additional options. Options include **Close** the tab, **Close All But This** tab, or **Eject** the tab to a floating window. Open tabs can also be ejected to a floating window by clicking the **Eject Tab** icon next to the **Close Tab** X. To return a floating window to tab view, click the **Dock this Window in Xperience** icon on the floating window.

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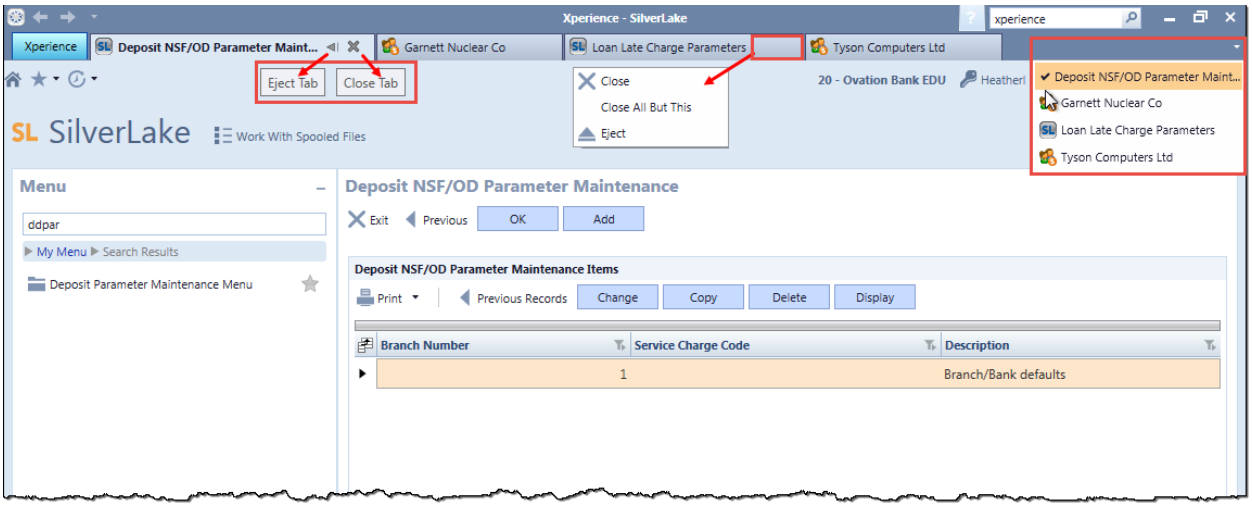

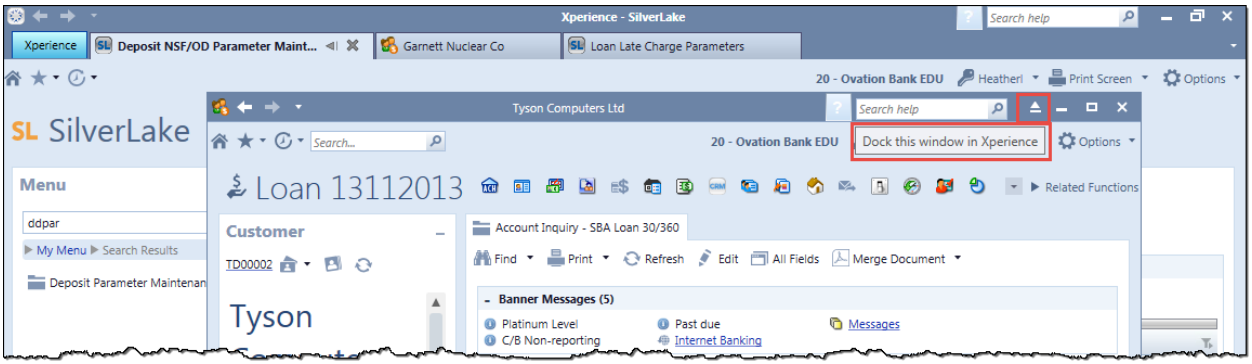

Use the screen sizer in the lower right corner of the Xperience screen to adjust the window scale in an Xperience tab.

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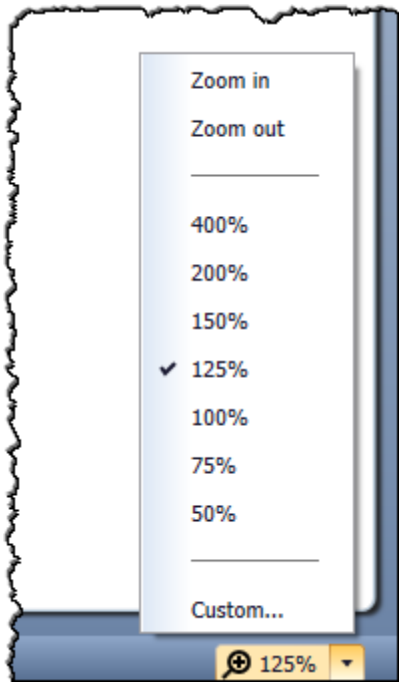
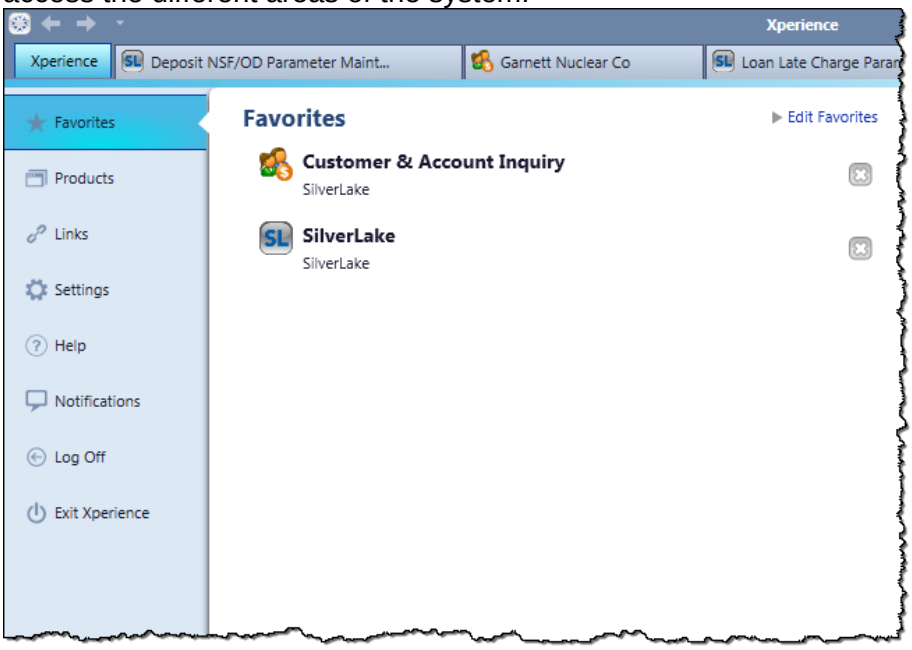


Xperience Start Menu

The start menu is the left side of the Xperience screen. Options on the start menu are used to access the different areas of the system.



Favorites

The favorites area is divided into two sections, **Favorites** and **Recents.** Favorites is where each user can store Xperience functions for quick and easy access. Functions can be added to the favorites area by clicking the star icon next to the function. Functions are removed by clicking

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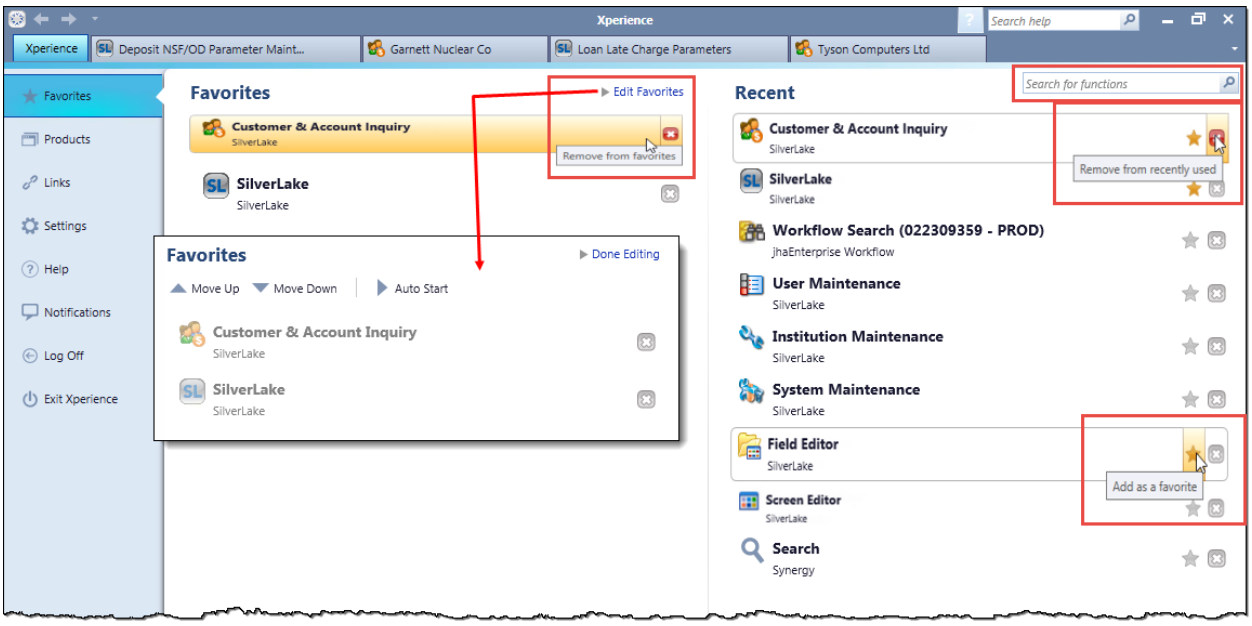
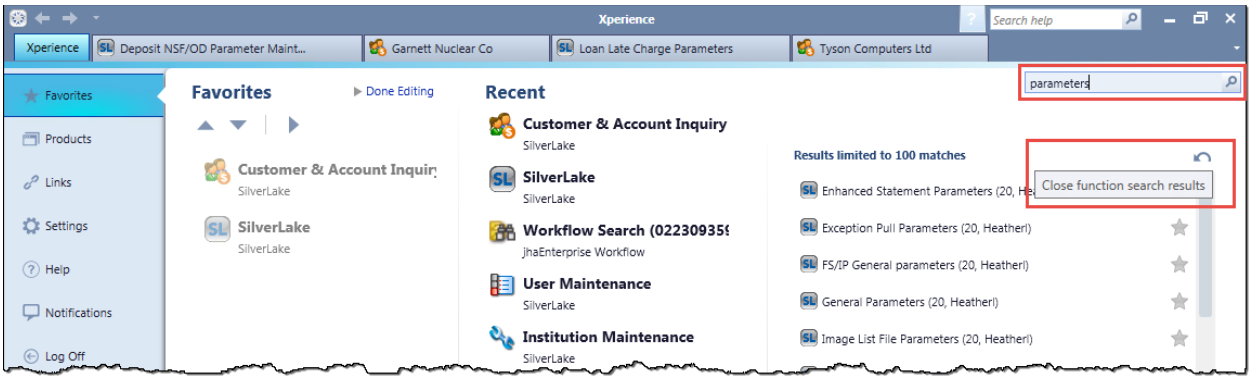
the X icon next to the function. Recents stores the recently used functions. Functions can be removed from the recents by clicking the X icon next to the function.

Functions in both the favorites and recents can be reorganized by hold-clicking a function and dragging it up or down in the list. The favorites can also be reorganized by clicking **Edit Favorites.** In addition to moving functions up or down, the functions can also be selected for **Auto Start**. Auto start functions open in a new tab automatically when the user launches Xperience. For example, if you often perform Customer & Account Inquiry, the function can be auto started to launch automatically. Click **Done Editing** to close edit mode.



Within the recents area, a **Search for Functions** field is available to search for functions. For example, if you enter **parameters** and then click the magnifying glass or press **Enter**, all parameter-related functions are shown. You can click the function to launch, highlight the star to the right to save it as a favorite, or close your search by clicking the back arrow at the top of the search.



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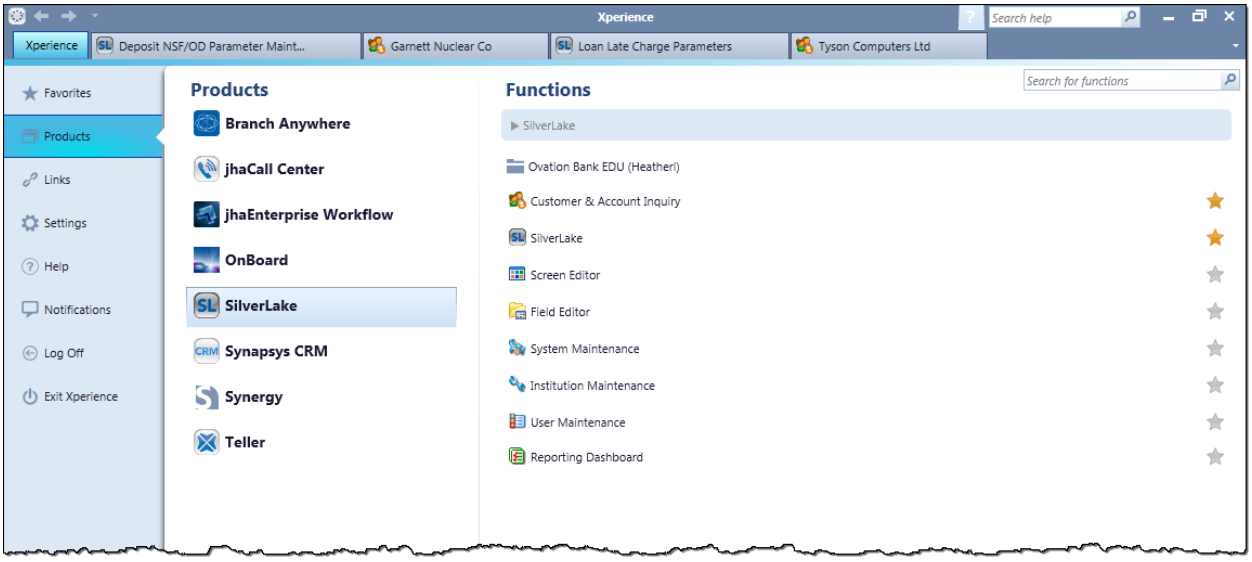
Products

The products area is divided into two sections: a column listing all products available to the user, and a column of the functions within the selected product. For example, when the SilverLake product is selected, functions appear to access Customer & Account Inquiry, SilverLake, and the SilverLake Xperience administrative functions. The administrative functions, **Screen Editor, Field Editor, System Maintenance, Institution Maintenance**, and **User Maintenance**, are controlled by accessing the **SLUIMENU**.

Any of these functions can be saved as favorites by highlighting the star to the right. The **Search for Functions** field is also available to search for functions.



Customer & Account Inquiry

Customer & Account Inquiry is used to access customer or account information for inquiry or maintenance. When selected, a new tab is started and a pop-up window prompts for selection of the institution to be accessed. If only one institution is available to you, the pop-up window does not appear.

Depending on the User Maintenance template settings, you may be required to Select an Institution. This screen varies based on the user and the institutions they can access.

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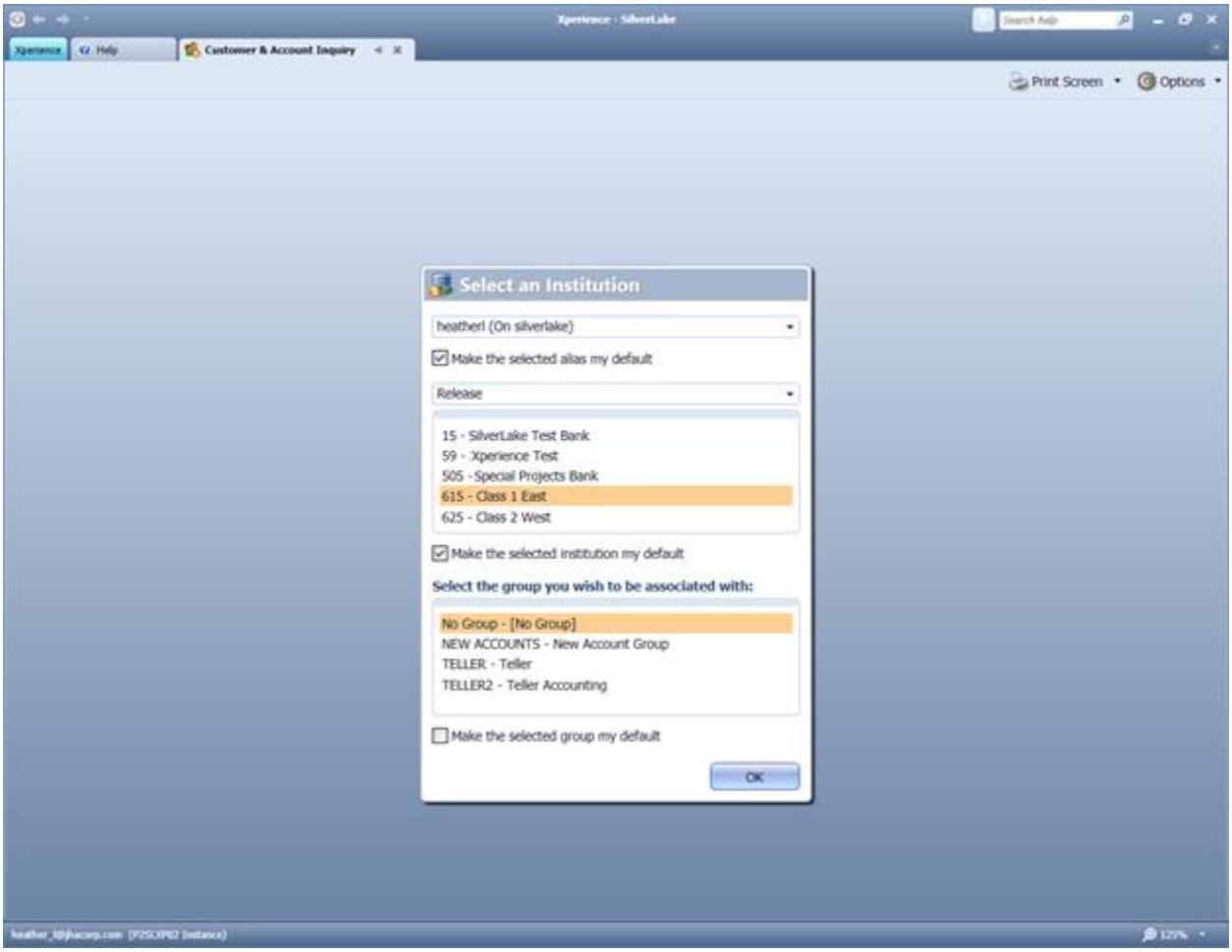

The first drop-down list allows you to select your alias user, if applicable. The second drop-down list allows selection of the release environment, if working with multiple releases. Next, select the bank.

Finally, if utilizing Global SilverLake Security, users that are part of multiple groups receive an additional option to select the group for sign on. Global security allows users to be part of multiple groups. The group selected defines the user's access to the system.

Defaults can be selected for each section. Once information is complete, click **OK** to access the institution Customer & Account information.

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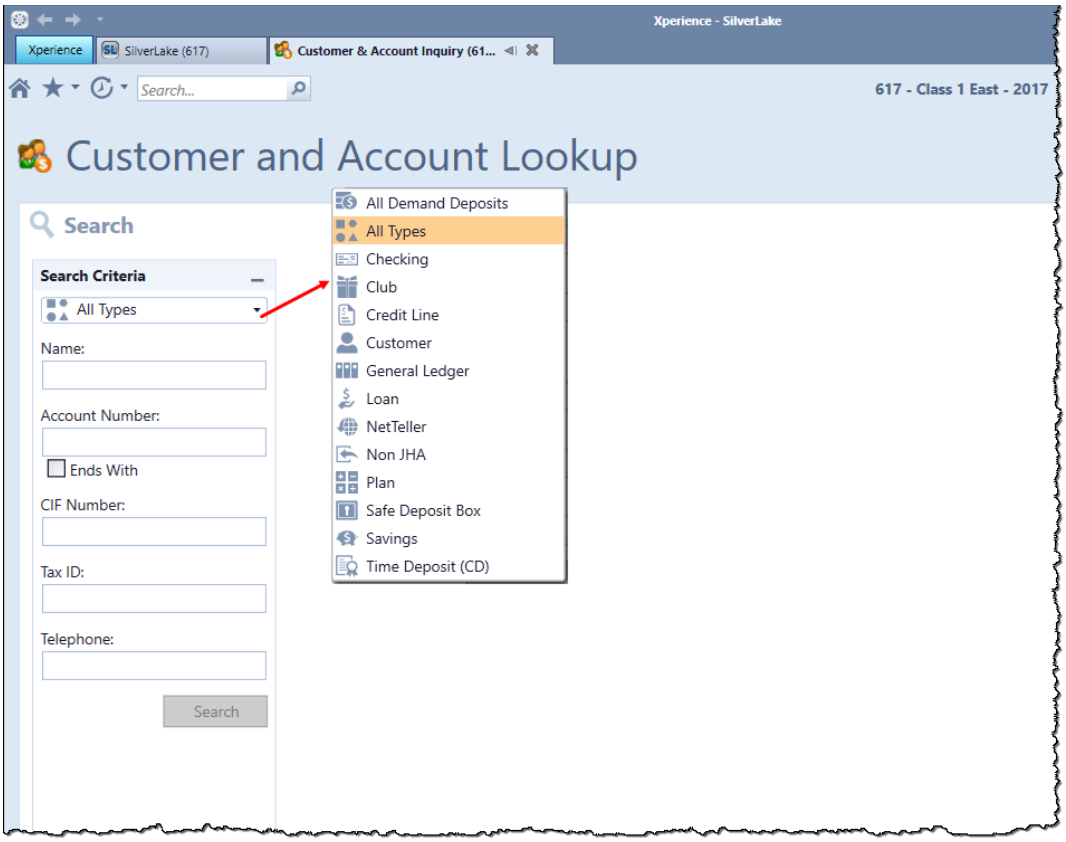
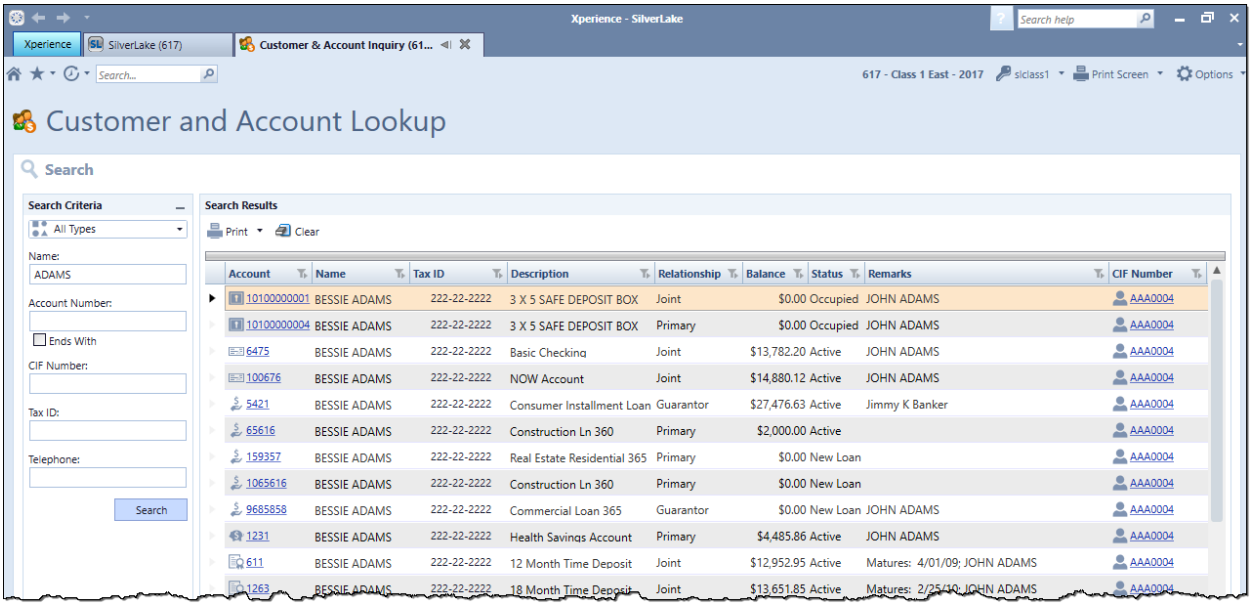


Select the desired account type for inquiry, then enter the search criteria.



Click the account number link or the customer number link to go directly to the account or the customer. You can also double-click on a highlighted line to go to the account.

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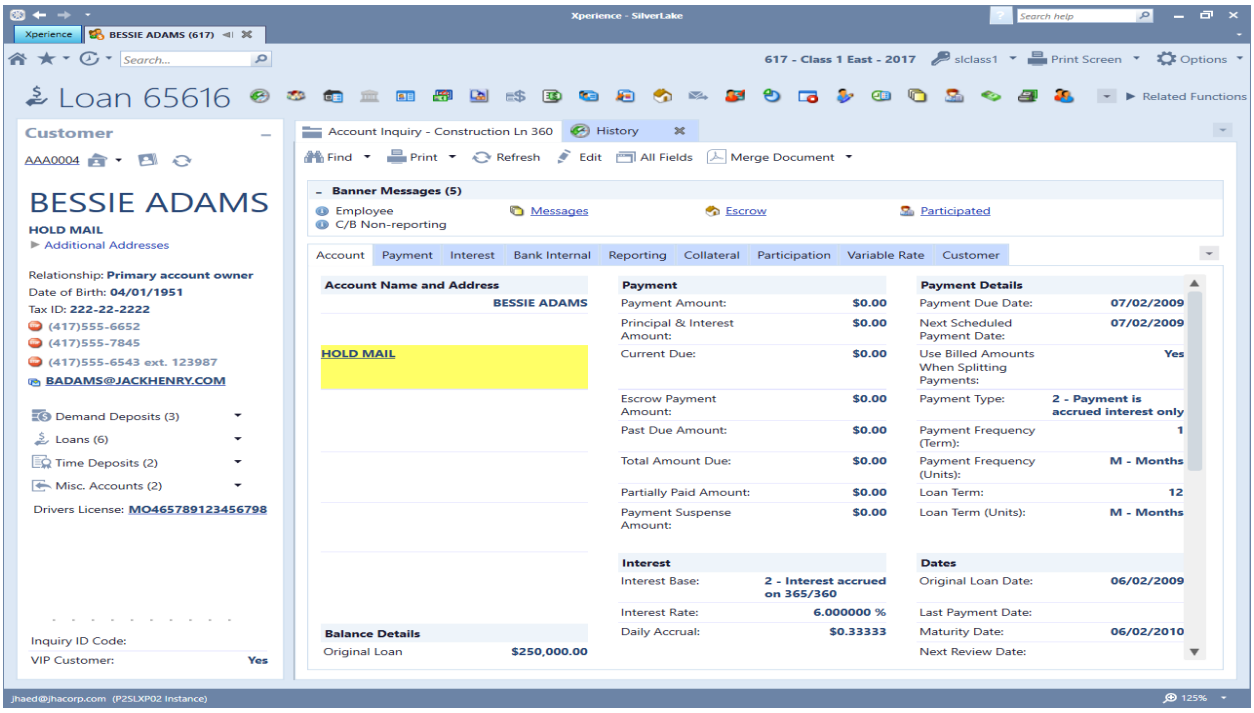

The layout of the customer and account screens are all similar. The left of the screen displays a collapsible customer panel. This panel appears on all types of inquiry. The larger section contains the customer or account information. The default view displays tabs of pages with common fields.

If you are unsure what page a field is on, **All Fields** can be used to search for the field by name.

For users that are authorized to maintenance, the **Edit** button can be used to open the fields up to be maintained.

Any related functions now appear at the top of the screen

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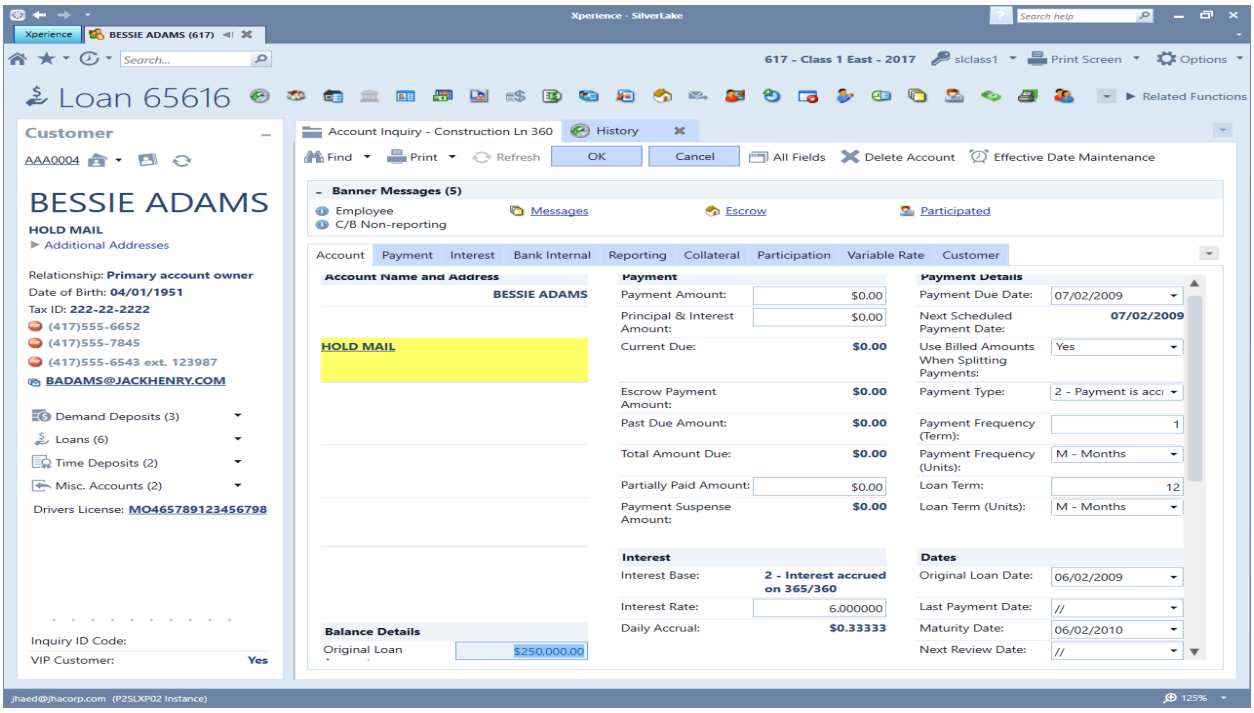
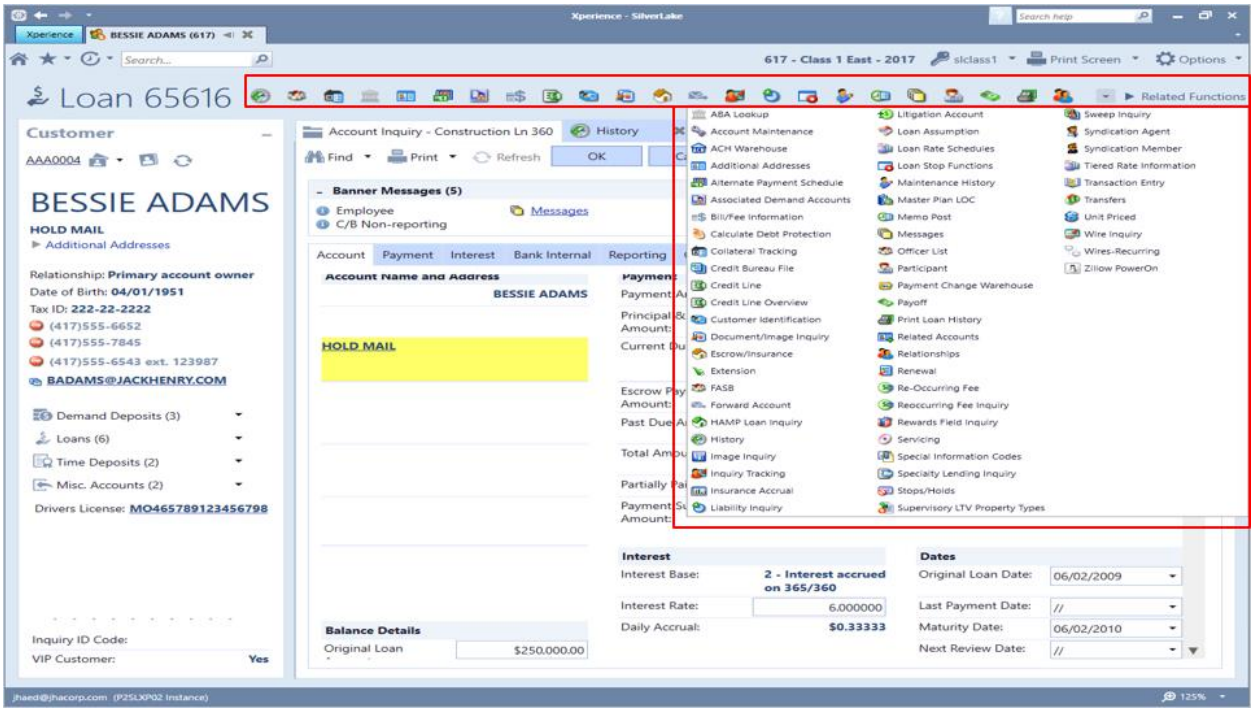


For users that are authorized to maintenance, the **Edit** button can be used to open the fields up to be maintained. Once on the edit screen, the **Effective Date Maintenance** option is available to schedule the maintenance to occur in the future.



All related functions are available at the top of the screen.

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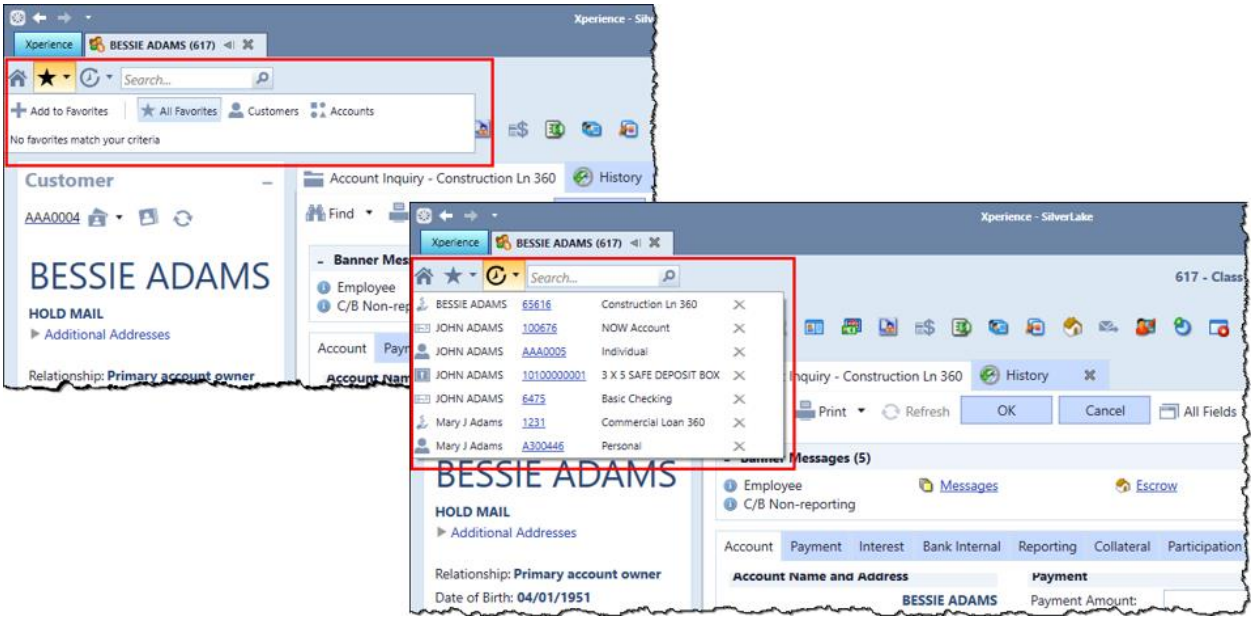

The home icon returns the screen to the initial search screen.

Frequently accessed customers or accounts can be added to the favorites for quick access.

The recent icon can be used to access the recently used customers or accounts.

Search can be used to enter a customer name or account number to switch to a different record.

SilverLake

The SilverLake product allows access to any functionality that is not available using Customer & Account inquiry. This includes parameter, maintenance, and report related options.

Just as with Customer & Account Inquiry, when selected depending on the User Maintenance template settings you may be required to *Select an Institution*.

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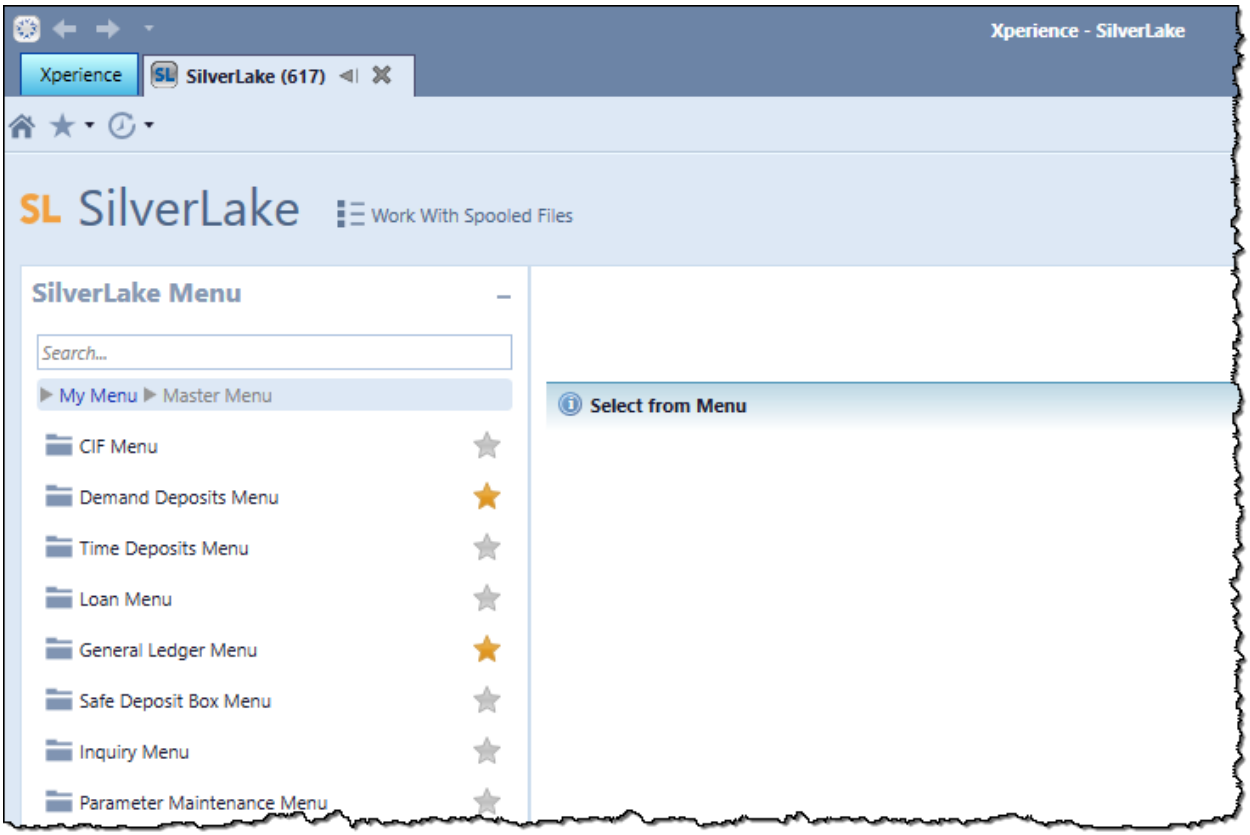
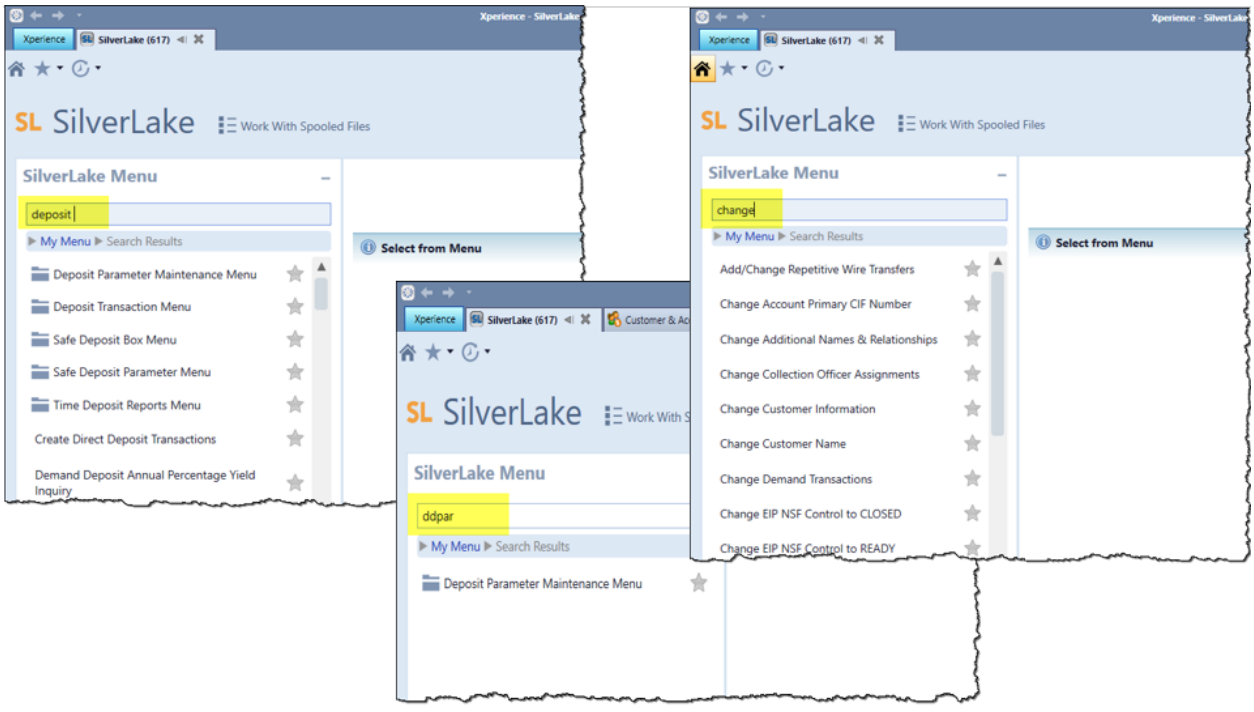


Once the SilverLake tab is open, your initial menu is displayed. Use the search box to navigate to a menu and option.



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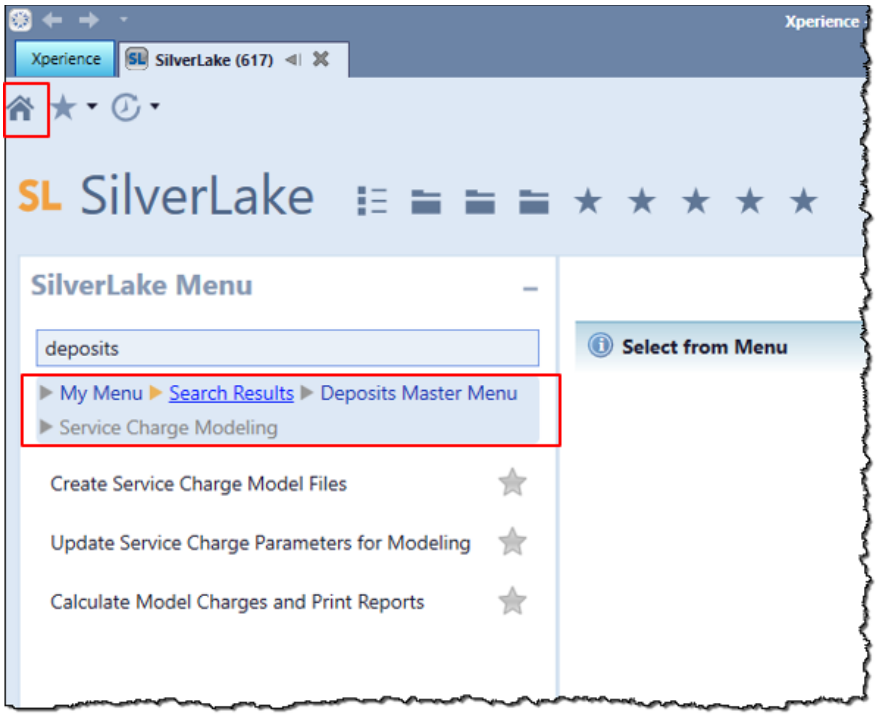
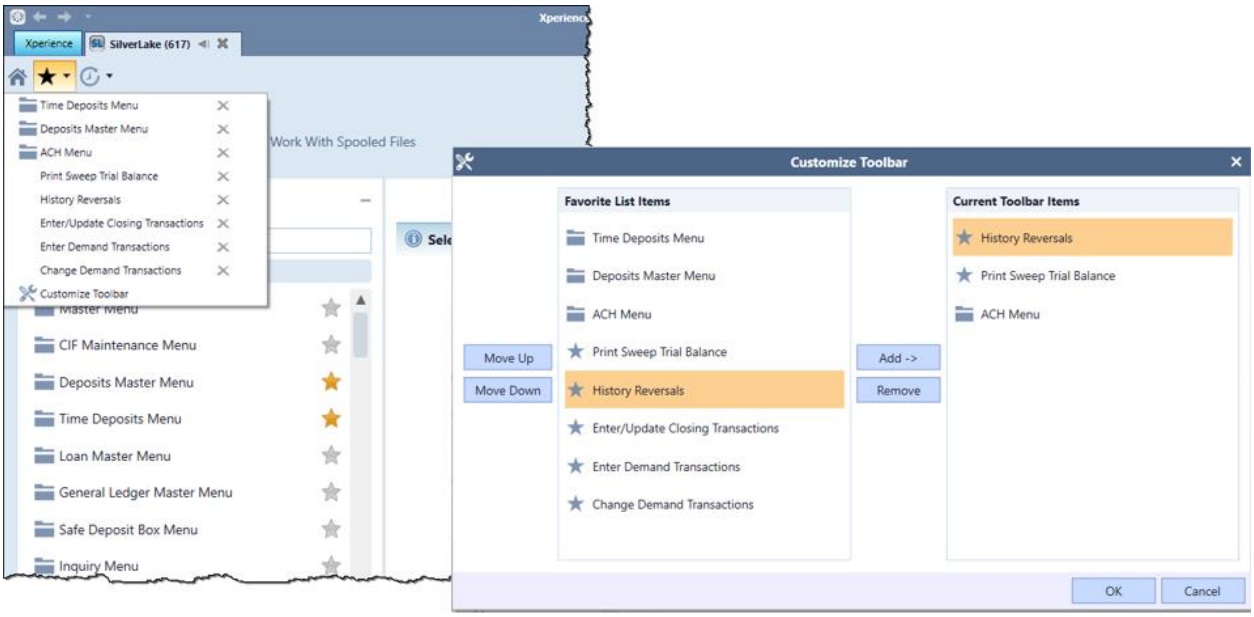


As you click through the menus and select options, a breadcrumb trail will be created at the top of the menu. You can click the links in the breadcrumbs to move backwards through your search.

You can also click the **House** in the upper left corner at any time to go to your home menu.



The **Star** next to the **House** is **Favorites**. When selected, any options you have placed a **Star** beside appear in your favorites list. At the bottom of the favorites list is **Customize Toolbar**.

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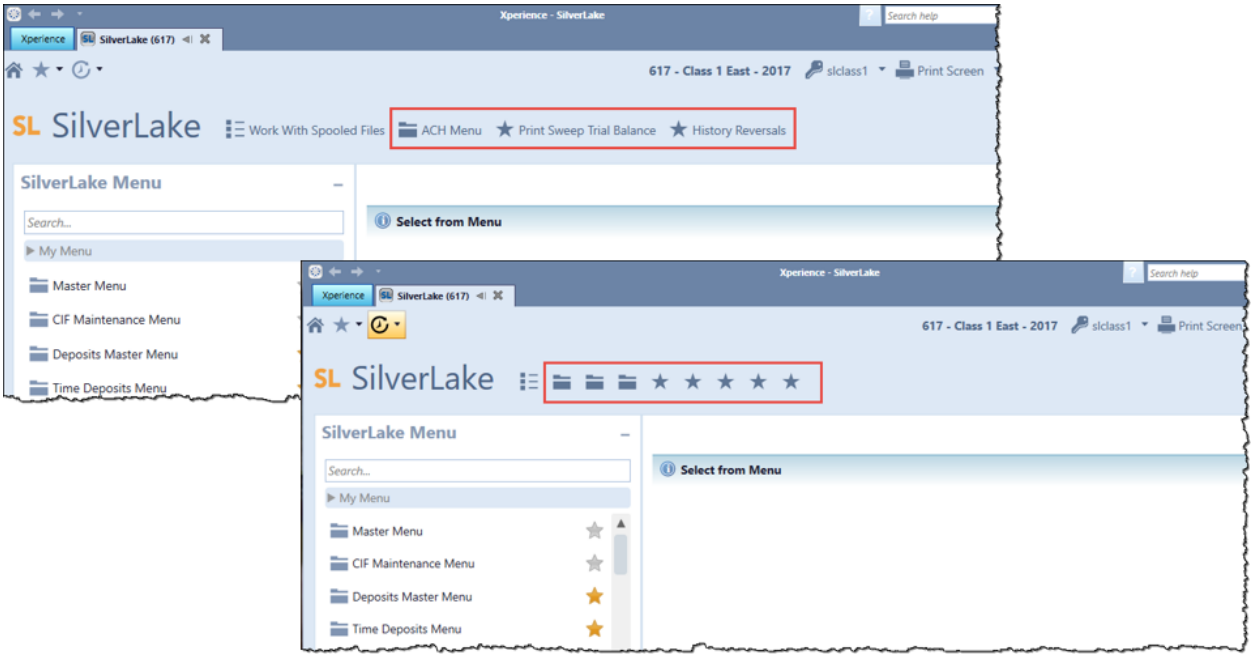
Customize opens a new window allowing you to select from your favorites the menus and options to add to the toolbar. You can also adjust the order they appear in in your favorites list.



Once you select the options for the toolbar, they appear at the top to the right of the **Work with Spooled Files** option. Depending on the number of items selected for the toolbar, the icon or the icon and description will appear. You can, from any screen, click an option or menu in your toolbar to quickly advance to that screen.

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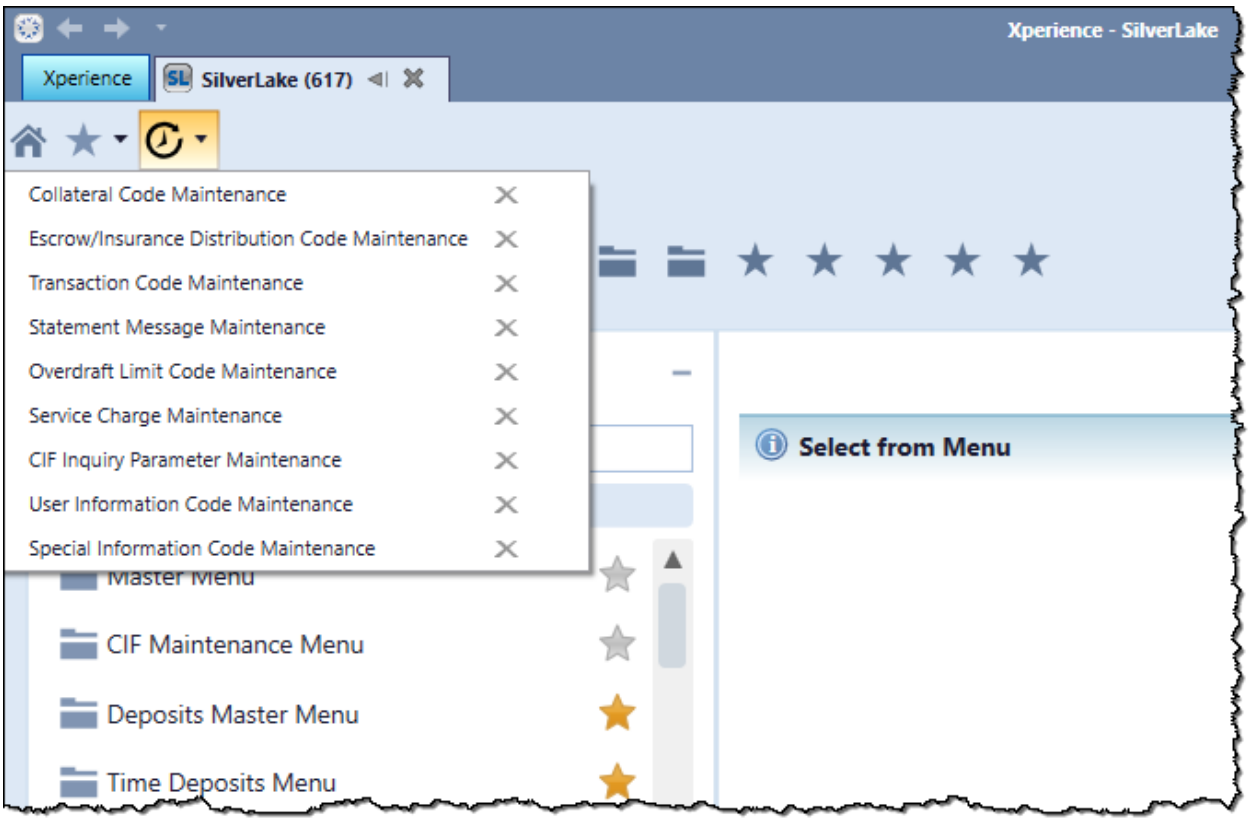
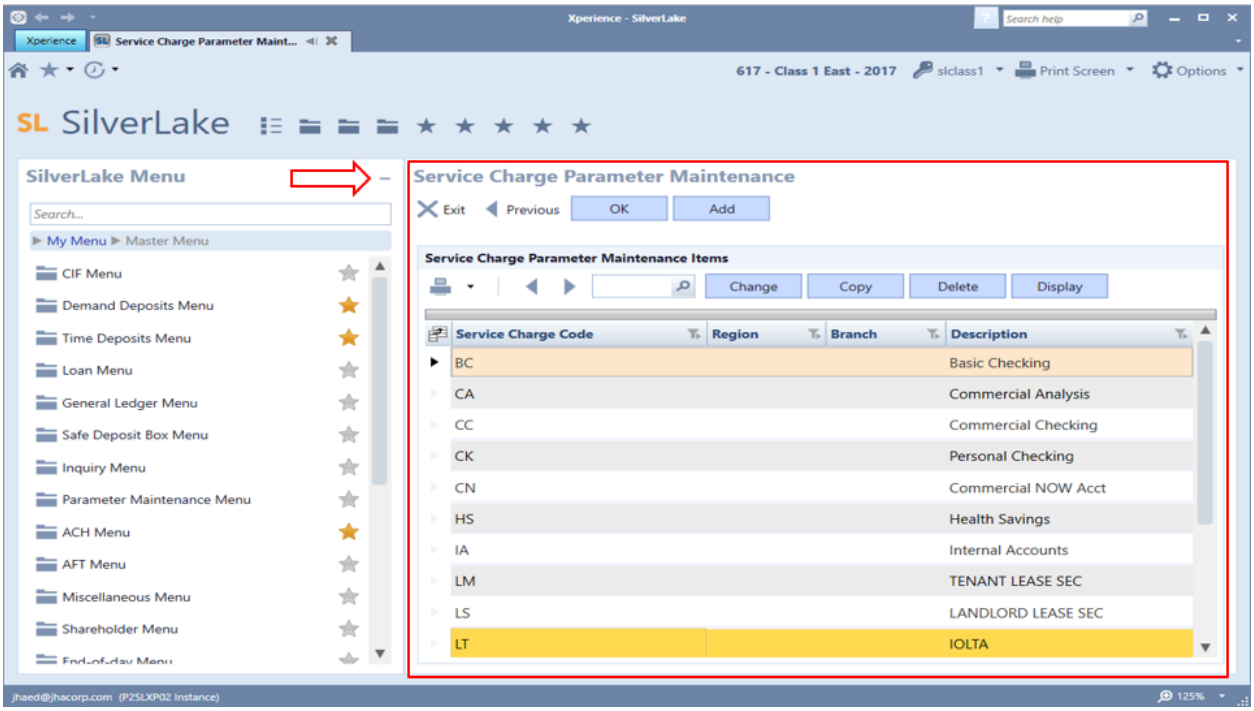


The third icon is for recent options. You can remove an option from your recent options by clicking the X next to the option.



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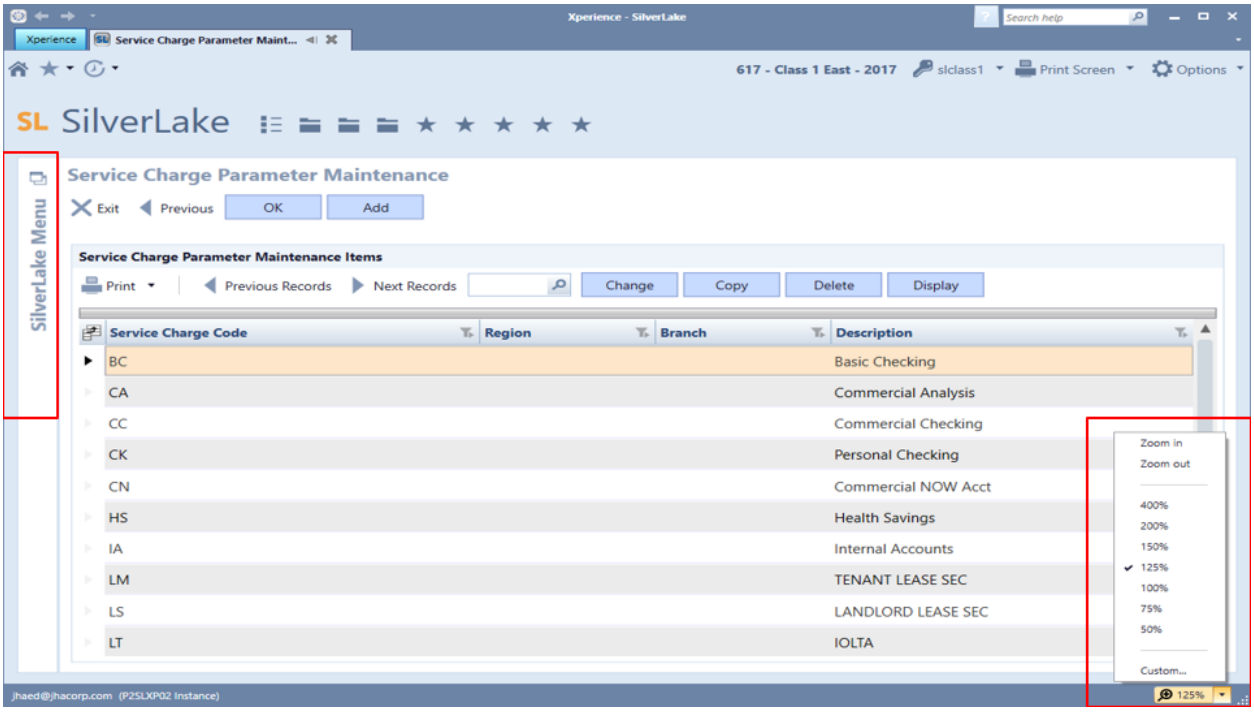
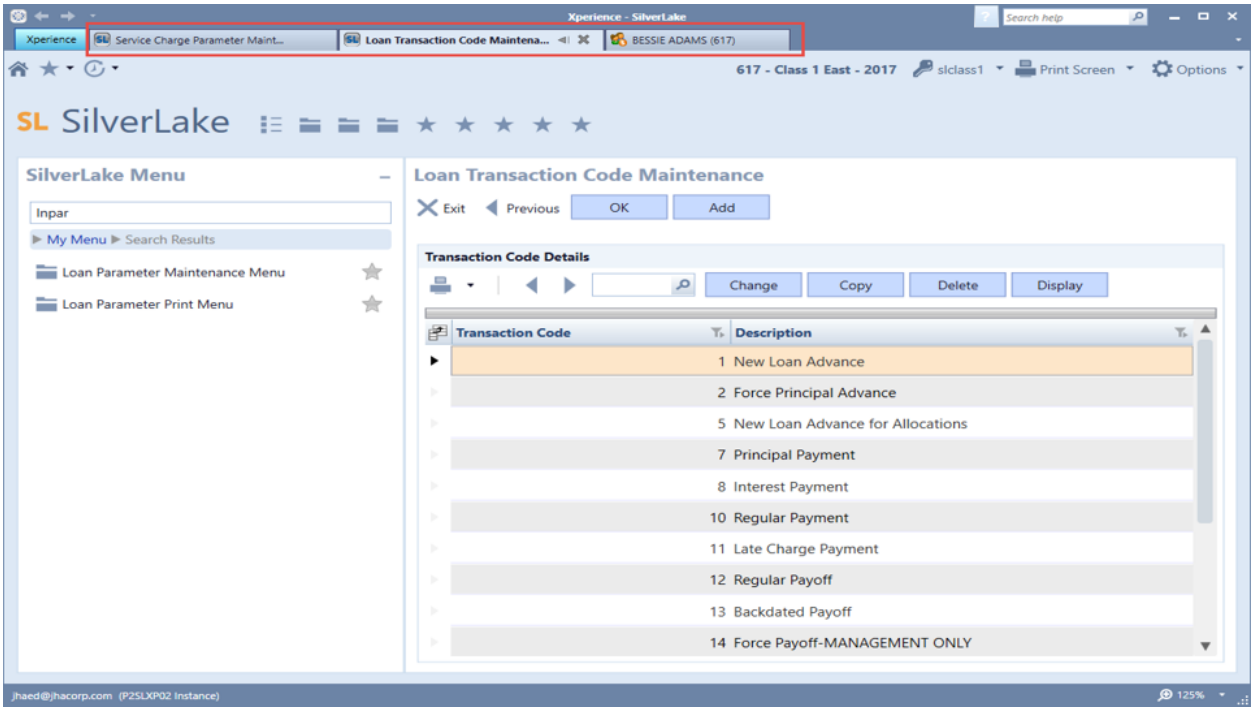
Once you locate the option, the content will open, in the area to the right of the menu. Once open you can collapse the menu if needed to display more information on the screen.



Once collapsed, you can always re-access the menu by clicking on it. You can adjust the size of the screen using the sizer in the lower right corner.



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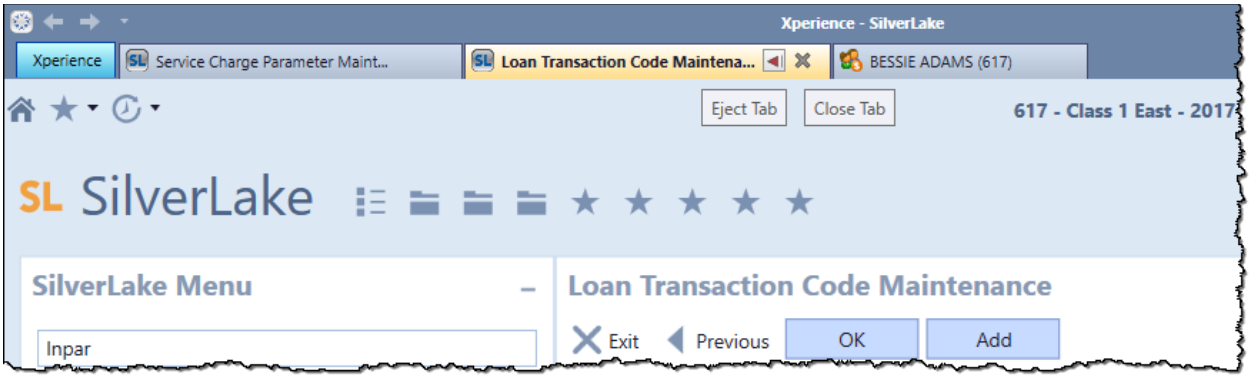
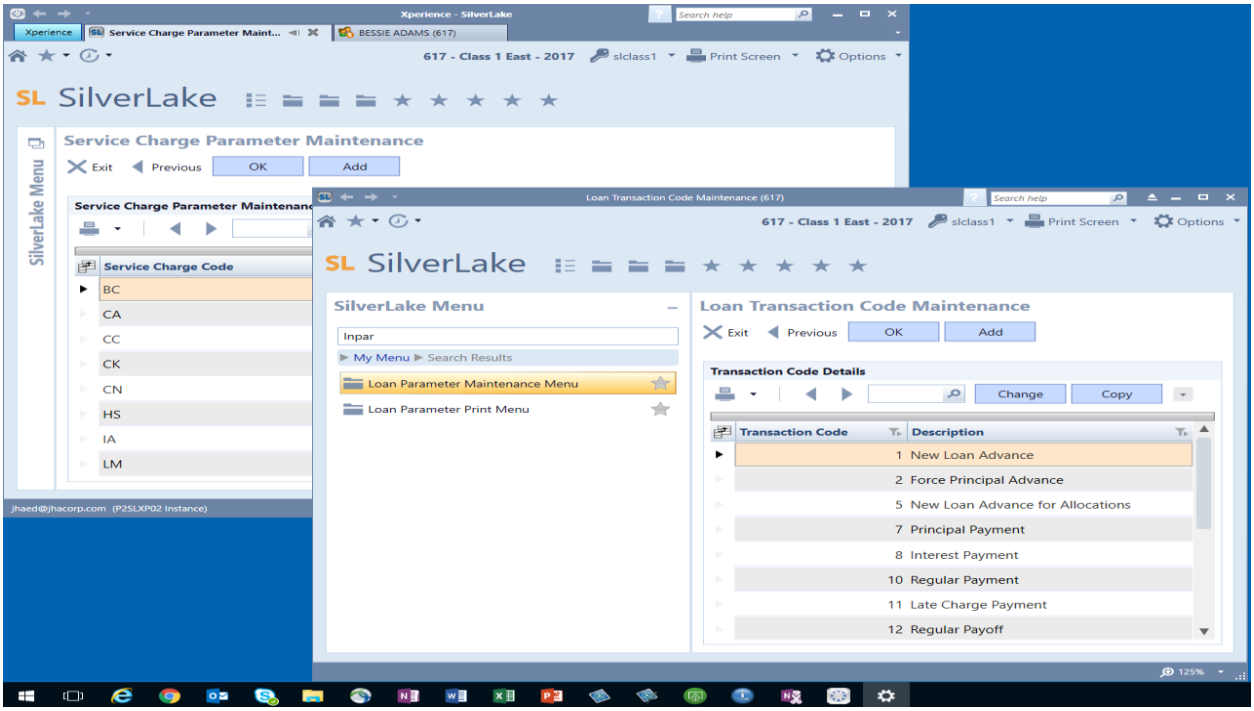
If you open the **SilverLake** or **Customer & Account Inquiry** functions multiple times, each session will open in a new tab. The title of the tab will change depending on the screen you are accessing.



Each tab has the options to **Eject Tab** or **Close. Eject Tab** pops the tab out to become its own floating window.



Ejecting a tab allows you to compare information on two tabs at the same time, placing them side by side on your screen.

Dock this window in Xperience will place the tab back in the **Xperience** window**.**

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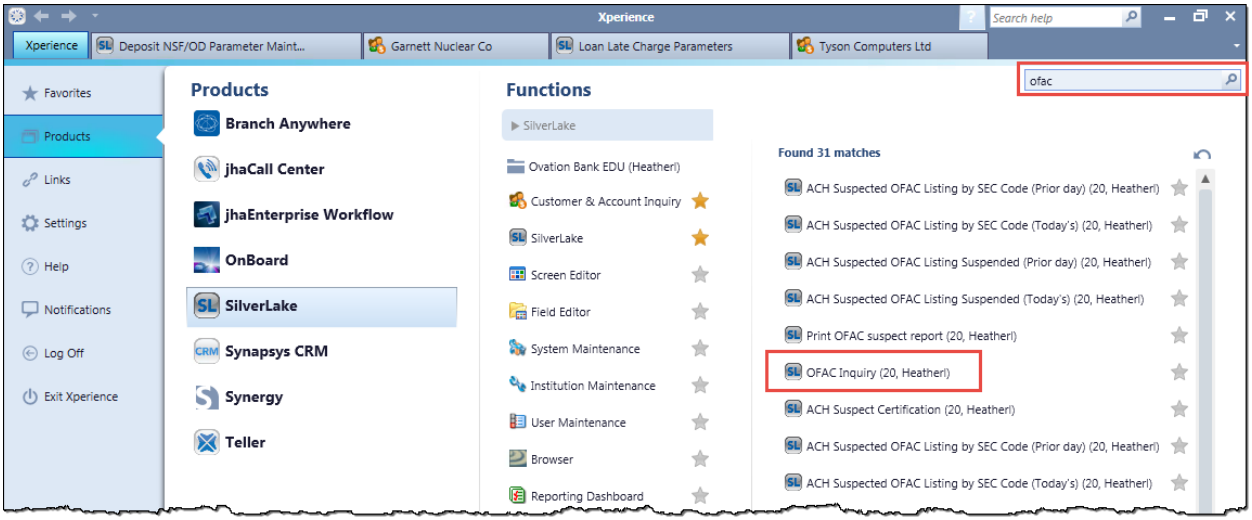
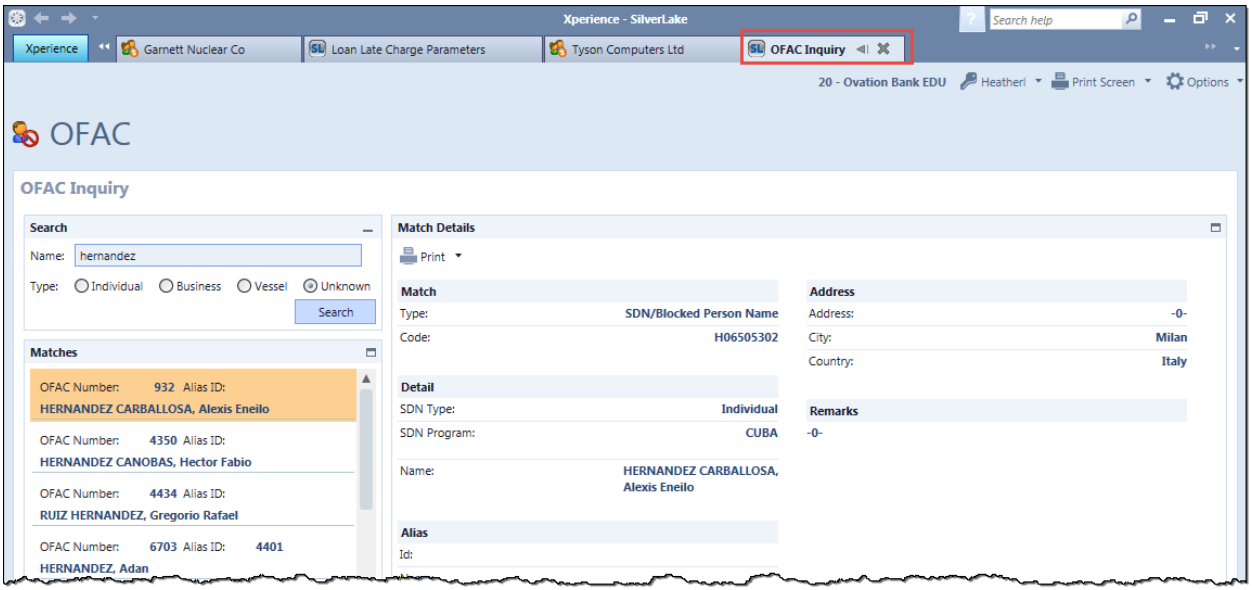
OFAC Inquiry

The **OFAC Inquiry** function allows you to inquire on the contents of the OFAC file uploaded from the Department of the Treasury website. The **OFAC Inquiry** function can be found in your SilverLake functions folder, or you can search for OFAC in the function search box. To save it as a favorite, highlight the star to the right of the function.



Enter a name in the search box, select the type, and click **Search**.



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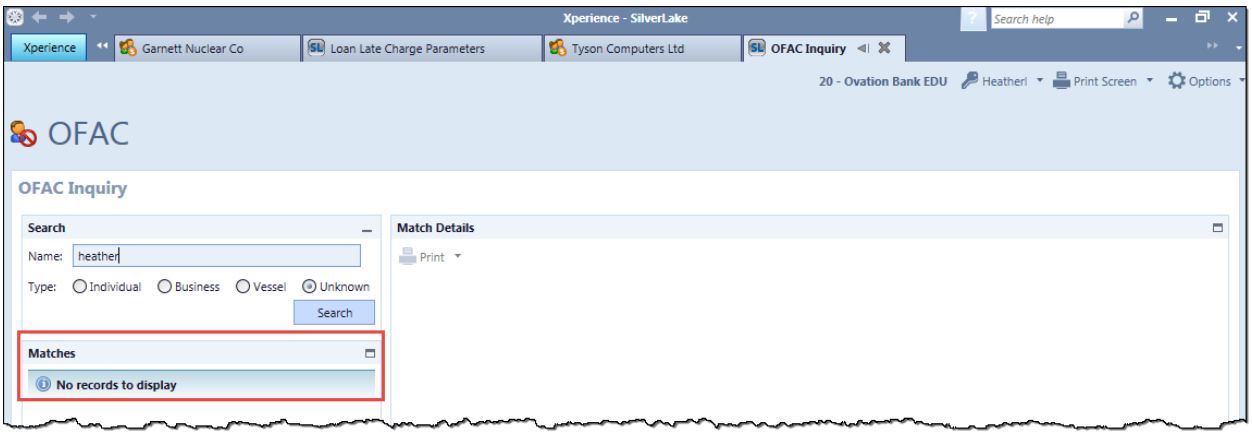
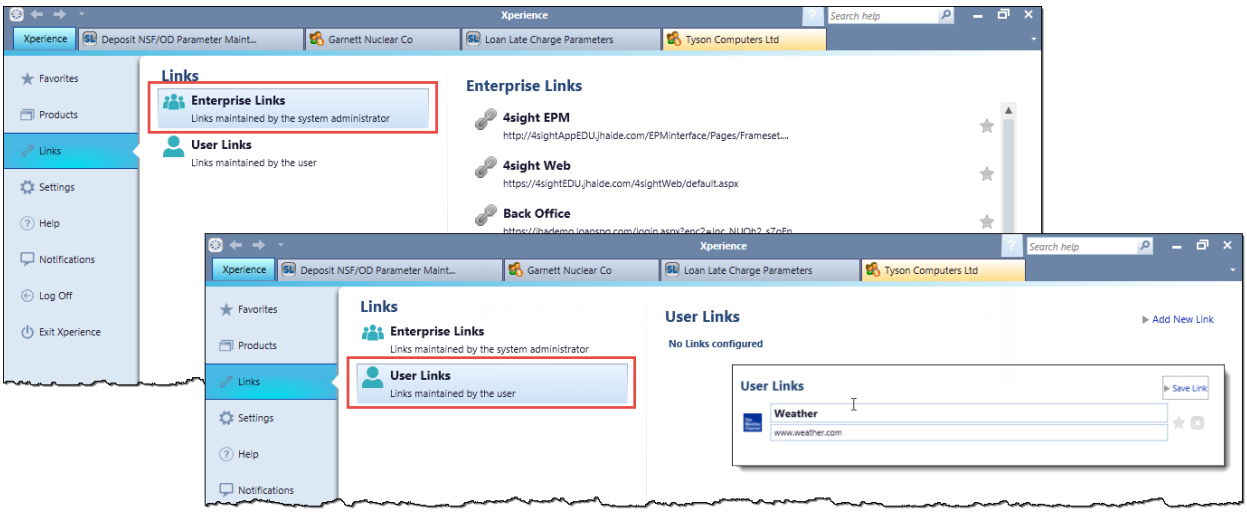


Links

The links area allows you to save and access commonly used links. There are two types of links available. **Enterprise Links** are set up by your system administrator. The system administrator must have access to the management console to add or change enterprise links. **User Links** allows you to view and or save links to your custom list.



Settings

The settings area contains three settings options. **Select a Theme** allows each user to choose various settings to customize the look of their Xperience screen.

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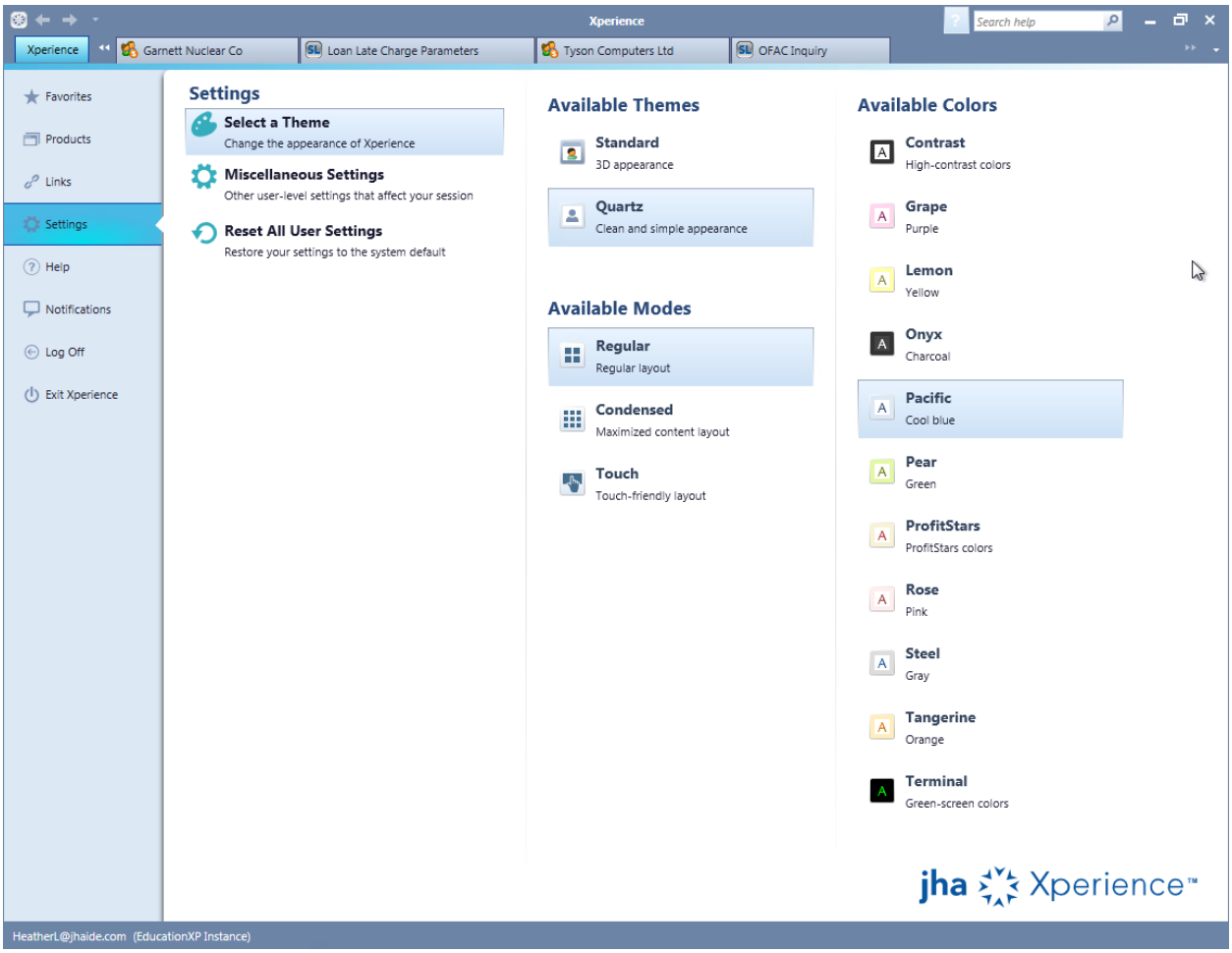
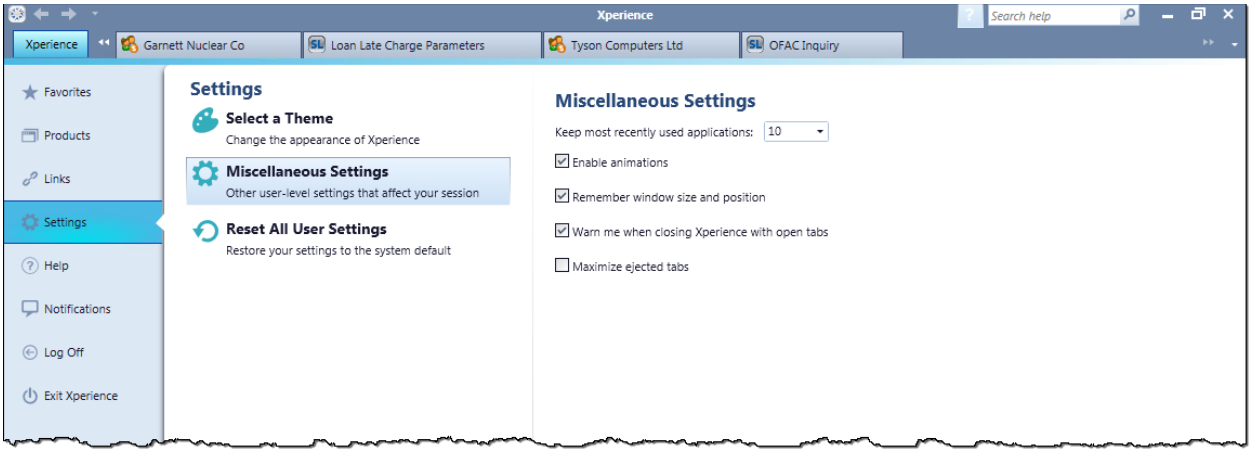


The first **Miscellaneous Setting** allows the user to select the number of recently stored applications that appear in the **Recent** section of the **Favorites** area.



Enable Animations determines if animation is used when waiting for the system to open/respond to a request. For example, the spinning wheel versus an hourglass that does not move.

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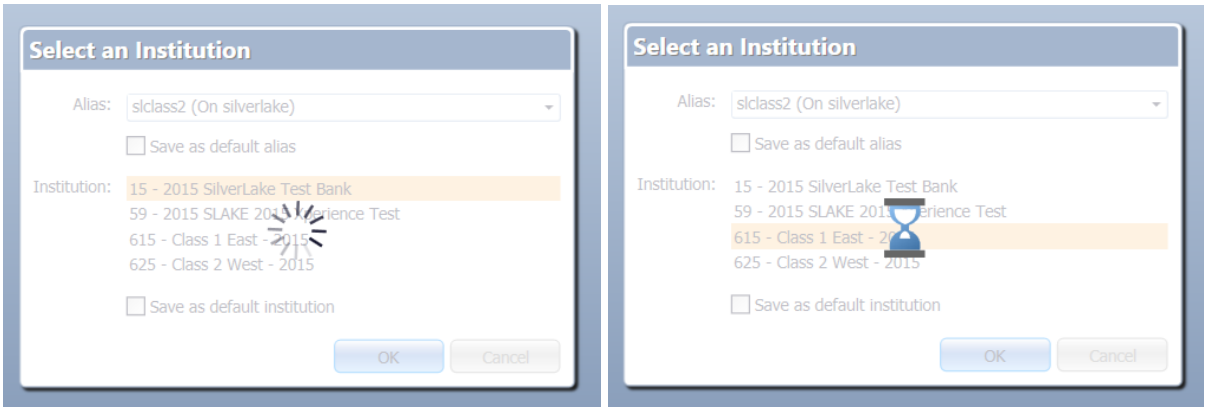
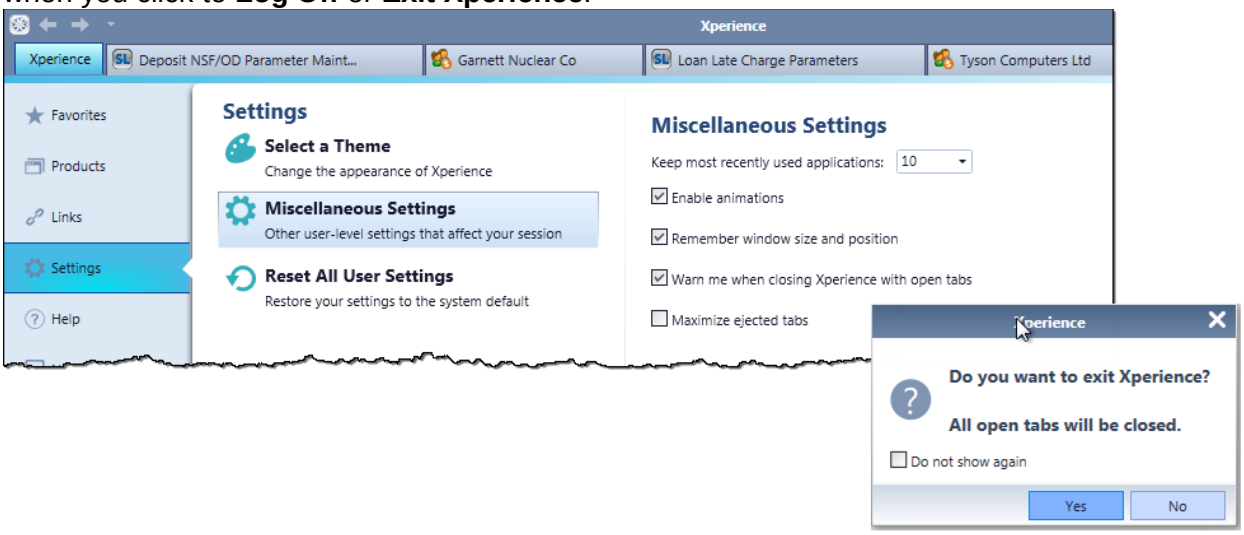


If the **Remember window size and position** field is selected, the size and position of the Xperience window is remembered when you log on. If the field is not selected, the Xperience window opens full screen.

If the **Warn me when closing Xperience with open tabs** field is selected, a warning appears when you click to **Log Off** or **Exit Xperience**.



If the **Maximized Ejected Tab** is selected, when a tab is ejected it will automatically size to full screen.

Reset All User Settings allows you to reset Xperience to all default settings. This erases any favorites, auto starts, or recently used applications you have saved.

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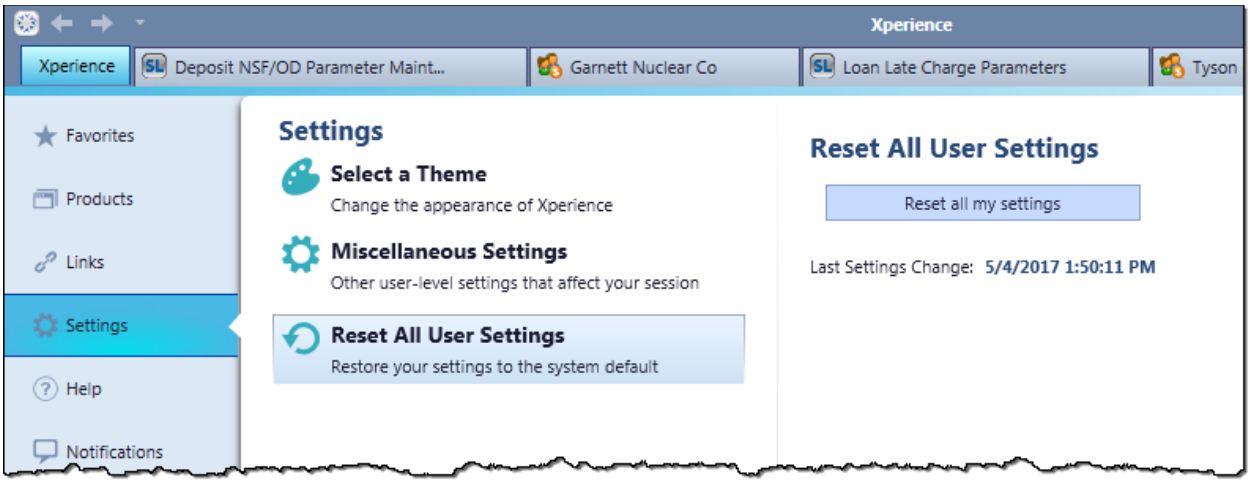


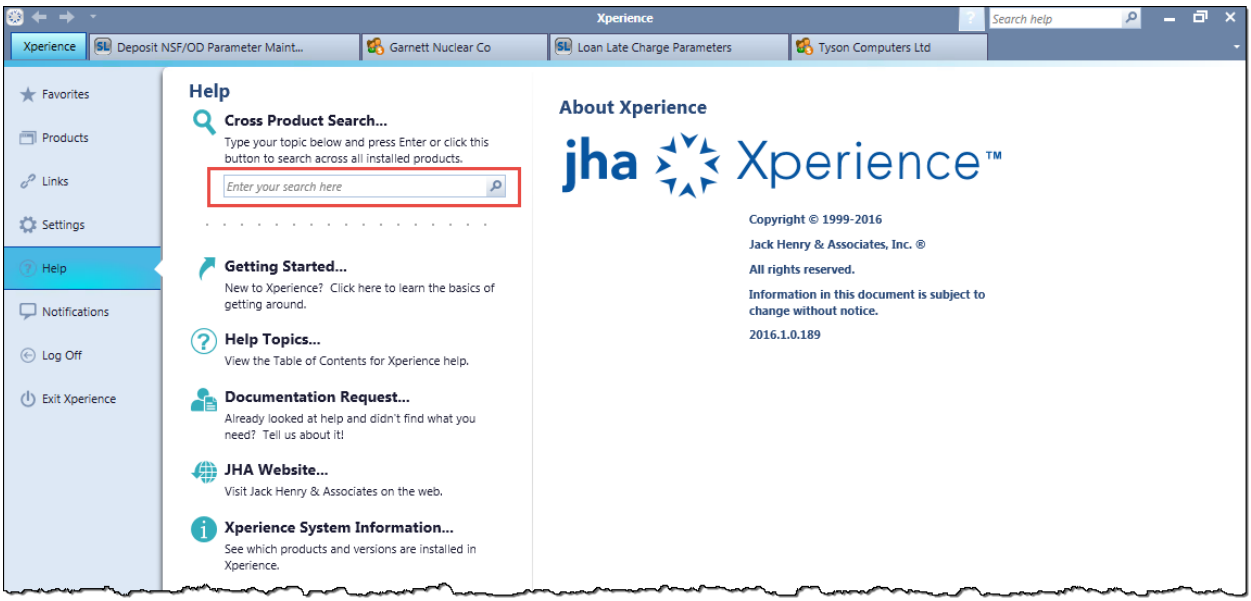
Help

Additional help options are available in the Help area.

Help

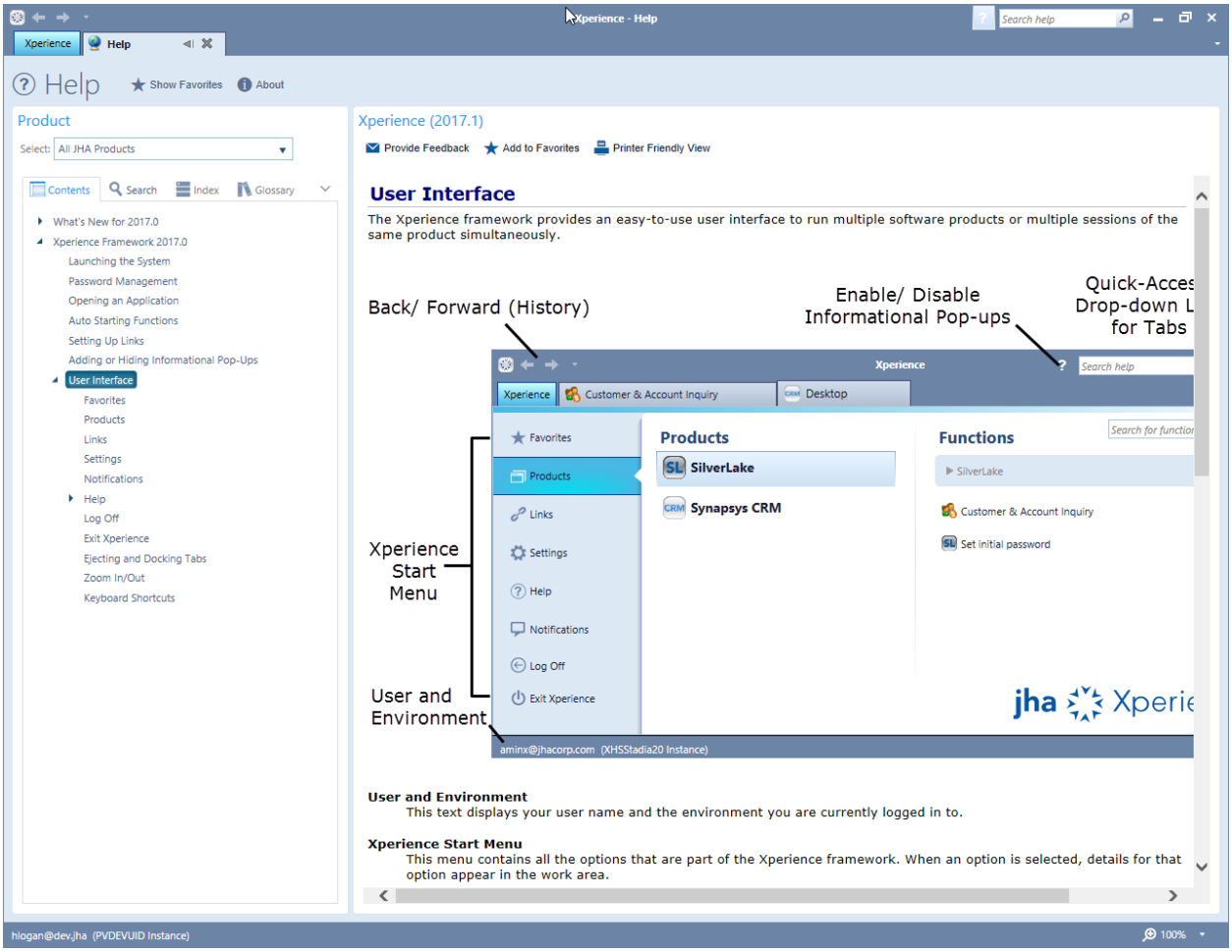
Help can be accessed by entering a topic in the **Search Help** field at the top right of your screen, or in the help menu **Cross Product Search**. Xperience searches through all user guides that have been installed and opens a new tab returning results relating to the search.

Once the help tab is open, the User Guides for your products are available. Use the drop-down box to select All JHA Products, or the specific User Guide needed.



Getting Started

The getting started area has helpful tips for navigating within Xperience.



Documentation Request

If you have searched the User Guides and have not found what you are looking for, click **Documentation Request** to complete a form to submit to JHA Documentation. You can also access the documentation request form by clicking the **Provide Feedback** link on each page of the documentation.

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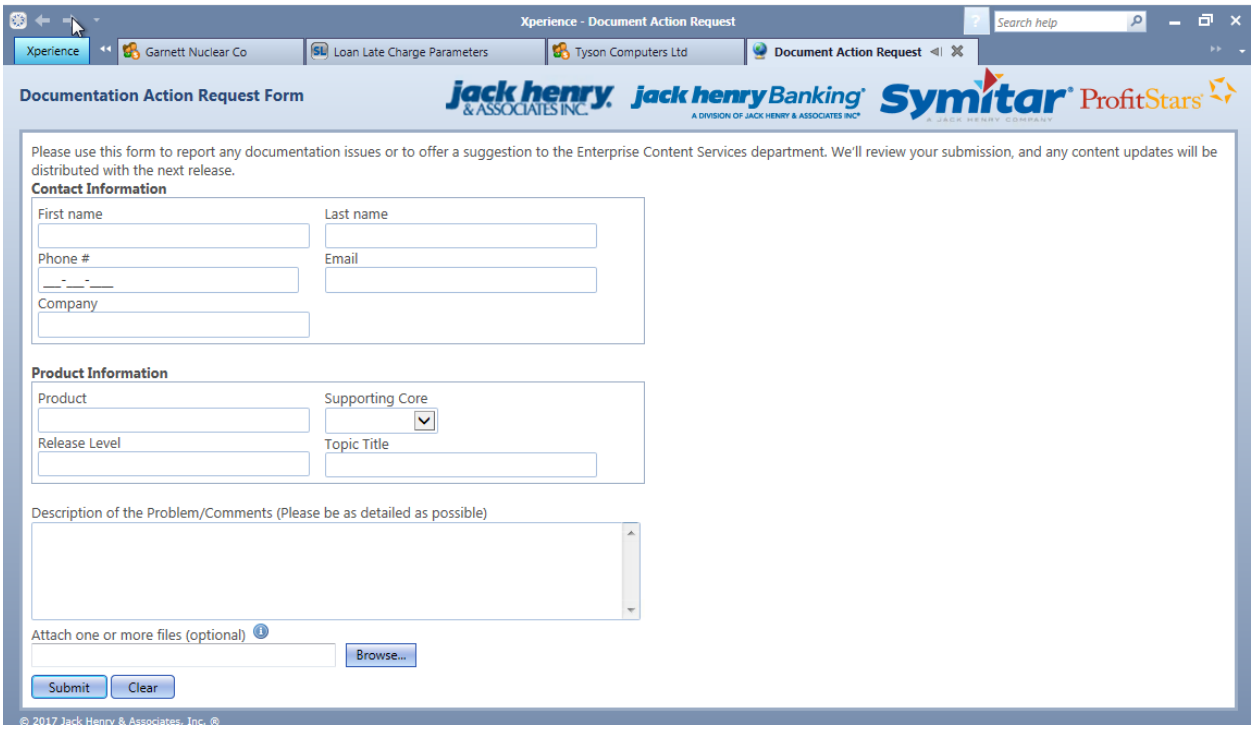
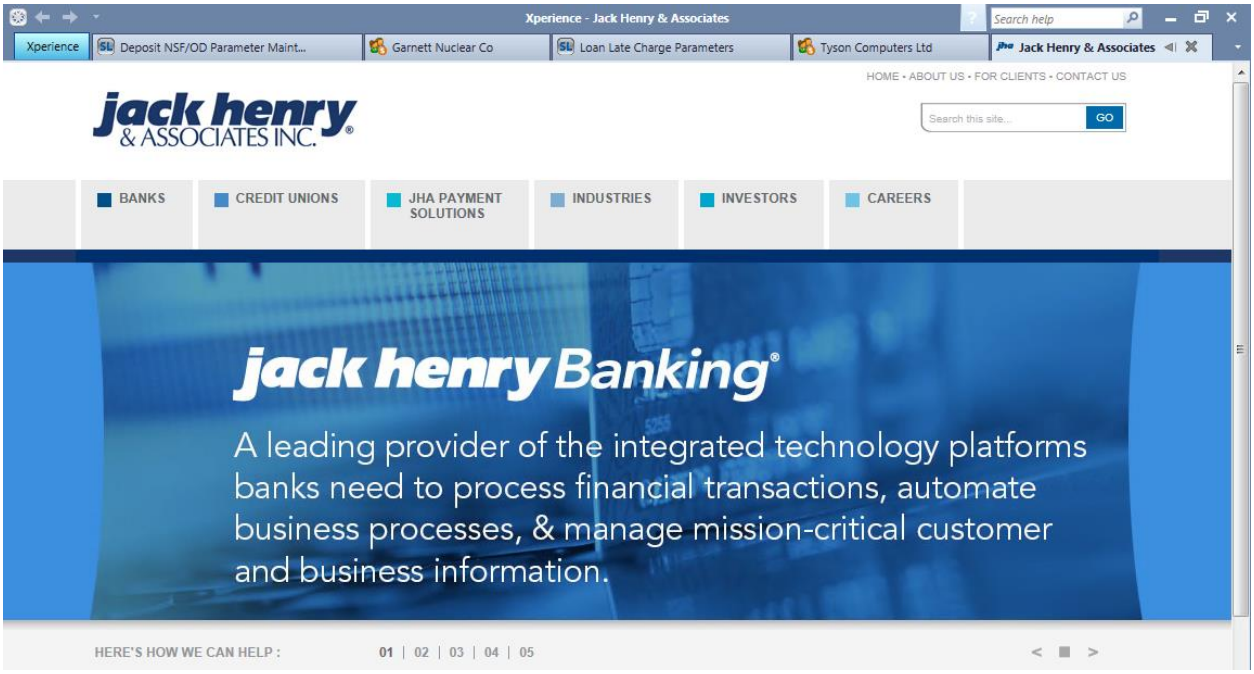


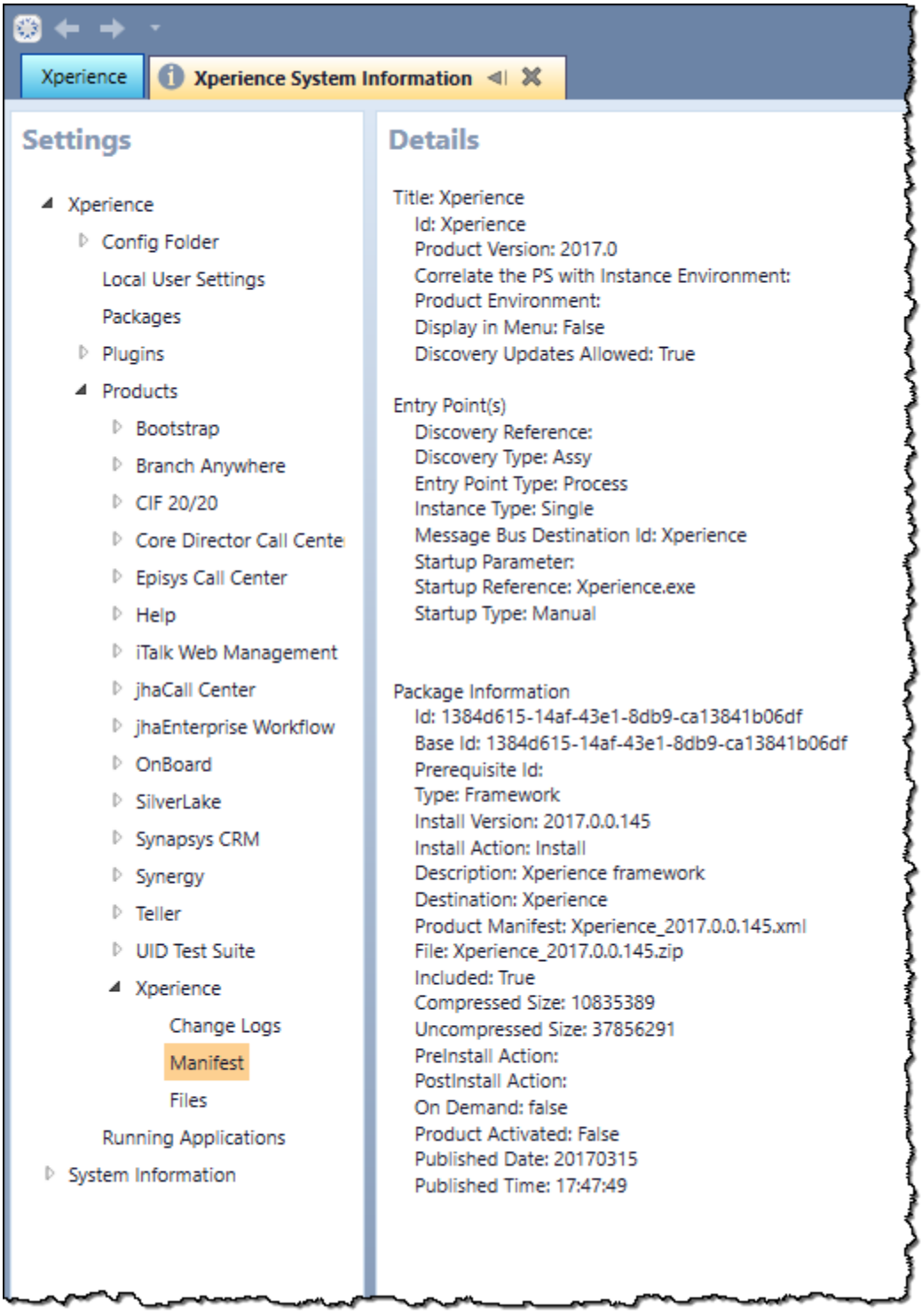
JHA Website

JHA Website allows you to move from Xperience directly to the Jack Henry & Associates website. The www.jackhenry.com website is launched in a new tab, within Xperience.



Xperience System Information

The **Xperience System Information** area provides details about your installed products within Xperience and their versions. This information may be helpful when placing support calls.



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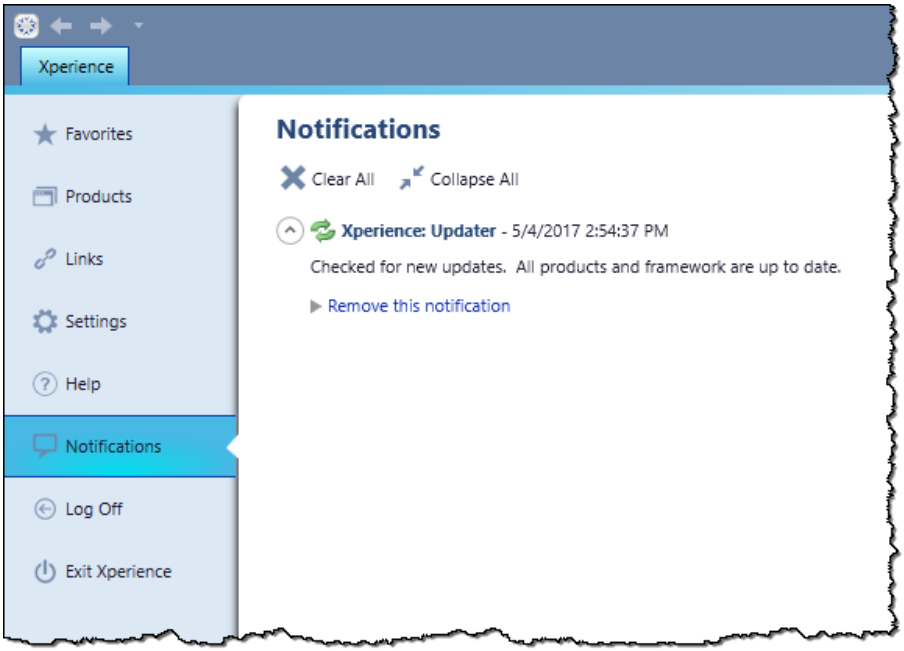
Notifications

All Xperience notifications are stored and tracked, and can be viewed by selecting **Notifications**.

Notifications are messages displayed to the user to gain their attention and provide information. For example, when an Xperience user uses the **Forward** feature to forward a customer or account to you, the notification appears here, allowing you to access the account.

Notifications are cleared when you log off or exit an Xperience session.



Log Off and Exit Xperience

Log Off logs off your user ID and returns you to the log in screen, which allows another user to log in to Xperience. This option does not appear if your bank has chosen to use the Windows® Login option through jXchange.

Exit Xperience

Exit Xperience closes all open applications and closes Xperience.

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