

## Treasury Management

# progressive web app (PWA) the how-to guide

This is a “How-To” Guide that will help financial institutions determine their migration approach for the new Treasury Management Progressive Web App (PWA).

In this guide, you will find information on the following topics:

1. UIS & PWA Dependency
2. Determine “Your Migration Approach”
3. Key Dates
4. Supported Browsers
5. PWA URL Information
6. Options for installing PWA to device’s homepage
7. Branding the PWA Experience
8. Communication Tools
9. Actions & Information regarding the existing Treasury Management App
10. Determining the appropriate PWA user experience
11. UIS (Details)
12. Treasury Management Native App (Details)
13. Financial Institution Checklist

### **1. Prior to getting started, please note that PWA has a dependency on UIS!**

### **2. Determine your “Migration Approach”**

UIS and PWA are significant changes. Nobody knows your customers like you do. What is their tolerance for change? Do you need a pause between UIS (remember this must be first) or would it be best to implement the change at one time, possibly conveyed as a platform upgrade?

- Scenario 1 - Migrate to UIS and PWA at the same time.
- Scenario 2 - Migrate to UIS, take a pause, then migrate to PWA.

When selecting your migration approach, consider the following:

#### **Most important considerations**

- Nobody knows your customers like you do!
- You know your customers tolerance for change.
- Any sensitive customers to take into consideration?
- Any customers on the verge of moving their business whereby these changes will send them over the edge?
- Plan accordingly!

#### **Other implications to consider**

- Will operating as a single event be more efficient from a planning, education, and support perspective?
- Will support have 1 or 2 really busy windows?
- What is your customers tolerance for change?
- Do you want to impact your customers 1 time or multiple times?

### **3. Key Dates (Please Note: PWA has a dependency on UIS)**

Financial Institutions will be able to select their migration dates keeping in mind the end dates for UIS and PWA. They will need to submit a case titled "PWA Migration", and pick a date to get on the schedule. In addition to selecting their migration dates, financial institutions will be able to select a date whereby the Native App version 12.7.X is pushed to the stores, and users of the app will get an alert that a new version is available.

TM native app will be available to customers for 30 days after PWA is enabled. After the 30-day window, the TM Native App will be delisted from the stores for that financial institution and user logins will be denied, preventing login. Delisting the native mobile app will be performed by the Jack Henry fulfillment team. The TM Native App cannot be automatically removed from a user's device. The user will have to delete the app from their phone.

The relevant dates for UIS and PWA are as follows:

#### **UIS (Should this migration be first or at the same time as PWA?)**

- Start date is 4/30/2024.
- End date is 9/30/2024.

## PWA

- Start date is 4/30/2024.
- End date is 10/15/2024.

*Disclaimer: Dates contained in this document are provided as estimates only and can be changed at any time at the sole discretion of Jack Henry.*

## 4. Supported Browsers

PWA supports most browsers, however, does not support IE or other obsolete browsers. The current and prior versions of Chrome and Safari browsers are supported.

## 5. PWA URL Information

<https://treasury.jackhenry.com/pwa/financial-institution/login>

- PWA is a part of the path name and follows the domain name.
- Financial institution is a part of the path name and follows /pwa.

## 6. Options for installing PWA to device's homepage

Easily access PWA by installing or adding the app to the device’s homepage. Note that the app is not downloaded from an app store like a native app. Depending on their individual device settings, users can be prompted automatically to install the PWA, or it can be installed manually through the following actions:

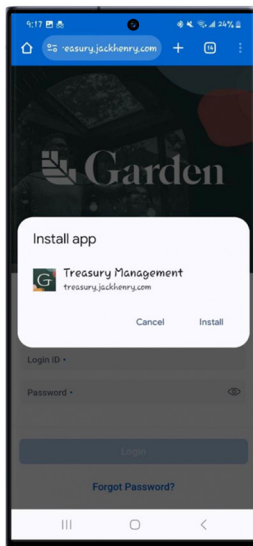
### Installing the app on an Android device

The PWA can be installed manually on an Android device by selecting "Settings" (the three dot icon) on Chrome, selecting "Install App", then selecting "Install" when prompted by the Install App Modal.

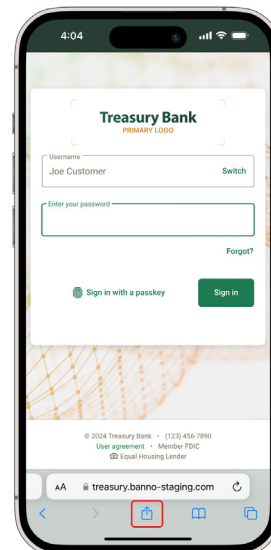
### Installing the app on an iOS device

The PWA can be installed manually on an iOS device by selecting the "Share" icon at the bottom of the page, and then selecting "Add to Home Screen".

Android



iOS



## 7. Branding the PWA Experience

### Logo Requirements

- One color and one reversed (all white) version in SVG (Scalable Vector Graphics) format.



- Additionally, provide simplified versions of logos that translate well in a smaller form factor.
- If an SVG logo is unavailable, providing an AI (Adobe Illustrator) or EPS (Encapsulated Postscript) version will be the next best thing, allowing direct conversion to an SVG. If none of those are available, provide a PNG (Portable Network Graphic) with a transparent background with a size that is 600px w by 150px h.

### Login Background Image (PWA Only)

- If an image background is desired, please provide an image approximately 3000px w by 2000px high in any standard image format.
- Most typical image formats are acceptable since we do not have to worry about transparency, but we do need to consider effective, efficient compression.

## 8. Communication Tools (Communicating with your customers)

### Treasury Management (Channel)

- **Information Center**  
Note: You can attach documents and/or add links for more information in the Information Center widget.
- **Modal Message**  
Note: This feature can be used when the migration period starts and then remove close to the end date.
- **Banner Message**  
Note: This feature can be used for a more persistent reminder. For example, the week before the event starts and then the week before the event ends.

### Other

- **Email communication outside of Treasury Management**
  - Utilize the UserInfo tab of the monthly reports package for email addresses.
  - Utilize the User Status Report - Detailed / Summary report in Back Office Reports for email addresses.

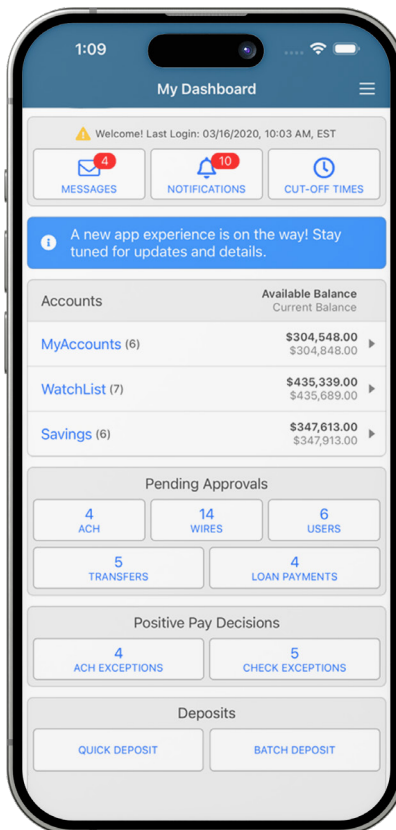
## 9. Actions & Information regarding the existing Treasury Management App

A new version (12.7.X) of the TM Native App is required to be downloaded by all bank customers currently using the mobile app for the following reasons:

- The native app will have the ability to determine if UIS is enabled for the bank.
- If the UIS is enabled, the native app's login page will display the UIS login page requiring the Digital ID, and User Password.
- If the UIS is not enabled, the native app's login page will display the traditional login page requiring Company ID, User ID, and User Password.

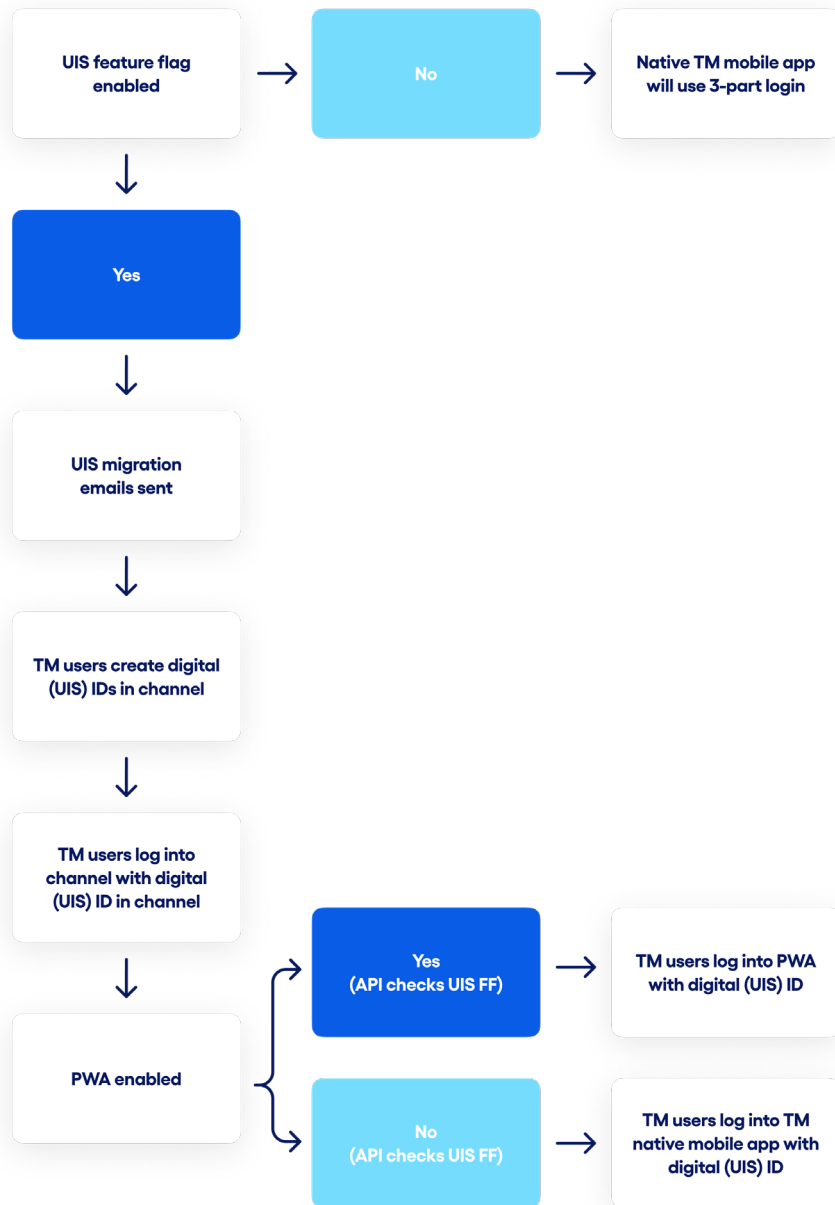
A static and generic banner message will be located on the dashboard for Android and iOS, and will be available for ALL bank customers.

Note: Changes to the banner message will not be allowed.



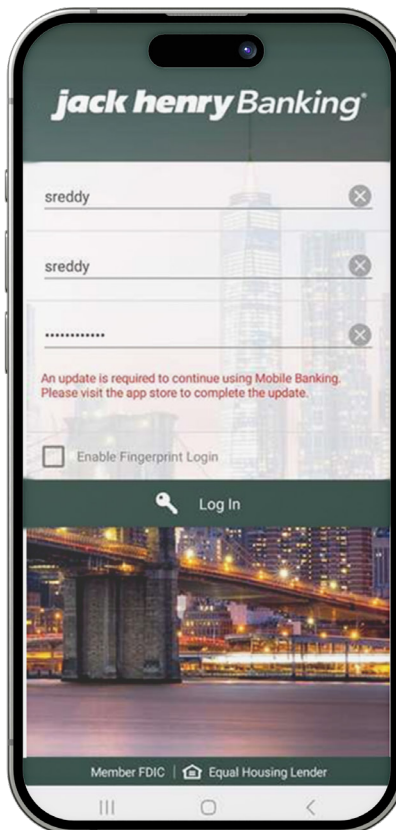
Note: Reference the following flowchart for a better understanding of the UIS & PWA process.

### 10. Determining the appropriate PWA user experience



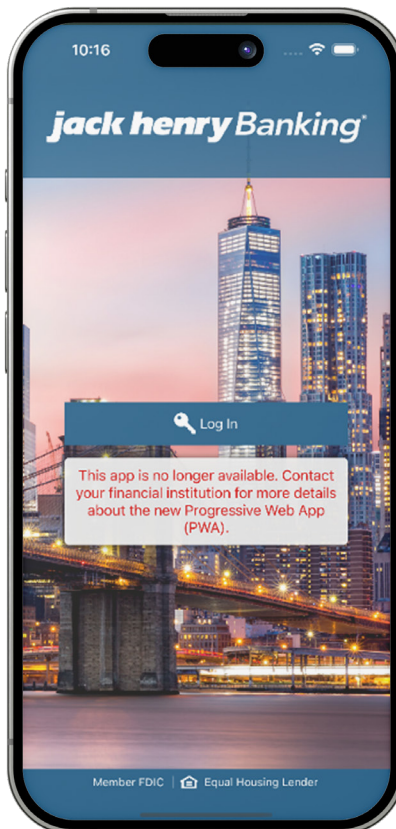
## 11. UIS (Details)

- Once UIS is enabled, the new UIS login pages will be displayed for the TM Native App and PWA. This would be effective immediately. If the current native app has been downloaded and UIS is on, they get the UIS login flow.
- Customers will be blocked from logging into the TM Native App if they are not on the current version (12.7.X).
- Login will fail and a message will be displayed to update the app on the login screen.



## 12. Treasury Management Native App (Details)

- **Users must download** the new version (12.7.X) of the TM Native App.
- Note that Apple and Google enable automatic updates which alerts the user that there is a new version of the app is available. It is up to the users to select the appropriate action.
- If a customer is using a version of the TM Native App that is not equal to the 12.7.X version, their access will be denied and will be unable to login to the mobile app.
- Once PWA is enabled, the following will take place:
  - TM native app will be available to customers for 30 days.
  - After the 30-day window, the TM Native App will be delisted from the stores for that financial institution.
  - Delisting the native mobile app will be performed by the Jack Henry's fulfillment team.
  - Note that the TM Native App cannot be removed from a user's device. The user will have to delete the app from their phone.
  - After the 30-day window, access to the TM Native App will be denied and will display the following message on the login page.





### 13. Financial Institution Checklist

- Select a migration approach (UIS & PWA, or UIS, pause, PWA).
- Select a migration date for UIS & PWA.
- Select a date for Jack Henry's Fulfillment Team to publish TM Native App version 12.7.X which includes the banner message to your customers.
- Create a case titled "PWA Migration" and include the PWA migration date along with a publish date to the stores for TM Native App version 12.7.X.
- Utilize available communication tools if deemed appropriate.
- Communicate new URL for PWA.
- Communicate iOS and Android installation instructions for PWA.
- Review logo and branding for PWA.
- After PWA has been enabled, inform your customers that the TM Native App will be sunset after 30 days.