jack henry™

Implementation Guide

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Let's get started

We're here to help make this as easy as possible.

First, we want you to know how happy we are to have you on board. Together, we can do amazing things.

We know this may seem overwhelming, but we've outlined our process step-by-step so you understand exactly what we need to do to make this happen. Anything labeled with a ★ will be something for your to-do list; but no need to worry about those items yet. Your implementation coordinator will keep track of them and remind you when the time comes. Think of this person as your project concierge – their number one goal is to help you.

When will you be introduced to this magical person? As soon as onboarding begins. We'll kick off your project with a phone call, introduce you to your implementation coordinator, review project needs and address any initial questions your team may have.

You'll also be receiving an invite to **Basecamp**. This is a project management and team collaboration tool that serves as our communication record, so even when the project is discussed via phone or email, we'll circle back and record notes here. There are too many moving parts to let anything go undocumented.

Be on the lookout for that email and bookmark the page – you'll be a frequent visitor.

What to Expect

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We try to run a tight ship to get your product out the door ASAP.

01 Onboarding

02 Design

03 Implementation

04 Acceptance Testing

05 Launch
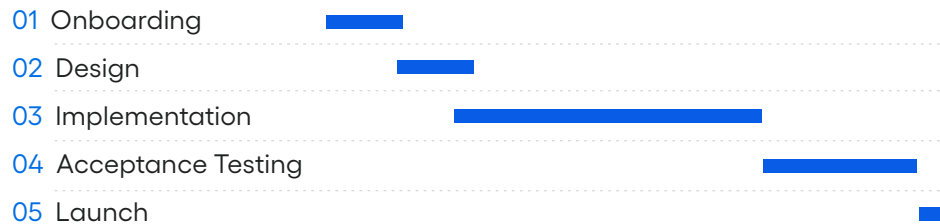
01 Onboarding *takes approximately two weeks.*

You'll be guided through this process by an implementation coordinator – someone who is easily accessible to answer all of your questions, coordinates work efforts, and ensures timely delivery.

Key tasks:
- Make introductions
- Complete kick-off call
- Gather required onboarding items (like logos, developer accounts, balance display configuration)

02 Design *takes approximately two weeks.**

Once we've gathered the necessary assets, we'll customize the design of your apps to match the look and feel of your brand. We want your customers/members to seamlessly transition between your physical and digital bank.
*The duration of this process can vary significantly depending on the number of revisions.

Key tasks:
- Create design preview (includes app icons, background images, store graphics, and more)
★ • Review design
- Revise design if needed
★ • Provide final design approval

Anything marked with a ⭐ will be something for your to-do list.

03 **Implementation** *takes approximately six weeks.*

This is when the magic happens. Our team goes to work on connecting your core to Banno services and creating an impressive digital solution for you.

Key tasks:
- Configure core-specific items
- Set up third party products
- Update customized content
- Enable applicable features
- Deploy apps
- Perform internal testing

04 **Acceptance Testing** *takes approximately four weeks.*

This is all you (well, mostly). Your team will test the product before it goes live (don't worry, we'll give you a training session before we hand over this responsibility). First impressions matter, and we don't let anything out the door until it's ready.

Key tasks:
- ⭐ Participate in app training
- ⭐ Schedule time with your internal team to test the apps
- ⭐ Complete pre-release testing checklist
- ⭐ Identify any updates to configuration that require resolution before going live
- ⭐ Provide final launch approval

05 **Launch** *your digital suite.*

After approximately 20 weeks of preparation and testing, we will be able to publish your digital suite or individual applications. Your Banno online site will be live, and your mobile apps will be made available in the App Store and Google Play Store for your users. We usually like to celebrate at this point.

Please keep in mind the length of these phases can vary significantly based on things like response times, thoroughness of acceptance testing, and number of revisions to each configuration.

01: Onboarding

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Let's get down to business.

The onboarding phase is all about gathering the items needed to complete the project. But before we really dive in, we want to emphasize that you will have help along the way. You'll be matched with a personal implementation coordinator to make sure the whole process moves smoothly – from start to go-live.

Meet our onboarding team.

Brian Frost
Implementation Manager

Brent Moinet
Implementation Manager

Heather Rubino
Senior Implementation Manager

Kayla Bell

Amy Brooks

Liz Bulgrin

Hannah Coatney

Marny Cook

Emilee Garretson

Bailey Hagerdorn

Tiffany Jones

Who should be invited to the kickoff meeting?
Everyone actively involved in the project.

Faheem Khan

Jake Mastroianni

Kristin McBride

Jason McRoberts

Amber Medlin

Tiffany Miller
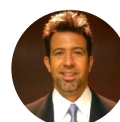
Carlos Saenz

Spencer Williams

It's time for your kickoff call.

Your implementation coordinator will reach out to you and schedule a kickoff call. During this time, we will review:

- Project phases
- Timelines and launch date
- Basecamp
- Requested onboarding items
- Integrations with other services

We'll leave plenty of time for questions, so don't worry if you have a long list. Our goal is to end this meeting with everyone feeling confidently 'in the know'.

And for that very reason, it's a good idea to *include everyone that will be actively working on this project.*

Note: We'll only have a few scheduled calls during the implementation process because we know this isn't the only ball you're juggling. In order to let you digest and answer when it's convenient for you, we'll do the majority of our communication on Basecamp. That being said, we're more than happy to schedule phone conversations – we want to make this as easy as possible.

Your Checklist

We've covered the heavy hitters in the What to Expect overview, but you'll find a more extensive list in Basecamp.

Essentials
- ☐ Your Apple developer account credentials
- ☐ Your Google developer account credentials
- ☐ Test account and credentials (we'll need these throughout the life of our partnership)
- ☐ Hosting Account Setup

Branding
- ☐ Preferred name of your app (note: this should be unique to comply with store standards)
- ☐ Your logo (please send in Vector format – .ai or .eps types are preferred)
- ☐ Style guide for your brand
- ☐ RGB/Hex numbers for your specific brand colors

Current Usage
☐ The existing number of mobile users
☐ The existing number of online banking users

Custom Text
☐ Welcome message for RDC
☐ RDC disclaimer message
☐ Front of check capture message
☐ Back of check capture message
☐ Transfer hours disclaimer message
☐ Re-order card message
☐ Available balance disclosure

Contact Info
☐ The 'Call' feature phone number
☐ Who is your after hours support contact at the FI?
☐ In the For Clients Portal, please identify staff authorized to create support cases for Banno products
☐ Provide your ATM locations/networks

Miscellaneous Configurations
☐ Provide details for external transfer configuration
☐ Provide details for balance display configuration
☐ Do you want to select which admins see employee accounts? yes/no
☐ Do you want account numbers to be masked for admins? yes/no
☐ Provide details for transaction filtering

> **Note:** As we start to gather various pieces of the onboarding information, we'll be doing things behind the scenes like verifying your credentials and laying the groundwork for your digital suite.

Strategic Communication Plan

Now is the time to begin planning how you will communicate this transition to your account holders. An entirely new digital platform means a significant change to their digital banking experience – even if you're transitioning from another Jack Henry product – and change can be hard if you're not prepared for it. We recommend that you consider the following as you begin planning:

- Craft messaging that builds excitement leading up to the big unveiling
- Build a thoughtful marketing plan for getting it out there
- Make use of email, social media, and website advertising campaigns to reach account holders effectively
- Work with Banno's Website Solutions team to leverage their digital marketing expertise

02: Design

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## Aesthetic is just as important as function.

As soon as we have your branding materials, we'll start working on the design of your app. Once the team is confident that everything adheres with your brand standards, your implementation coordinator will post a preview on Basecamp. This will include a variety of screens on multiple devices; we want to make this as realistic as possible.

> **Note:** We believe aesthetic is just as important as functionality – we take this very seriously and will continue to iterate on the design until you're completely satisfied. Our goal is to 'wow' your customers/ members.

We take your brand and apply it to:

Your Apps
(Preview on Multiple Devices)
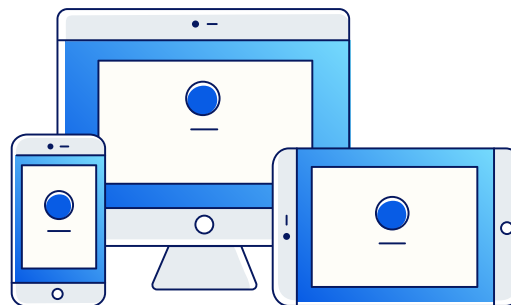
Your App Icons
(iOS and Android App Icons)

Your Store Graphics
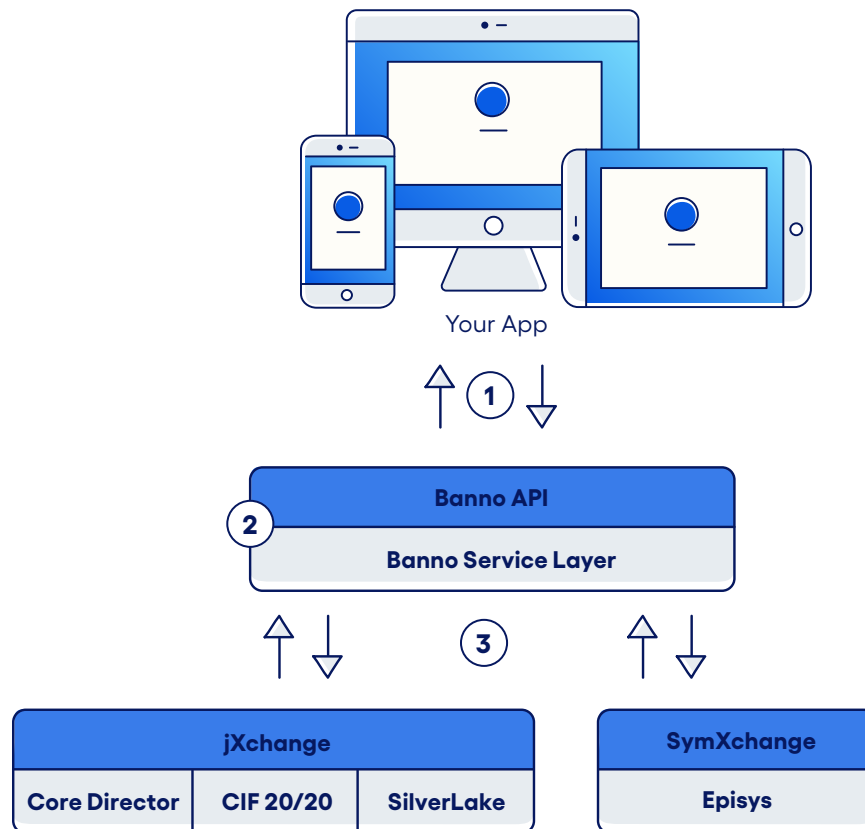(iOS App Store and Android Play Store)

03: Implementation

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Here's a look at what's going on behind the scenes.

We connect to your core.

(1)

A connection is made between **Your App** and the **Banno API** to allow information to populate in your users' accounts.

(2)

The **Banno API** uses the **Banno Service Layer** as a communication translator to and from your core and other non-Banno services. (This does not apply to credit unions)

(3)

jXchange / SymXchange are the direct communicators to your core. They exchange requests and data between the Banno services and the core. For your app to have open connectivity to your core, the **Banno Service Layer** must be connected to **jXchange / SymXchange**.

Your App

(1)

(2) | **Banno API** |
Banno Service Layer

(3)

jXchange		
Core Director	**CIF 20/20**	**SilverLake**

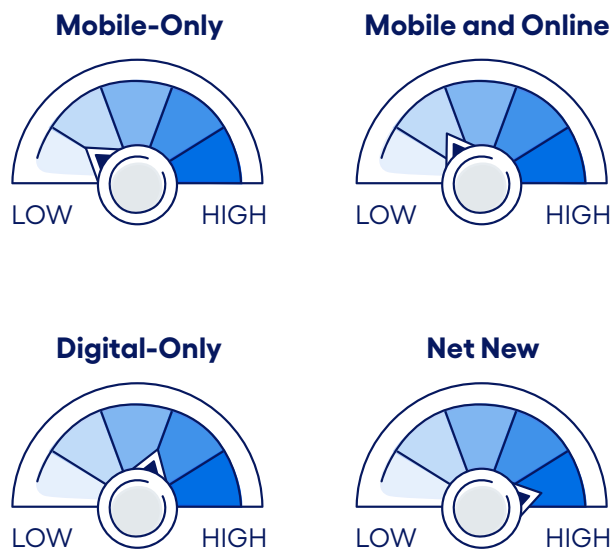| **SymXchange** |
| --- |
| **Episys** |

At this point, we need to work with other JHA teams to build the connection between Banno and your core – this allows two-way communication, like a telephone line.

Making this connection takes approximately 30 days. Once the connection is in place, we are sent information for testing to make sure the lines of communication are open and working.

Any additional JHA products and features that need to be configured will be added to your Digital Suite at this time.

Data Conversion

We'll work with the data conversion teams at JHA – the best in the business – to safely and efficiently convert everything from your current provider to Jack Henry. We know it's a great deal of effort to do any type of conversion, so here's a quick breakdown of how / your level of involvement.

Mobile-Only

LOW   HIGH

Mobile and Online

LOW   HIGH

Digital-Only

LOW   HIGH

Net New

LOW   HIGH

Internal Testing

We'll start on our end.
Once the implementation tasks are completed, we put your apps through a series of tests. To start with, your implementation coordinator will verify that they can authenticate the credentials provided by your institution. When that's done, we'll move onto reviewing the designs and ensuring that the configurable components have been completed as intended.

If any issues are detected, your implementation coordinator will work with the appropriate teams to resolve them as quickly as possible.

04: Acceptance Testing

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Let's work out the kinks.

Once we have design approval, we'll deploy your apps, so you can see them in action.

The IS Education team will schedule a training session with you and the key stakeholders. We prefer that test participants do not take part in this session – we want them to experience the Digital Suite without instruction, so they can take note of anything that may trip up your first-time users.

During the training session, we'll discuss:
- Major features
- Configurable components
- Frequently asked questions
- Expectations of your FI's acceptance testers

Our hope is that you'll be able to take what you learn and train your staff, but don't worry if you miss something – we'll be here to help. We'll also provide documentation that you can share with your team.

Now it's your turn. Are your testers ready?
Great! We're excited, too.

Remember, we highly recommend having **at least 10 participants** (but the more, the merrier). These new sets of eyes help us do a number of things: catch typos and missing information, review workflows for inconsistencies, and provide potential future updates.

If your institution uses Cash Management we recommend that you select 2-3 businesses that are willing to take part in testing alongside your traditional consumer/retail customers. It's important to choose people that are willing to provide honest/open feedback to your team to make sure you know how you'll communicate externally to your business customers before going live.

Plus, by having your own team members use the apps, they'll get acclimated prior to the launch date and be more helpful to your users during the rollout.

This part is truly a team effort, and everyone will need to pull their weight. Your implementation coordinator will be heavily involved, communicating frequently in order to report and resolve issues as quickly as possible – we never want to postpone a launch date.

05: Launch

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It's go time.

As soon as we're given your final stamp of approval, after months of preparation, it's time to release your apps to the public.

Note: The final data conversion steps will be completed prior to launch.

As the project comes to an end, your implementation coordinator will transition you to the support team. Don't worry – we'll update them with all the information they need to assist you going forward.

Congratulations! Your Digital Suite is now live.

A few maintenance notes:
- If you've decided to migrate your users from GoDough to Banno with our prompts, they will be live as soon as the app is released.
- We'll unpublish your old apps in the Google Play Store and App Store to avoid any confusion.
- Your project will be archived in Basecamp. You can still access all of the content, but you will no longer be able to add or edit.

06: Support

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We'll introduce you to our friends – they know *everything*.

After the launch of your apps, we'll introduce you to our support team. Don't worry…we won't leave you hanging. We'll make sure everything is live, and life is good before we say our goodbyes.

Once we conclude our work together, any future issues should be directed toward the Banno Support team. You can open a case by doing one of two things:
1. Use the *For Clients* portal
2. Call (800) 299-4222

When opening a case, make sure to include specific information about your problem, anyone that should be included in the conversation, and useful attachments. We try to factor severity level into our prioritization, so please be as descriptive as possible.

Standard/Production Normal: to be used for a general support request, or issue that does not seem to be affecting multiple users.

High/Production Affected: to be used for issues that are more widespread or have a more serious negative impact on your users.

Urgent/Production Down: to be used for issues that cause all mobile users to be unable to access updated information or functionality in their mobile app.

Low Impact: to be used for particularly minor issues or questions.

07: Wrapping Up

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We recognize that every implementation is unique. If there's something we haven't covered that you're curious about, we want to hear from you.

And last, but not least, thank you for serving your community the way that you do, and thank you for letting us be a part of it.