HORIZON-XE – Phase 1
Development

Gary Stewart
HORIZON-XE Development Manager

28 years of FIS experience

HORIZON-XE Development Team

Programmers
Programmer Analysts
Business Analysts

In addition to development, QA, Professional Services, Product Management and Business Administration all work to support HORIZON-XE.
HORIZON-XE – Phase 1

What’s Included in Phase 1?

Customer Relationship Summary
For all existing customers and accounts, the relationship summary provides a full view of the entire customer relationship. From household to business relationships - users can view it all.

Advanced Navigation
Users have access to customer data, account and service information. Powerful, modern navigation including Universal search, Favorites, History and Interactive Data Tables

Mobile Capabilities
Same great features and functionality on the tablet as in the office. The entire system can be mobile.
HORIZON-XE – Phase 1
What’s Included in Phase 1?

• **Role-based, field-level security**
  – Customer and account servicing can be extended to the point of customer contact allowing instantaneous customer service without fear of critical processing fields being altered.
  – Up to 10 field Permission levels are available for stratification across your workforce.

• **Consistent confidential and dormant account and customer controls**
  – Confidential fields are now bank-defined and have been extended to include Loan accounts and customers. Groups can be set to be blocked or to have limited access.
  – Up to 10 field Confidential levels are available for stratification across your workforce and customer base.

• **Active page help and contextual links to the bookshelf**
  – Highlights page level permissions and the current user’s assignment to them with an optional link for users to request access. Field definitions include HORIZON 360 BI’s paths, wherever applicable.

New security features allow your bank to determine who has access and who doesn’t – ultimately providing your customers more protection than ever before.
HORIZON-XE – Phase 1
What are the key benefits?

- Instantly understand the customer, their accounts, and their behavior
- Improve the overall customer relationship
- Provides cross-selling opportunities
HORIZON-XE – Phase 1
Who Will See Immediate Advantages of Using HORIZON-XE?

Call centers
Loan and deposit managers
Branches who use tablets
Business relationships on the go
HORIZON-XE – Phase 1
How Does it Work?

DEMO
The Professional Services team is focused on delivering exceptional service in the areas of consulting, training and the implementation of new labels and add-on products. These teams provide services to more than 1,000 Community Core clients.

23 years of FIS experience
HORIZON-XE – Phase 1
Implementations

1. **How to request an implementation**
   - Clients should submit a Request for Professional Services (RPS)
     - Contact your CSM or SAM and request an RPS be submitted.
     - Request an RPS through client portal.

2. **Scheduling**
   - Implementations will reach out to the client upon receipt of the RPS to discuss scheduling.
   - Implementations is currently booking out to August 2017 for installs.
   - Implementation timelines are running approximately 45 days.

3. **Installation**
   - FIS will install HORIZON-XE in two environments
   - FIS can install HORIZON-XE on additional environments, but an RPS is required
• **Environmental Assessment**
  – Prior to installation, FIS will complete an assessment to determine whether existing host and network environments can support the additional workload. This preliminary measure ensures that their hardware and communications infrastructure is capable of processing HORIZON-XE’s new features and HTML5 browser experience.
  - Discuss and define the minimum requirements necessary to successfully run HORIZON-XE
  - Provide a comprehensive analysis of the existing environment including host, servers, desktops, and network
  - Review software levels and patch levels
  - Review the host system and communication network capacities
  - Define what, if any, changes must be made to support HORIZON-XE
  - Present a report on the findings of the environment assessment

• **Once the assessment is complete, clients will work with FIS to schedule an implementation date.**
**Training**

- The Community Core Solutions training team has developed several self-paced training modules to assist clients in navigating the new system. Clients can view these courses anytime, for free, in FIS’ Learning Management System (LMS). Courses currently available include:
  - HORIZON-XE - Overview
  - HORIZON-XE - Customer Processing
  - HORIZON-XE – Security

- All banks interested in installing HORIZON-XE must complete the LMS training modules prior to installation. Anyone interested in learning more about HORIZON-XE can access these training courses. The courses provide an excellent way to learn more about the system.
• Optional HORIZON-XE Consulting for a Fee
  
  – Security Consulting - HORIZON-XE introduces field and group level permissions not available in HORIZON. For customers who need guidance in setting up the security parameters in HORIZON-XE, our Professional Services team is offering custom security consulting engagements.

  – On-site and Web Training – If a bank needs additional training, the Community Core Solutions training team offers HORIZON-XE on-site and web training for a fee.

  – Wireless Services – FIS is offering assistance to banks who need help with wireless set-up to implement HORIZON-XE’s mobile capabilities.