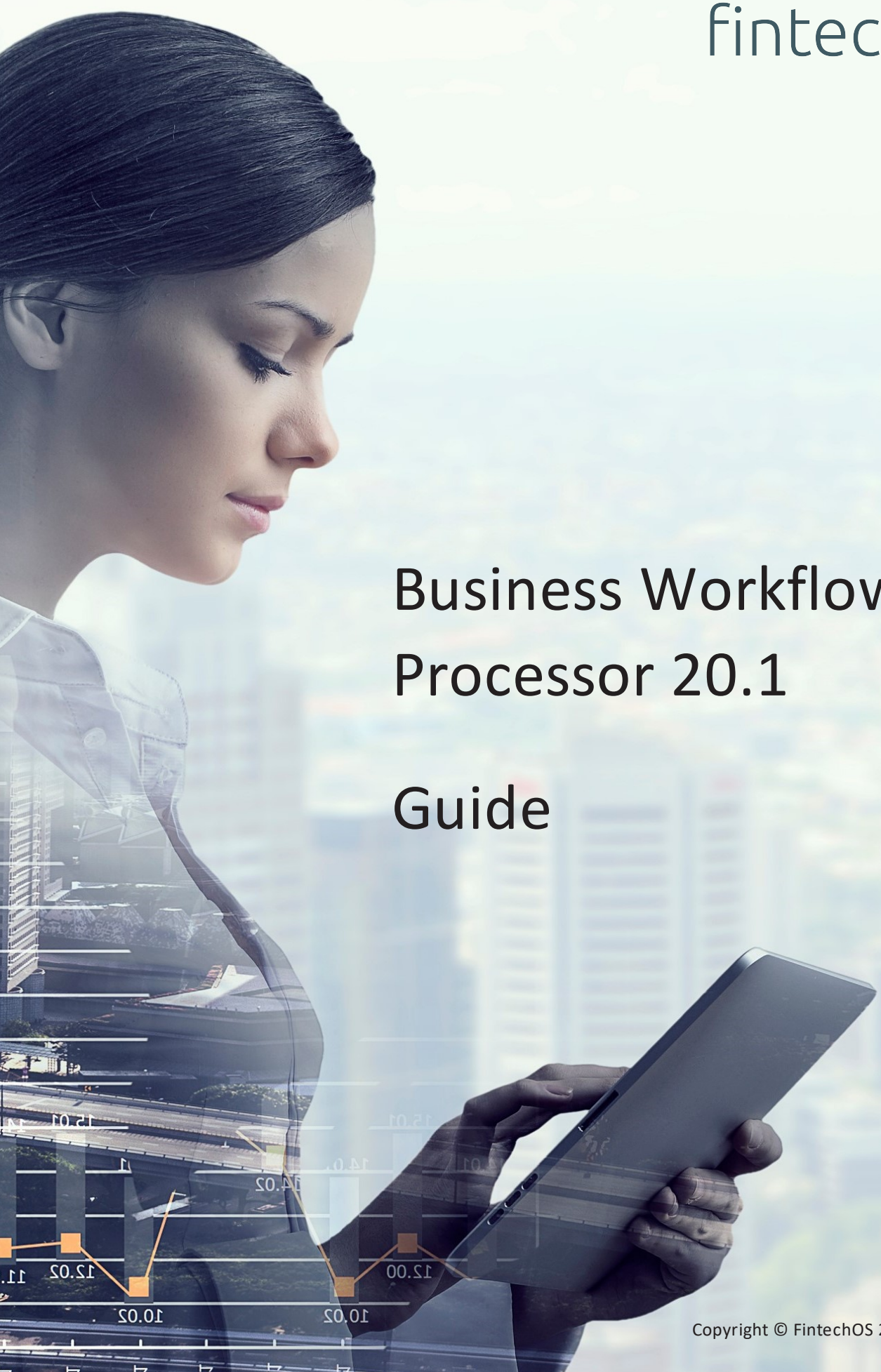


Business Workflows Processor 20.1

Guide

TOC

Overview

Business workflows help organizations coordinate tasks between people and synchronize data between systems, with the ultimate goal of improving efficiency and responsiveness.

Workflow stages show the status of a record in the workflow and provide processing that must occur for the record to move to the next phase. The tasks, information or documents are passed from one status to another (from one participant to another for action) either manually or triggered by business rules or actions specified for that specific status.

Business rule transitions enforce business logic, such as checking if the user has entered the required data or has proper security to perform a transition.

The Business Workflows Processor enables you to set an easy-to-follow process by using rules-driven business workflows, which helps users within your organization be more efficient, operate faster and better understand the actual business logic underlying the business process.

In FintechOS, business status has approval tasks embedded and stores audit information related to stage transition as well.

FintechOS provides you with centralized management of digital statuses, through dedicated lists and user interfaces for configuring statuses and transitions from one status to another.

Business Workflows Processor Features

- Automatation of repetitive tasks
- Adaptive business rules
- Easily visualize and design your workflows
- Role based access and controls
- Audit trail

Applications

The Business Workflows Processor can facilitate business processes, such as:

- Customer account
- Loan applications
- Case management

Installation

FintechOS Studio comes with the Business Workflows Processor pre-installed.

How to Set Up a Business Workflow

FintechOS Studio enables you to define, execute and automate business processes, passing tasks, information or documents a from one participant to another for action, according to a set of rules.

Business workflows comprise of statuses, transitions, and business rules (herein referenced as workflow rules).

To set up a business workflow, follow these steps:

"Step 1. Add Business Workflow" below

"Step 2. Define Workflow Statuses" on the next page

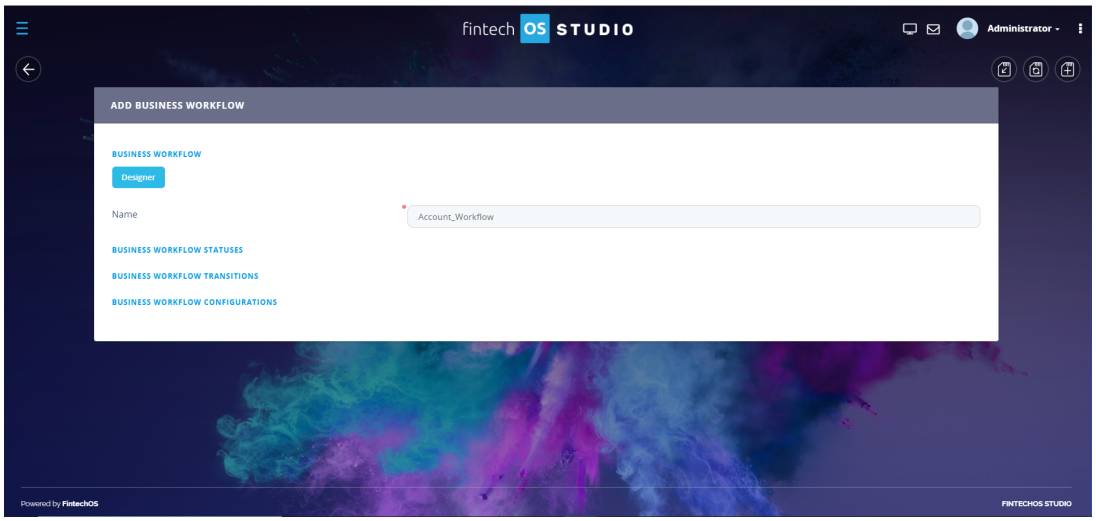
"Step 3. Define Workflow Transitions" on page 8

"Step 4. Configure Workflow Rules" on page 11

Step 1. Add Business Workflow

In order to set up a business workflow with subsequent statuses, transitions and rules, you need to first add the business workflow in FintechOS Studio. To do so, follow these steps:

1. In FintechOS Studio, click the main menu icon ( ) at the top left corner.
2. In the main menu, click **Fintech Automation** > **Business Workflow** > **Business Workflows**.The Business Workflows List page appears.
3. Click the **Insert** button ( ) at the top right corner of the page. The Add Business Workflow page appears.
4. Enter the **Name** of the business workflow.



5. Click the **Save and Reload** button ( ) at the top right corner of the page. The Edit Business Workflow appears.

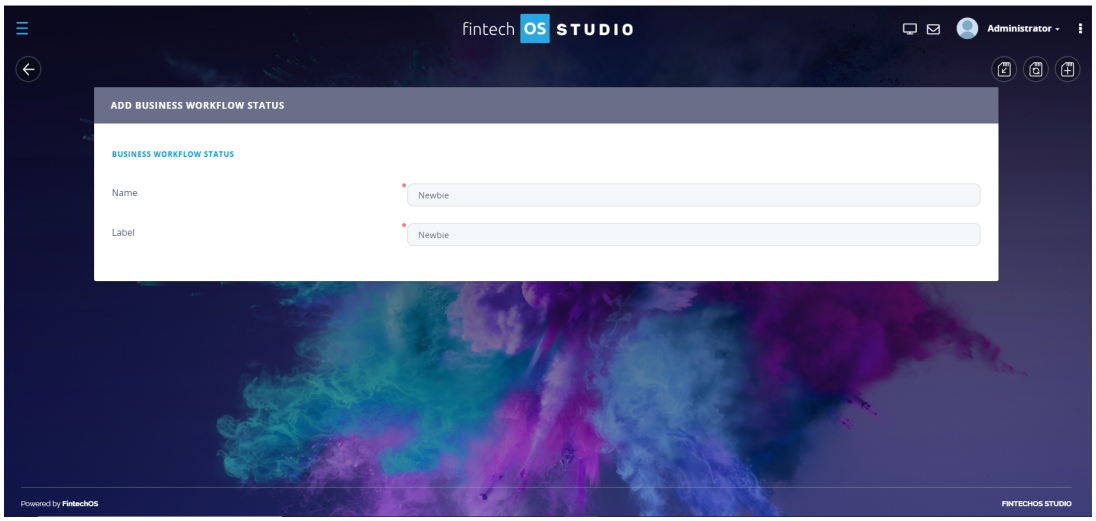
Now you need to define the workflow statuses.

Step 2. Define Workflow Statuses

You can define workflow statuses either from the Business Workflow Statuses section or by using the Workflow Designer. For information on how to add business workflow statuses using the Workflow Designer, see Workflow Designer.

This section describes how to add a business workflow status from the Business Workflow Statuses section:

1. In the Edit Business Workflow page, scroll-down to the Business Workflow Statuses section and click the **Insert** button. The Add Business Workflow Status page appears.
2. In the **Name** field, enter the status name that will be used by the system.
3. In the **Label** field, enter the name of the status that will be displayed in the UI.



4. Click the **Save and Close** button ( ) at the top right corner of the page.

Follow the procedure above as many times as statuses your business workflow has.

After you finish adding the business workflow statuses, you need to define the workflow transitions.

Step 3. Define Workflow Transitions

You can define workflow transitions either from the Business Workflow Statuses section or by using the Workflow Designer. For information on how to add business workflow statuses using the Workflow Designer, see Workflow Designer.

This section describes how to add a business workflow transition from the Business Workflow Statuses section:

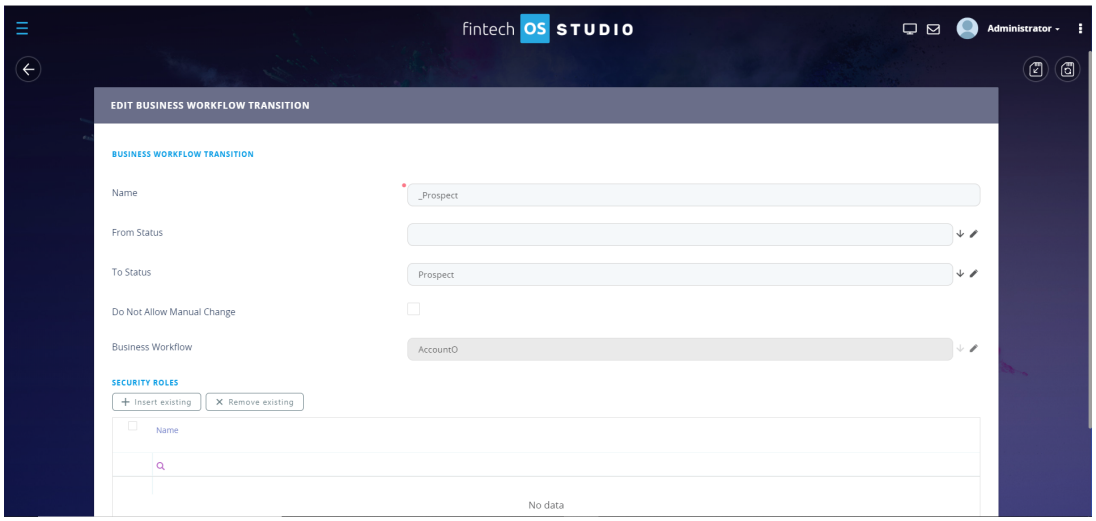
1. In the Edit Business Workflow page, scroll-down to the Business Workflow Transitions section and click the **Insert** button. The Add Business Workflow Transition page appears.
2. Fill-in the following fields:
3. From the **From Status** field, select the status from which the workflow transitions.

> **NOTE** When adding the first workflow status, leave this field empty as it is the initial workflow status.

4. From the **To Status** field, select the status to which the workflow transitions.
5. Tick the **Do Not Allow Manual Change** checkbox if you want the workflow transition to be automatically triggered based on strict business rules.

   The **Name** field is automatically filled in with the concatenation of the names entered in the **From Status** and **To Status** fields. If this is the initial workflow transition it follows the following naming convention: "_*ToStatus*".

   The **Business Workflow** field is a non-editable and displays the name of the business workflow for which you define the transitions.
6. If you allowed manual changes (ticked clear the **Do Not Allow Manual Change** checkbox) and want all users to manually perform the workflow transition, skip steps 7 and 8, go to step 9.
7. If you want only users with specific security roles to perform the business status transition, click the **Save and Reload** icon at the top-right corner of the page. The Edit Business Workflow Transition page appears



8. To add a specific security role, from the Security Roles section, click the **Insert existing** button and from the pop-up that appears, double-click the security role. Repeat this step to add as many security roles as your business requires.

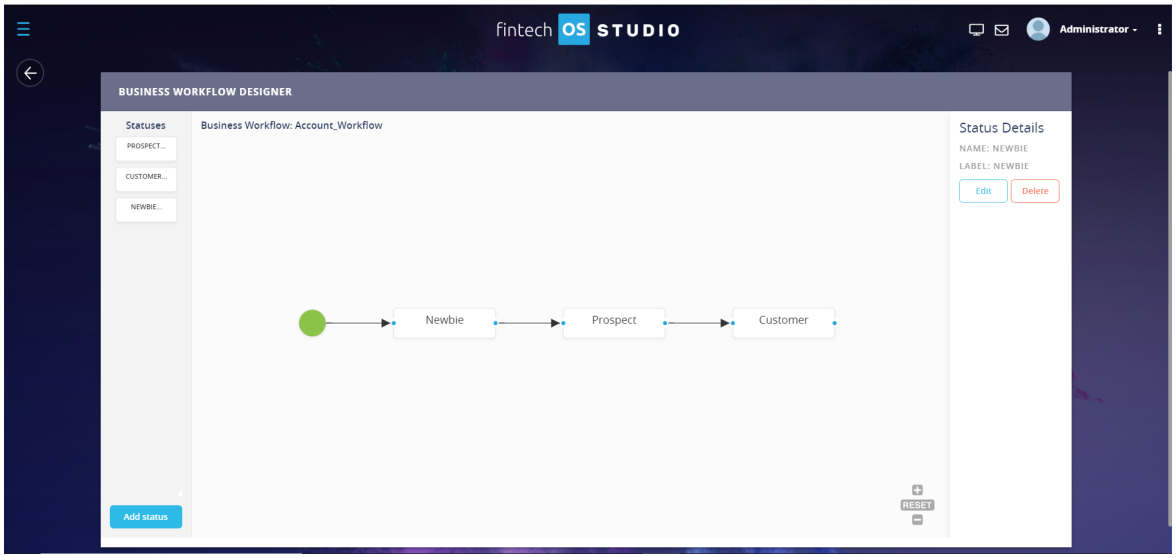
> **NOTE** If you ticked the **Do Not Allow Manual Change** checkbox, users will not be able to manually change the status transition; it will be automatically triggered based on strict business rules.

9. Click the **Save and Close** button ( ) at the top right corner of the page.

Follow the procedure above as many times as business status transitions you need to meet your business needs.

After you define all the business workflow transitions, if you some business transitions will be automatically triggered by specific rules, you need to define the workflow rules.

If you want to visually see the workflow statuses and transitions, in the Edit Business Workflow page, click the **Designer** (Designer) button. The Workflow Designer appears. The figure below provide an example of how a business workflow might look like in the Workflow Designer.



Step 4. Configure Workflow Rules

FintechOS Studio enables you to provide extensive configuration of the business workflow used on a specific entity, by defining the set of rules to be automatically triggered on workflow status change and also define specific actions to be performed before or after status change.

Step 1. Select business workflow on entity

To configure the workflow rules, you first need to select the business workflow you previously created on the entity where you want to use it. To do so, follow these steps:

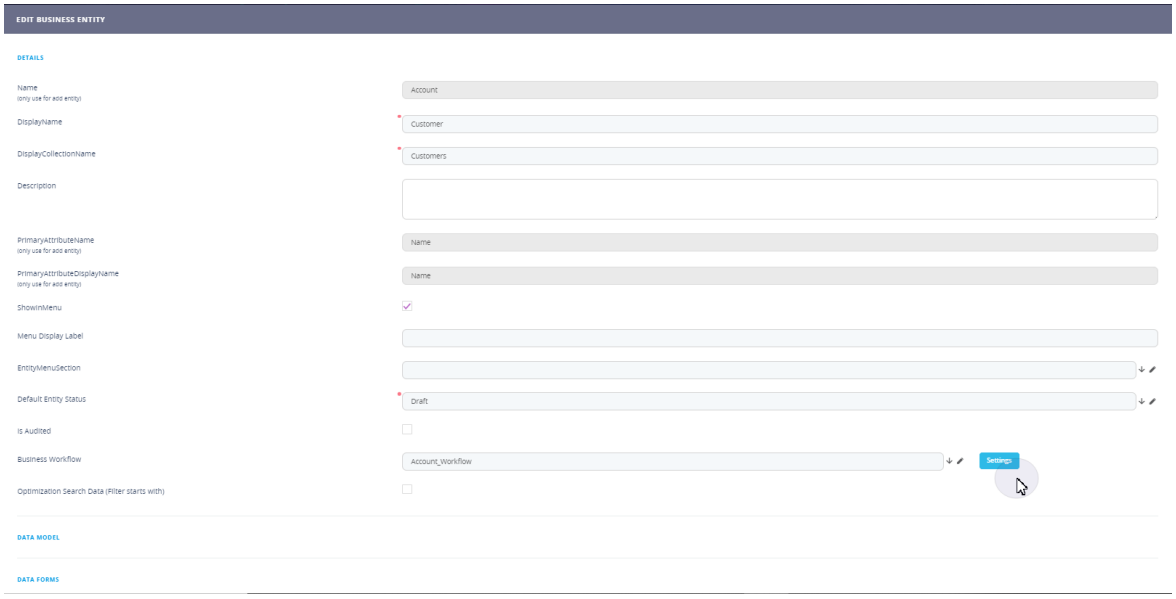
1. In FintechOS Studio, click the main menu icon ( ) at the top left corner.
2. In the main menu, click **Evolutive Data Model**> **Data Model Explorer**. The Business Entities List page appears.
3. Double-click on the desired entity. The Edit Business Entity page appears.
4. In the **Business Workflow** field, select the business workflow to be used on the business entity.
5. Save the changes.

A new record is added in the Business Workflows Configurations List page (**Fintech Automation** > **Business Workflow** > **Business Workflow Configurations**) with a name that follows this convention: "<*the name of the business workflow*> for <*the name of the entity on which the business workflow was selected*>".

Step 2. Configure workflow rules

You can configure the workflow rules from the Edit Business Workflow Configuration page. You have two options to access it, as follows: .

- From the Edit Business Entity page, by clicking the **Settings** button next to the Business Workflow non-editable field.



- From the Business Workflows Configurations List page, by double-clicking on the record that you want to configure.

In the Business Conditions section, add the business conditions by defining the rules and actions to be run on transition from one status to another if specific business conditions are met.

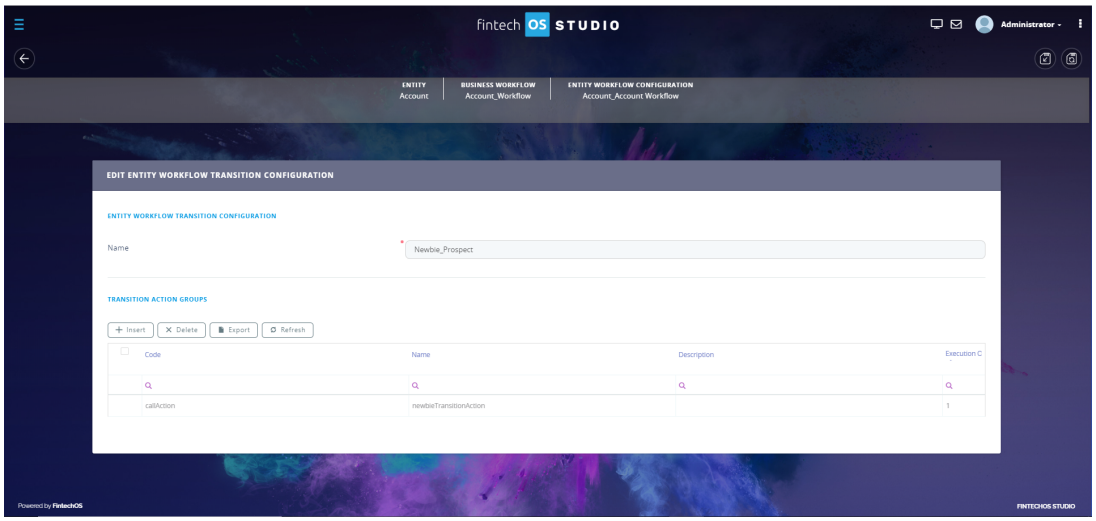
If you want to restrict the workflow transitions to the list of defined transitions, tick the **Allow Only Defined Transitions** checkbox.

Edit Workflow Transition Configuration

You can add specific actions to be performed before or after status change by editing the workflow transition configuration:

Step 1. Add action group

1. In the Business Workflows Configurations List page, from the Entity Workflow Transition Configuration section, double-click on the transition configuration you want to edit. The Edit Workflow Transition Configuration page appears.



2. In the Transition Action Groups section, click the **Insert** button. The Add Transition Action Group page appears.
3. Enter the **Name** of the action group which will be used by the system.
4. At the top-right corner of the page click the **Save and Reload** icon. The Edit Transition Action Group page appears.
5. Add actions to be performed on workflow transition. For information on how to do it, see .before, after or before and after business workflow status change by adding actions in the Entity Workflow Transaction Actions Before section, respectively Entity Workflow Transaction Actions Before section, or both. The procedure for adding actions is the same for both before and after transaction. For information on how to add a workflow transaction action, see
6. After you add the actions that you need, at the top-right corner of the page click the **Save and Close** icon

Step 2. Add workflow transaction actions

You can add before, after or before and after business workflow status change by adding actions in the Entity Workflow Transaction Actions Before section, respectively Entity Workflow Transaction Actions Before section, or both. The procedure for adding actions is the same:

1. Click the **Insert** button from the section corresponding to when you want the action to be performed (before or after status change). The Add Entity Workflow Transition Action page appears.
2. Enter the **Name** of the action to be used by the system.
3. Tick the **Apply Always** checkbox to ensure business consistency,
4. Select the **Action Type** from the following available values:
   - **Go to Business Workflow Status**. You have to select the **Business Workflow Status** to which the workflow transitions.
   - **Call Processor**
   - **Custom Script**. You have to enter the script **Code** to be executed on workflow transition.
   - **Validate Condition**. You have to enter the **Error Message** to be displayed if the business condition fails.
5. Click the **Save and Reload** button ( ) at the top right corner of the page.
6. Add as many actions as you need, then add the business conditions which if met will trigger specific action execution.

Step 3. Add action business condition

1. In the Edit Transition Action Group page, scroll-down to the Action Business Conditions section and click the **Insert** button. The Add Action Business Condition page appears.
2. Enter the **Name** of the action business condition to be used by the system.

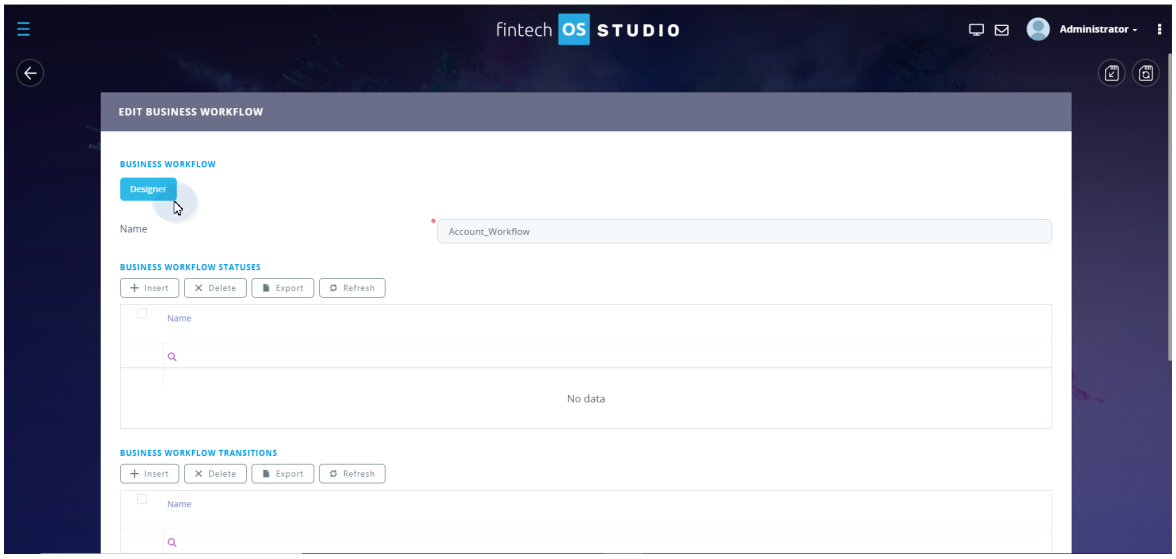
3. Select the **Business Condition** from the list of previously added business conditions.
4. Select the **Required Evaluation Value**. If you want the action to be run if the business condition is met, select **True**; otherwise select **False**.
5. Click the **Save and Reload** button ( ) at the top right corner of the page.

Workflow Designer

The Workflow Designer is a graphical tool that simplifies business workflow creation enhancing productivity. It enables you to add workflow statuses and transitions by using drag and drop.

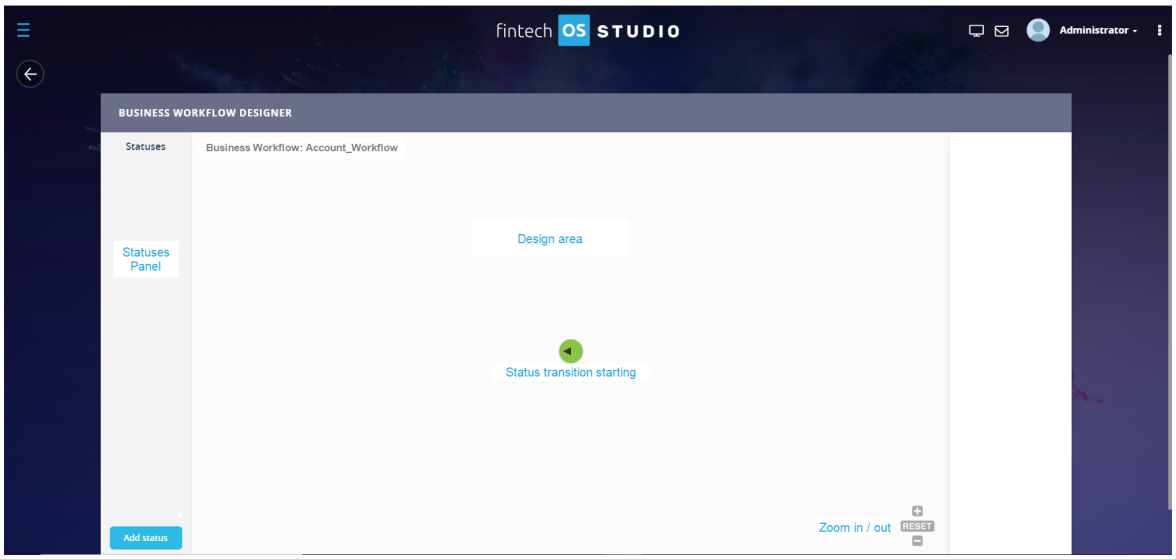
> **NOTE** To access the Workflow Designer you need to first add a business workflow into FintechOS Studio. For information on how to add one, see section Add Business Workflow.

You can access the Workflow Designer from the Edit Business Workflow page, by clicking the **Designer** button.



Workflow Designer Interface

The Workflow Designer provides a very user-friendly interface offering the means to add workflow statuses and transactions and easily update them.



Statuses Panel

The Statuses Panel lists all the workflow statuses you add via the Workflow Designer or by using the Add Status button available at the bottom of the Statuses Panel

Design Area

The design area is the place where you design the business workflow. It contains a the green filled circle that indicates the starting point of the business workflow. The workflow status connected to the green filled circle is the initial business workflow status.

The name of the business workflow is displayed as title of the Design Area.

Details Panel

The details panel displays basic details of the element (status or transition) selected in the design area and provides you with the means to edit and delete it.

Zoom in/out

At the bottom-right corner of the Design Area, the Zoom in/out feature is available.

Create Business Workflows

> **IMPORTANT!** To create a business workflow using the Workflow Designer you need to first add a business workflow into FintechOS Studio. For information on how to add one, see section Add Business Workflow.

To create a business workflow using the Workflow Designer, follow these two steps::

Step 1. Add Workflow Statuses

1. From the **Statuses Panel**, click the **Add status** button. The Add Status pop-up appears.
2. In the **Name** field, enter the status name that will be used by the system.
3. In the **Label** field, enter the name of the status that will be displayed in the UI.
4. Click the **Save & Reload** button if you want to save the workflow status and continue adding another one; otherwise, click the **Save** button. The workflow status(es) appear in the Statuses Panel. They are also listed in the Edit Business Workflow page, in the Business Workflow Statuses section.
5. Drag and drop statuses from the **Statuses Panel** to the **Design Area**.

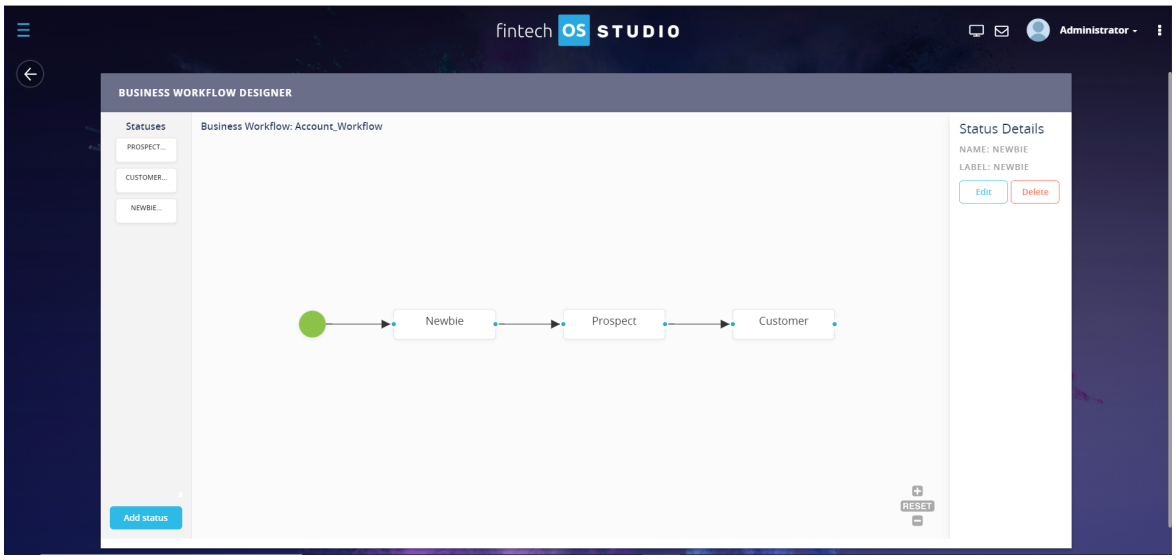
Step 2. Add Workflow Transitions

To mark the initial workflow transition, click-hold on the workflow starting point (the green filled circle) and drop-hold on the entry point (blue dot displayed on the left) of the status to be the initial status of the workflow.

Continue drawing transitions from one status to another status by click-holding on the exit point (blue dot on the right) of From Status to the entry point (blue dot displayed on the left) of the To Status. The workflow status transition is marked with an arrow which indicates the transition From Status > To Status.

The workflow transitions are listed in the Edit Business Workflow page, in the Business Workflow Transitions section.

This is how a business workflow might look like for a customer account:



Edit Business Workflows

The Workflow Designer allows you to edit business workflows by editing or deleting both statuses and transitions.

Editing workflow statuses

To edit a workflow status, in the **Design Area**, click on the status. In the **Details Panel**, click the **Edit** button. The Edit Business Workflow Status page appears. You can edit both the name and label. Make the desired edits, then at the top-right corner of the page click the **Save and Close** icon.

Editing workflow transitions

To edit a workflow status, in the **Design Area**, click on the status. In the **Details Panel**, click the **Edit** button. The Edit Business Workflow Transition page appears. You can change the transition from one status to another, allow manual chnage on workflow transition or add security roles to restrict users access who manually change the workflow status.. Make the desired edits, then at the top-right corner of the page click the **Save and Close** icon.

Deleting workflow statuses and transitions

To delete a workflow status, from the Design Area, select the status and in the Details Panel click the **Delete** button. A confirmation dialogue appears. Click **Yes** to confirm deletion.

The status is deleted and so do all transactions to / from the status.

To delete a workflow transition, select the transition arrow and in the Details Panel click the **Delete** button. A confirmation dialogue appears. Click **Yes** to confirm deletion. The workflow transition is removed.