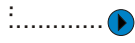




INFOWorkflow

Features



InfoSolutions has a Workflow Definition System built into the architecture which interacts with the messaging system as well as the inter branch module to provide for a generalized route to be defined for a message, within the bank.

The main aspects of defining the flow are mentioned here under.

- The route the message takes is termed as the **Workflow**.
- The system allows the bank to specify a workflow for every transaction type over non- overlapping **ranges**. The ranges can be specified in various currencies.
- A given transaction type can have alternative routes associated with it for the same range-currency combination. These alternative workflows are termed as **Sets** in the system.

TELLER SUPERVISOR MESSAGING

The most common application of this system would be for Teller-Supervisor messaging, where each branch of the bank can define the number of supervisors of each group that need to approve a transaction. Hence based on the transaction being executed, the workflow definition system decides exactly which supervisors to send the transaction to, for an approval.

There are three basic types of transactions that may need approval.

- Intra-Branch Transaction
- Inter-Branch Transaction
- Intra-Branch transaction which needs approval from remote branch supervisor

WORKFLOW INTERFACE

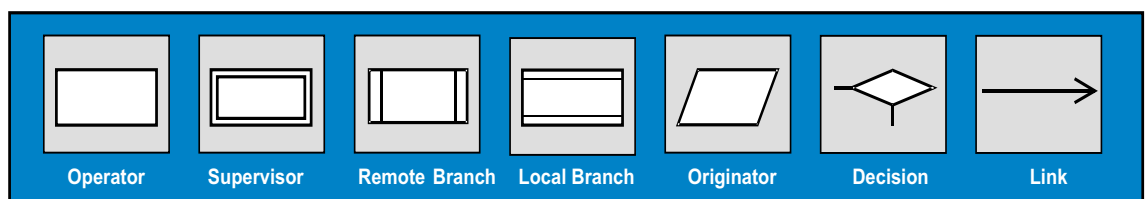
A front-end is provided to enable the user to easily define a workflow. For defining a workflow first the user needs to specify, certain details that identify the workflow he/she is about to define i.e. The user needs to enter

- Transaction Range & currency
- Transaction Type
- Inter-Branch OR Intra-Branch

The user is then shown any previous sets that may have been defined for this combination of range and transaction-type. The user is also given option to define a new set (route for the message).

WORKFLOW DEFINITION TOOLBAR

The user is provided with a toolbar that lists the controls that are required to define a set. The user can select some or all of these controls to design a workflow for the set. A schematic of the toolbar is shown below.





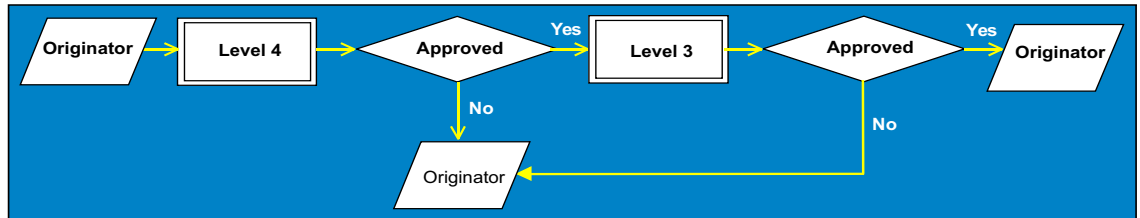
INFOWorkflow

Process Flow

An example of a workflow-set for an inter-branch transaction is shown below.

.....▶

Amount $\leq 200,000$ and $> 500,000$, Intra-Branch Cash Withdrawal.

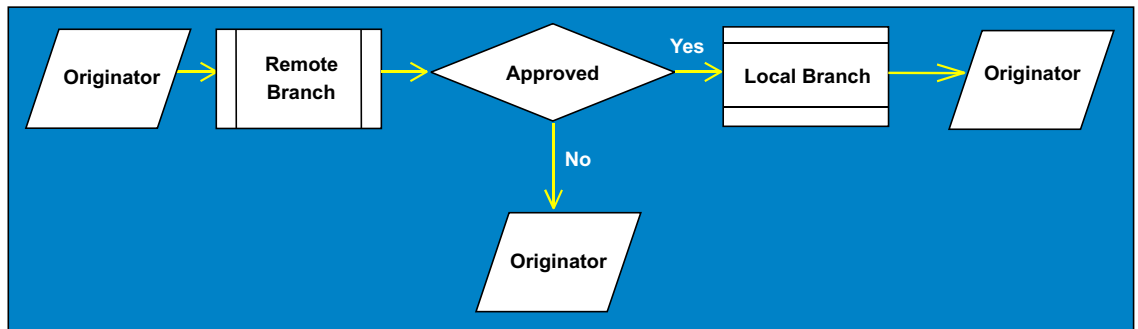


Thus for a transaction that falls into this category first needs an approval from a level 4 supervisor. The level for each user is defined in the database. Once the level 4 supervisor has processed the message, the response is checked, if approved the message is sent to the level 3 supervisor else the message is sent back to the originator. Then the level 3 supervisor processes the message. The response is verified, but here in any case it is sent back to the originator.

Note that all the three Originator boxes represent the same user, who has originated the workflow, i.e. the user who will be executing the transaction.

An example of a workflow for an inter-branch transaction is shown below.

Amount $\leq 200,000$ and $> 500,000$, Intra-Branch Cash Withdrawal.



Thus for an inter branch transaction that falls into this category, first an approval is obtained from the remote branch, the result is verified and then approval is obtained from the local branch. At the remote branch the workflow sets existing in that branch are referred to, to decide the route of the message within the branch. Similarly at local branch also the existing workflow sets are referred to, in order to decide the flow of the message within the branch.

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