

Workflow with

FileOptics

ELECTRONIC DOCUMENT SOLUTIONS

Introduction

The FileOptics Workflow module, FileFlo and associated Workflow Designer, is a powerful tool that allows for the fast and easy creation and deployment of Document Centric Workflows.

The Workflow designer can be easily operated by a Business Analyst and does not require coding skills to create a Workflow.

The Workflow module sits server side and is delivered to users via FileView, which is browser based.

- Automate document centric processes
- Formalise business processes
- Business process improvement
- Productivity gains
- Audit trails
- Customer service gains
- Monitor process performance
- Build your own Workflows

FileFlo

FileOptics International

FileFlo

– Workflow Designer

The Workflow designer can be easily operated by a Business Analyst and does not require coding skills to create a Workflow. FileOptics has approached Workflow from a document centric perspective. When a document with pre-defined attributes hits a particular cabinet within FileOptics a Workflow is triggered.

- Assign tasks to set users or user groups
- No coding skills required
- Modular workflow design
- Document centric workflow approach
- Break down business processes to assignable steps
- Branching and decisioning of workflows catered for
- Unlimited process design
- Open architecture for easy integration with other systems

“The FileFlo Workflow Designer is an easy to use and intuitive tool that is a pleasure to use. We can now turn business process diagrams into real usable workflows”

The screenshot displays the FileFlo Workflow Designer interface. The main window is titled "Add a Workflow Step" and contains the following fields:

- Name: Review Application
- Assign to: Even
- Days to complete: 4
- Description: Review
- Requirements: A list of requirements including Form Status Check, Member Type, Member Number, Loan Category, Credit Check Require, and Attach Credit Report.
- Branch When Complete: A dropdown menu.
- Workflow: A dropdown menu.

An "Add a Required Field" dialog box is open in the foreground, containing the following fields:

- Name: Form Status Check
- Mandatory Field:
- Type: MultipleChoice
- Options: Complete, Incomplete
- Description: Check all the required fields are filled by an applicant

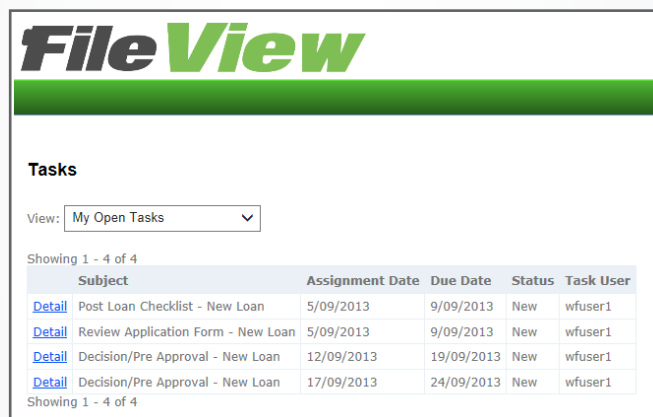
The interface also features a sidebar with navigation buttons (up, down, plus, minus) and a save icon at the bottom right.

FileFlo

– Browser Based User Interface

The user accesses their task list via the FileView module in their browser. As it is browser based, users can check their task list from any device with a browser, be it laptop, tablet or smartphone.

- Intuitive user interface
- User assigned task list
- All activity recorded and auditable
- Email notifications
- Standard and bespoke reporting
- Attach documents to tasks



File View

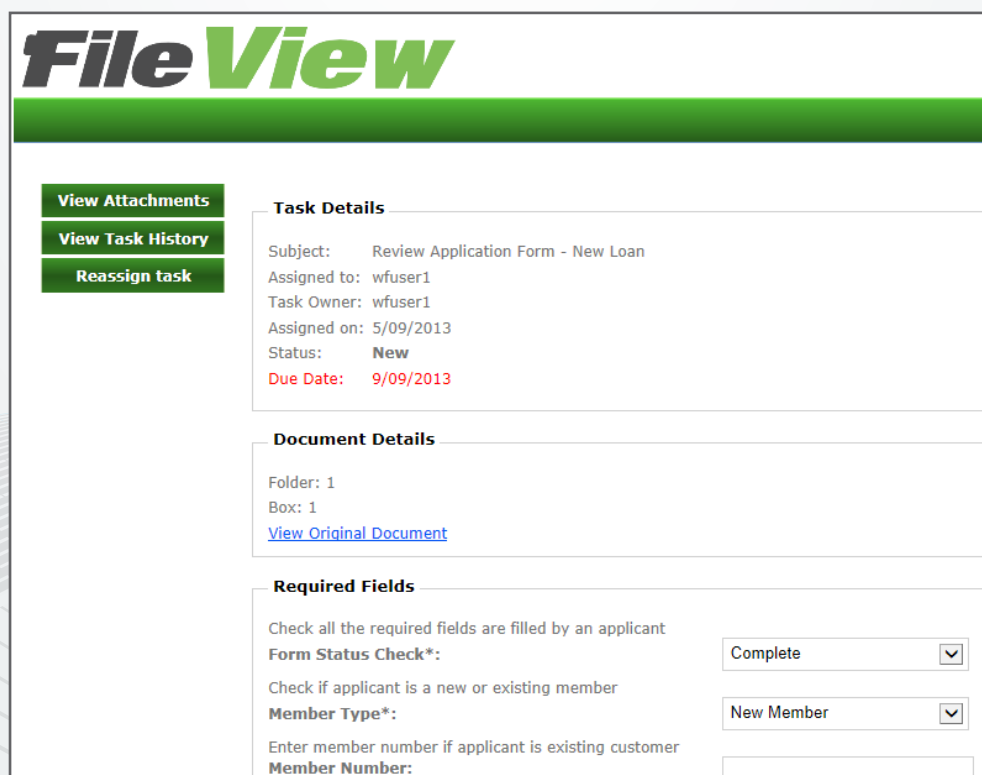
Tasks

View:

Showing 1 - 4 of 4

| | Subject | Assignment Date | Due Date | Status | Task User |
|------------------------|------------------------------------|-----------------|------------|--------|-----------|
| Detail | Post Loan Checklist - New Loan | 5/09/2013 | 9/09/2013 | New | wfuser1 |
| Detail | Review Application Form - New Loan | 5/09/2013 | 9/09/2013 | New | wfuser1 |
| Detail | Decision/Pre Approval - New Loan | 12/09/2013 | 19/09/2013 | New | wfuser1 |
| Detail | Decision/Pre Approval - New Loan | 17/09/2013 | 24/09/2013 | New | wfuser1 |

Showing 1 - 4 of 4



File View

[View Attachments](#)
[View Task History](#)
[Reassign task](#)

Task Details

Subject: Review Application Form - New Loan
Assigned to: wfuser1
Task Owner: wfuser1
Assigned on: 5/09/2013
Status: **New**
Due Date: **9/09/2013**

Document Details

Folder: 1
Box: 1
[View Original Document](#)

Required Fields

Check all the required fields are filled by an applicant
Form Status Check*:

Check if applicant is a new or existing member
Member Type*:

Enter member number if applicant is existing customer
Member Number:

Case Study – First Credit Union, NZ

1. The Situation:

First Credit Union (FCU) is a successful and growing Credit Union headquartered in Hamilton New Zealand with branches right across the North Island. As a power user of FileOptics already (they no longer retain or store any paper files) FCU was keen to make use of the FileOptics workflow module. The area identified to initially make use of this module was an online loan application process where a loan application was received as an email by the online loans officer.

This process was a largely paper based process with loan officers required to do time consuming manual reporting on a monthly basis.

2. The Solution – FileOptics workflow module FileFlo:

A FileOptics Business Analyst sat with the online loans officer and documented the online loan process. This allowed the process to be divided into several steps:

- Review application form
- Decision / Pre-approval , including new loan checklist
- Security and supporting documents
- Pre draw down process
- Post Loan Checklist

Each step in the process has a number of tasks the loans officer must complete before marking the loan step as complete. If required, different steps can be allocated to different users or groups of users.

The loan process included two paper based check lists that loan officers are required to complete and attach to the file. These checklists were turned into electronic pdf's that are now completed on a PC and attached to the Workflow.

3. Results:

The use of FileFlo for this loan process has dramatically reduced the amount of paper being produced by this process. The loans officer now builds an electronic folder of documents, rather than printing every document out. Furthermore, this loan file is available to appropriate staff regardless of their location.

Loan processing times have been reduced and management have found the live reporting information from the system invaluable, not to mention the time saved by staff no longer manually generating reports on a monthly basis. It has also allowed customer service staff to give timely feedback on the status of a particular loan application.

4. Next Steps:

The success of this initial workflow has shed light on the opportunities available for using the workflow module for many other processes across the business.

There is also ongoing opportunity to improve the loans process workflow by integrating it with other systems such as the core banking system.

Workflow from FileOptics is allowing FCU to do more business more quickly.

FileFlo

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