



QPR WorkFlow

Minimize Process Time, Maximize Process Outcome

Introduction: QPR Business Process Management

- BPM & Benefits
- Ingredients for success with BPM
- QPR's BPM offering


QPR WorkFlow

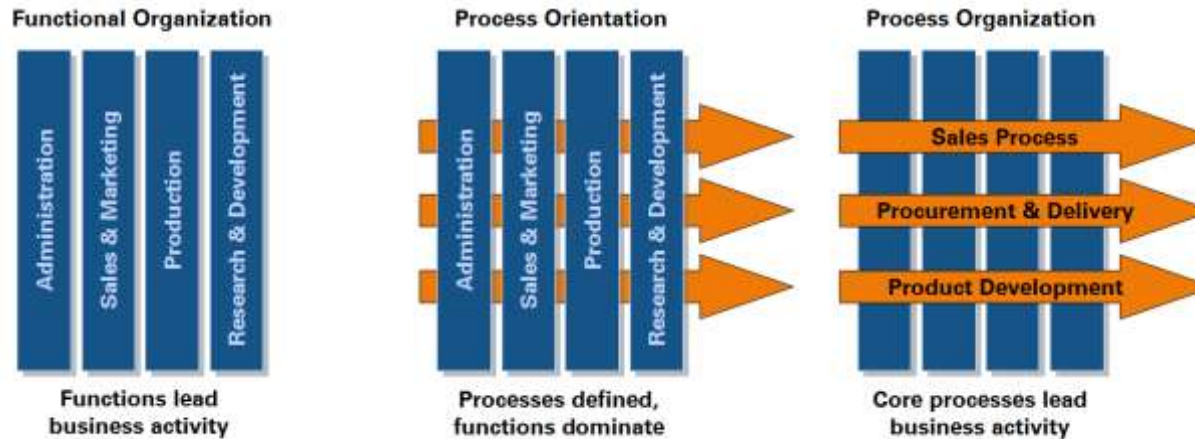
- What is a workflow and what are the benefits? Example
- When/where to apply?
- QPR WorkFlow tool architecture, modules and integration
- Technical requirements
- What makes QPR WorkFlow different?
- What are the benefits?



QPR BPM: Customer success

Q&A

Business Process Management

-  A management discipline that combines a **process-centric and cross-functional** approach to improving how organizations achieve their business goals








-  BPM is a fast, agile process in which business and IT work together using tools that enable them to arrive at solutions that not only support the organization's efforts right now, but **provide the enabling framework** for rapid adaptation to new challenges.
-  A BPM solution provides:
 - The tools that help make processes **explicit** (awareness & measurement)
 - The functionality to help **business managers** control and change **both manual and automated** processes

BPM Benefits

-  Increase customer retention
 - Customer satisfaction through faster processes and better access to information
-  Reduce process time
 - Process optimization and efficiencies (faster time-to-market and time-to-service)
-  Improve regulatory compliance
 - Documented processes, improved process control and automated processes
-  Improve efficiencies across organizational boundaries
 - Visibility and control (incl. supply chain and outsourcing)
-  Reuse and create new IT assets
 - Integration with legacy applications & creating new composite applications
-  Greater personal productivity and satisfaction
 - Greater insight in processes and automated workflow
-  Reduce risk
 - Reduced waste and more profitable allocation of human resources
-  Increase agility
 - Framework that enables rapid adaptation to new challenges

Agile organizations

-  Execute their evolving strategy effectively
 - Keep processes in sync with your corporate goals
-  Increase productivity with well-defined responsibilities
 - (Re)define & streamline your processes
-  Increase operational efficiency
 - Automate repetitive work → Better leverage your intellectual capital
-  Increase quality & customer satisfaction
 - Achieve predictable, consistent process outcome
-  Assess and analyze process performance
 - Feedback for improving your strategy

→ BPM Helps Provide Significant Competitive Advantage

Effective BPM - Requirements

Strategically-aligned processes

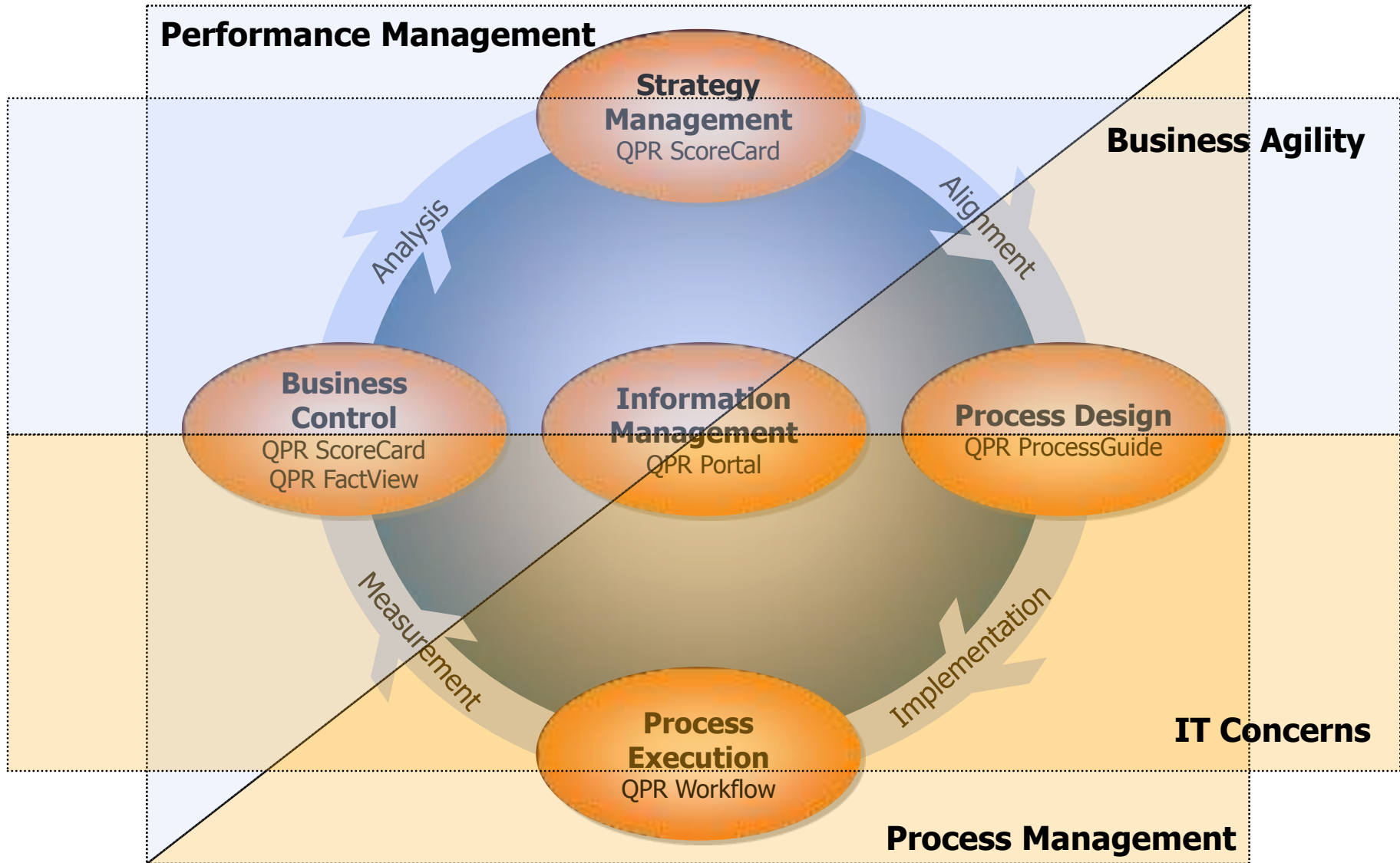
- Constantly measure and analyze performance
 - Foster company-wide collaboration and initiative management
 - Improve strategy with powerful assessment and analysis
- QPR ScoreCard, QPR FactView, QPR ProcessGuide, QPR Portal

Streamlined processes

- Clear understanding of processes
 - Automate where possible
 - Low barrier to process optimization or re-engineering
- QPR ProcessGuide, QPR WorkFlow

→ QPR BPM Tool Suite Provides All the Tools to Meet These

An End-to-End, Rapidly Deployable BPM Solution



QPR WorkFlow – Overview

A rapid, web-based application generator for **automating the process steps** that comprise operational business processes, focused at the **business user**.

QPR WorkFlow - Example

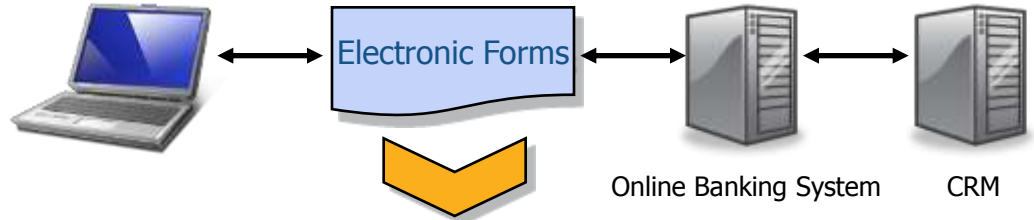
Online banking workflow

- Process overview
- Bank website
- Integration with MS Outlook
- Approving requests
- Management reports

Online Banking Process Overview

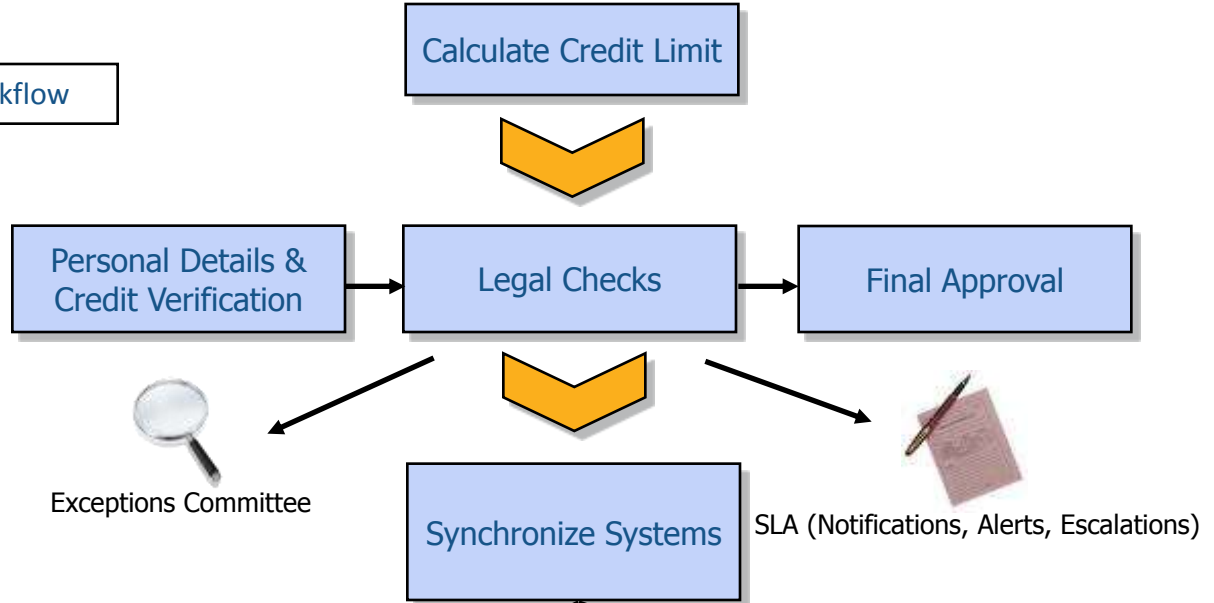
1. Customer wants to open a new account

Request Input



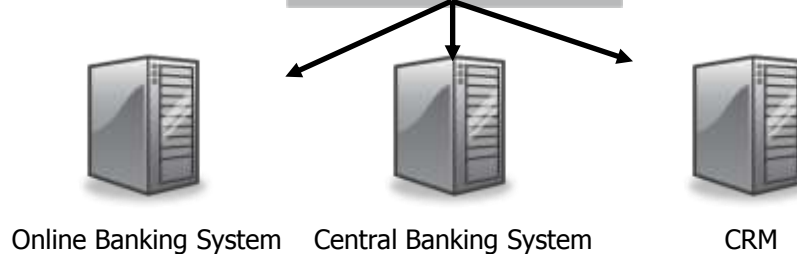
2. Need approvals:
 a. Tom Watson, Credit dept.
 b. Peter Green, Ordering dept.
 c. Mark Brown, Manager

Execute Workflow

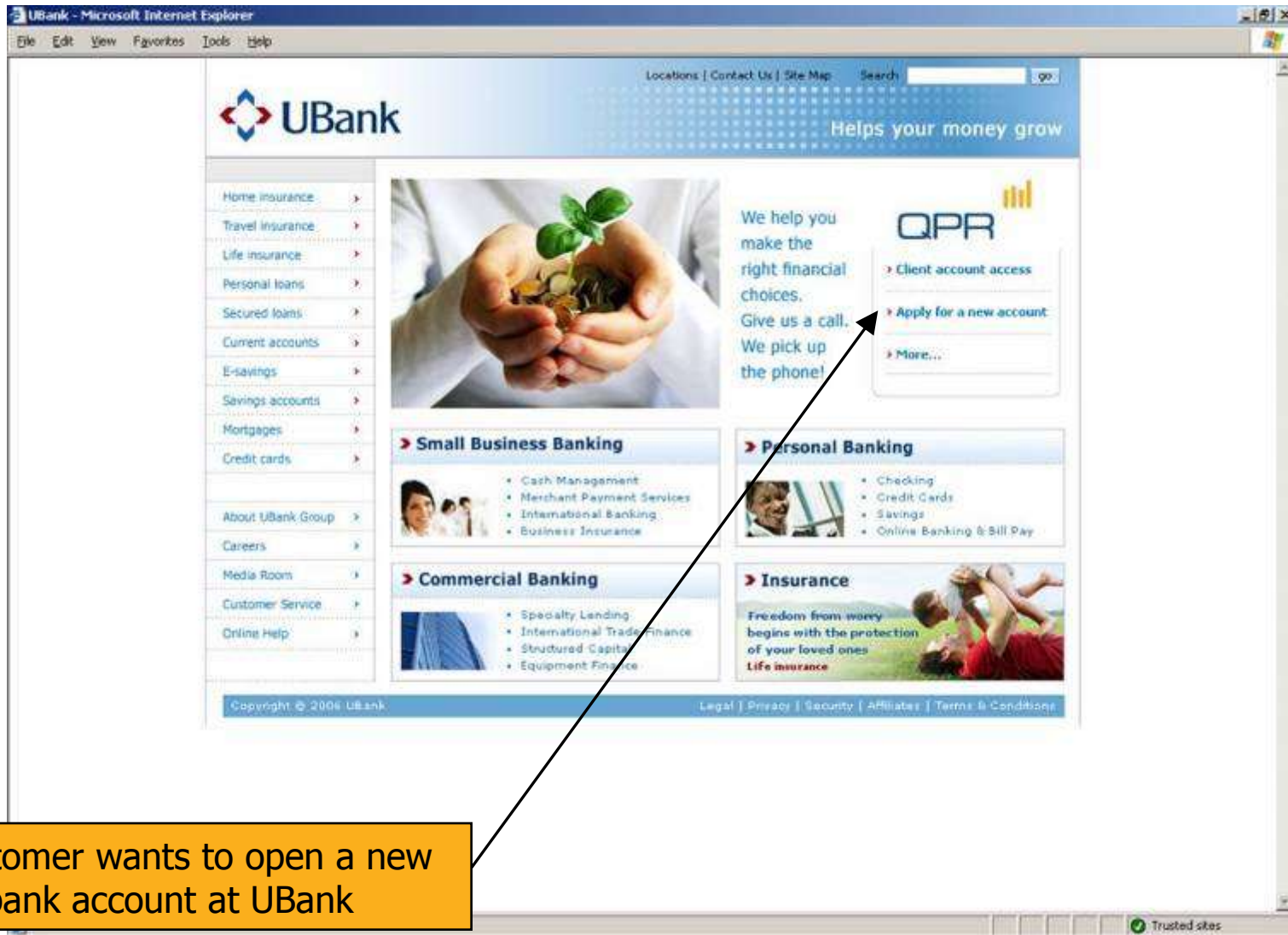


3. Update systems and send notifications

Systems Synchronization




Customer - UBank Website



UBank - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Locations | Contact Us | Site Map Search go

 **UBank**

Helps your money grow

Home insurance >
Travel insurance >
Life insurance >
Personal loans >
Secured loans >
Current accounts >
E-savings >
Savings accounts >
Mortgages >
Credit cards >

About UBank Group >
Careers >
Media Room >
Customer Service >
Online Help >

Small Business Banking

- Cash Management
- Merchant Payment Services
- International Banking
- Business Insurance

Personal Banking

- Checking
- Credit Cards
- Savings
- Online Banking & Bill Pay


Commercial Banking

- Specialty Lending
- International Trade Finance
- Structured Capital
- Equipment Finance

Insurance

Freedom from worry begins with the protection of your loved ones

Life insurance



We help you make the right financial choices. Give us a call. We pick up the phone!

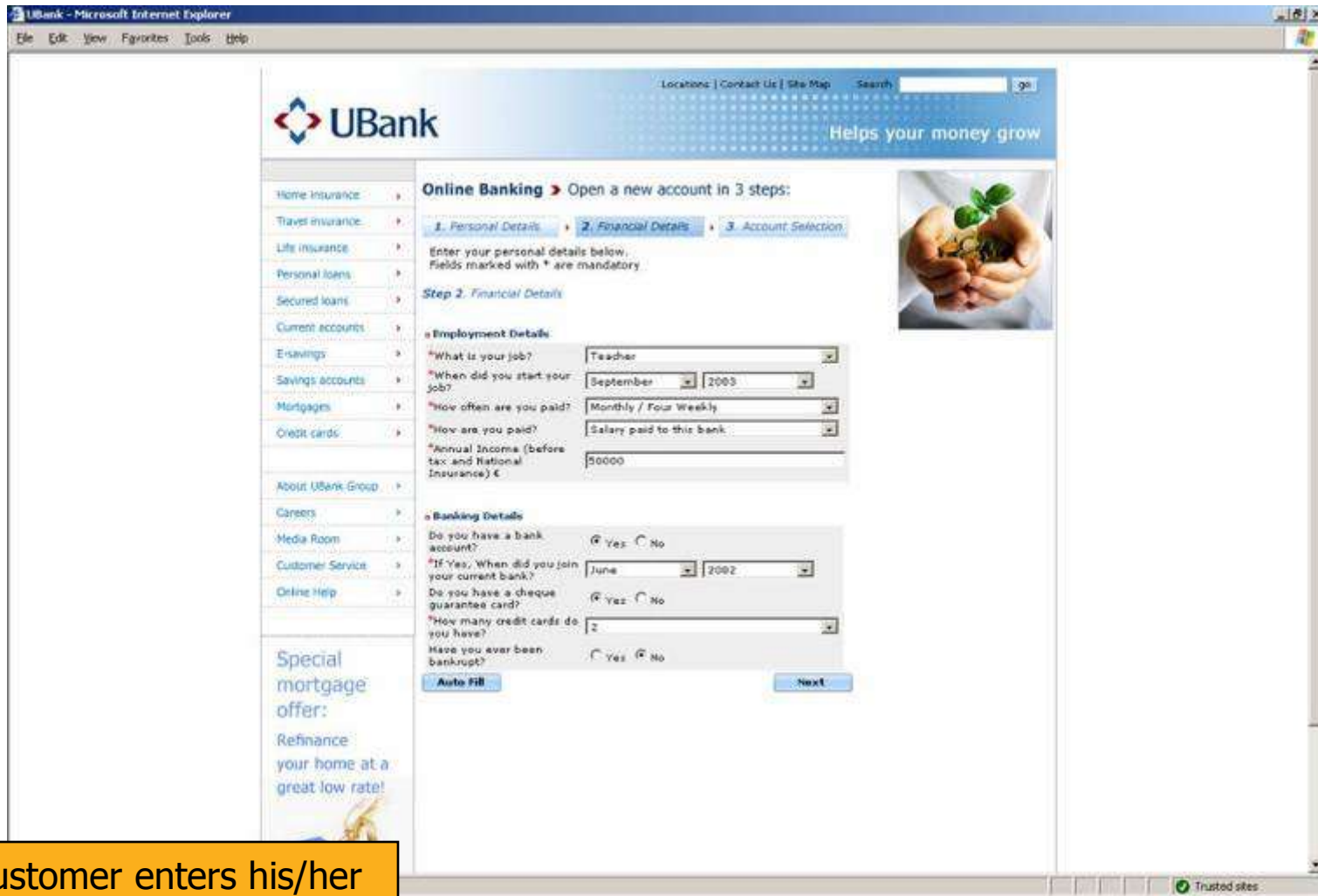
- Client account access
- Apply for a new account
- More...

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Trusted sites

A customer wants to open a new bank account at UBank



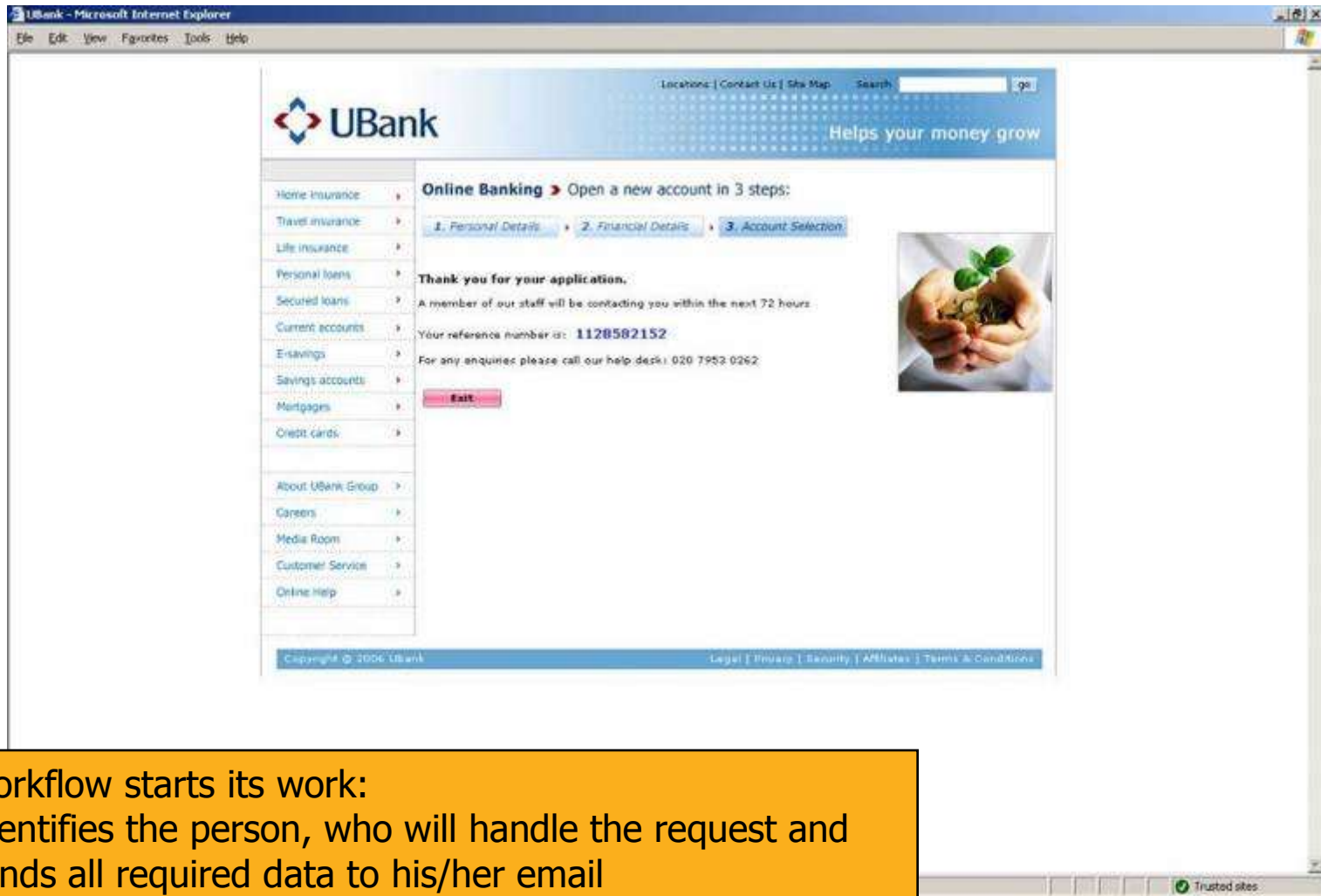
The screenshot shows a web browser window titled "UBank - Microsoft Internet Explorer". The page features the UBank logo and navigation links like "Locations", "Contact Us", and "Site Map". A search bar is present in the top right. On the left, there is a vertical menu with categories such as "Home insurance", "Travel insurance", "Life insurance", "Personal loans", "Secured loans", "Current accounts", "Resavings", "Savings accounts", "Mortgages", "Credit cards", "About UBank Group", "Careers", "Media Room", "Customer Service", and "Online Help".

The main content area is titled "Online Banking" and includes a sub-header "Open a new account in 3 steps:" with a progress indicator showing "1. Personal Details", "2. Financial Details" (the current step), and "3. Account Selection". Below this, it says "Enter your personal details below. Fields marked with * are mandatory." The current step is "Step 2. Financial Details" and is divided into two sections:

- Employment Details:**
 - *What is your job? (Dropdown menu: Teacher)
 - *When did you start your job? (Dropdowns: September, 2003)
 - *How often are you paid? (Dropdown menu: Monthly / Four Weekly)
 - *How are you paid? (Dropdown menu: Salary paid to this bank)
 - *Annual Income (before tax and National Insurance) € (Text input: 50000)
- Banking Details:**
 - Do you have a bank account? (Radio buttons: Yes (checked), No)
 - *If Yes, When did you join your current bank? (Dropdowns: June, 2002)
 - Do you have a cheque guarantee card? (Radio buttons: Yes (checked), No)
 - *How many credit cards do you have? (Text input: 2)
 - Have you ever been bankrupt? (Radio buttons: Yes, No (checked))

At the bottom of the form are "Auto Fill" and "Next" buttons. On the right side of the page, there is an image of hands holding a small plant. At the bottom left, there is a "Special mortgage offer:" section with the text "Refinance your home at a great low rate!". The browser's status bar at the bottom right shows "Trusted sites".

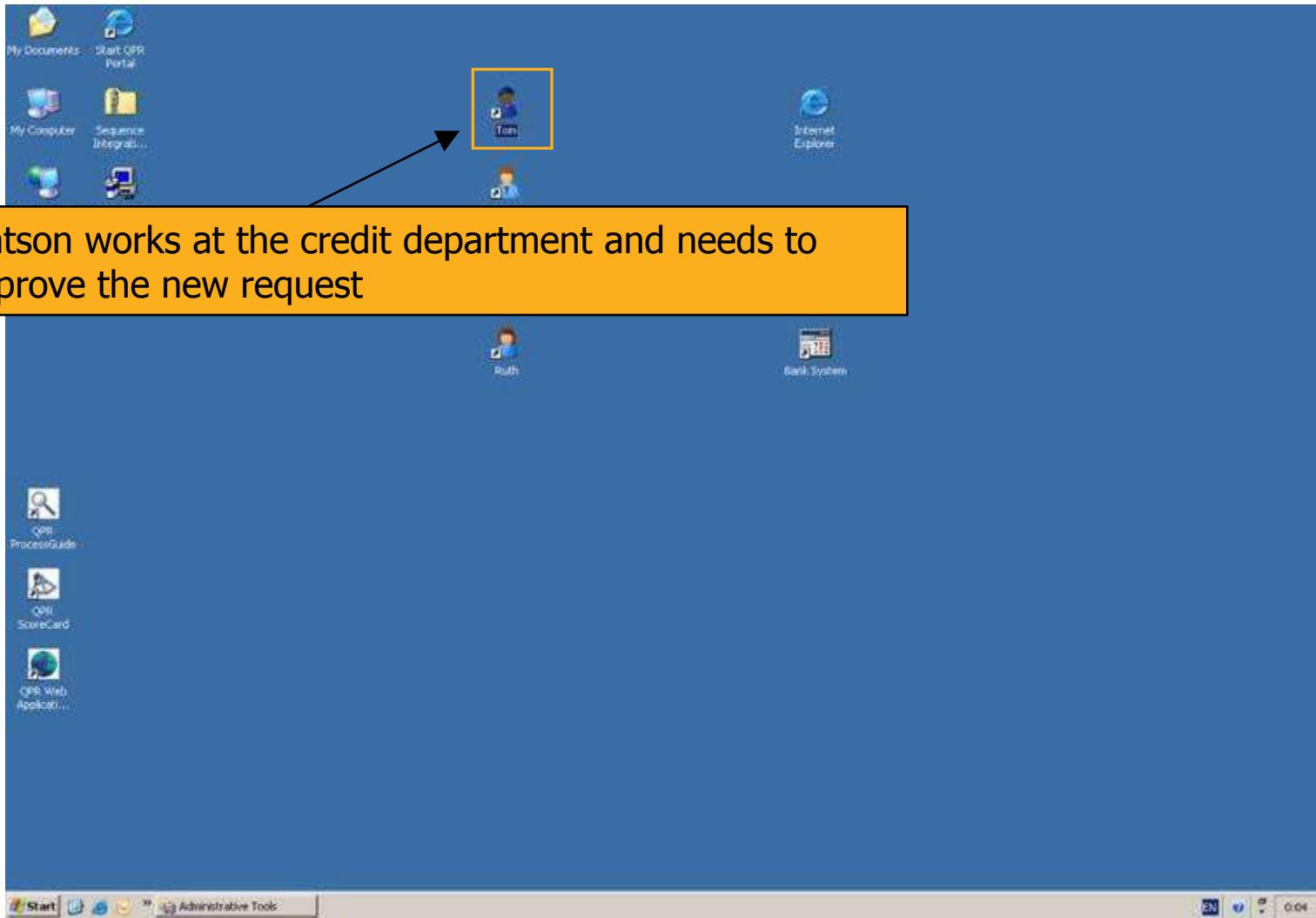
The customer enters his/her financial details and submits

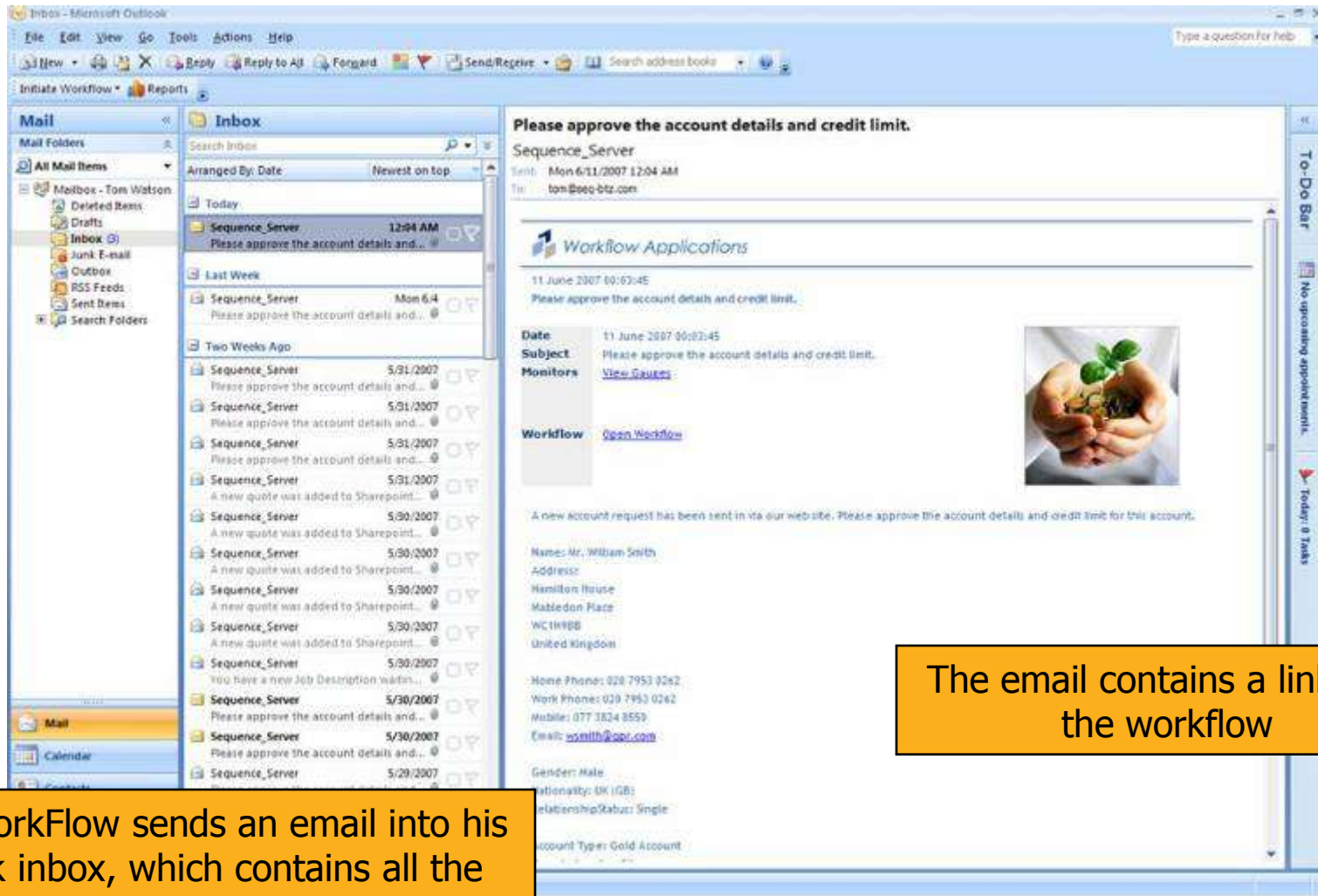


QPR Workflow starts its work:

1. Identifies the person, who will handle the request and sends all required data to his/her email
2. Creates a reference number for the customer

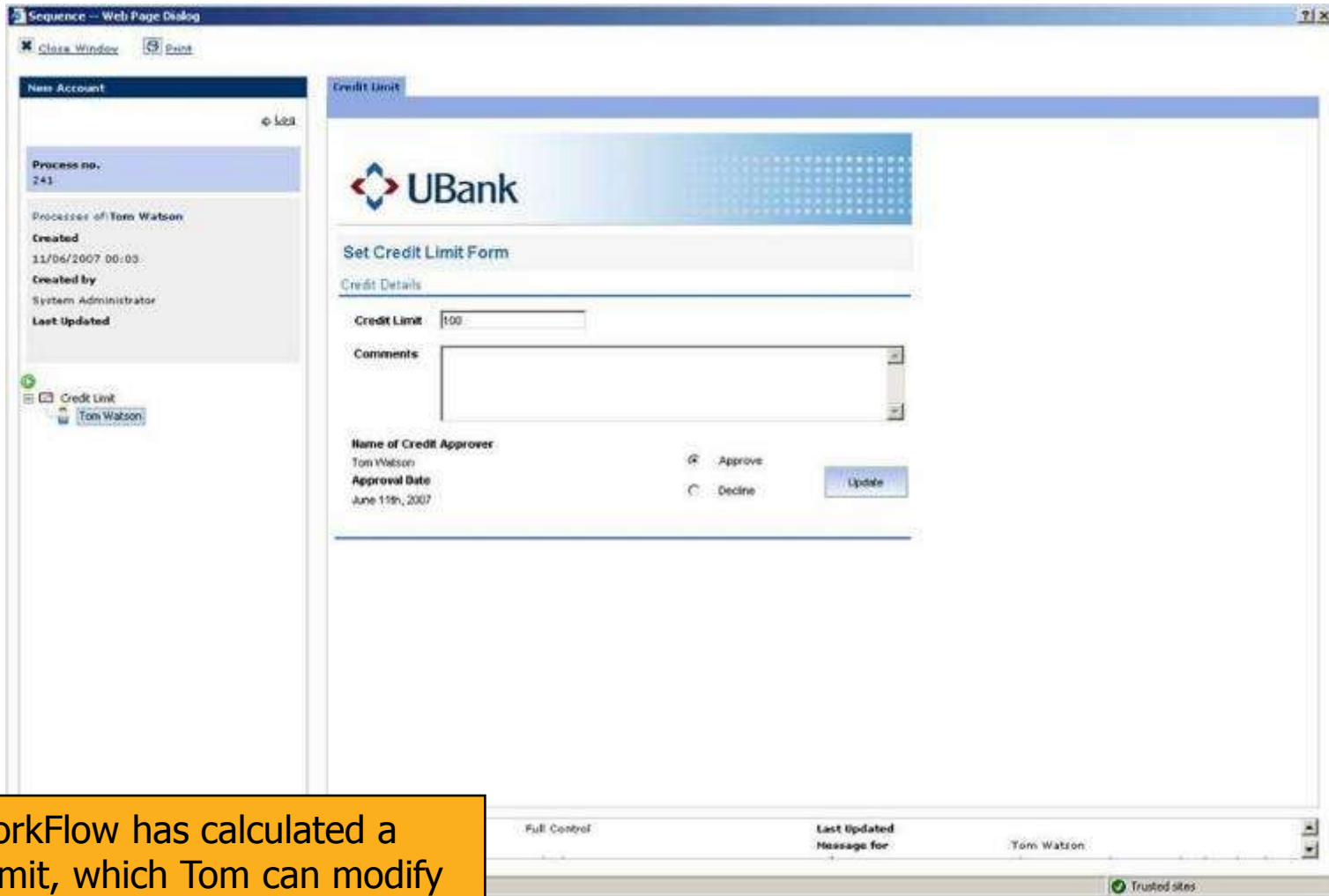
Tom Watson – Approve Credit Limit





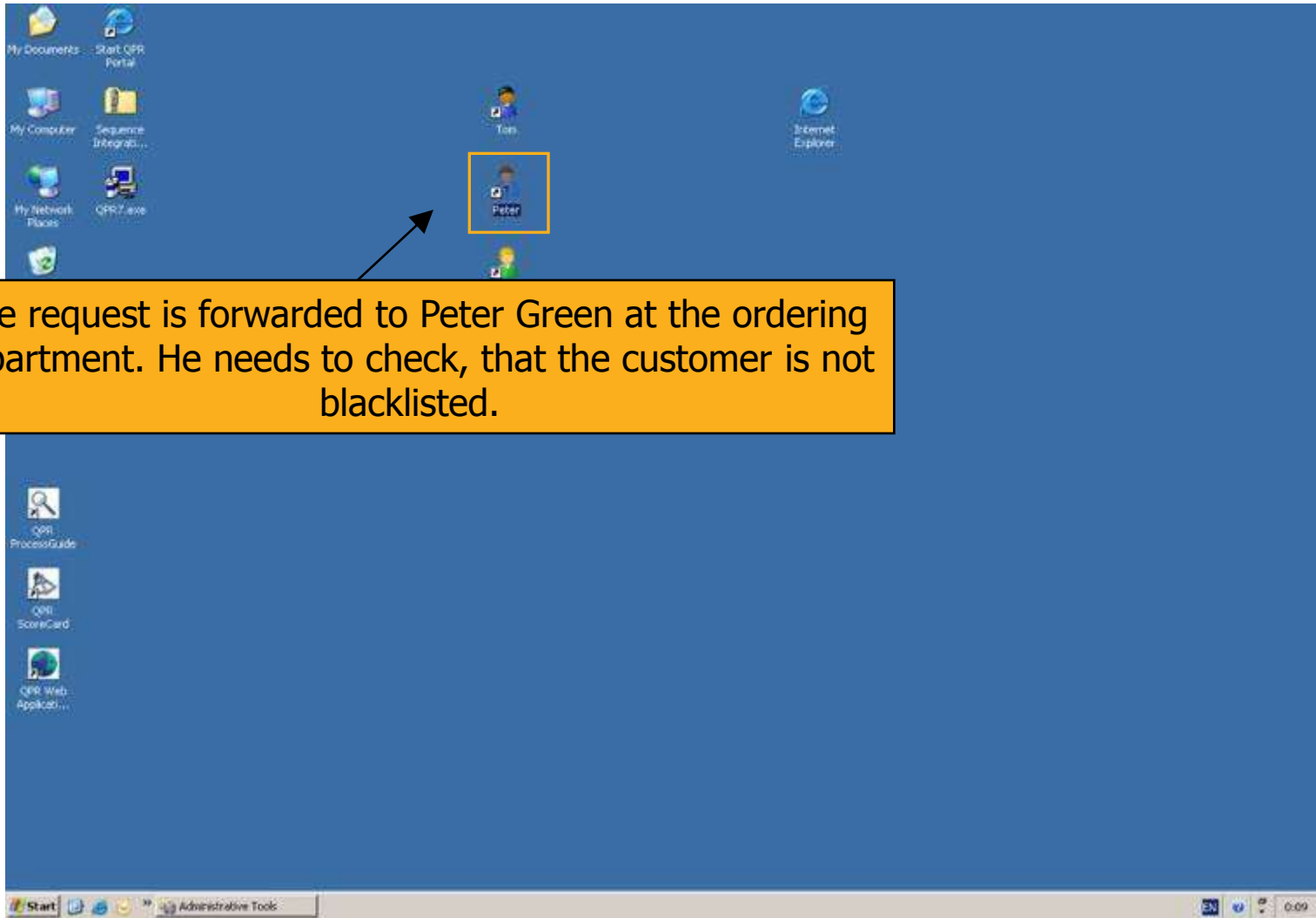
QPR WorkFlow sends an email into his Outlook inbox, which contains all the details of the new request

The email contains a link into the workflow

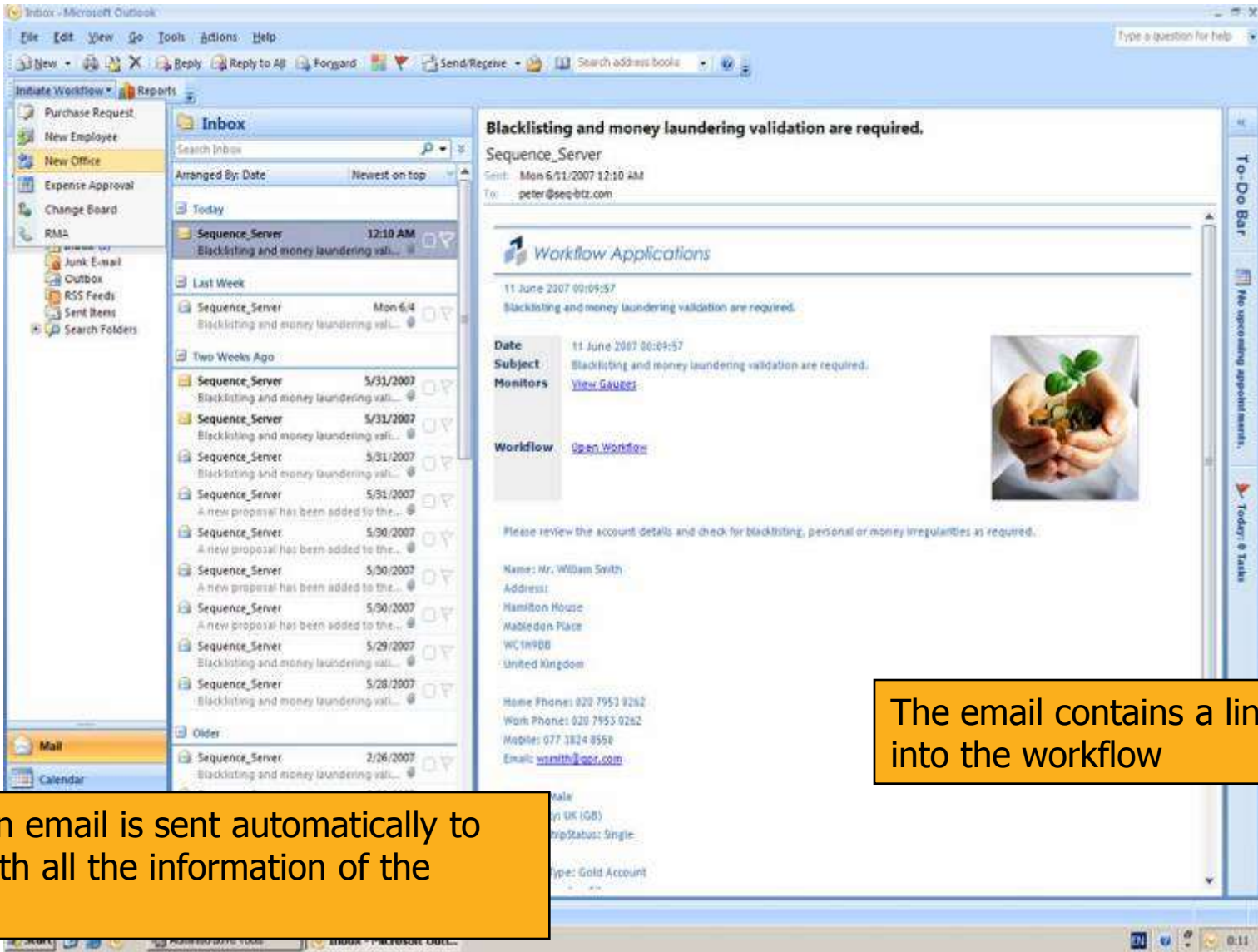


QPR WorkFlow has calculated a credit limit, which Tom can modify and approve or decline

Peter Green – Check Blacklists

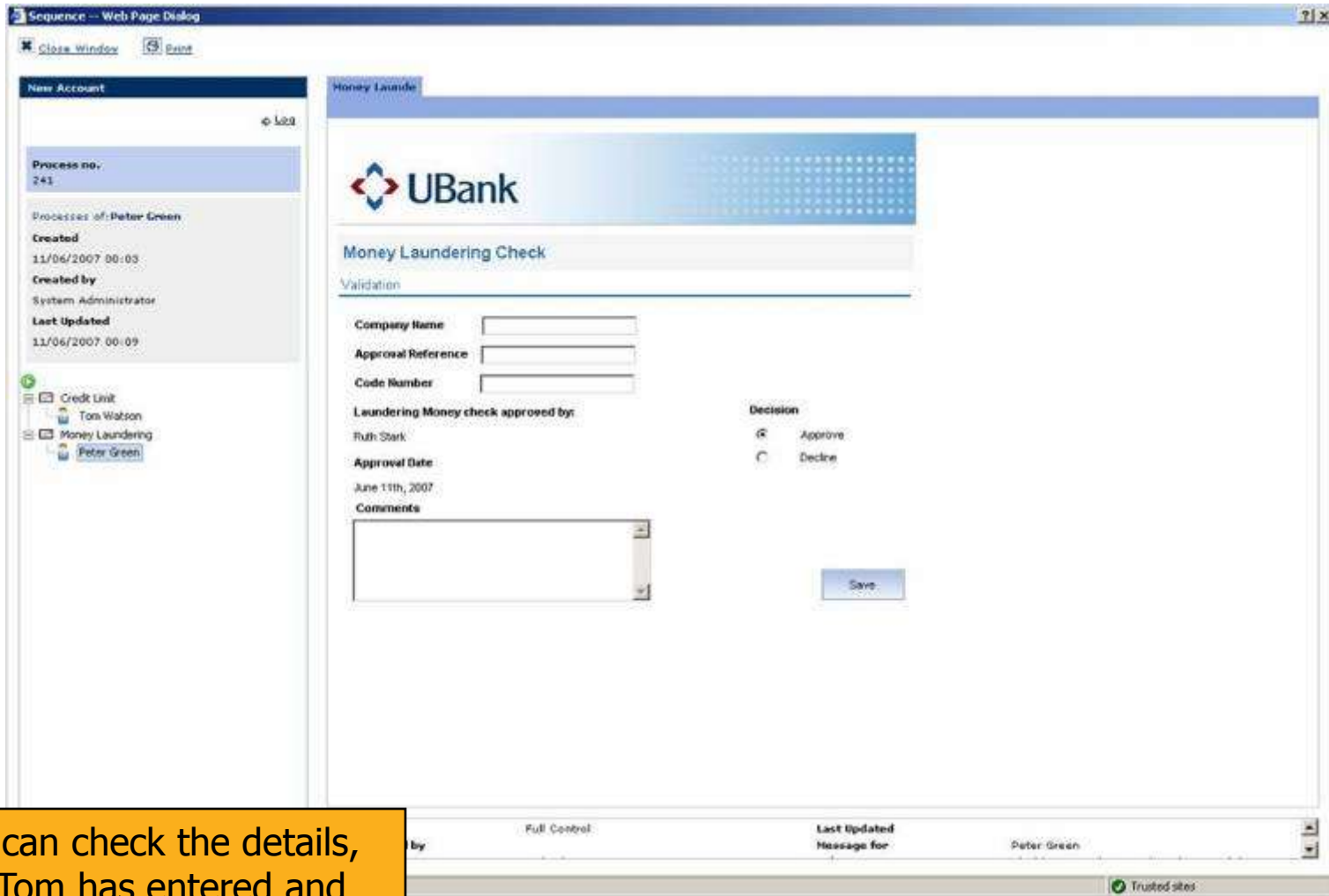


Next, the request is forwarded to Peter Green at the ordering department. He needs to check, that the customer is not blacklisted.



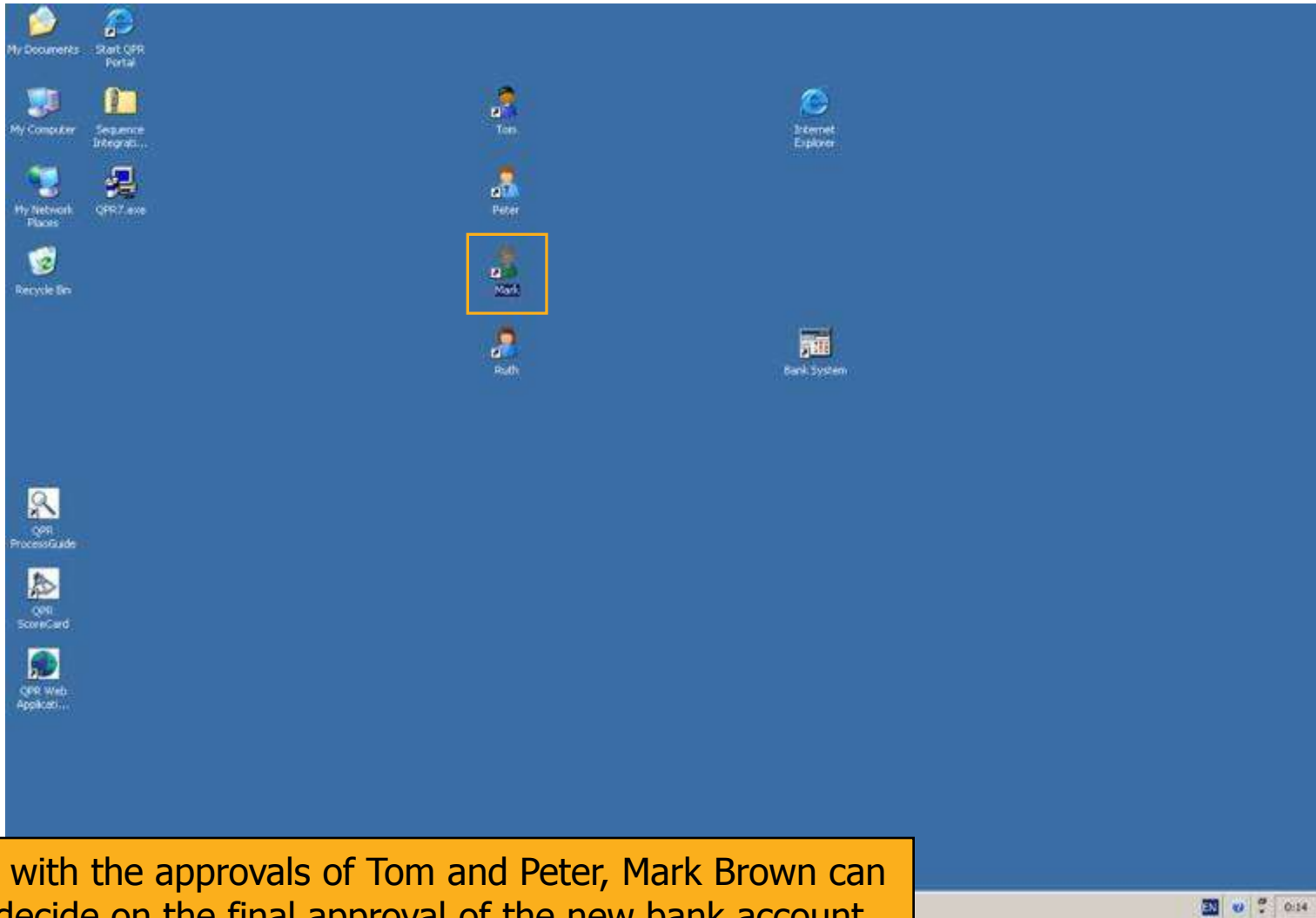
Again, an email is sent automatically to Peter, with all the information of the request.

The email contains a link into the workflow

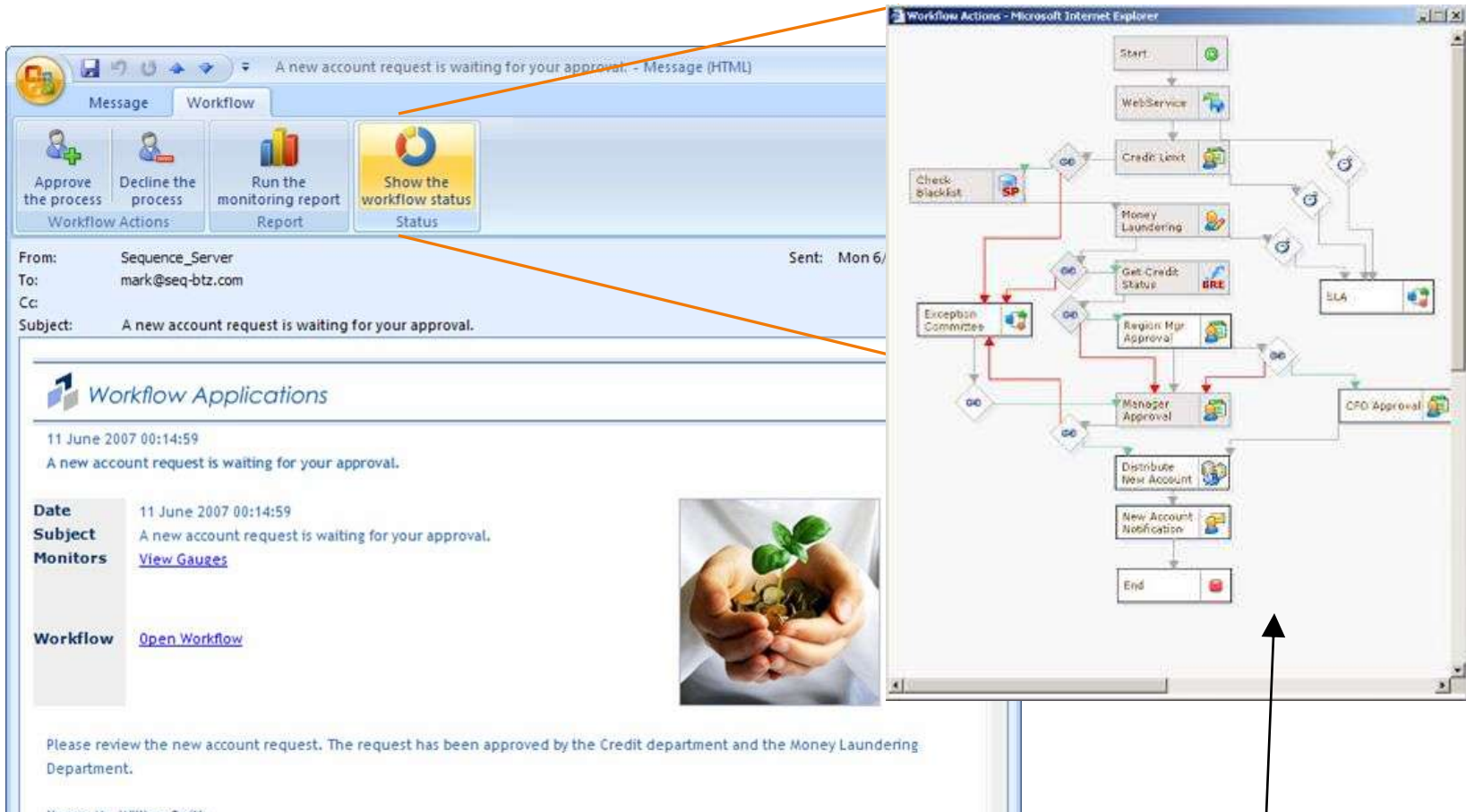


Peter can check the details, that Tom has entered and approve/decline his request

Mark Brown – Approve Request



Finally, with the approvals of Tom and Peter, Mark Brown can decide on the final approval of the new bank account

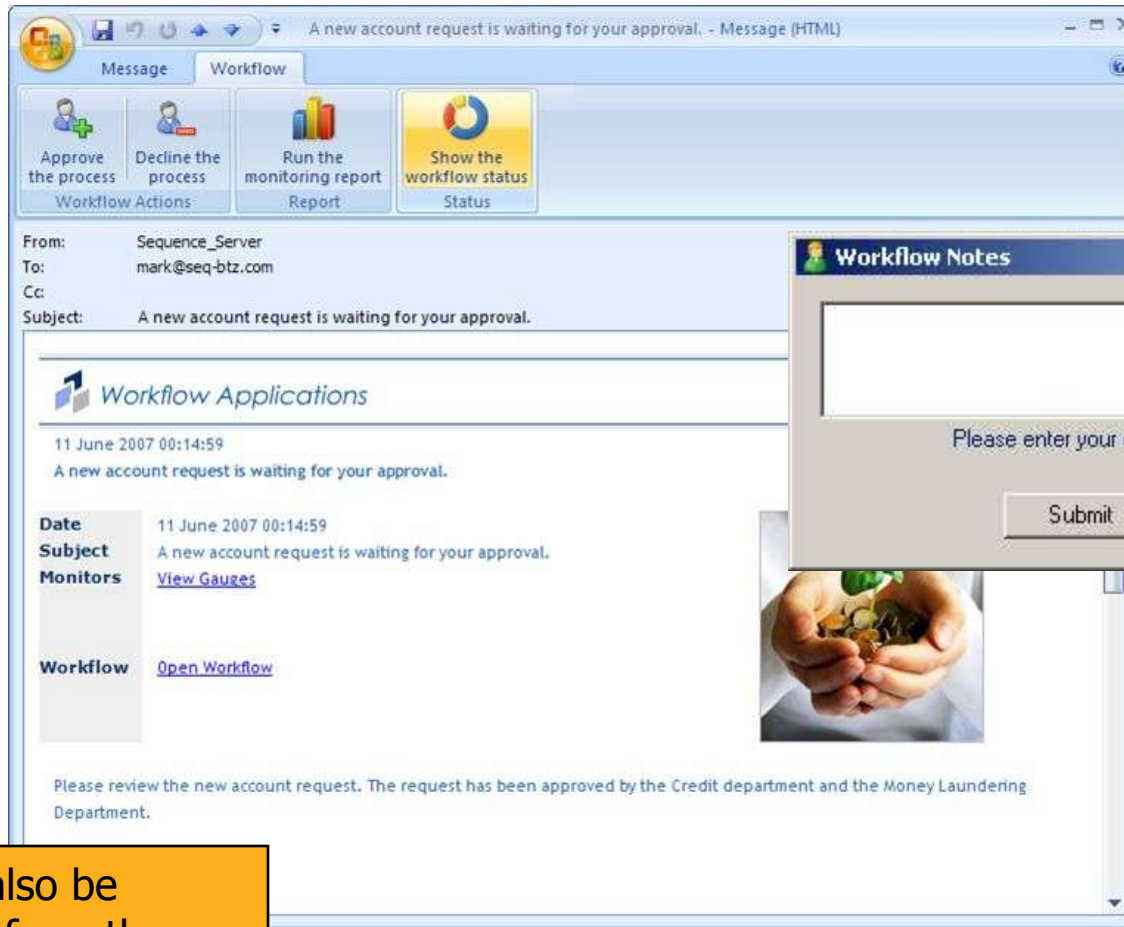


The screenshot shows an email client interface with a message titled "A new account request is waiting for your approval." The message content includes a "Workflow Applications" section with a timestamp of "11 June 2007 00:14:59" and a subject line "A new account request is waiting for your approval." Below this, there are fields for "Date", "Subject", "Monitors" (with a link to "View Gauges"), and "Workflow" (with a link to "Open Workflow"). A small image of hands holding a plant is also visible. At the bottom of the email, a message states: "Please review the new account request. The request has been approved by the Credit department and the Money Laundering Department."

To the right, a separate window titled "Workflow Actions - Microsoft Internet Explorer" displays a detailed flowchart of the workflow process. The flowchart starts with "Start" and "WebService", leading to "Credit Limit", "Money Laundering", "Get Credit Status", "Region Mgr Approval", "Manager Approval", "Distribute New Account", "New Account Notification", and finally "End". There are also branches for "Check Blacklist", "Exception Committee", "CPD Approval", and "BLA". Grey boxes indicate activities that have already been processed, while white boxes indicate pending or unprocessed activities.

It is also possible to check the status of the workflow directly from the email client.

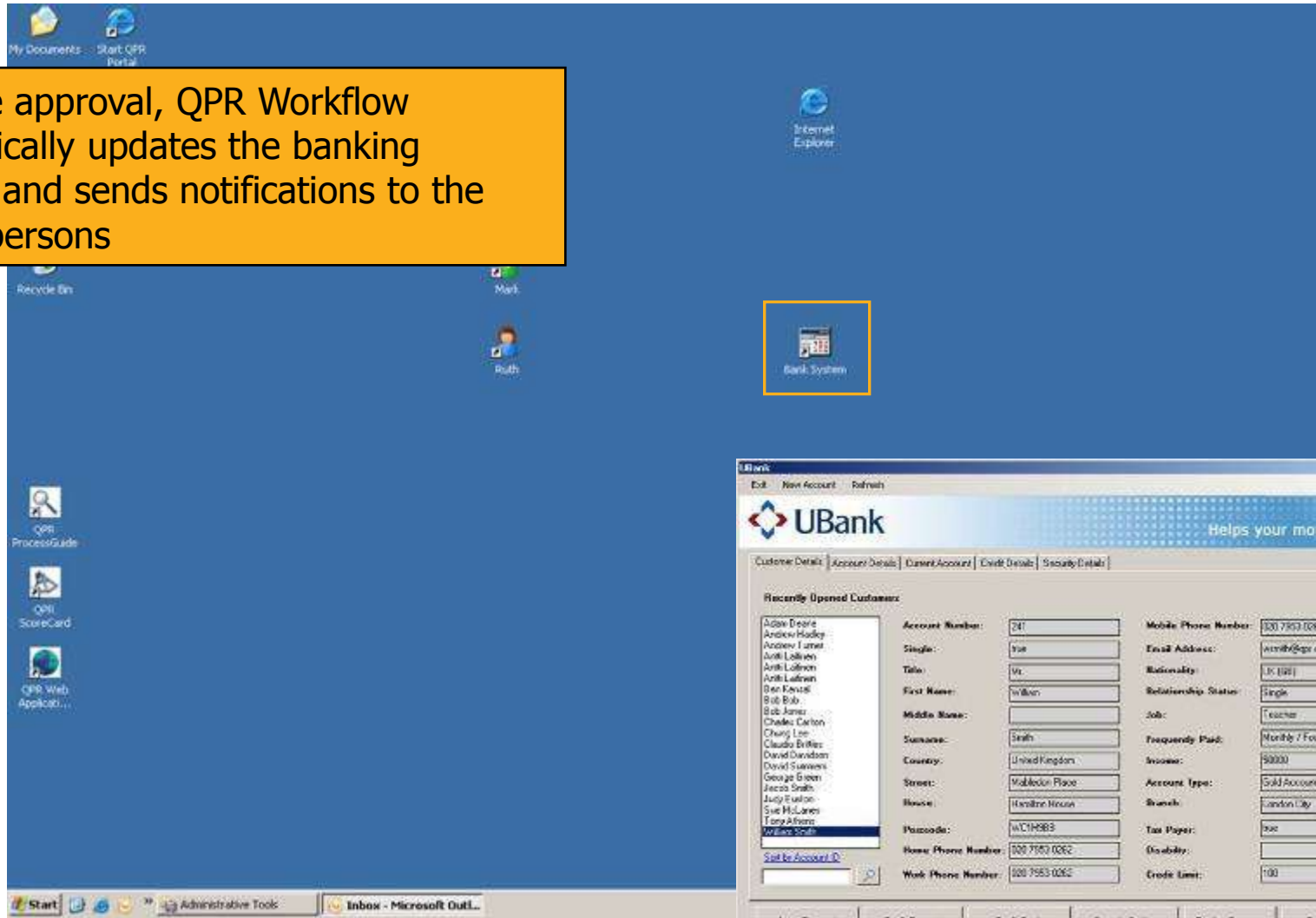
Grey boxes represent the activities, that have already been processed.








The request can also be approved directly from the email client

Updating Bank Systems

After the approval, QPR Workflow automatically updates the banking systems and sends notifications to the correct persons



UBank Benefits Summary

-  Faster process cycle and less errors
 - All repetitive work is automated
-  Improved task handover
 - Less idle time with tasks waiting for completion on someone's desk
 - Nothing falls through the cracks
-  Better service to customers
 - Direct interface with account creation system
 - Better access to process information
 - Reduction in processing time → increase in customer satisfaction
-  Easy problem detection and remedy
-  No need to learn or use new tools
 - Embed workflow execution in tools already in use (email, browser)

QPR Workflow: Solution Areas

Marketing & Sales

- Account Management
- Claims Processing
- Product Lifecycle management
- Installation Management
- System Enhancement Management
- Customer Acquisition
- Customer Help Desk
- Sales Planning
- Distribution/VAR Management
- Product Development Management
- Publicity Management

Manufacturing & Quality Assurance

- Work procedure,
- Route card,
- Document cycles,
- Efficiency procedures
- Customer Complaint
- Preventive actions
- Audits
- MRB
- Certifications

Regulations & Compliance (SOX, MIFID, Basel 2)

- Financial audits
- Decision control
- Expenses control
- Risk Management
- Process Audit
- IT procedures
- Client management
- Operational risk management
- Money laundry, fraud protection
- Tasks management

Customer Management

- Service Agreement Management
- Professional Service Management
- Warranty Management
- Call Center Service
- Repair planning Management
- Customer Channel Management
- Inventory Management
- Service Fulfillment

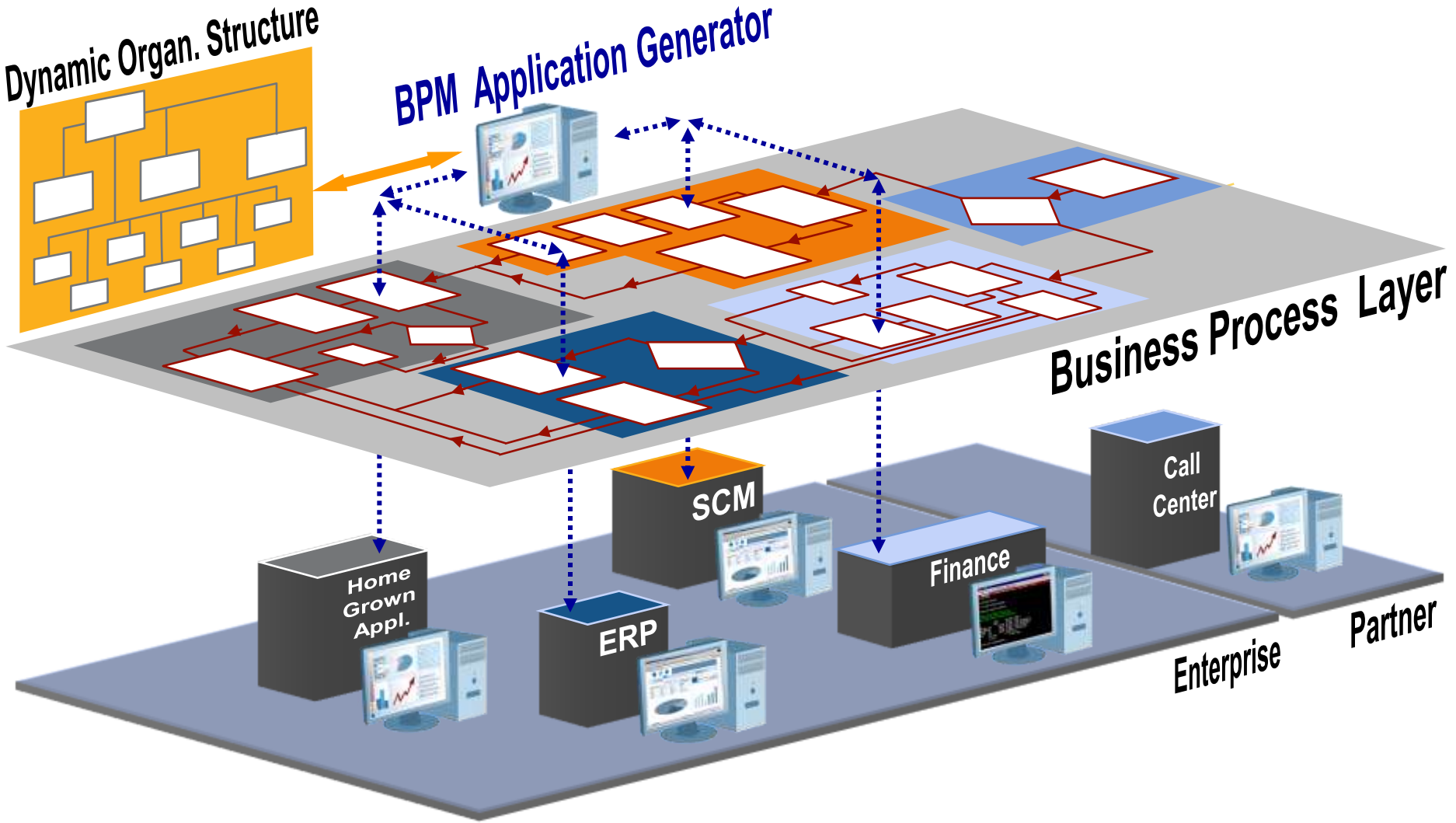
R&D

- Change request
- Specifications
- Document cycles
- Time To Market
- Customer commitments
- Task management

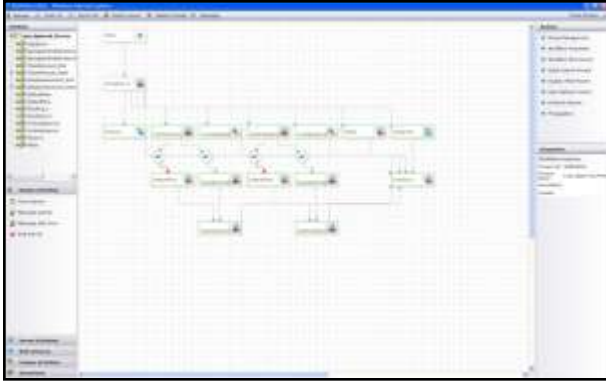
Human Resources

- Time Card Processing
- Expense Report Processing
- Payroll Processing
- First Day/Last Day Management
- Recruitment Process
- Hiring & Orientation
- Succession Planning
- Benefits Administration
- Performance Review

QPR WorkFlow Architecture

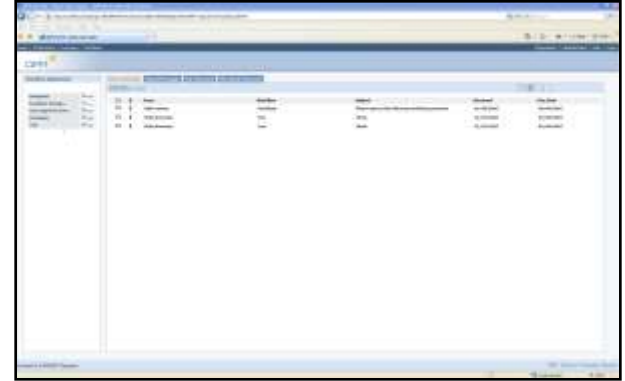


QPR WorkFlow - Modules



QPR WorkFlow Designer

Flexible, web-based tool, enabling the application designer to define workflows, activities, forms and business rules



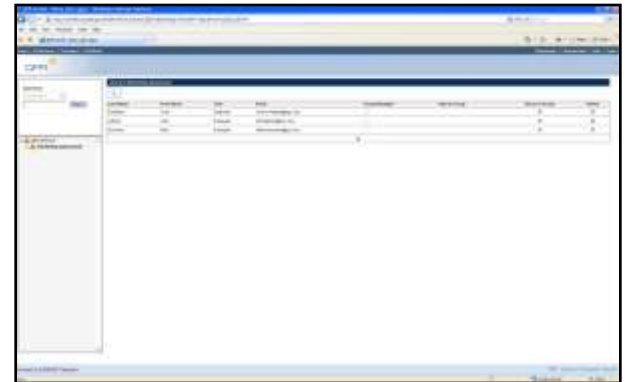
QPR WorkFlow Portal

Business user oriented GUI for launching, tracking and completing workflow processes



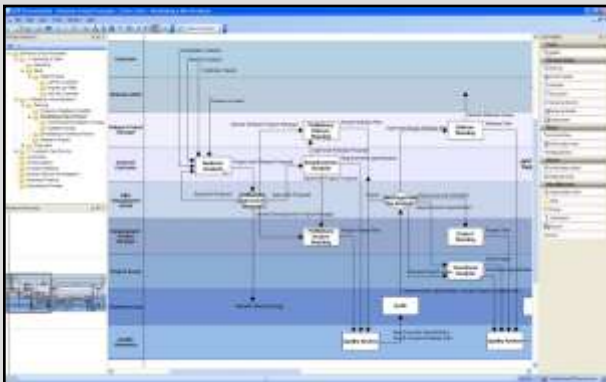
QPR WorkFlow Server

System core, connects all workflow-specific elements: Definitions, management and operation

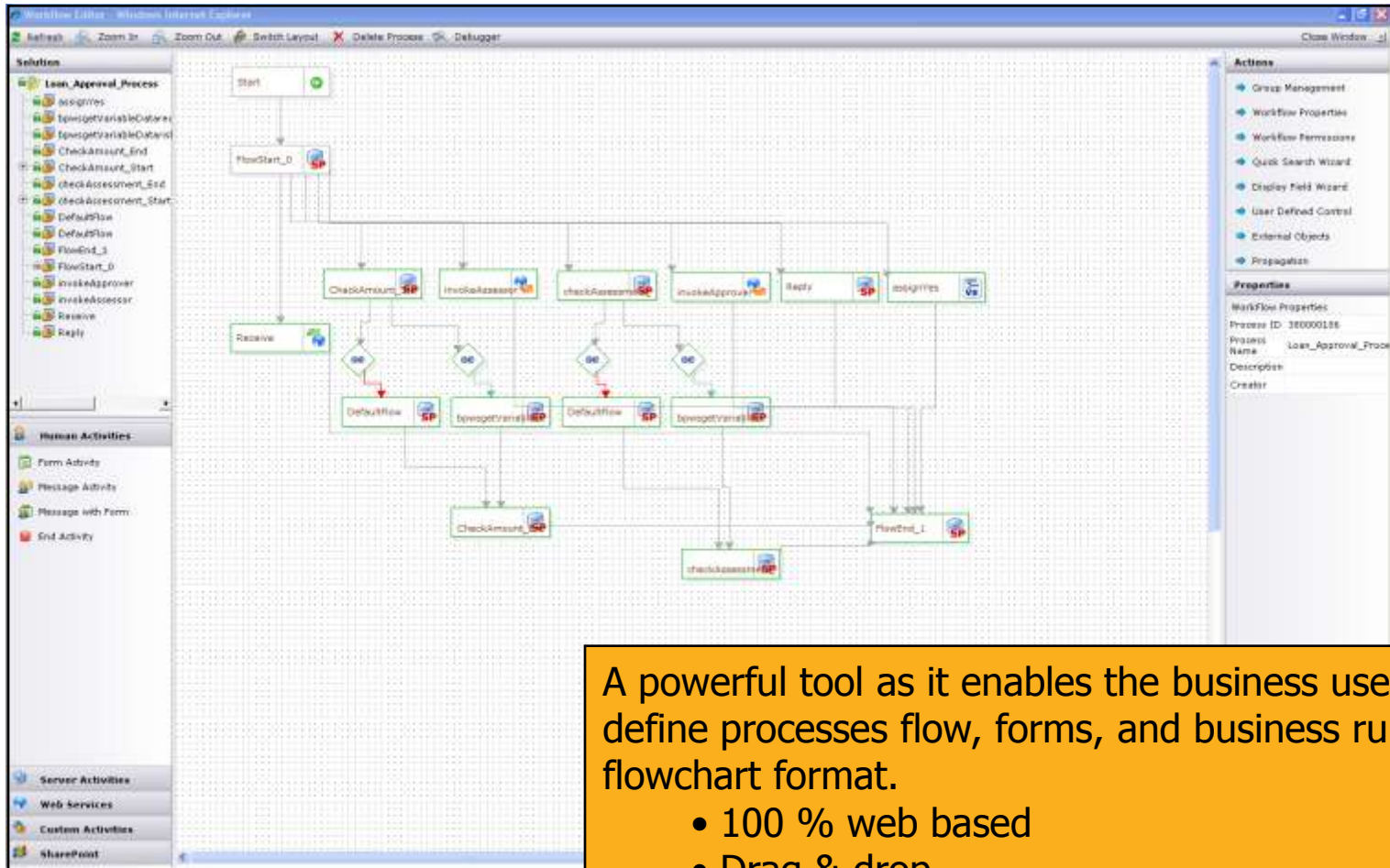


QPR WorkFlow Administrator

Simple, efficient way to define, manage, control and monitor system entities (roles, permissions, organizational structure)



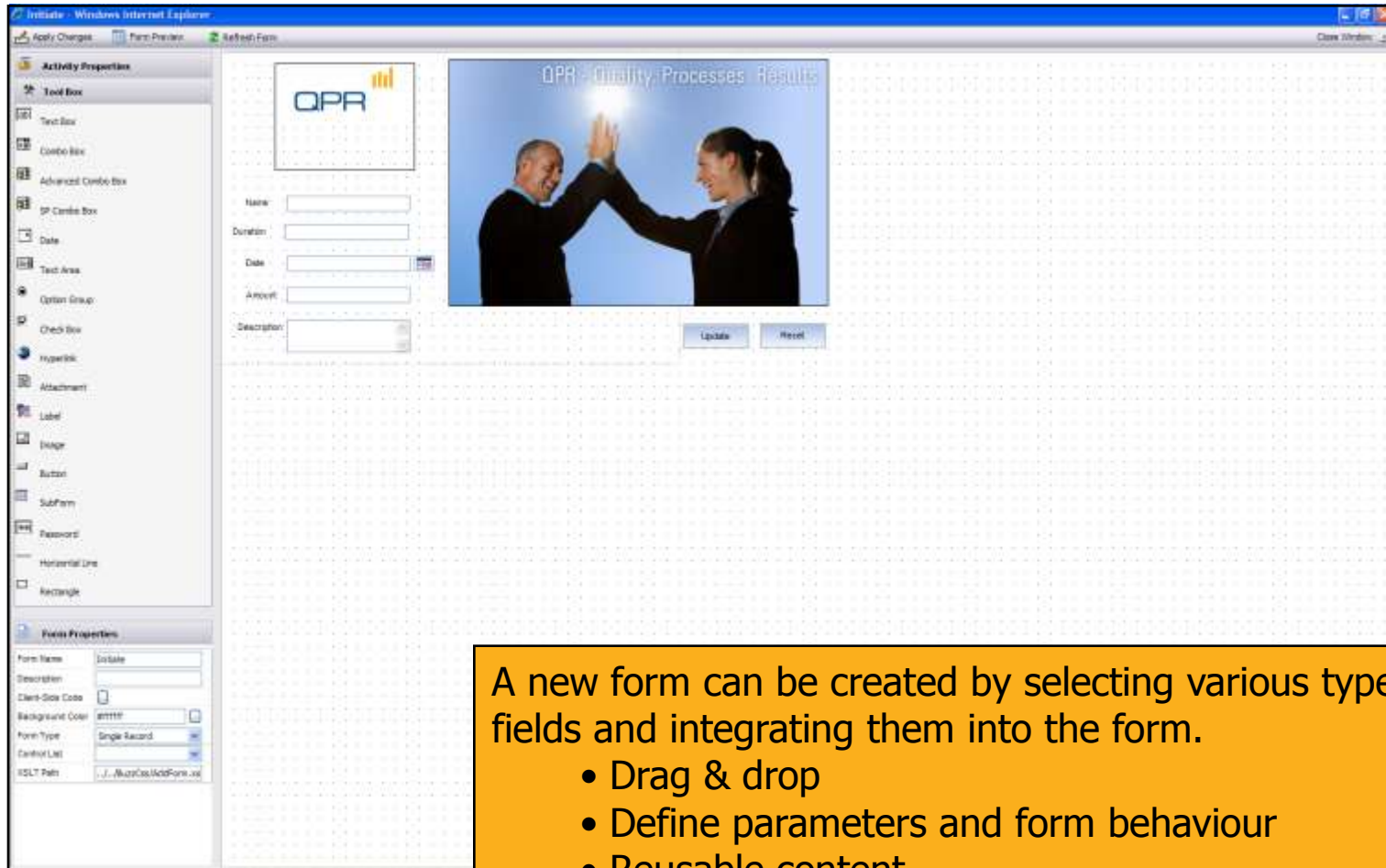
QPR ProcessGuide Designer



A powerful tool as it enables the business user to define processes flow, forms, and business rules in flowchart format.

- 100 % web based
- Drag & drop
- Wizard driven

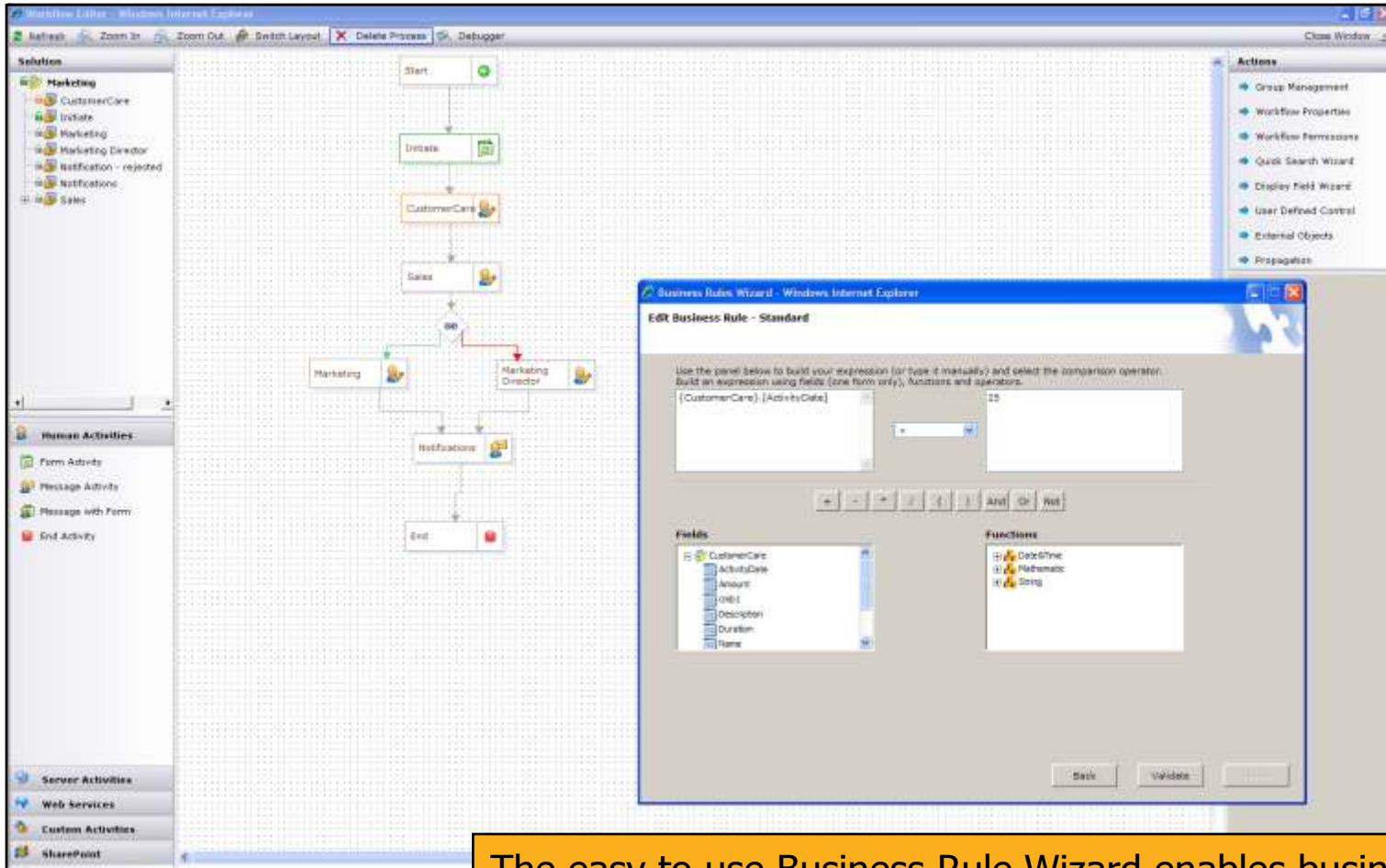
Designer Module - Form Editor



A new form can be created by selecting various types of fields and integrating them into the form.

- Drag & drop
- Define parameters and form behaviour
- Reusable content
- Connect to external tables / web services

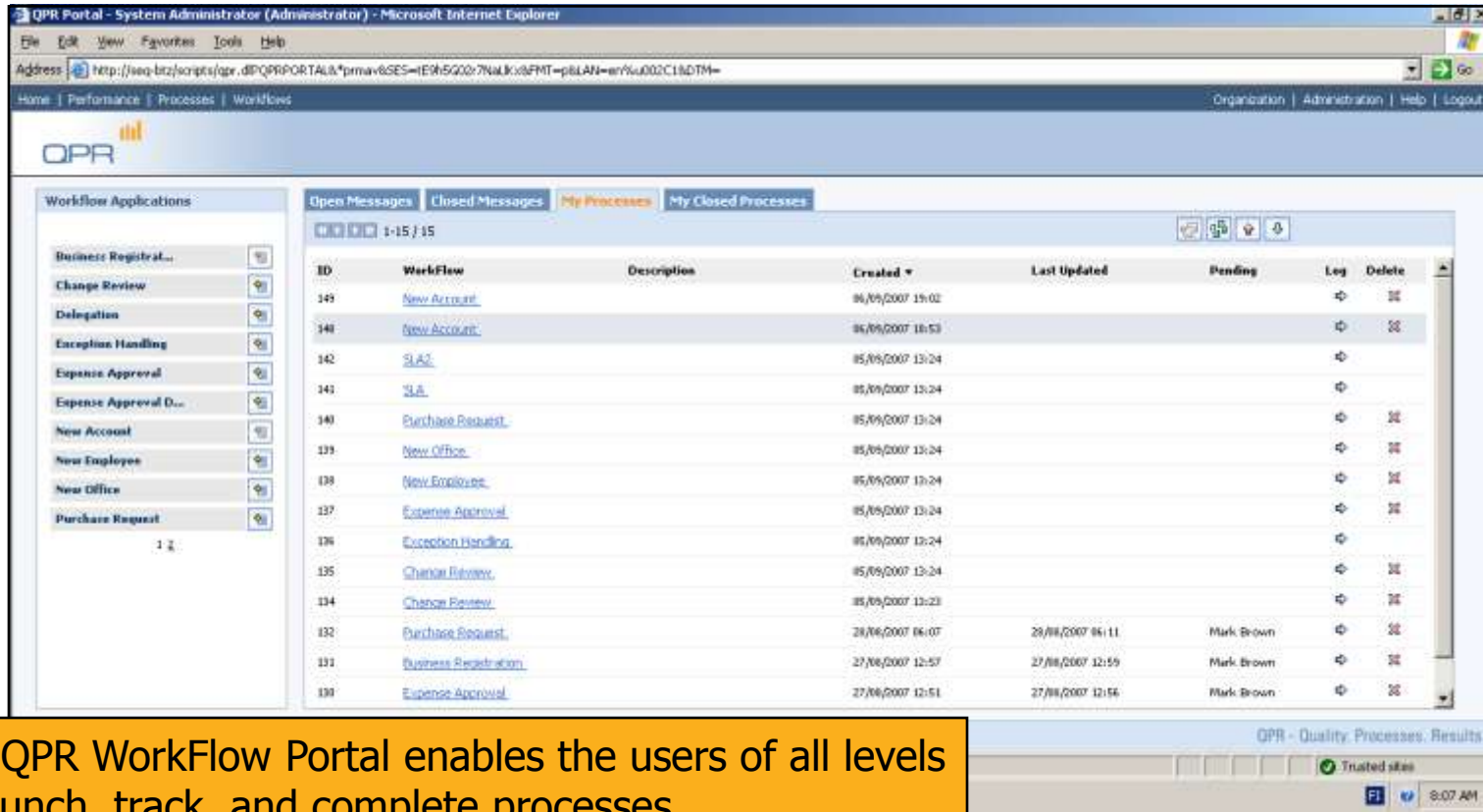
Designer Module - Business Rules



The screenshot displays the QPR Designer Module interface. On the left, there is a 'Solutions' tree with categories like Marketing, Human Activities, Server Activities, Web Services, and Custom Activities. The main workspace shows a workflow diagram with nodes: Start, Initiate, CustomerCare, Sales, Marketing, Marketing Director, Notifications, and End. A 'Business Rule Wizard' window is open in the foreground, titled 'Edit Business Rule - Standard'. It contains a text area with the expression: `{CustomerCare}. {ActivityDate}` followed by a dropdown menu showing '='. Below the text area are navigation buttons (back, forward, search, etc.) and a 'Functions' list containing DateTime, Mathmatic, and String. At the bottom of the wizard are 'Back' and 'Validate' buttons.

The easy to use Business Rule Wizard enables business users to define flow behaviour

QPR WorkFlow Portal Module

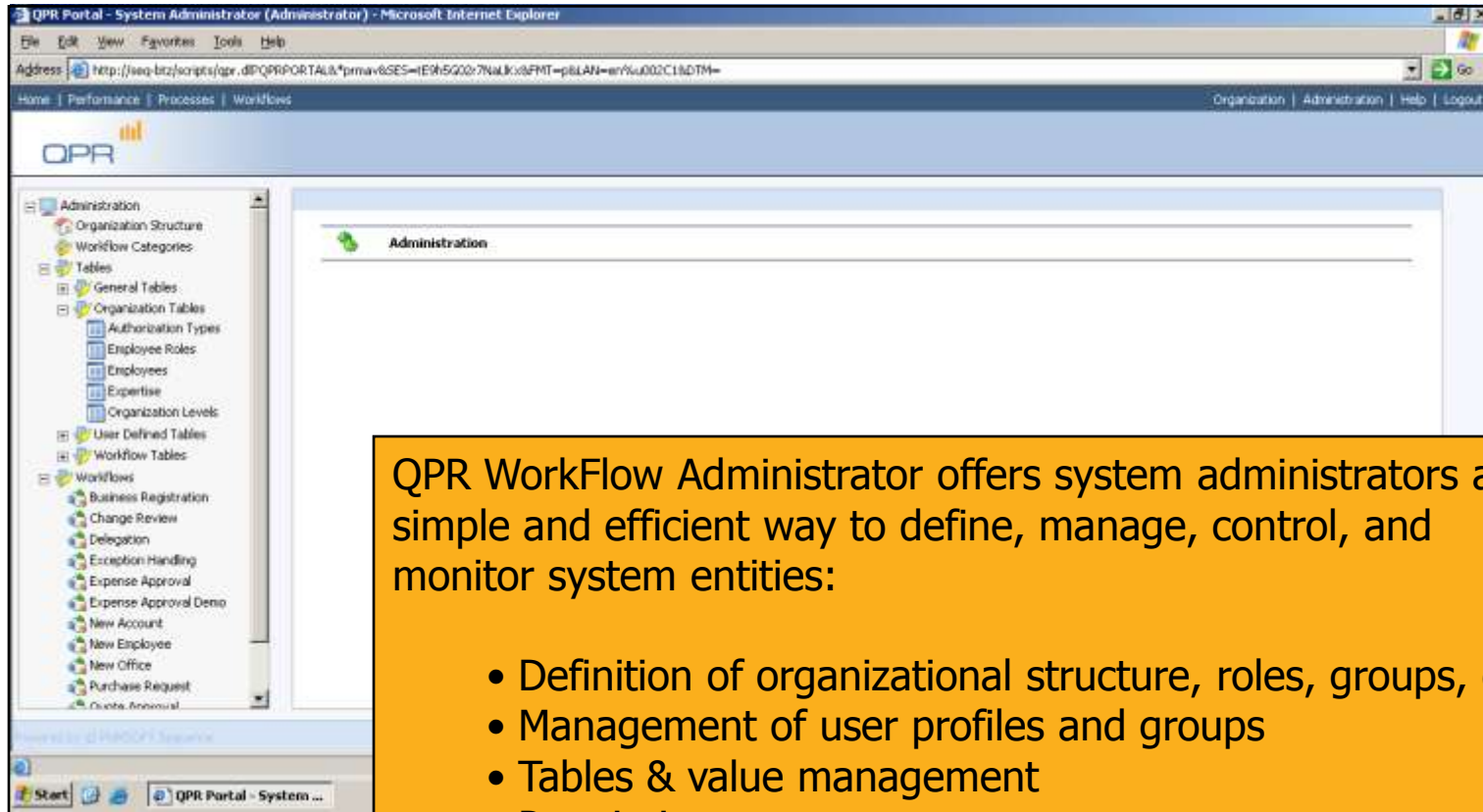


The screenshot displays the QPR WorkFlow Portal interface. On the left, there is a sidebar with 'Workflow Applications' including Business Registrat..., Change Review, Delegation, Exception Handling, Expense Approval, Expense Approval D..., New Account, New Employee, New Office, and Purchase Request. The main area shows a table of process instances under the 'My Processes' tab. The table has columns for ID, Workflow, Description, Created, Last Updated, Pending, Log, and Delete. The data rows are as follows:

ID	Workflow	Description	Created	Last Updated	Pending	Log	Delete
145	New Account		06/09/2007 15:02				
148	New Account		06/09/2007 15:53				
142	SLA2		05/09/2007 13:24				
141	SLA		05/09/2007 13:24				
140	Purchase Request		05/09/2007 13:24				
139	New Office		05/09/2007 13:24				
138	New Employee		05/09/2007 13:24				
137	Expense Approval		05/09/2007 13:24				
136	Exception Handling		05/09/2007 13:24				
135	Change Review		05/09/2007 13:24				
134	Change Review		05/09/2007 13:23				
132	Purchase Request		28/08/2007 06:07	28/08/2007 06:11	Mark Brown		
131	Business Registration		27/08/2007 12:57	27/08/2007 12:59	Mark Brown		
130	Expense Approval		27/08/2007 12:51	27/08/2007 12:56	Mark Brown		

The QPR WorkFlow Portal enables the users of all levels to launch, track, and complete processes.

- Full multilingual support
- One-click process initiation
- Alerts for tasks and task progression monitoring



QPR WorkFlow Administrator offers system administrators a simple and efficient way to define, manage, control, and monitor system entities:

- Definition of organizational structure, roles, groups, etc.
- Management of user profiles and groups
- Tables & value management
- Permissions management
- Version management

QPR ProcessGuide

- Workflow design and initiation
- Workflow communication & learning

QPR ScoreCard

- Performance-driven workflow initiation
- Workflow metrics

External Databases

- Push & pull workflow information from third party databases

Web Services

- Information exchange with external services

Microsoft SharePoint Portal Server

- Complete interface with the Web Parts mechanism integrated into the Microsoft SPPS.

Microsoft Office (MS Outlook, MS Word)

- Workflow execution (e.g. notifications, approvals)

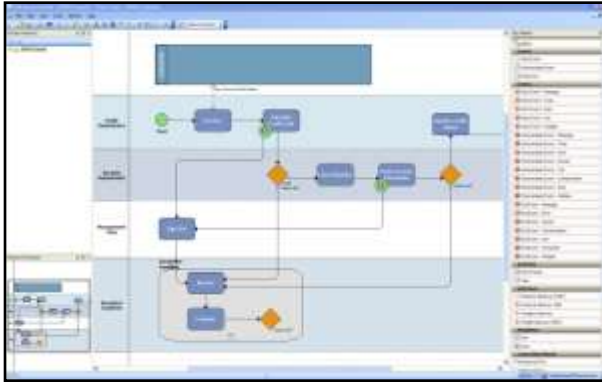
Microsoft BizTalk Server

- Built-in ability to interface with the BizTalk server for data-transfer and the operation of Orchestrations defined in the BizTalk server.

Application Programming Interface

- Customized workflow applications & web sites

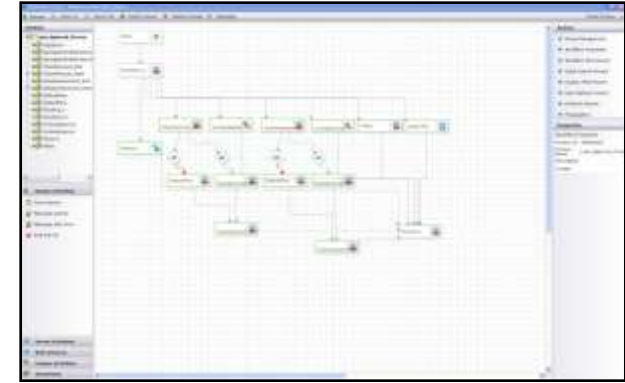
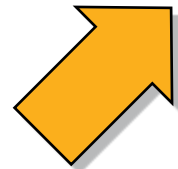
Integration with QPR ProcessGuide (1)



1. Model using BPMN



2. Transfer to XML (BPEL4WS)

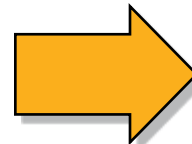


3. System design

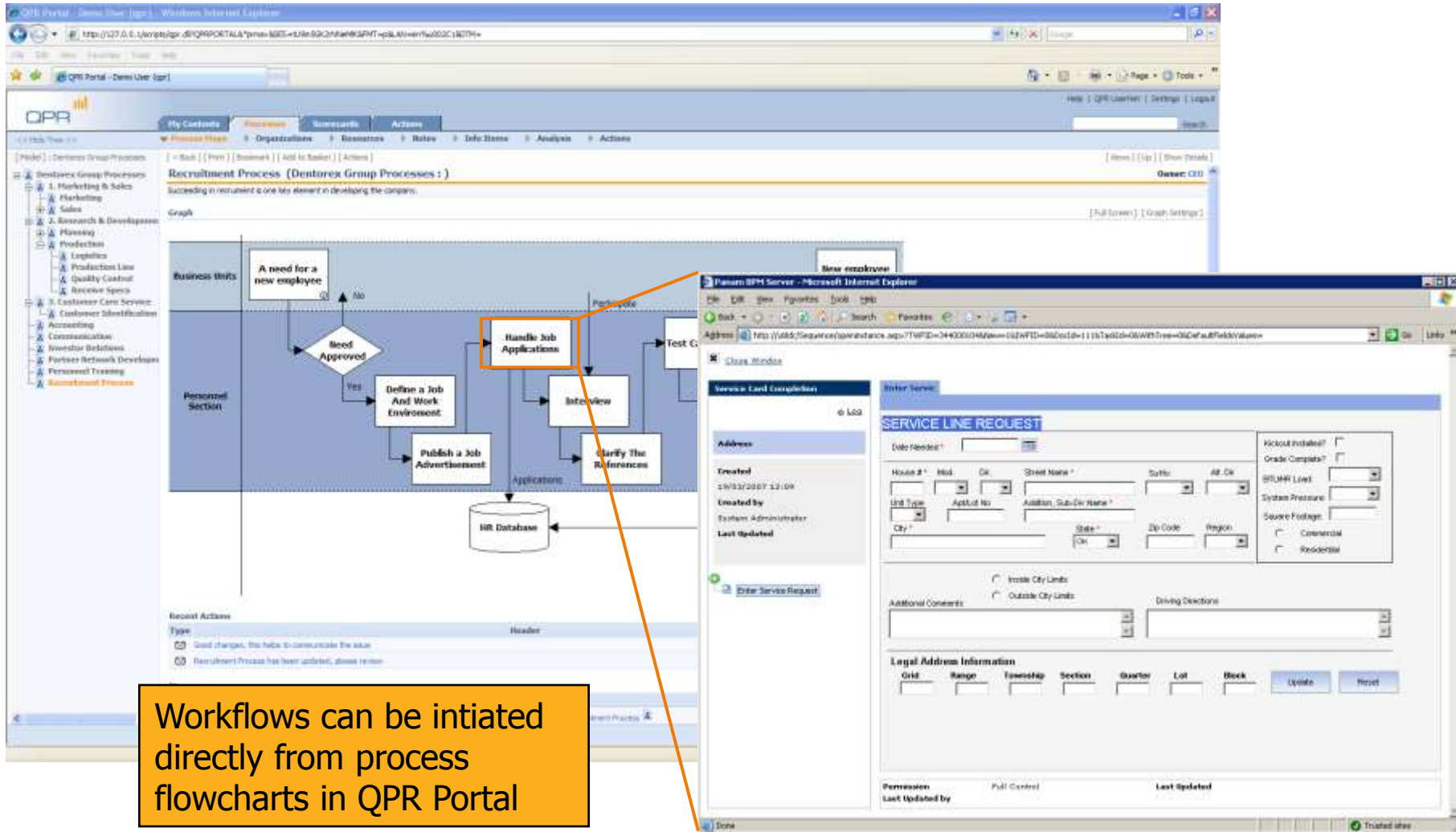


Process ID	Start Time	End Time	Status	Owner
...
...

4. Execute process



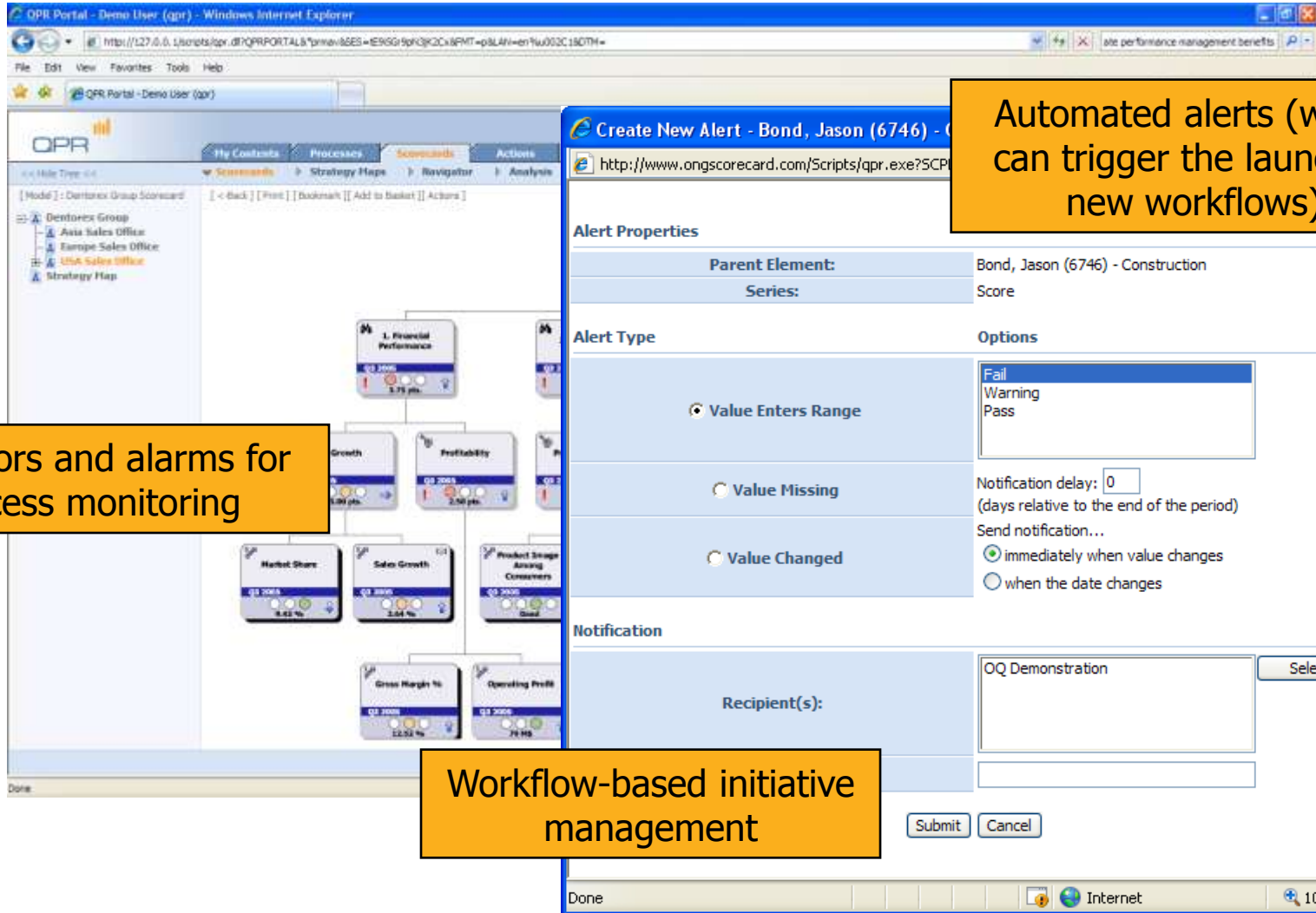
Integration with QPR ProcessGuide (2)



The image displays two overlapping screenshots from a QPR Portal. The background screenshot shows a process flowchart for 'Recruitment Process (Dentorex Group Processes)'. The flowchart starts with 'A need for a new employee', leading to a decision 'Need Approved?'. If 'Yes', it proceeds to 'Define a Job And Work Environment', then 'Publish a Job Advertisement', 'Handle Job Applications', 'Interview', and 'Clarify The References', finally leading to 'Test C...'. An 'HR Database' is connected to the 'Handle Job Applications' step. The foreground screenshot shows a 'Service Line Request' form with fields for 'Address', 'Date Requested', 'Hourly Rate', 'Mid', 'City', 'State', 'Zip Code', 'Region', 'Additional Comments', and 'Driving Directions'. A yellow callout box points from the 'Handle Job Applications' step in the flowchart to the 'Enter Service Request' button on the form.

Workflows can be initiated directly from process flowcharts in QPR Portal

Integration with QPR ScoreCard



The screenshot displays the QPR ScoreCard interface within a Windows Internet Explorer browser. The main dashboard shows a hierarchical tree of scorecards under 'Dentorex Group Scorecard', including 'Asia Sales Office', 'Europe Sales Office', and 'USA Sales Office'. Below this, several performance indicators are visible, such as 'Financial Performance', 'Growth', 'Profitability', 'Market Share', 'Sales Growth', 'Product Range Among Consumers', 'Gross Margin %', and 'Operating Profit'. Each indicator includes a small chart and numerical values.

Overlaid on the right side is the 'Create New Alert' dialog box for 'Bond, Jason (6746) - Construction'. The dialog contains the following sections:

- Alert Properties:**
 - Parent Element: Bond, Jason (6746) - Construction
 - Series: Score
- Alert Type:**
 - Value Enters Range
 - Value Missing
 - Value Changed
- Options:**
 - Fail
 - Warning
 - Pass
 - Notification delay: 0 (days relative to the end of the period)
 - Send notification...
 - immediately when value changes
 - when the date changes
- Notification:**
 - Recipient(s): OQ Demonstration

Buttons for 'Submit' and 'Cancel' are located at the bottom of the dialog.

Indicators and alarms for process monitoring

Automated alerts (which can trigger the launch of new workflows)

Workflow-based initiative management

QPR WorkFlow - Differentiators

Business

- Rapid Business Process Automation (Shift from IT to Business)
- Management Control (problem identification and remedial)
- Easy to use and deploy (launch, track and complete workflow steps)
- No need to learn new tools

IT

- Rapidly deployable (easy integration, 100% web based)
 - Seamless integration with MS SharePoint, BizTalk, Office)
 - Easy & rapid interface with business systems (CRM, SCM, ERP, SQL etc.)
- Scalability (1000s of users, 1000s of simultaneous processes)

→ Companies can Streamline and Optimized Processes Conveniently

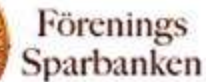
→ Improve their Operational Performance

→ Minimize process time. Maximize process outcome!

QPR WorkFlow Benefits

- You improve customer satisfaction (and therefore retention)
 - Reduce errors and rework
 - Reduced backlogs
 - Easier organization change
 - Consistent, predictable service quality
- You reduce operating costs (and therefore improve margins)
 - Reduction in processing time, paper costs, storage & office space
- You shift process automation control to your business users
 - No coding, no training approach
 - Quick process implementation and maintenance – no communication barriers with IT
 - Eliminate the gap between process design and process implementation
- You enjoy a low TCO and near-immediate ROI!
 - 100% Web based
 - Easy to operate, cheap to maintain
 - Reliable (Based on Microsoft technology)
 - Easy to roll out

World's best performing processes are implemented with QPR!





QPR WorkFlow
Thank You!
– Questions & Answers –

QPR Software Plc