JBOSS BPM CLIENT ONBOARDING DEMO DEMONSTRATION GUIDE

INTRODUCTION

Welcome to the The Business Process Automation - Client Onboarding Demo developed in conjunction with Red Hat JBoss BPM Suite and Entando, running on OpenShift.

This downloadable demo can be used to illustrate a large number of process-driven use cases or to highlight the customer-centric use experience of Red Hat's JBoss BPM Suite.

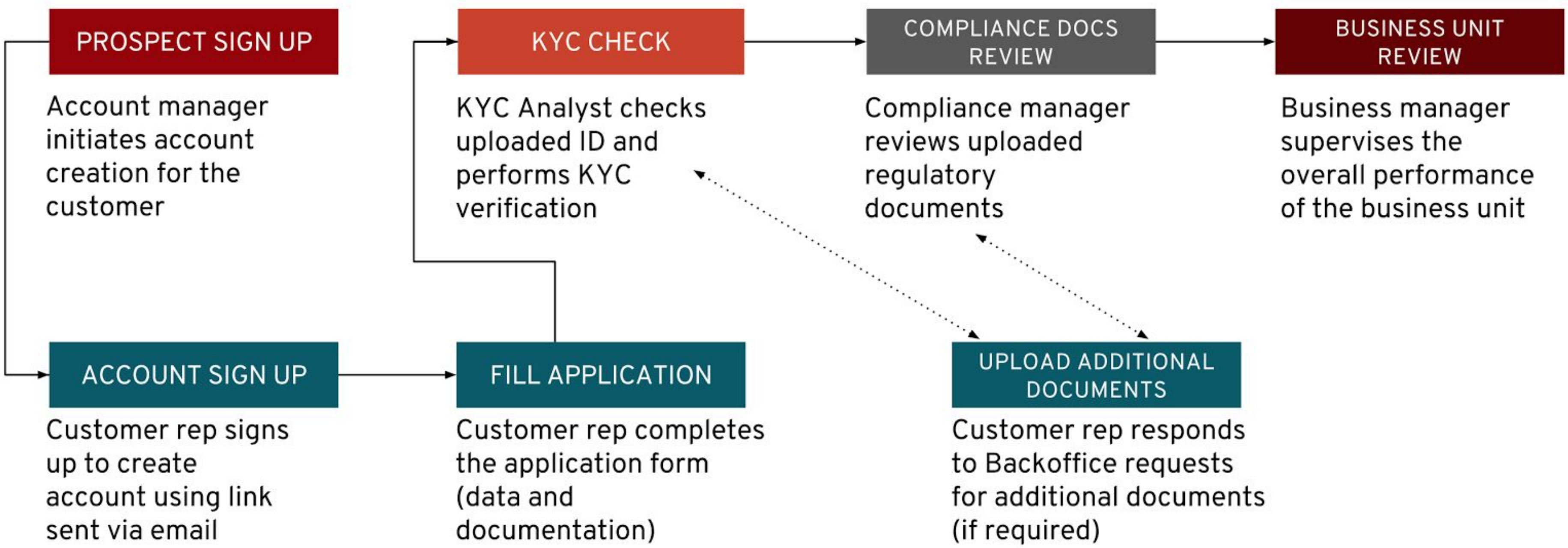
Some features of this demo include: Case management, drag-n-drop application building, smart inbox, document approvals/attachments, custom task screens, PDF viewers, decision management, analytics, forms, digitized processes and more.

WHAT TO KNOW

Presentation Considerations

This client onboarding demo utilizes multiple application instances that incorporates a variety of use cases and user personas. It is recommended to open "private" or "incognito" windows to avoid session conflicts whilst logging in as different users.

Client Onboarding Story (Demo Flow)



STEP 1

LOGIN AS ACCOUNT MANAGER

TIME: 0.5 MIN
PERSONA: ACCOUNT MANAGER

SCRIPT:

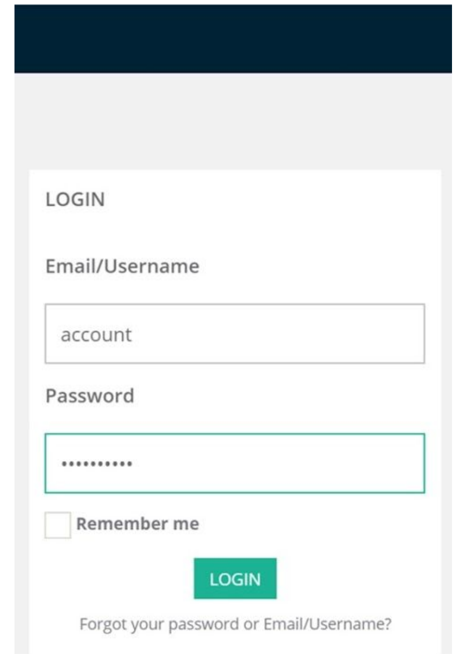
An Account Manager at Fortress Bank convinces the CFO at a medium-scale business, Interstellar to sign up as a customer of the bank. Once the customer rep agrees to open a business banking account with the bank, the Account Manager starts the onboarding process by going to his home page with his credentials through the login form accessible through the bank portal.

ACTIVITIES:

1. *Go to URL: http://fsi-backoffice.serv.run/fsi-backoffice/*
2. *Login as:*
   User: account
   Password: adminadmin

HIGHLIGHTS

- AUTHENTICATION & AUTHORIZATION: the platform allows you to set various levels of permission, according to any organizational structure.



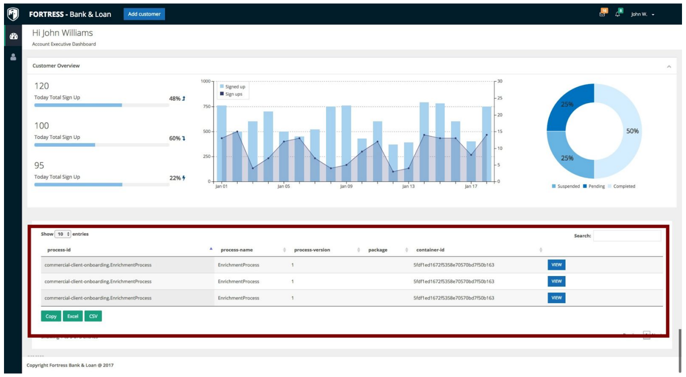
STEP 2

ACCOUNT MANAGER DASHBOARD

TIME: 0.5 MIN
PERSONA: ACCOUNT MANAGER

SCRIPT:

Once on his home page, the Account Manager can sign up a new Customer by clicking on the ADD CUSTOMER button in the upper part of the page. He can also monitor all the KPIs related to his portfolio, for example the Customer Overview and the Customers' data.



ACTIVITIES:

1. *Click on the ADD CUSTOMER button*

HIGHLIGHTS

- The page can be designed by dragging and dropping widgets, which are integrated with BPM Suite to get the information from forms

STEP 3

SIGNUP NEW CUSTOMER

TIME: 0.5 MIN
PERSONA: ACCOUNT MANAGER

SCRIPT:

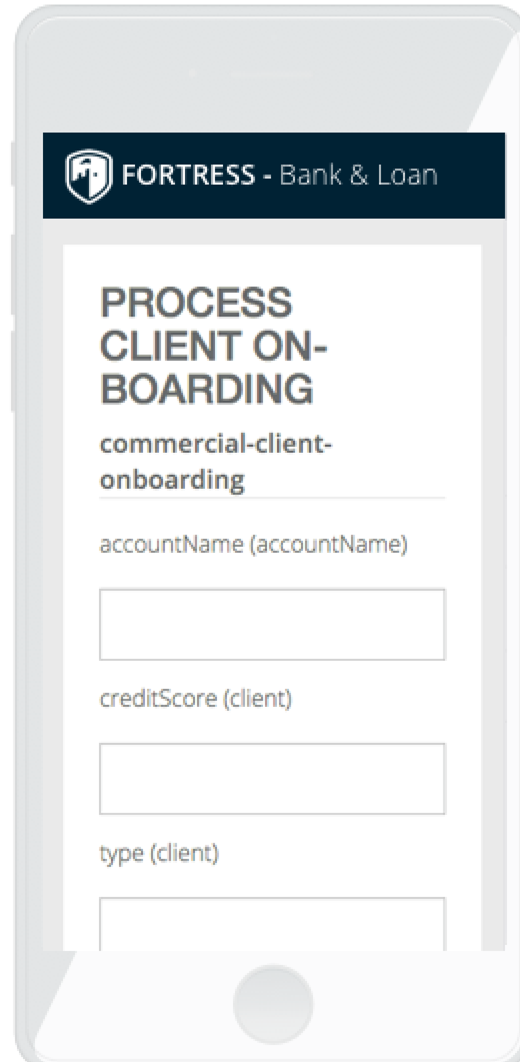
The Account manager starts the commercial client onboarding process by filling this form from any mobile device. He enters the email of customer rep i.e. CFO of Interstellar and submits the form. Other fields such as client type, account name are pre-filled to make it easy for the demo.

ACTIVITIES:

1. *Complete New Client Form*
2. *Feel free to use your own email*
3. *Click on the SUBMIT button*

HIGHLIGHTS

- OMNICHANNEL: modern applications have to perform well on every screen/device: this is what responsive design enables



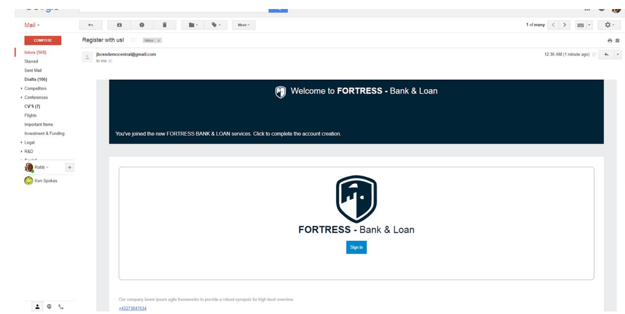
STEP 4

OPEN EMAIL AND SIGN IN

TIME: 0 MIN
PERSONA: CUSTOMER

SCRIPT:

The Customer receives a Welcome email from the System and he clicks on the SIGN IN link available in the email to complete the account registration.



ACTIVITIES:

1. *Open email client and click on SIGN IN link*

HIGHLIGHTS

- This is an automated step where the process in BPM suite can be configured to send an email once the account manager signs up the prospect

STEP 5

REGISTER FOR AN ACCOUNT

TIME: 0 MIN
PERSONA: CUSTOMER

SCRIPT:

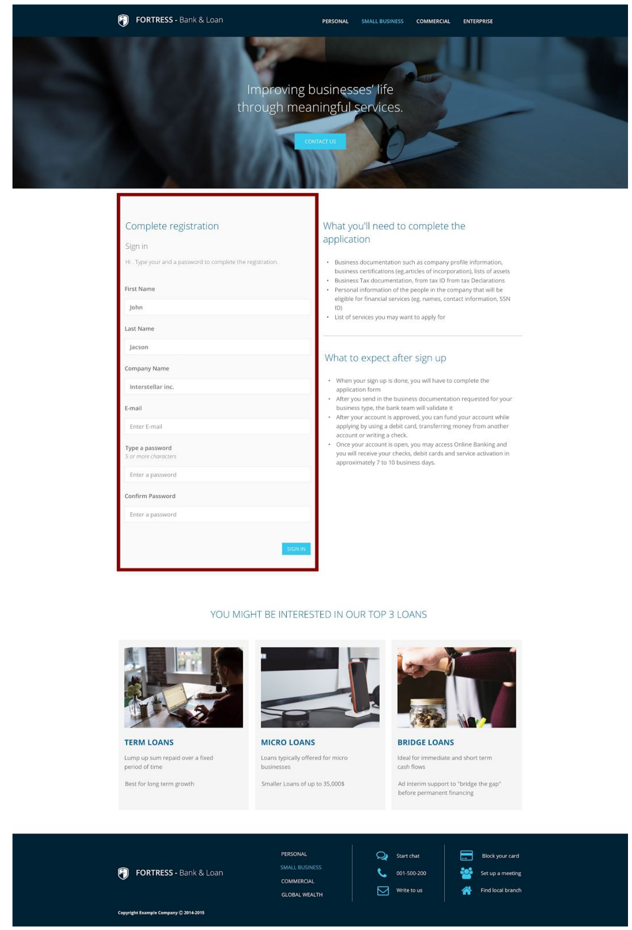
After sign in, the Customer can now register for an account at Fortress Bank by inserting his First Name, Last Name, Company Name and creating a password for the account. To complete the registration, he clicks on the SUBMIT button; a success message appears to confirm that the account has been created successfully.

ACTIVITIES:

1. *Complete the signup form by creating a password for the account*
2. *Click on SUBMIT button*
3. *A success message should confirm that the account has been created successfully*

HIGHLIGHTS

- USE CONTENT TO IMPROVE CONTEXT: Pure BPM elements such as forms can be enriched by content (texts, images, videos) that help set up the application context and can be easily managed through a CMS



STEP 6

LOGIN TO FILL APPLICATION

TIME: 0 MIN
PERSONA: CUSTOMER

SCRIPT:

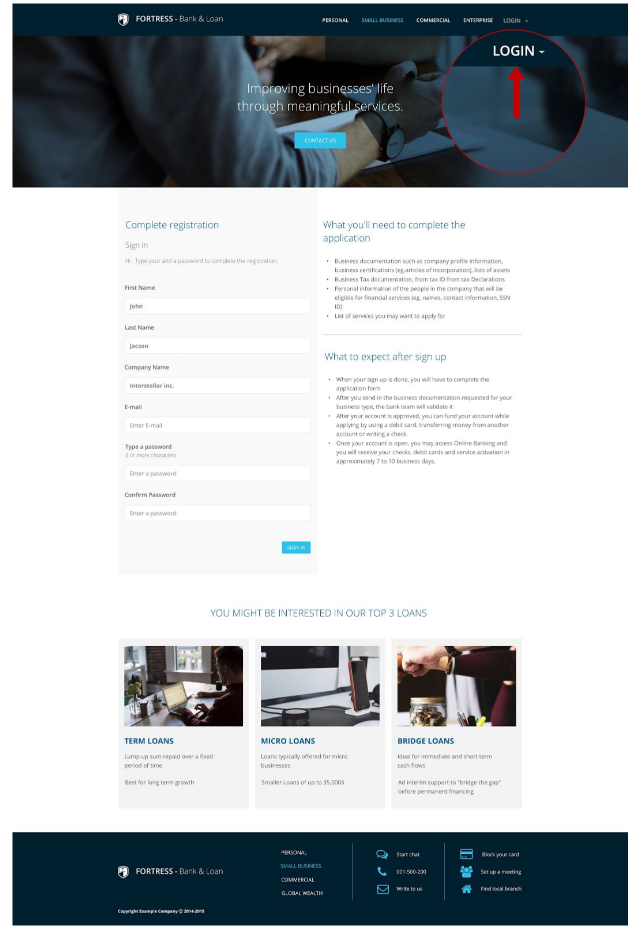
After completing the registration, the Customer can login to the System from the link on the upper right side of the page, using the account credentials just created.

ACTIVITIES:

1. *Login by selecting the LOGIN link in the upper right side of the page.*
2. *Use your configured username and password to sign in.*

HIGHLIGHTS

- Initial Sign up enables the customer (prospect) to save and finish the application as per his convenience.



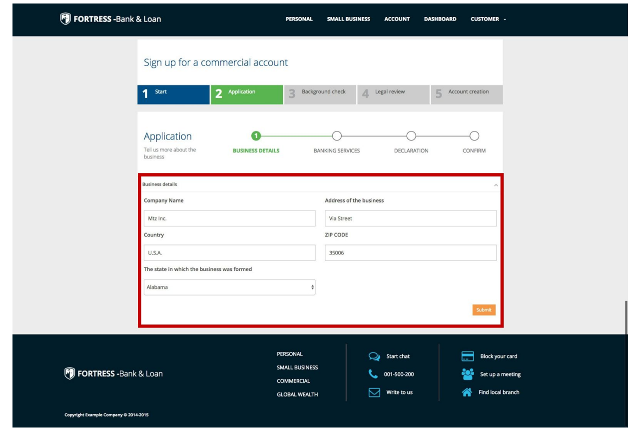
STEP 7

FILL APPLICATION: BUSINESS DETAILS

TIME: 0 MIN
PERSONA: CUSTOMER

SCRIPT:

Once logged in, the Customer can sign up for a commercial account. The first step is to complete the Business Details form to tell the Bank more about his Business and then click on the SUBMIT button to move to the next step of the Application.



ACTIVITIES:

1. *Fill in the form*
2. *Click on the SUBMIT button*

HIGHLIGHTS

- Pictorial representation shows number of steps to finish the application. This helps in enhancing customer experience.

STEP 8

FILL APPLICATION: BANKING SERVICES

TIME: 0 MIN
PERSONA: CUSTOMER

SCRIPT:

In the second step of the application for a commercial account, the Customer is asked to select all the banking services he is interested in. Then clicking on the SUBMIT button, he can move to the last step of the Application.

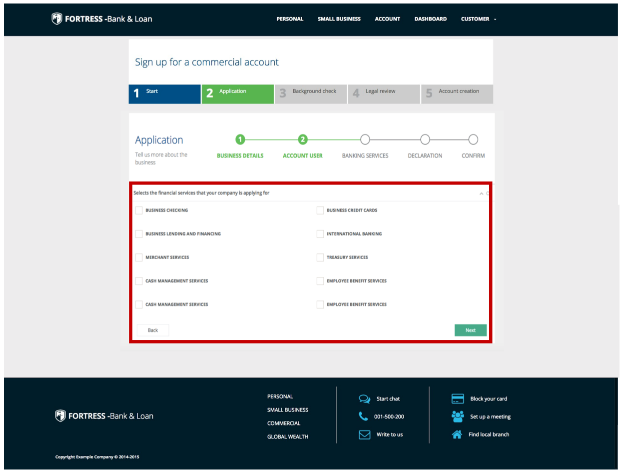
ACTIVITIES:

1. *Flag the services the customer is interested in*
2. *Click on the SUBMIT button to move to the next step*

HIGHLIGHTS

- FRICTIONLESS INFORMATION FLOW: This page reflects the services entered by the Account manager. The customer can confirm the same or add or delete the services he wants to sign up for.

Adrare



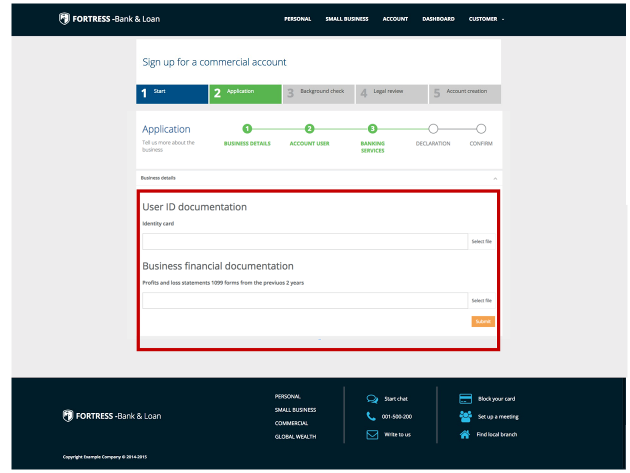
STEP 9

COMPLETE APPLICATION: UPLOAD DOCUMENTS

TIME: 0 MIN
PERSONA: CUSTOMER

SCRIPT:

In the last step of the application for a commercial account, the Customer is prompted to upload business and tax documentation. They can be uploaded by clicking on SELECT FILE. Clicking on the SUBMIT button completes the application. If all the required fields are filled and documents uploaded, a confirmation page appears and the customer has to now sit back and relax until it is approved by the back-office.



ACTIVITIES:

1. *Upload documents by clicking on select file*
2. *Click on the SUBMIT button to move to the next step*
3. *A confirmation page will appear*

HIGHLIGHTS

- AUTOMATION: processes are easily-customizable to enable service automation in a way that is consistent with any type of business flow

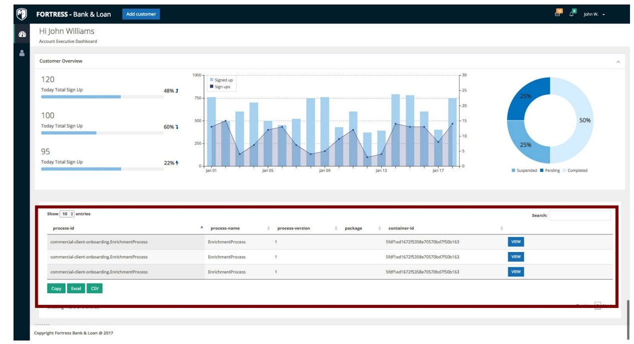
STEP 10

CHECK CUSTOMER STATUS

TIME: 0 MIN
PERSONA: ACCOUNT MANAGER

SCRIPT:

Now that the Customer has completed the application, let's move again to the Account Manager's home page, refresh the page. The Account Manager can now visualize and point Customers' data in the Inbox. Click on the VIEW button to see the Customer's full details.



ACTIVITIES:

1. *Move to the Account page*
2. *Refresh page*
3. *Visualize and point Customers' data in the Inbox*
4. *Click on the VIEW button to see the Customer's full details*

HIGHLIGHTS

- CUSTOMIZABLE UI: thanks to decoupling (app front end detached from app back end), the branding elements (es. colours/visuals) and the overall the layout of any page can be easily designed and changed anytime, without affecting the underlying application logic and functioning. For example you could place the pie chart in a different position, without re-deploying the application

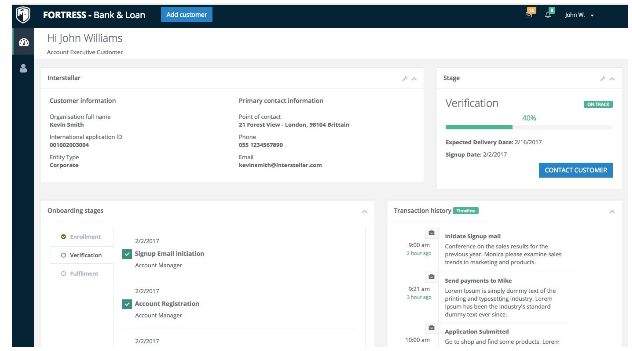
STEP 11

VISUALIZE CUSTOMER DETAILS

TIME: 0 MIN
PERSONA: ACCOUNT

SCRIPT:

From this page, the Account Manager can visualize the data submitted by the Customer,
In the upper page the customer full details, while in the lower part of the page the stage in the onboarding process. It’s available also information about the stage of the customer application and the Transaction history



ACTIVITIES:

1. *Highlight the customer full details in the upper part of the page*
2. *Highlight the stage in the onboarding process in the lower part of the page*
3. *Logout*

HIGHLIGHTS

- *CUSTOMIZATION: low code tools can be used to customize not only customer-facing pages but also the employee-facing pages*

STEP 12

LOGIN AS KYC ANALYST

TIME: 0 MIN
PERSONA: KYC ANALYST

SCRIPT:

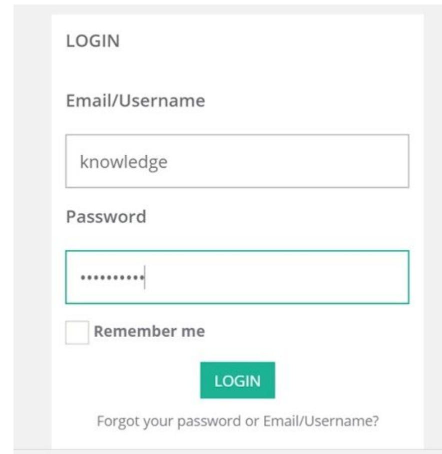
Now that the Customer has shared all the required documentation, the back-office team starts the validation process. The first persona involved for this activity is the KYC Analyst, who can login using his personal credentials.

ACTIVITIES:

1. *Go to this page: http://fsi-backoffice.serv.run/fsi-backoffice/*
2. *Insert credentials to login*
   user: knowledge
   psw: adminadmin
3. *Click on the LOGIN button*

HIGHLIGHTS

- Based on the process, different pages can be created for each knowledge worker using low code tools.



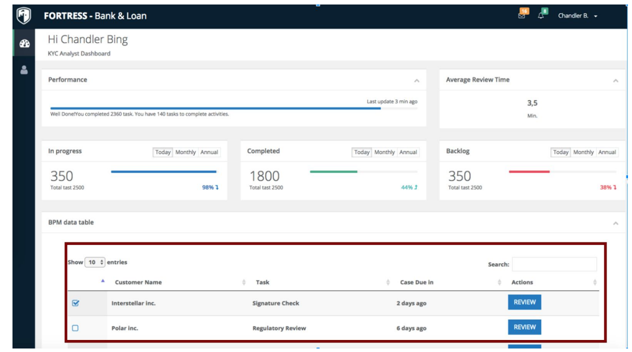
STEP 13

KYC ANALYST: CHECK CURRENT PENDING TASKS

TIME: 0 MIN
PERSONA: KYC ANALYST

SCRIPT:

KYC Analyst can keep track of his performance indicators, for example the average review time per customer. More importantly, under the charts, he can visualize his task inbox that shows the list of customers, the corresponding tasks, the due date.
Here's where the analyst starts checking the KYC aspects of the customer by clicking on the REVIEW button.



ACTIVITIES:

1. *Visualize the customers list*
2. *Click on review*

HIGHLIGHTS

- "AUGMENTED" BPM EXPERIENCE: BPM components such as task lists can be enriched by side contents, such as charts and graphs, that make dashboards much cooler in terms of user experience

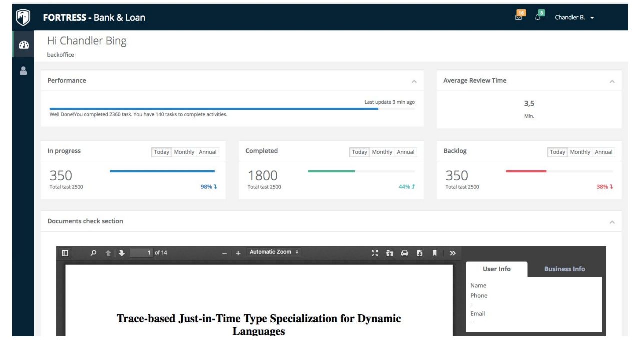
STEP 14

KYC ANALYST: CHECK DOCUMENTATION

TIME: 0 MIN
PERSONA: KYC ANALYST

SCRIPT:

The REVIEW button opens, within the same page, the document that should be formally checked. Scrolling down the document, the KYC Analyst can read all the contents and make sure that the formal requirements are met and either validate or reject.



ACTIVITIES:

1. *Visualize the document*
2. *Scroll down to see all the contents in the document*

HIGHLIGHTS

- At this step, the document viewer is embedded in the page for this demo.

STEP 15

KYC ANALYST: VALIDATE DOCUMENTATION

TIME: 0 MIN
PERSONA: KYC

SCRIPT:

To the right of the document, there's a tool that guides the KYC Analyst in processing the document based on a set of items. Each item correspond to a field. Fields are precompiled by the Customer. Clicking on each field arrow, the KYC Analyst can visualize the field value and approve it or reject it. Assuming that, after checking the entire document it does result perfect, the KYC Analyst can approve it by clicking on the APPROVE button and quickly go back to the next task on the list.

ACTIVITIES:

1. *On the right hand of the page, look at the INFO tab selected. The fields pre-filled by the user. Next to each field name you can see a small arrow pointing down*
2. *Click on the arrow to display the field "value"; the field value appears along with a green/red button*
3. *Click on the green button to validate*
4. *Repeat this task for each field*
5. *When the last field has been marked, an APPROVE button appears*
6. *Click on the APPROVE button to conclude the validation process*
7. *Logout*

HIGHLIGHTS

- Most organizations may have partnership with some document viewers or even use products that perform KYC check instead of a knowledge worker. Whatever the case, the process can be configured based on the organization's requirements.

STEP 16

LOGIN AS COMPLIANCE MANAGER

TIME: 0 MIN
PERSONA: COMPLIANCE MANAGER

SCRIPT:

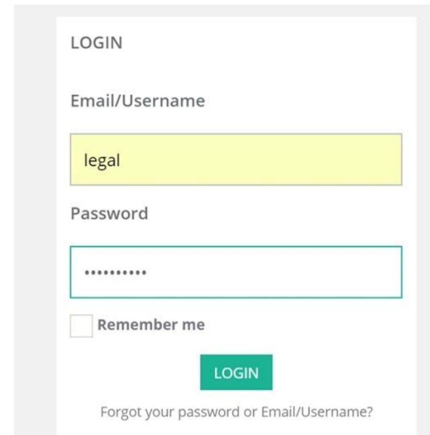
Now that all the KYC requirements have been ensured and reviewed by the KYC analyst, let's move to the Compliance Manager experience. She reviews the legal documents such as tax forms. Let's login in with the appropriate credentials.

ACTIVITIES:

1. *Go to this page: http://fsi-backoffice.serv.run/fsi-backoffice/*
2. *Insert credentials to login*
   user: legal
   psw: adminadmin
3. *Click on the Login button*

HIGHLIGHTS

- As for other personas, the platform allows you to set various levels of permission, according to any organizational structure.



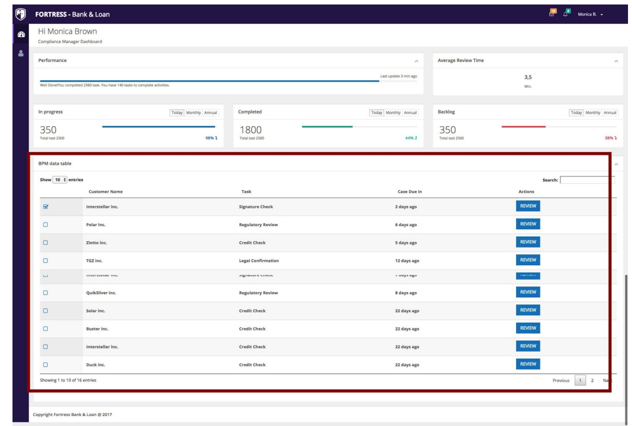
STEP 17

COMPLIANCE MANAGER: REVIEW TASKS

TIME: 0 MIN
PERSONA: COMPLIANCE MANAGER

SCRIPT:

Compliance manager can see a series of indicators that summarize the state of his activities, for example the remaining tasks to be completed.
The most important item, here, is her task list. This is where she can efficiently manage the pending requests. For each record, she can see the relevant information that she needs to effectively perform her tasks: the customer name, the type of task and the due date.
Once she clicks the REVIEW button, she can start the review process.



ACTIVITIES:

1. *Visualize customers list*
2. *Click on review*

HIGHLIGHTS

- Same task inbox widget is used for all the knowledge workers but the data is different based on the process defined in BPM suite. This enables quicker development of apps be it customer-facing or employee-facing

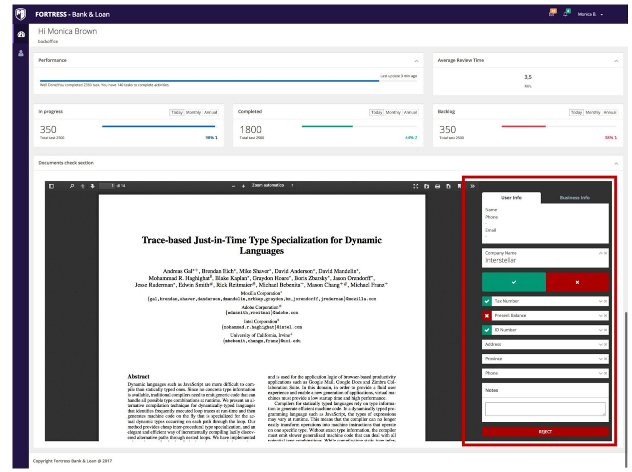
STEP 18

COMPLIANCE MANAGER: VIEW DOCUMENTATION

TIME: 0 MIN
PERSONA: COMPLIANCE MANAGER

SCRIPT:

Clicking on the REVIEW button, a document opens inside the page.
The Compliance Manager first can scroll the document to read it all, check if it's readable and acceptable from a compliance point of view.



ACTIVITIES:

1. *Visualize the document*
2. *Scroll down to see all the contents in the document*

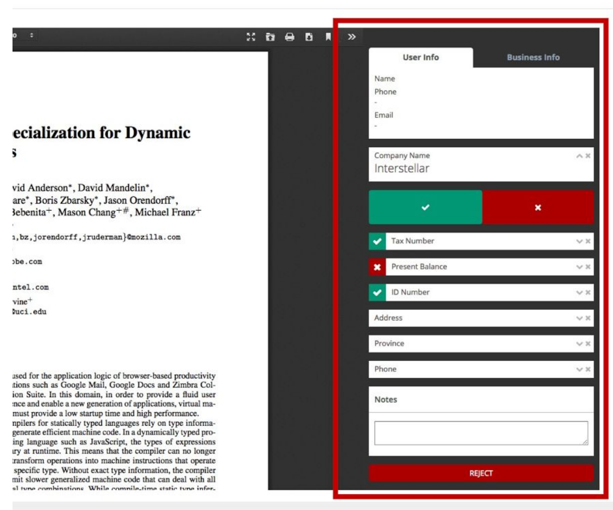
HIGHLIGHTS

- Document viewer is used to make the job easy for compliance manager. It is at the discretion of organization to decide to use a document viewer or make this task an automated one.

STEP 19

COMPLIANCE MANAGER: VALIDATE DOCUMENTATION

TIME: 0 MIN
PERSONA: COMPLIANCE MANAGER



SCRIPT:

Having read the entire document, the Compliance Manager is now asked to validate it. An easy tool on the right of the page allows her to visualize a set of precompiled fields that describe the document items and value. Each field's content can be approved or rejected. After browsing and managing all the fields, assuming that all the contents in the document are legally compliant, she can then approve it and move that Customer to the next step of the process.

ACTIVITIES:

1. *In the right hand of the page see the preselected USER INFO tab, that shows a set of fields*
2. *Next to each field name you can see a small ARROW pointing down, pre-filled by the user*
3. *Click on it to display the field "value"*
4. *The field value appears along with a green/red button*
5. *Click on the green button to validate*
6. *Repeat this task for each field*
7. *When the last field has been marked, an APPROVE button appears*
8. *Click on the APPROVE button to conclude the validation process*
9. *Logout*

HIGHLIGHTS

- If the document is approved, the status of the application is reflected on customer's home page. If the document is rejected or marked for more information, the customer is notified of it and the status is reflected on his home page.

STEP 20

LOGIN AS BUSINESS MANAGER

TIME: 0 MIN
PERSONA: BUSINESS MANAGER

SCRIPT:

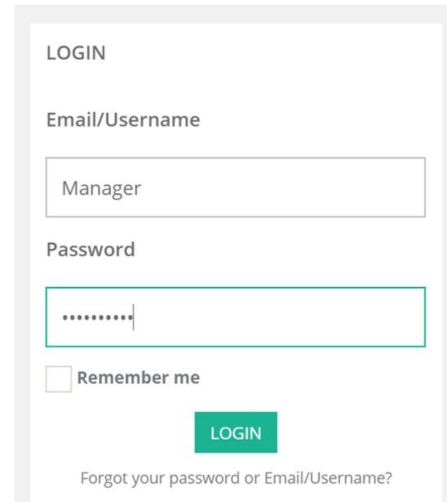
Let's finally move to the last persona, the Client Onboarding Manager. He's supposed to monitor his team's activities and business unit's performance. Let's login with his credentials and take a look at his dashboard.

ACTIVITIES:

4. *Go to this page: http://fsi-backoffice.serv.run/fsi-backoffice/*
5. *Insert credentials to login*
   user: Manager
   psw: adminadmin
6. *Click on the Login button*

HIGHLIGHTS

- *SECURITY:* Only this persona is authorized to access information of the entire business unit unlike the other personas involved.



STEP 21

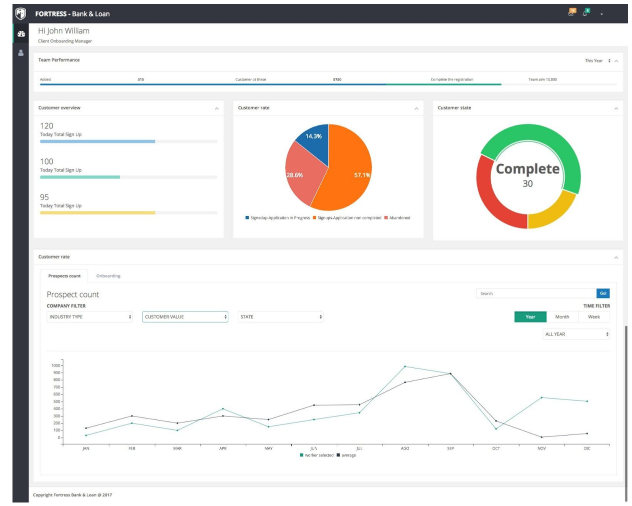
CHECK BUSINESS PERFORMANCES

TIME: 0 MIN
PERSONA: BUSINESS MANAGER

SCRIPT:

After logging in, the BUSINESS MANAGER has access to his control panel.
From here, he can monitor all the KPIs related to his business, for example:

1. The overall team performance
2. A snapshot of the main business KPIs, such as the pie chart on the right hand indicating the number of applications completed/suspended/pending
3. Some trends illustrated in the line charts:
    a. Clicking on the PROSPECT he can check the overall performance of a worker against the average
    b. Click on the ONBOARDING TAB he can control see the average time conversion and the trend of onboarded versus lost customers



ACTIVITIES:

1. *Point the mouse to the upper part of the page, Team Performances*
2. *Scroll below the Team Performances and highlight the overall business KPIs*
3. *Go below the pie charts and highlight the chart*
    a. *Click on the PROSPECT tab to measure the overall performance of a worker against the average*
    b. *Click on the ONBOARDING TAB to see the comparison between onboarded/lost customers*

HIGHLIGHTS

- The dashboards can be built based on the manager's requirements. All the widgets can be configured on Entando platform and data can be fetched from BPM Suite

CONCLUSION

This is the end of this Client onboarding demo, that gives you an example of a process driven application.

The demo is powered by :

- a versatile API integration layer
- rapid, low code tools that enable lightning fast application development
- flexible, easily-customizable processes and service automation
- A ux-rich, interactive, customer experience