Work Flow Manager

PURPOSE

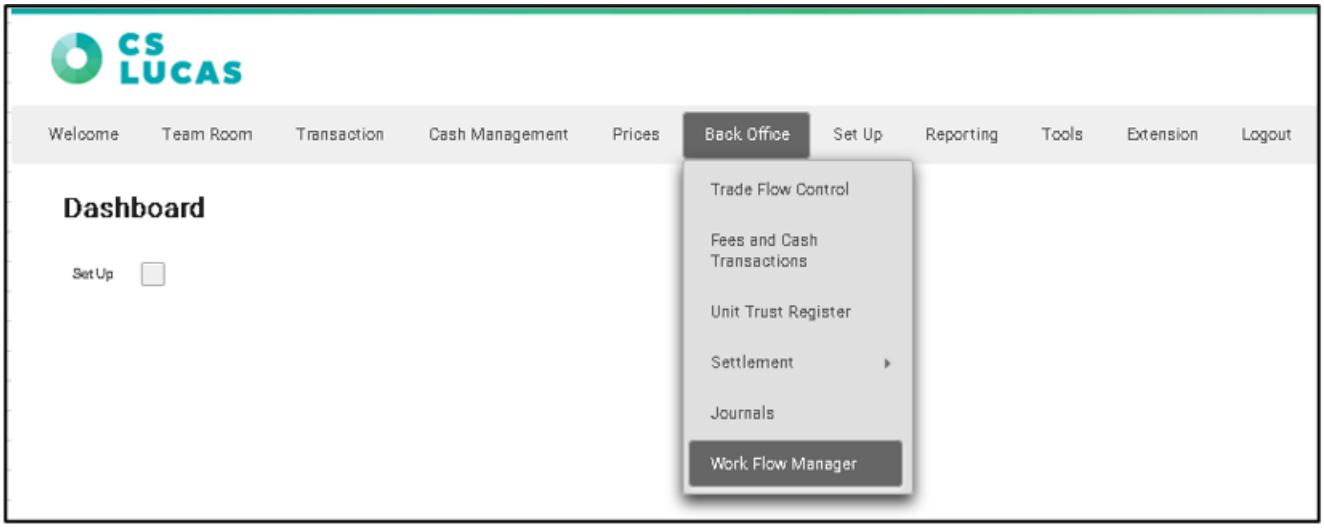
This document shows the procedure on how to set up/ configure workflow for processing payments in CS Lucas system.

WHY IS THIS IMPORTANT

Workflow manager configuration allows organisation to set up workflow for processing payments.

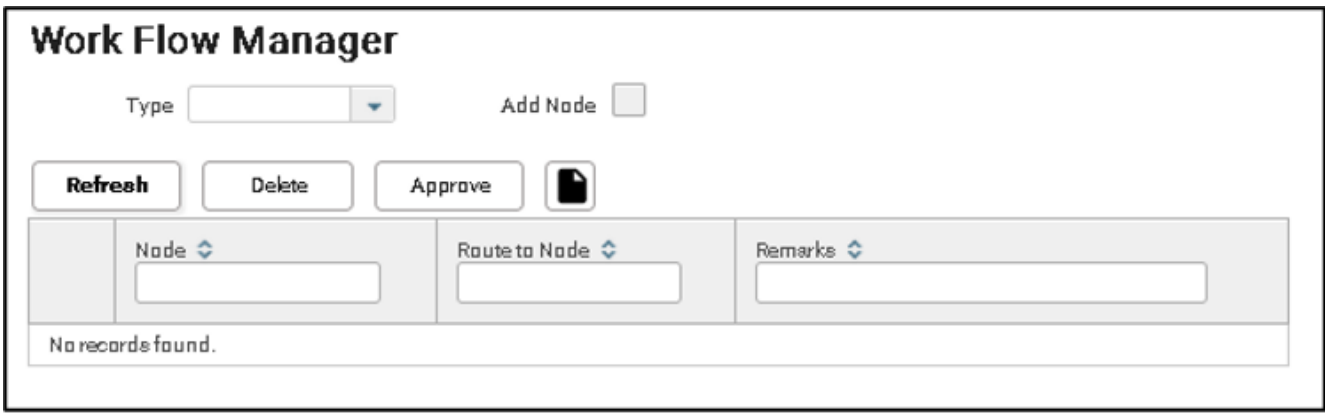
PROCEDURE

1. From the menu, select Back Office > Work Flow Manager.



Tip: If you do not see Work Flow Manager in the menu navigation, please ensure that you have the access rights to access this screen. Access rights required is 19700 Access Workflow Manager.

2. Work Flow Manager screen displays.



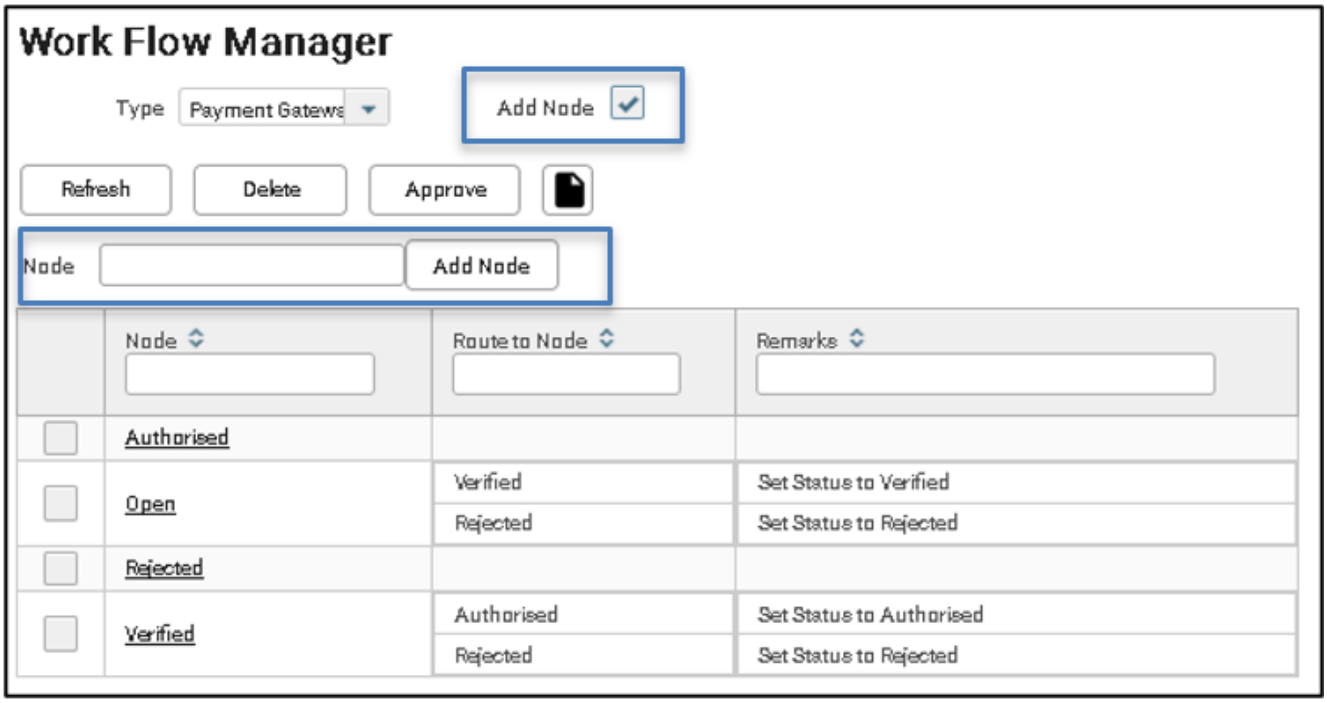
3. To view the node and workflow set up, select Payment Gateway from the Type drop down box and click Refresh.



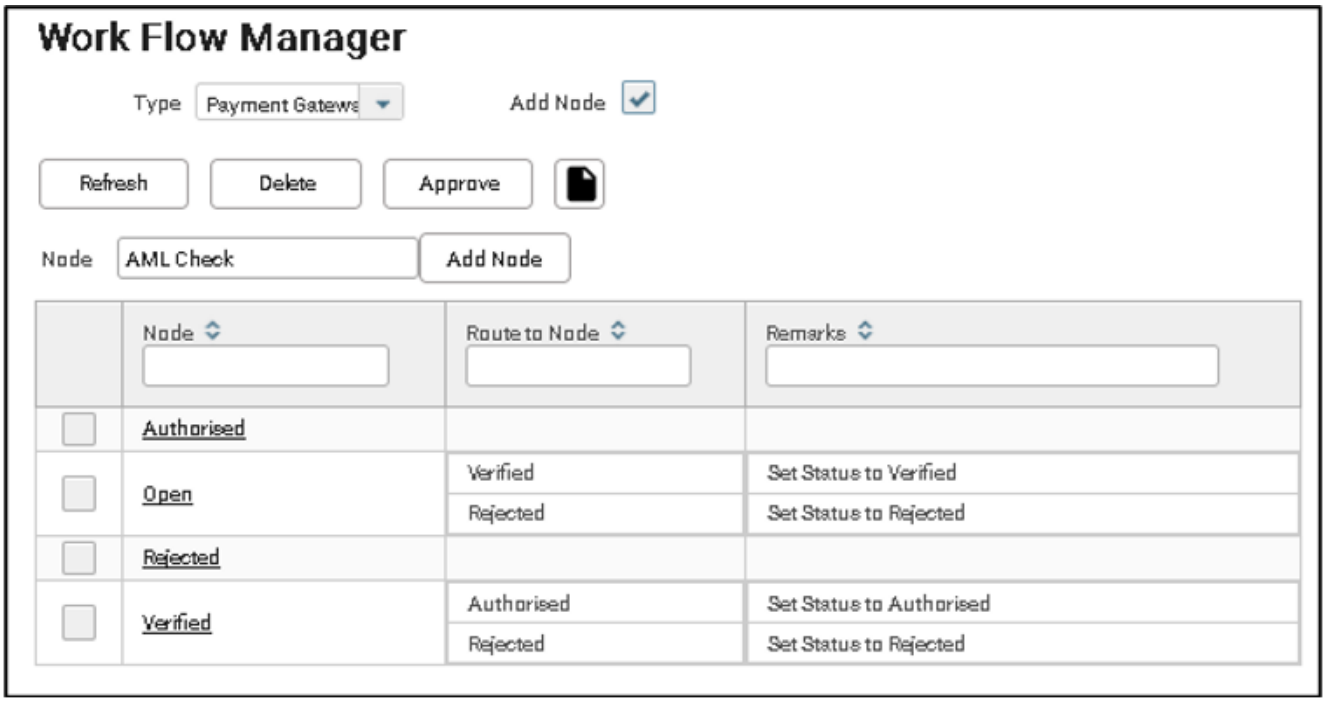
4. In the illustration above, there are four nodes created: Open, Verified, Authorised and Rejected.

5. For Open node, it is set to route to Verified or Rejected. Then, for Verified node, it is set to route to Authorised or Rejected.

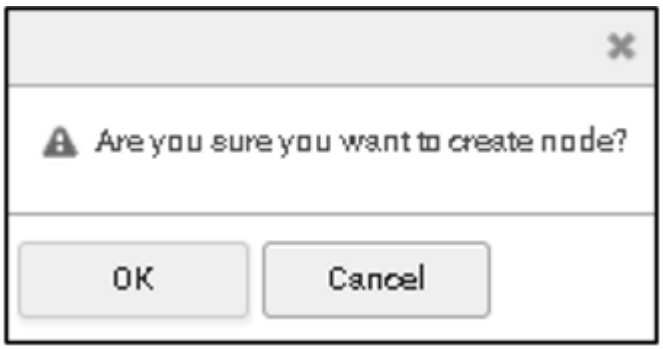
6. To add a new option “AML Check” to route to after payment batch is verified for example, tick on the Add Node checkbox. You will see a Node field to enter a new node.



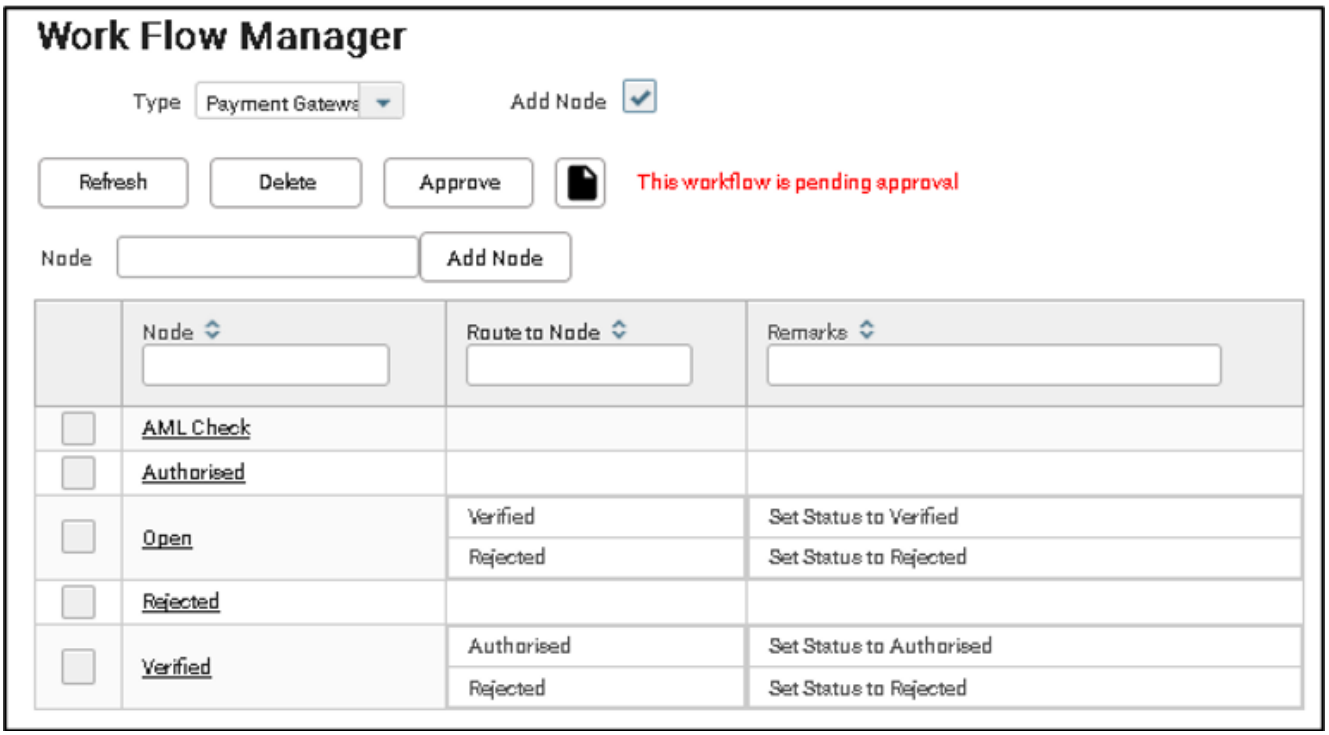
7. Enter the new node name, i.e. AML Check.



8. Click Add Node.

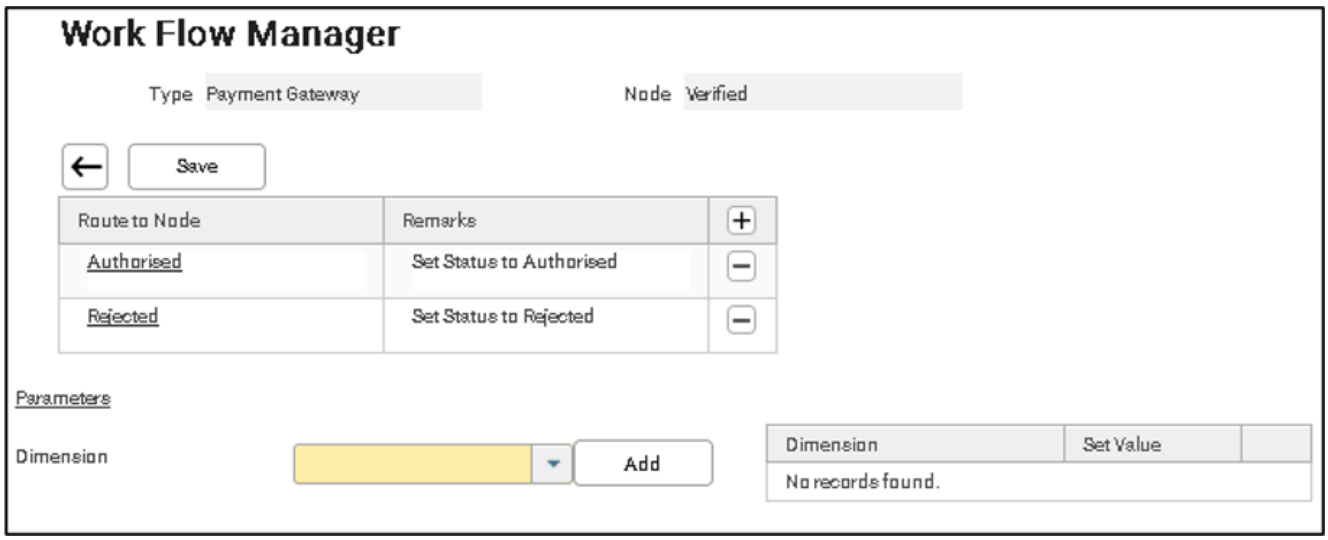


9. A popup message displays to confirm adding new node. Click OK.

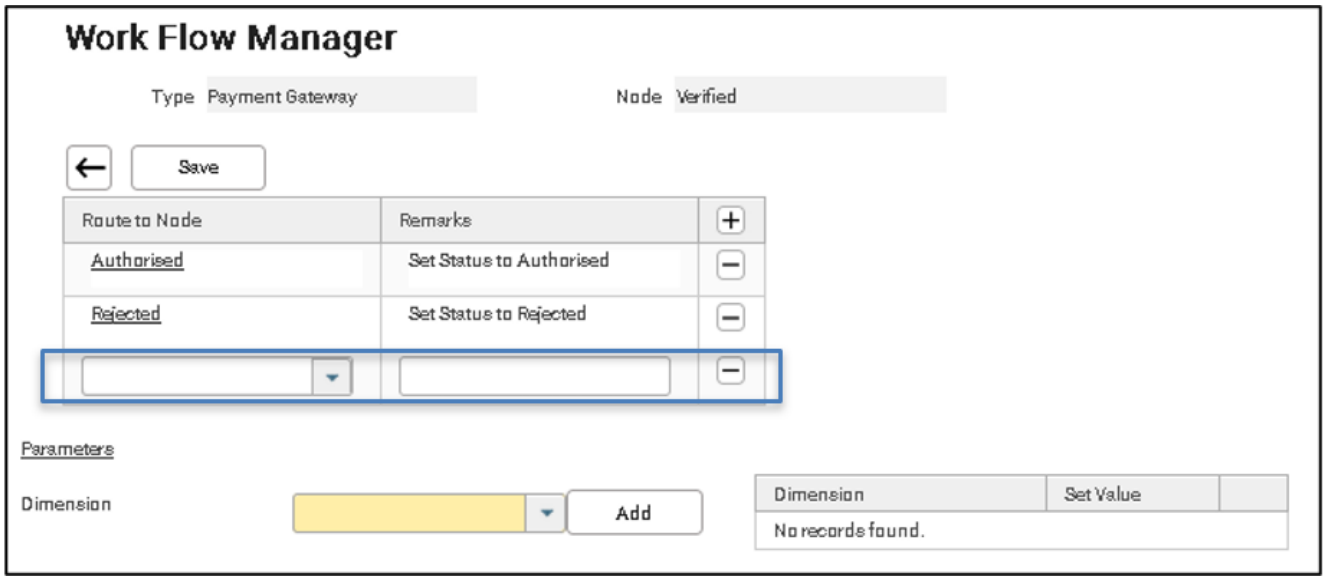


10. A new node “AML Check” is created. The workflow set up is now pending approval. Any creation/ amendment made to the workflow will requires approval before it can be applied for processing payments.

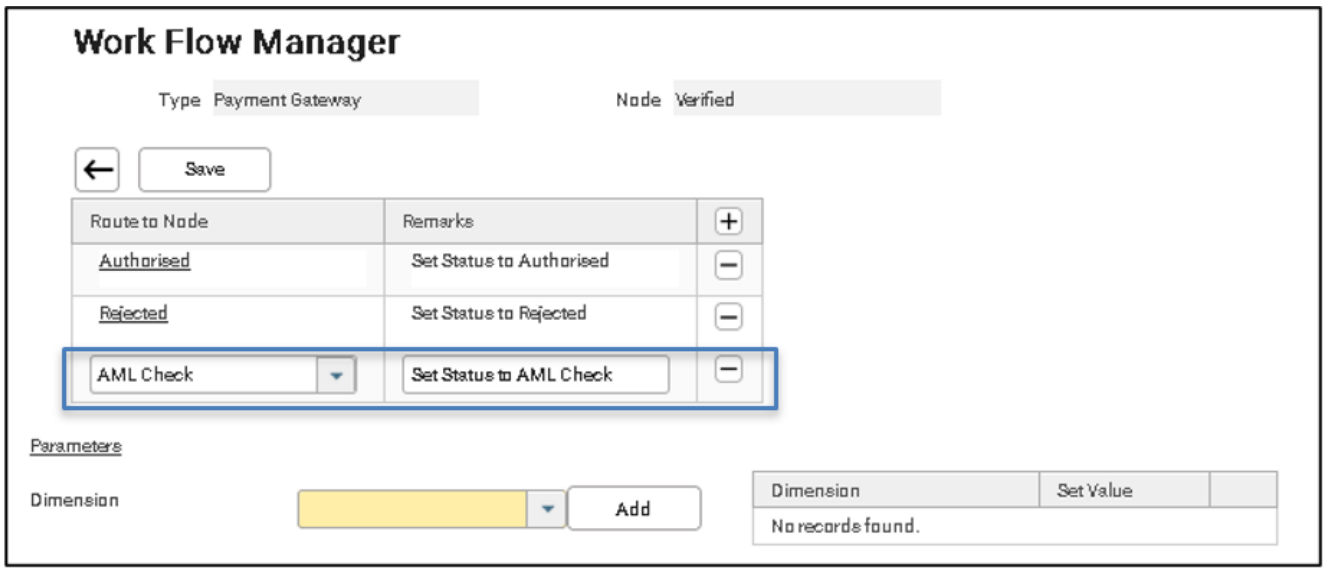
11. To set to route from Verified to AML Check, click on Verified node to drill down to the configuration screen.



12. Click + to add Route to Node. A new row item displays in the table.

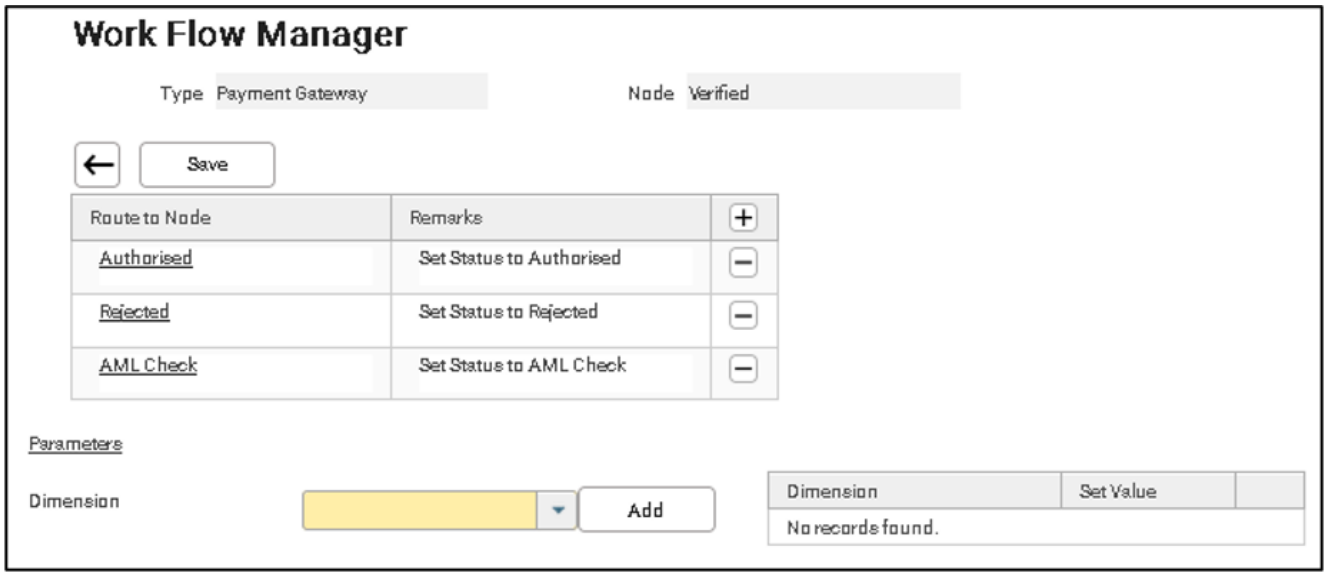


13. Select the Node to route to from the drop down box, i.e. AML Check and you can put also remarks.

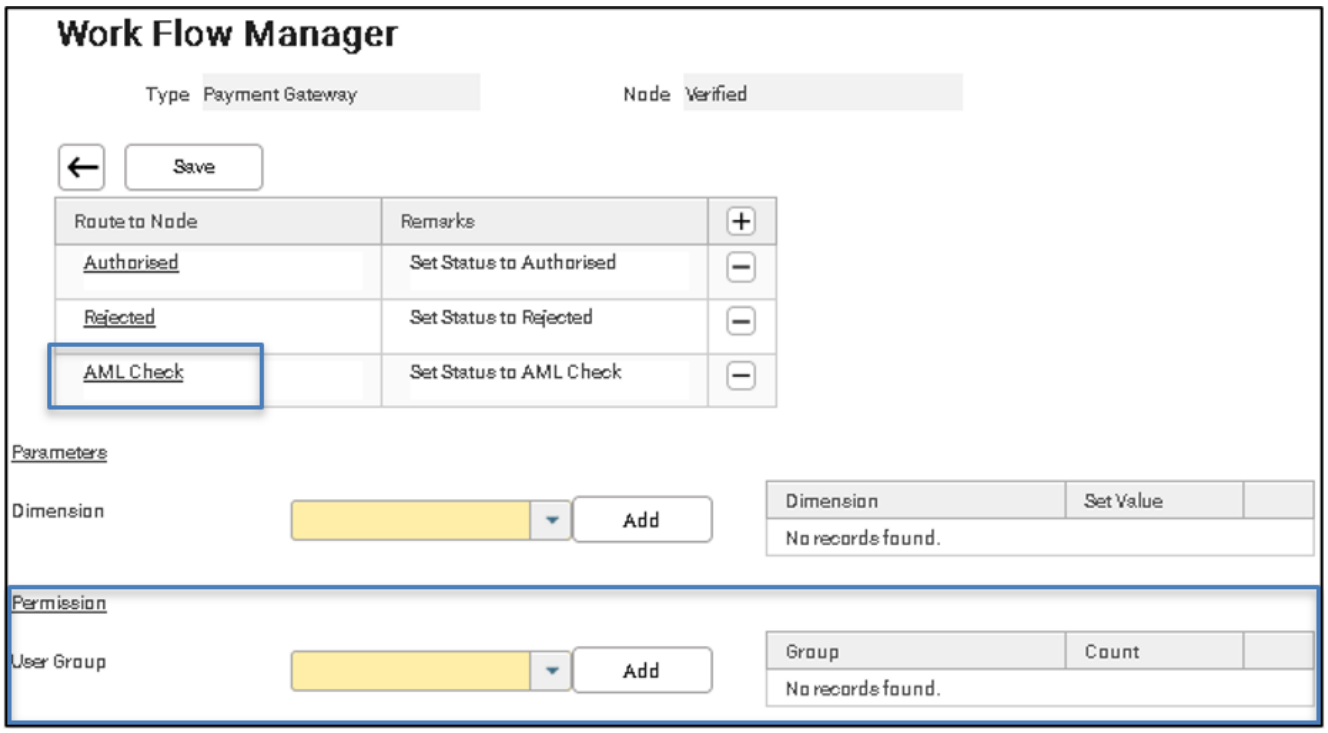


14. Click Save.

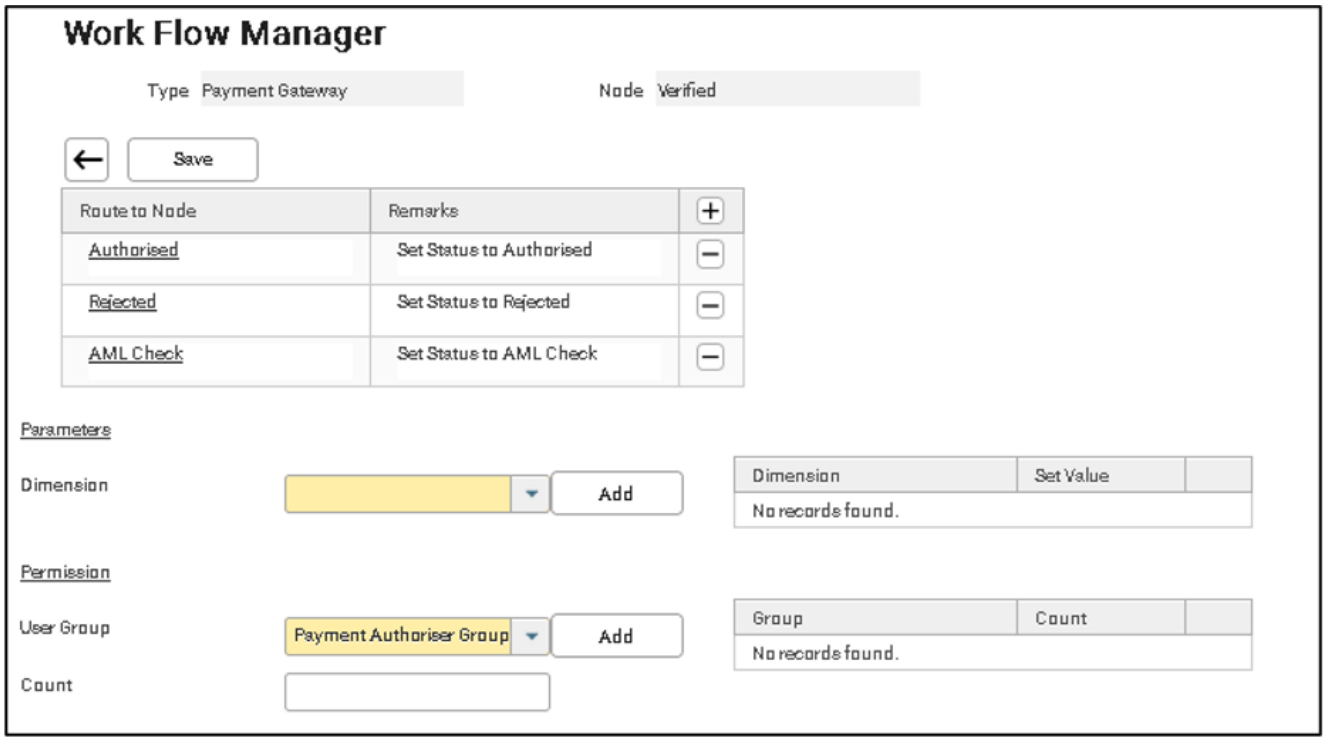
15. To set permission who can set to AML Check after payment batch is verified, click on the Verified node to drill down to Configuration screen.



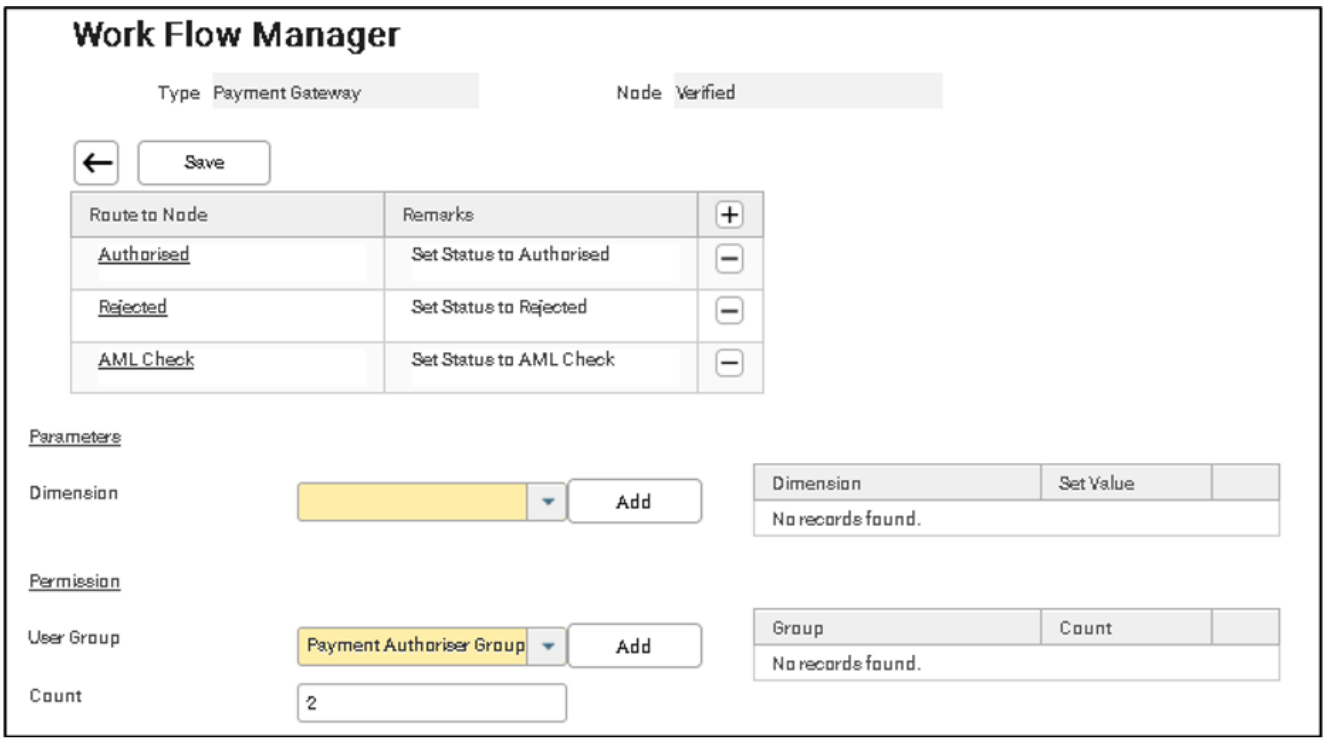
16. Click on AML Check hyperlink.



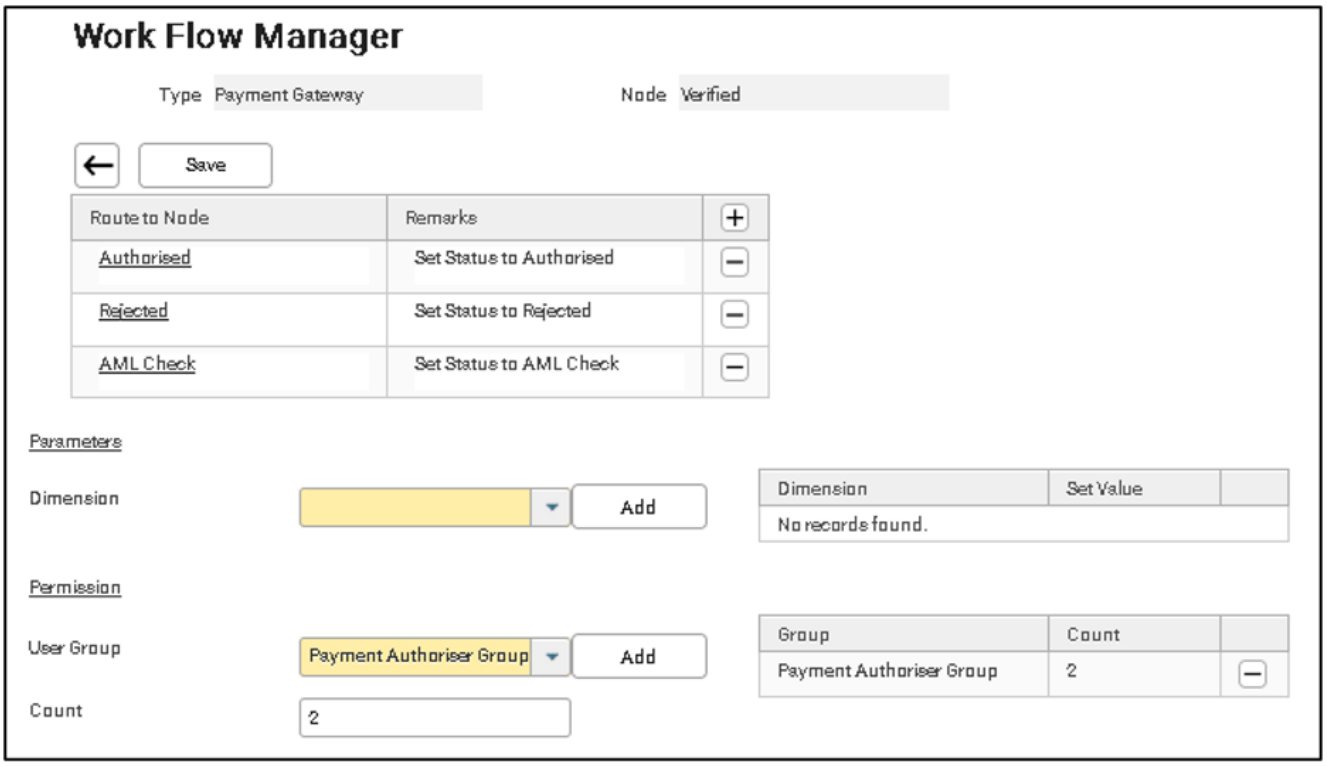
17. Under Permission section, select the user group who can set to AML Check.



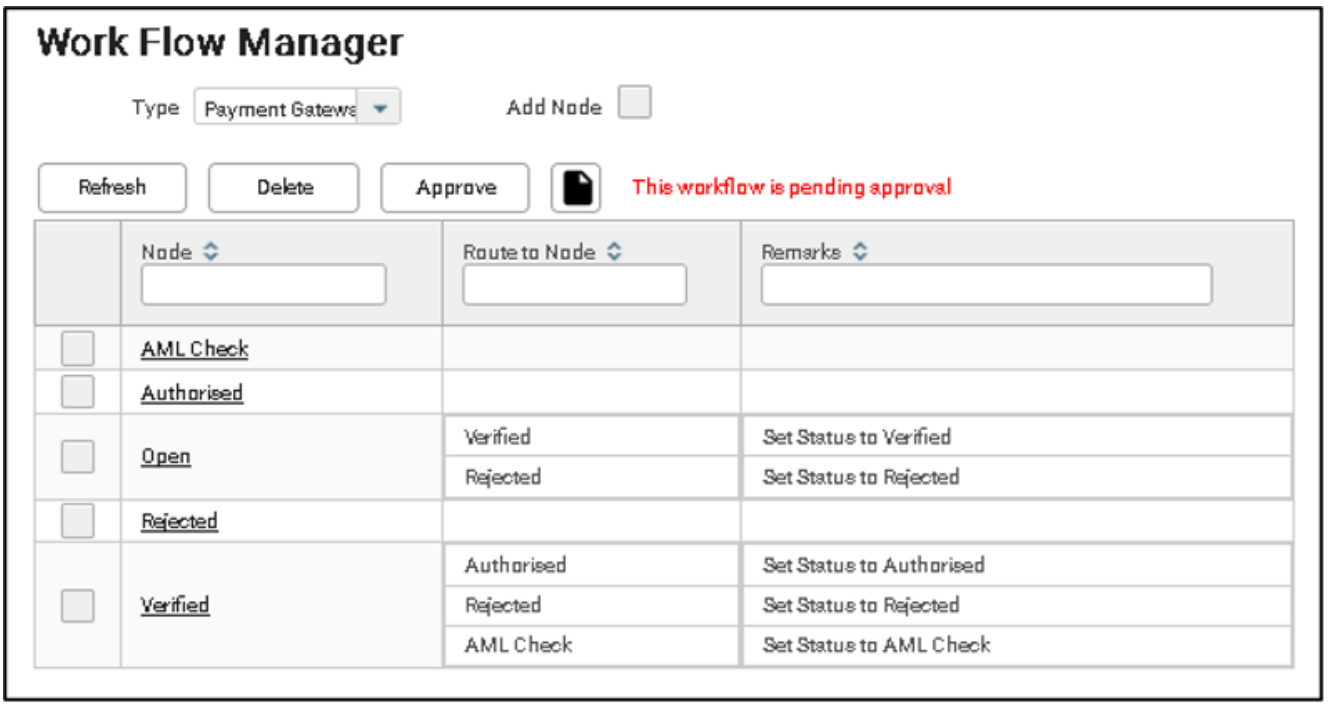
18. Next, type in the number of person required to set the status to AML Check in the Count field. For example, if it is set to 2, this means 2 person from the user group selected is required in order to set status to AML Check.



19. Click Add to add to the table on the right.



20. When completed, click Save.



21. Click Approve to approve the changes made to the workflow.

22. To delete a node, tick on the checkbox next to the Node and click Delete.

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

Settlement Control

CHANGE HISTORY

Date	By	Changes
20-Sep-2019	TS	Created.