

integrio

Smart process automation –
For the automation, visualisation and monitoring of
complex business and data processes.



Smart process automation

integrio automates, integrates, visualizes and monitors complex data-driven routine business processes so that you can concentrate on non-routine tasks and cases.

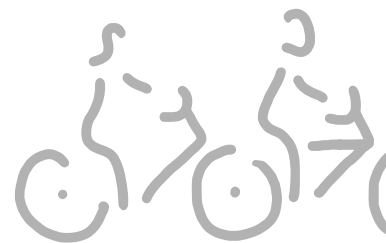
Benefits at a glance

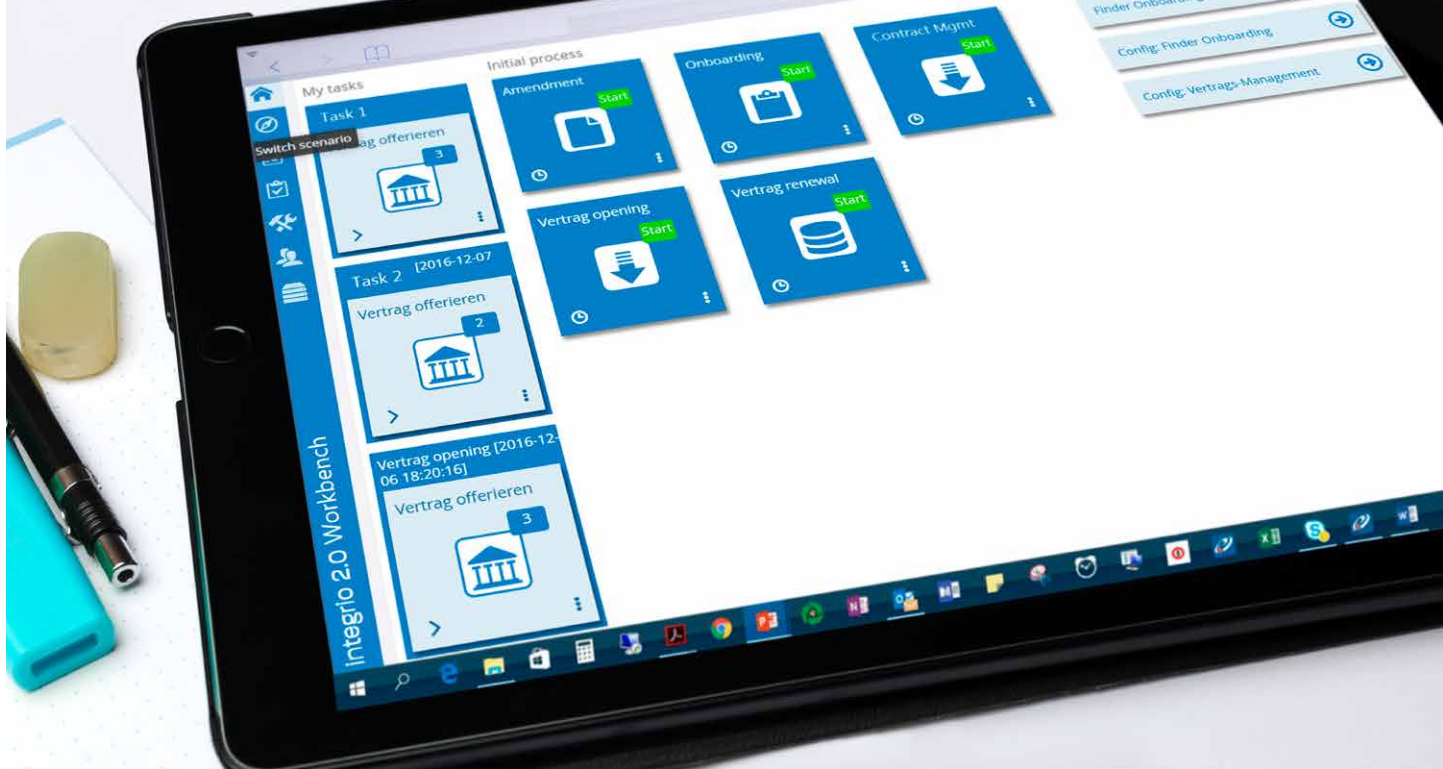
Automate all everyday, recurring processes so you can focus on handling exceptions, special cases and non-repetitive tasks.

- Modelling and configuring your end-to-end or sub-processes
- Straight-Through-Processing - across applications
- Interdisciplinary and cross-organisational use
- Active notification
- Guided user interaction
- Overview of the tasks to be processed and process steps

Fields of application

- Digital on-boarding - for partners and new employees
- Digital exchange and structured updating of contract and condition data between business partners
- Automated settlement of asset management and advisory mandates integrated with calculo
- Automatic determination and allocation of fees and digital dispatch of the respective invoices
- Automated reconciliation of data stocks, account reconciliation, etc.





Everything under control with the integrio Workbench

Application possibilities

Process automation

- Consistent process control and monitoring
- Triggering processes of external systems via interfaces
- Dynamic routing of tasks based on organisational structures and technical or business rules

Data import and consolidation

- Import and integration of master data, conditions and movement data
- Regular data import, e.g.: daily import of product data
- Data quality control thanks to syntactic and semantic validation

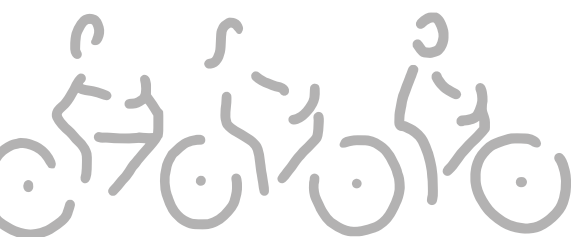
Digitisation of business processes

- Mapping processes across system or platform discontinuities (e.g. on-boarding, contract management etc.)
- Auditable monitoring of execution and configuration
- Combination of manual tasks and automated sub-processes

Data matching

- External versus own calculations
- Comparison of changes between current and previous data delivery

More focus on the core business through process automation and monitoring with integrio



What functionalities does integrio provide?

Process automation: integrio offers all the functionality required for the complete end-to-end automation and control of business and data processes.



Event-based process management: based on definable rules or expected results or bandwidths, integrio can decide whether to proceed automatically to the next process steps or require a user interaction.



Compatibility and triggers: integrio can interact with external systems via trigger mechanisms. Processes within integrio can be initiated externally and integrio can also trigger external processes in supervising systems, thus facilitating Straight-Through-Processing.



Definition and mapping of organisational structures, functions and roles for process control and monitoring. Access control using a role-based authorisation concept.



Resubmission of processes or process elements at predefined times or time spans.



Scheduling and tracking: Scheduling, tracking and reminders of required process steps and interactions. integrio actively informs the user of overdue process steps.



Notification: Contextual notification for user groups via e-mail or system messages. These can be configured for each process step.



Control: You can define which process elements require a 4-eyes approval process (e.g. erasures, alterations). Seamless recording and traceability of all audit-relevant actions and manipulations with storage of time stamps of the individual process steps.



Process Designer: The optional "Process Designer" allows trained users to model and configure processes themselves without the need for a change request to the supplier.

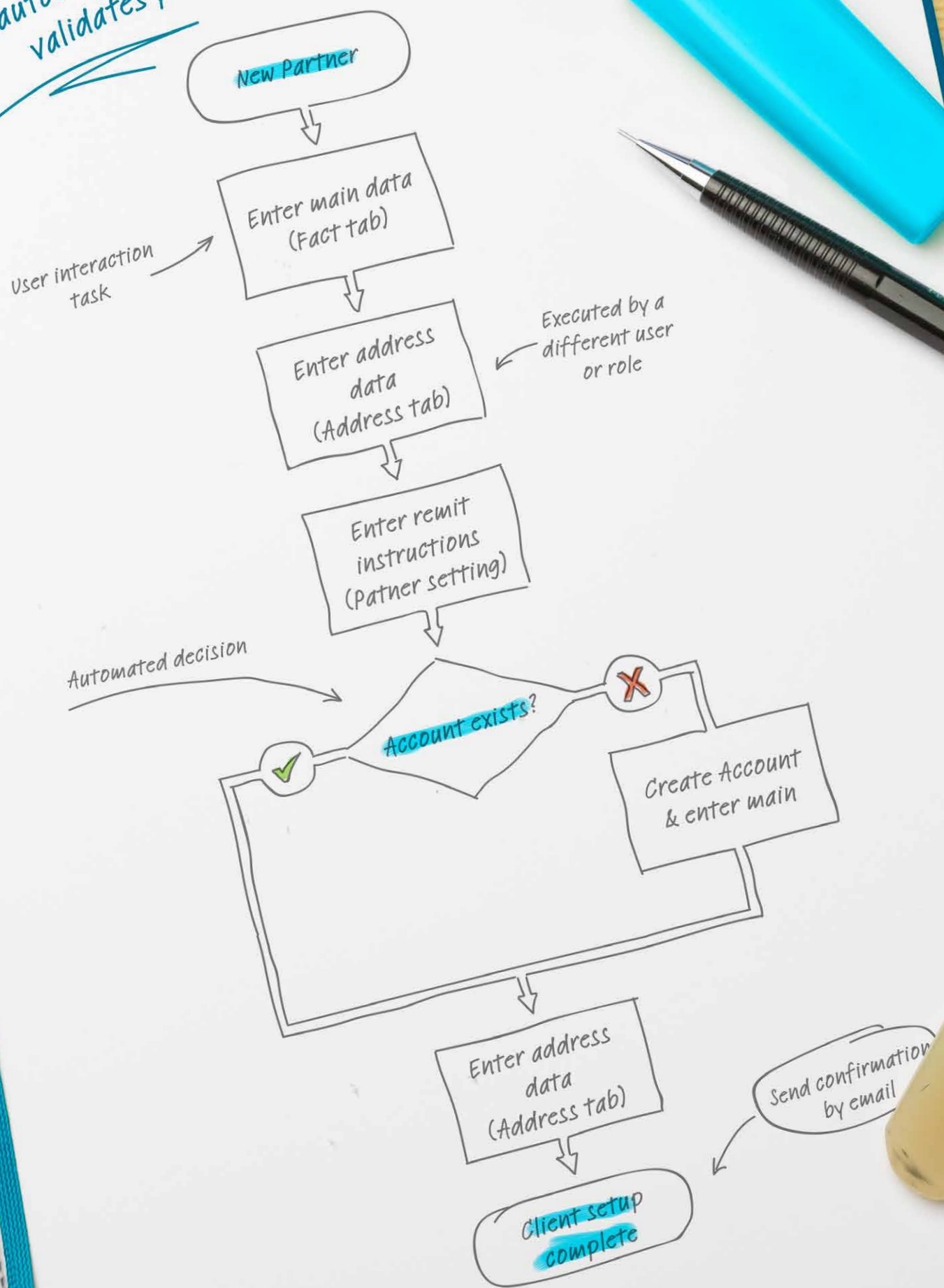


Adaptability: integrio's modular design enables standardised and customised process modules to be assembled.



Reporting and evaluations: The nature and cause of changes in the process and its components can be evaluated at any time.

integro automates and validates processes



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calculo smart fees management

Automate all your fee settlements on one platform. calculo manages, calculates, checks and settles all types of partner and product fees. It is user-friendly and efficient. calculo is available as a customer installation or as a hosted solution (Software as a Service).

arregulo the smart rules factory

arregulo is the framework that forms the basis of all our standard and custom software applications. arregulo includes all components required to quickly create a rule-based software solution that is easy to adapt to new requirements. This agility sets arregulo-powered solutions apart in the market.

