

# 500+ PROCESSES AND COUNTING...

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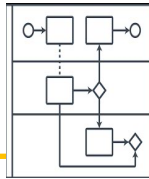
Managed workflow platform at Societe Generale

April 2020

# SG WORKFLOW

## Managed workflow platform at Societe Generale

### WORKFLOWS



600

Active workflows in Q1  
2x in 6 months

### TASKS



180k

Tasks completed in Q1  
10x in 6 months

### USERS



7500


Active users in Q1  
70x in 6 months

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**WHY?**

# WHAT DO I HAVE TO DO?




## Tasks

 **SG | Workflow**

Tasks ▾

Processes

Admin

 Sylvain Salvetti  
Sign out

My Tasks ▾

+ Launch Process

Quick Search

Name ▾

ELS SECONDARY

DEMO ELS SECONDARY FORMS IO (1bef11df-7f28-46f1-9b94-000000000000)  
[Sales] Input event economic data

FOREX QUOTE REQUEST

FOREX QUOTE REQUEST (80c5ed25-091d-48c0-ab59-000000000000)  
[CLIENT] Select the fund

Workflow


Created on 14 Nov 2019 11:16

1 Active Tasks

1 Completed Tasks

Task

[Sales] Input event economic data

Assigned:  sylvain.salvetti@sgcib.com Due: No Status: 

Assign

Claim

To Do

Comments

Attachments

ELS SECONDARY INCREASE/DECREASE

Event Economic Data

Elliot Deal Data

Secondary Type :  
MTM ▾

Full reset ?  
Full ▾

Way :  
Decrease ▾

Change :  
Nominal implied with spot price ▾

Quantity/ Nominal to operate :  
10000

Strike date :  
2019-11-14


Value date :  
2019-11-14

Your comment:

Client Comment:

Save form

Complete Task

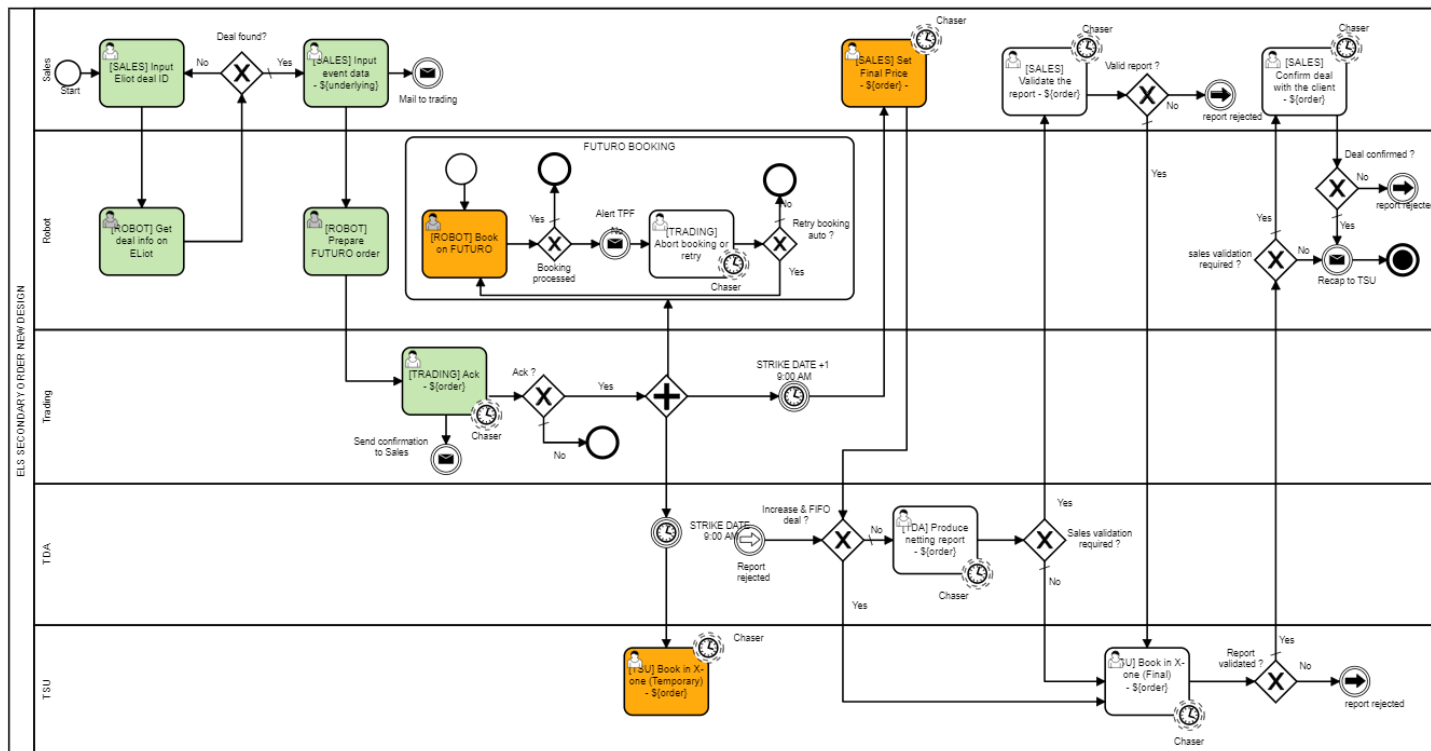
 Export as PDF ▾

**SG | MARKETS**  
Workflow

C0 PUBLIC | 4

# UNDERSTAND PRECISELY WHERE A PROCESS IS PENDING

## Process Diagram




### Tasks




- completed
- ongoing
- next

# AUDIT TRAIL

## Process Details

 SG | Workflow

TasksProcessesAdmin

 Sylvain Salvetti  
Sign out

← Back to Processes List

25 Tasks

 View Diagram

[SALES] CONFIRM DEAL WITH THE CLIENT - INCREASE QUANTITY BY 1940 ON VENNUE  
Unassigned  
In progress

[PROCESS INFO] INCREASE QUANTITY BY 1940 ON VENNUE  
Unassigned  
In progress

[ROBOT] NOTIFY SALES ON SYMPHONY  
ddd2ed05-6b1c-4494-b378-80130f22f231  
Completed 31 Jan 2020 11:00

[ROBOT] NOTIFY SALES ON SYMPHONY  
ddd2ed05-6b1c-4494-b378-80130f22f231  
Completed 31 Jan 2020 9:01

[ROBOT] NOTIFY SALES ON SYMPHONY  
ddd2ed05-6b1c-4494-b378-80130f22f231  
Completed 30 Jan 2020 17:00

[TSU] FOLLOW UP - INCREASE QUANTITY BY 1940 ON VENNUE - 2020-01-29  
victoria-margarita.sandoval-escalante@sgcib.com  
Completed 30 Jan 2020 15:08

[TRADING] ACK - INCREASE QUANTITY BY 1940 ON VENNUE

Export task as PDFCOMPLETED

ASSIGNEE: oussama.hassani@sgcib.com

CREATED AT: 29 Jan 2020 16:46

Deals to insert in FUTURO

Portfolio	Way Futuro Booking	Underlying Name	Value Asked	PV	Value to book	QTY/Nominal	Trade Date	Comment	Send to Futuro
TD_VENNUE	BUY	VENNUE	1940	1	1940	quantity	2020-01-29		<input checked="" type="checkbox"/>

Ack the following deal?  
☐ No ☒ Yes

Please add comment. (Write Ok if acked)  
Please add comment. (Write Ok if acked)

\*  
CCD Deal ID : 10147155

Deal ID  
1166646376



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**HOW?**



# LESSONS LEARNED

## User adoption is challenging

- Issue: Several workflow stacks
- Solution: My Tasks UI

- Issue: Integration with other systems (monolith vendor)
- Solution: API via OAuth delegation token, Process modeling Centers of Expertise

2018

2019

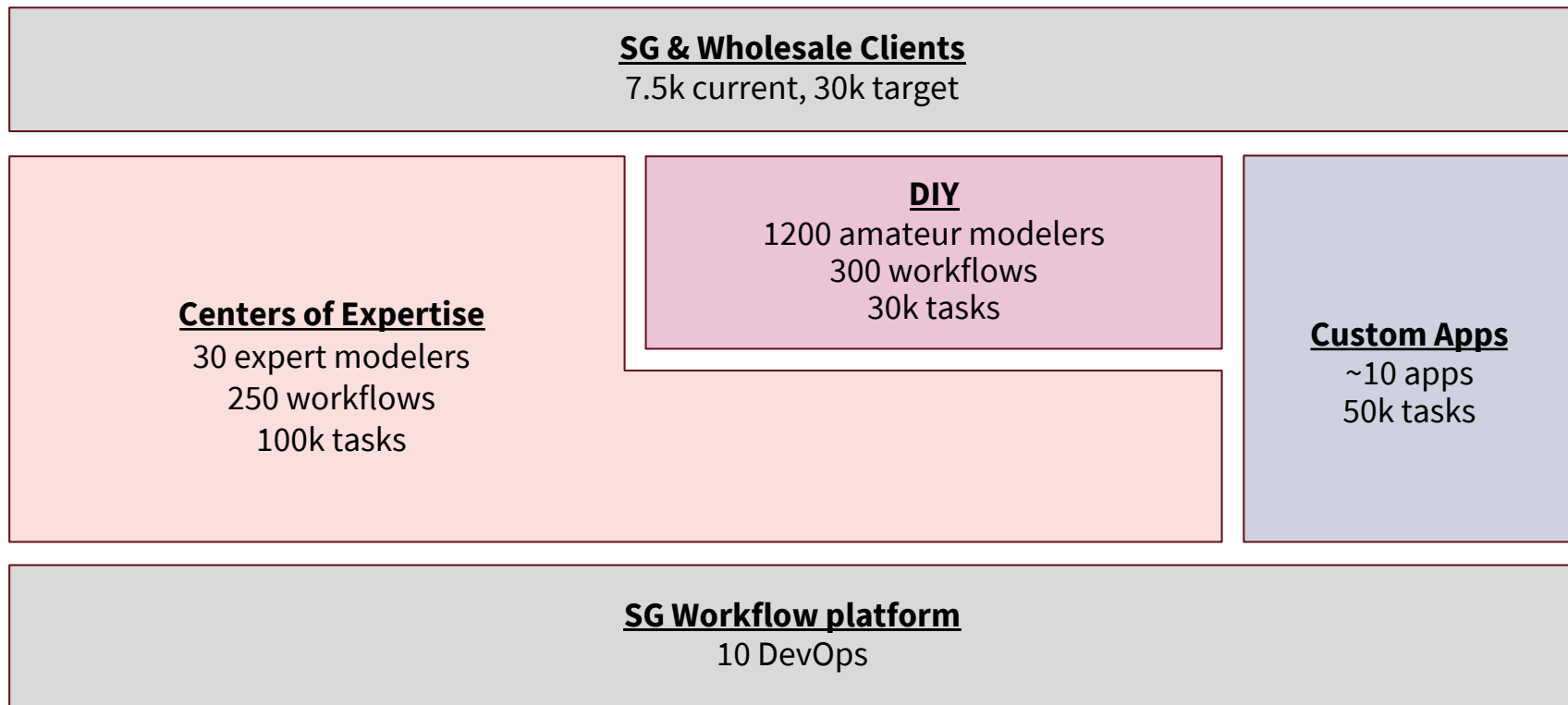
2020

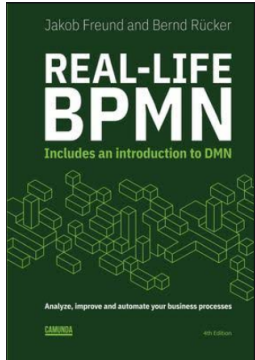
- Issue: Modeling by dev team doesn't scale (homegrown engine)
- Solution: DIY Process & Form modelers

- Issue: Difficult to convince large custom applications
- Solution: Web components, containerized multi-tenant engine

# 3 WAYS TO REACH END USERS

## Operating model





> Get started

▼ Beginner Guide

Administrators Pages

Good Practices and Tips

> Model a process

> Build a custom site

> Contribute

> Reference

> Resources

[SG Workflow](#) / Good Practices and Tips

## Good Practices and Tips

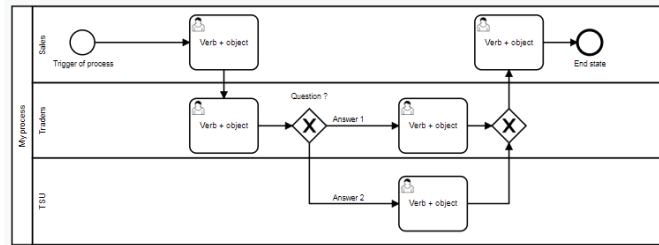
### Layout

#### 1. Use pools and lanes when possible to ensure readability.

This is extremely important to multi-participant workflow.

You should make sure to have a good reason not to do so. You should make sure to have a good reason not to do so.

Here is an example of multi-participant workflow using pools and lanes:



Good Practices and Tips

Layout

1. Use pools and lanes when possible to ensure readability.
2. Avoid crossing flows (spaghetti models)

Naming convention

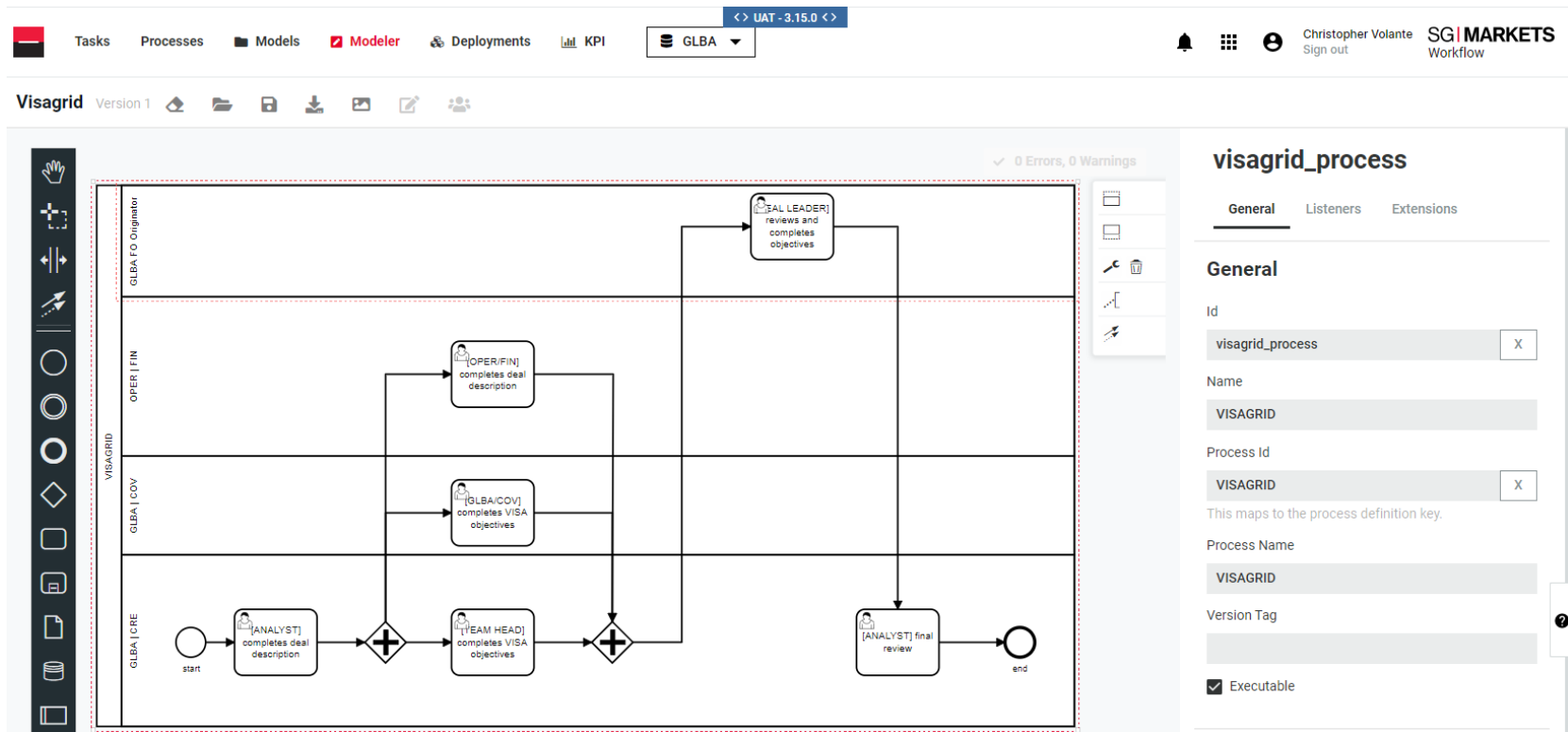
1. Models
2. Lanes
3. Tasks
4. Events
5. Gateways

Documentation

1. Process documentation
2. User tasks

# PROCESS MODELER

bpmn.io



# FORM EDITOR

form.io

Form editor: UserTask\_1bbwxq5 - [DEAL LEADER] reviews and completes objectives



Basic Components

- Text Field
- Number
- Password
- Text Area
- Checkbox
- Time
- Select Boxes
- Select
- Radio
- Content
- Button

Advanced

Layout

Data

SG Component

## GLBA-CBA VISA GRID

CORI-CBA VISA GRID objective: The Visa Grid is mandatory for all CORI-CBA transactions, for certification to management that (1) all procedures have been respected regarding the compliance of the legal documentation with credit approval, and (2) all the departments involved in the assessment of this deal are aware of the transaction and have no objections to the closing of this transaction.

CORI location or RMU

Client name

Transaction name

Expected signing date

yyyy-MM-dd hh:mm a

Relationship Manager Originator (Deal Leader)

FirstName

LastName

Email

- GLBA/CRE
- OPER/FIN
- GLBA/COV
- BANKER

### GLBA / CRE Team Head ensures that:

1. the credit terms mentioned in the credit application are consistent with the legal documentation

- Yes
- No

Comments

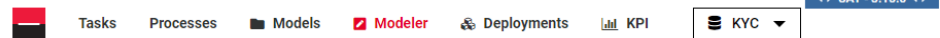
2. the legal documentation has been circulated to the departments involved in assessment of legal documents

Comments

Save

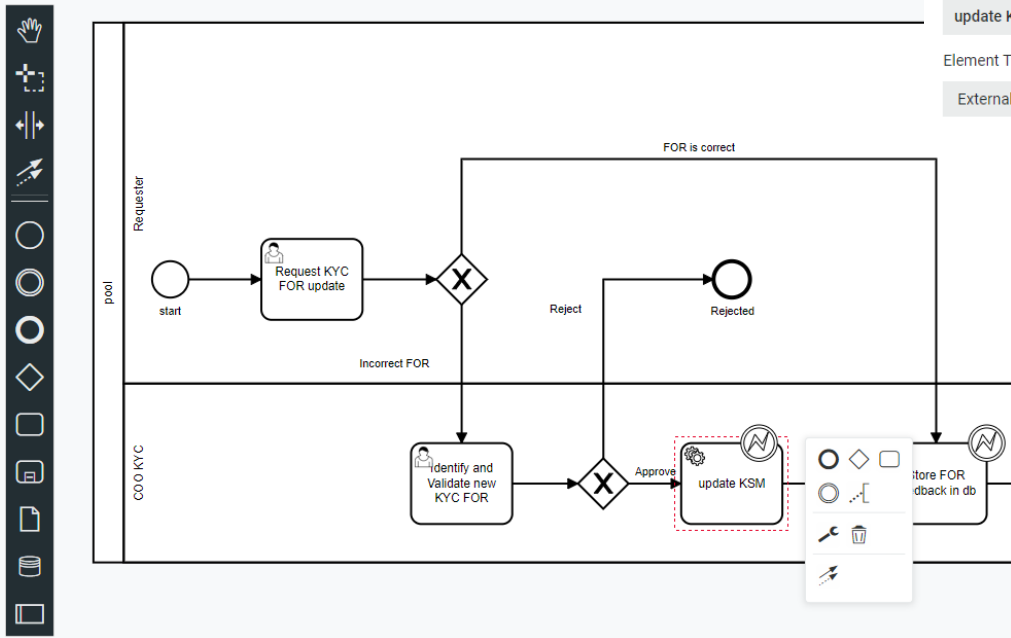
# API CALLS

## OAuth delegation token



Patch KYC Contact API delegation token

Version 18



## Task\_1ppxdy6

General Listeners Input/Output  
Field Injections Extensions

### General

Id

Task\_1ppxdy6

Name

update KSM

Element Template

External API Task

## Custom Fields

Implementation Type

\${externalAPI}

Config Identifier

SGWorkflow-KYC-DEV-Code

Endpoint

contacts

Method

PATCH

Result

updateKSMresult

Status

updateKSMstatus

Status Code

updateKSMstatusCode

Body (Script)

```
var contactPicker =  
execution.getVariable("SuggestedFOR").elements();  
var contactIdProperty =  
contactPicker.get(0).prop("id");  
var contactIdValue = contactIdProperty.value();  
var caselIdValue = execution.getVariable("caselId");  
var json = JSON.stringify({  
  "ecollectContactUpdateRequest": {  
    "caselId": caselIdValue,  
    "users": [  
      {  
        "profile": "FO_KYC_OWNER",  
        "sgmContactsId": contactIdValue  
      }  
    ]  
  }  
});  
json;
```

# WEB COMPONENTS

## React widgets

### SG Workflow – Tasks List – Card View

<https://developer.sgmarkets.com/products/widget/sg-workflow-tasks-list-card-view/v1/information>

Type Interaction	Assigned to Bruno URBINI	Client Fund industry insurances compliance	Subject Missing confirmation MS 14460400654065 40 4455404	From John SMITH	Reception date 07 Dec 2018 16:15	Due date 29 Mar 2020 16:15	Open →
<div>New</div> <div>Complaint</div> <div>Client ETF</div>							

Type Leave request	Assigned to Bruno URBINI	Team BSC/REF/DAT	Beneficiary Bianca CASTATOIRE	From 02 Mars 2020	To 05 Mars 2020	Due date 29 Mar 2020 16:15	Open →
<div>In progress</div>							

Type Interaction	Assigned to Bruno URBINI	Team BSC/REF/DAT	Beneficiary Bianca CASTATOIRE	ID 005483	Service IT Hosting (ZWF)	Environnement PROD	Due date 29 Mar 2020 16:15	Open →
<div>Suspended</div>								

Type Purchase request	Assigned to Bruno URBINI	Team BSC/REF/DAT	Beneficiary Bianca CASTATOIRE	ID 12345	Supplier Acme	Budget 123,456€	Due date 29 Mar 2020 16:15	Open →
<div>Suspended</div>								

Type ELS Secondary	Assigned to Bruno URBINI	Client Citadel	Team MARK/CTY/NRG	Task name Increase Quantity by 179 on SGIXESE	ID 123477	Reception date 07 Dec 2018 16:15	Due date 29 Mar 2020 16:15	Open →
<div>In progress</div>								

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**WHAT?**



# PRODUCT CARD

**SG Workflow makes it is easy to model and monitor your processes**

## 3 FEATURES

### SG Workflow – Process Engine

Camunda process engine orchestrating workflows including manual activities (tasks / cases) and system interactions (API calls)



### SG Workflow – UI

Web components connected to Process Engine and Aggregator



### SG Workflow – Aggregator

Grouping tasks and cases handled in various backends and applications



## ONE PRODUCT JOINTLY DEVELOPED BY WHOLESALE & CENTRAL FUNCTIONS

### Team

Product Owner  
Product Manager  
UX

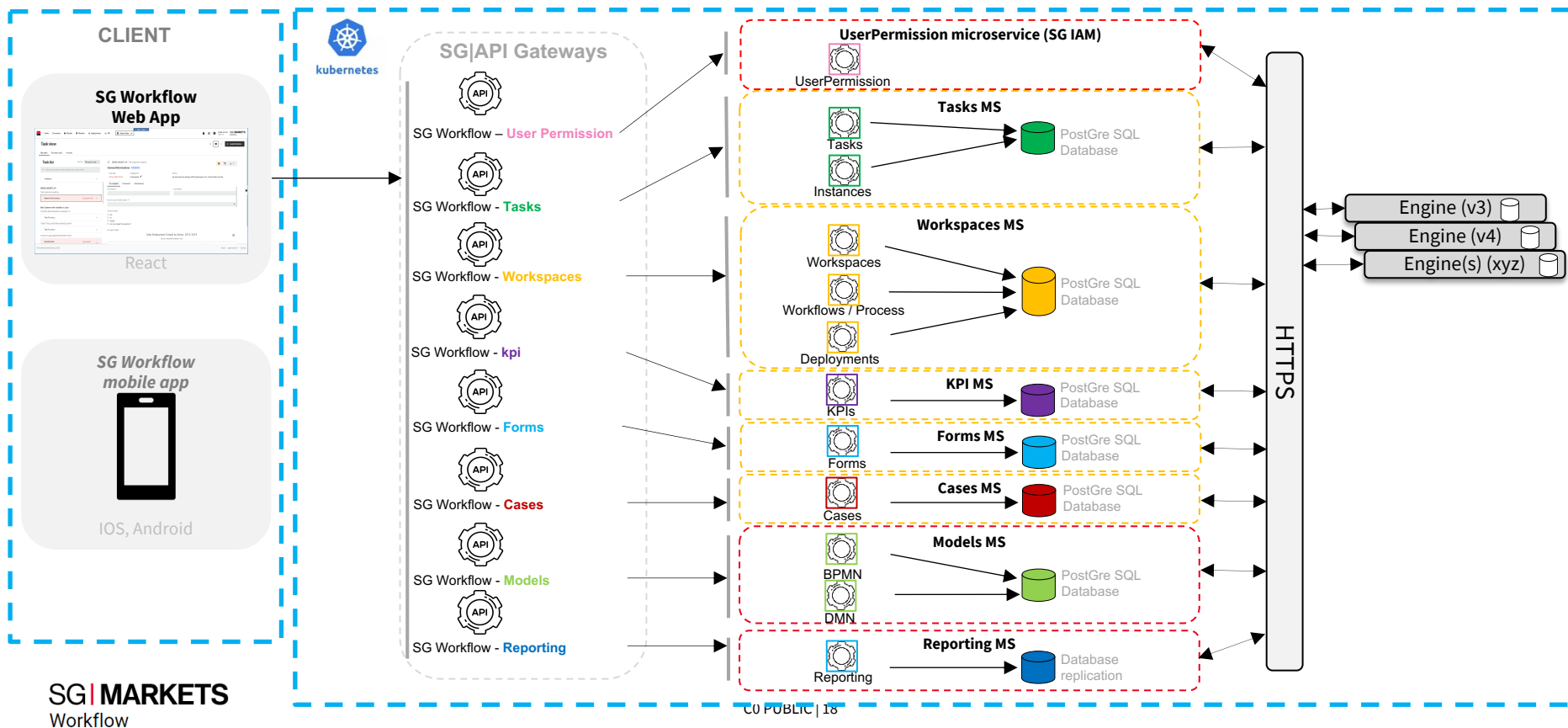
Simon LETORT  
Emilie AMORIM  
Caroline GANNE

Engine Lead  
Aggregator Lead

Olivier ALNET  
Aqib MUSHTAQ



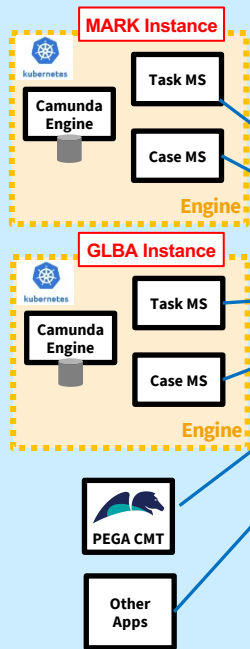
# ARCHITECTURE



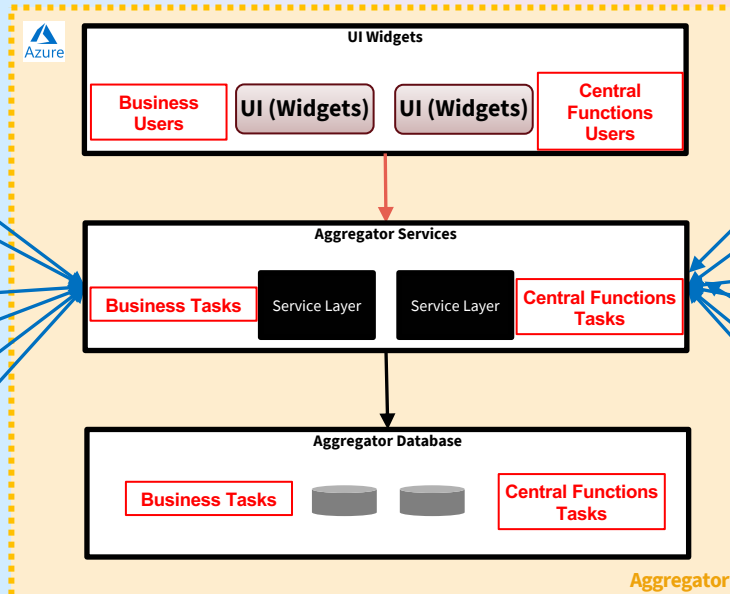
# YEAR END ROADMAP



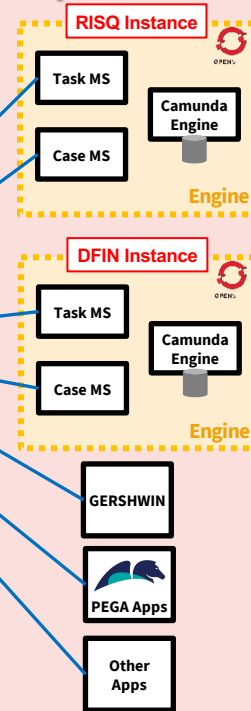
## Kube



## SG Azure subscription



## OpenShift



**THANK YOU FOR LISTENING**



# DISCLAIMER

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