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ELECTRONIC LOBBY MANAGER

CAPABILITY OVERVIEW

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Electronic Lobby Manager Operations (ELMO)

Overview

ELMO improves the overall user experience and efficiency of the branch visit process for financial institutions. It allows a user or a greeter to create a branch visit which immediately provides service representatives the users' information and reason for the visit. The self-service components of ELMO allow users to sign themselves in on their mobile device or at a kiosk located at the branch. This can significantly cut down wait times for customers and provides greater visibility into an institution's process.

The ELMO Core is a DNA application providing all the functionality necessary for lobby management. Configuration and management screens allow users to create and manage branches, visit queues, reasons and categories, and create financial products and services to associate with member visits. The visit screens display the visit queues for a branch and allow service representatives to create new visits and process existing visits. Reports are also provided, giving unique insight into metrics such as average visit times by branch, by queue, or by employee. The ELMO Core utilizes the DNA Core for all data persistence, backups, and disaster recovery.

The ELMO Self Service components provide a means for members to check themselves in at a branch using a touch screen Kiosk or the member's mobile device. This stream lines the process and reduces the need for a dedicated service representative to act as a greeter. Alternatively, a service representative can check in members using the ELMO Checkin iPad application.

ELMO Core

The ELMO core software provides all the capabilities to create and process member visits. It also includes capabilities to view reports, and tools for configuring and managing the application. It requires Fiserv DNA 4.2.2 or higher and Microsoft .NET Framework 4.5.2.

Application Configuration and Management

Various screens are provided within the DNAapp to allow configuration and management of the ELMO system. The system is highly configurable to suit the needs of any financial institution.

- Branch Management
 - Create, modify, and remove branches
 - Provide information such as branch name, number, and address
- Reason and Category Management
 - Create, modify, and remove reasons for visits (reasons are the products and services offered by the financial institution)
 - Create, modify, and remove categories for visits
 - Group reasons by category
- Queue Management
 - Create, modify, and remove visit queues
 - Create multiple queues per branch
 - Assign access roles to the queue
 - Assign one or more reasons that will be processed by each queue



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- User Group Management
 - Ability to customize user access by creating user groups and assigning users
 - Groups provide access control to menu items, branches, and queues
- Product Management
 - Create and edit the products and service categories (e.g. Personal Checking, Auto Loans) that are provided by the institution to track results of processing visits
- Configuration
 - Manage various configuration values; e.g. notification settings such as SMTP server address, sender email address, etc.
- Data Purge
 - Remove ELMO data older than a specified number of months from the current date
 - Data is retained indefinitely, until purged
- Auditing
 - All changes made through the administration tool are logged

Visit Processing

The visit processing screens of the ELMO DNAapp provide all the functionality to monitor and process visits through the entire workflow. This includes creating visits, processing them, and optionally transferring them to other representatives. The member information and reasons for the visits can be quickly accessed by the service representative ahead of an actual face-to-face meeting.

- Create Visits
 - Create new visits either by searching for and selecting existing member names or by manually entering non-member names
 - Associate one or more reasons for the visit
 - Optionally provide comments for the visit
- Process Existing Visits
 - Confirm scheduled visits created by ELMO self service
 - Acknowledge a visit to move it to an in-process status
 - Cancel visits
 - View visit history for a user
 - View visit details
 - Edit the reasons or comments of a visit
- Monitor Visits
 - View all visits currently being processed or all visits currently waiting
 - View all visits assigned to the authenticated user (completed visits and, at most, one in-process visit)
 - View visit details
 - View the relationship profile of a visit
 - Transfer a visit to another available representative
 - View a snapshot of all visit queues for each branch



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Reporting

ELMO's reporting features provide visibility into the overall process efficiency and effectiveness of a financial institution. Statistics are provided for average wait times, average processing times, and average visit times, all of which can be viewed by branch, by queue, or by employee.

- View statistics on visits, reasons, visitors, and employees
- Filter by date ranges, time intervals (e.g. daily), and branches
- View charts for total number of abandoned, canceled, and completed visits
- View charts for the average waiting and processing times for visits

Data Management

All data is persisted in extension tables of the DNA core platform. Backups and disaster recovery do not need be setup specifically for ELMO. In addition, the ELMO Core application provides an SQR DNAapp called ELMO Data Purge that provides a mechanism for deleting ELMO data that is older than a specified number of months from the current date.

ELMO Self Service Kiosk

ELMO Self Service Kiosk application provides an interactive touch screen interface for users to sign in when visiting a branch. This cuts down wait and service time by allowing the user to provide the reason for the visit and automating user information retrieval. In addition, this removes the need for a dedicated greeter to meet with members as they arrive.

Self-Sign in

Self-Sign in is a captive webpage accessed from touch enabled Kiosk hardware located in a branch. The hardware baseline is Windows 7 PC devices. For use of card swipe authentication, the devices require the addition of a USB connected card swipe.

- Multiple kiosks can be installed per branch
- Members can sign themselves in via the kiosk
- Sign in is accomplished via swiping a member card or by entering personal identification information (any swipe card reader device should work, but reader devices configured in HID mode are recommended)
- When signing in the member can select the reason for their visit from the list of pre-configured reasons. ELMO makes the selected reason code available to the service representatives to facilitate proper routing of the service request.

Application Configuration and Management

An administration tool is included with the ELMO Self Service components. The administration tool provides an interface for configuring the self-service server application.

- Log File Reader
 - Viewing of logs generated by ELMO Self Service component
 - Filter by log level, device, and member/customer



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- Configuration Management
 - Provides a way to configure various values of the ELMO Self-Service system (e.g. Client devices, email recipients for system alerts, institution type, and self-service version)
 - Configure logging
 - Configure email system for notifications
 - Administrator password management
- HMAC and Encryption Key Generation
 - HMAC keys are used for communication between the ELMO Service and the various client applications (e.g. ELMO Self Service Kiosk)
- License Key Management

ELMO Self Service Mobile

ELMO Self Service Mobile provides a way for members to use their mobile device to view availability for each branch and place a time sensitive check in request. This puts the member in the visit queue prior to their arrival. Their position in the queue is maintained if they arrive at the branch within the allotted time frame. This reduces member wait time.

Self-Sign In

Self-sign in is a website that supports mobile web page for cell phone based check in. The web site supports all IOS and Android devices (or whatever limits we have on versions). The self-sign in website resides on a separate server located in the network DMZ.

- Branch Selection
 - Provides distance to each available branch
 - Visibility into the number of members waiting in the branch queues
 - Branch information: address, hours of operation
 - Map and directions to branches
- Check in
 - Members can check in with member number and personal identification information or with first and last name with personal identification information
 - Member provides a visit category if more than one is configured and one more reasons with a comment describing the purpose of the visit
 - Members confirms their arrival by entering their confirmation code in the ELMO Self Service Kiosk
 - Member can select email or text for notifications
 - Visits expire after the drive time to the branch plus 20 minutes
 - Members are notified prior to visit cancelation (configurable time interval defaulted to 5 minutes before expiration)

Application Configuration and Management

ELMO self-service mobile provides an administration tool for configuring and managing server-side resources.

- Log File Reader
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ELMO Check-in (iPad)

ELMO Check-in is a native application that runs on iOS devices that allows service representatives a way to check in members manually via the same user interface available on the Self-Service Kiosk.

- Multiple iPads can be used per branch
- Service Representatives can sign in members via swiping a member card or by entering personal identification information (any swipe card reader device should work, but reader devices configured in HID mode are recommended)
- When signing the member in, the service representative can select the reason for their visit from a pre-configured list. ELMO makes the selected reason code available to the service representatives to facilitate proper routing of the service request.