



# *jha*Enterprise Workflow Marketplace

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## *jha*Enterprise Workflow Marketplace

The JHA Marketplace is a valuable resource in helping credit unions make the most of their investment in the *jha*Enterprise Workflow solution. Here credit unions will find over fifty pre-defined workflows, including documentation and installation instructions. As we build *jha*Enterprise Workflow (EWF) workflows for our clients, we also continue to standardize and add these workflows to the JHA Marketplace for the benefit of all.

The Marketplace offers workflows that were created for credit unions as well as general workflows that were not created with a specific core in mind. As a result, these workflows have a variety of applications, and can often be implemented with some minor changes to the systems with which they are being integrated, and minor adjustments made based on business processes. The result? Clients can realize efficiency gains in a fraction of the time it would take to build a workflow from start to finish.

Below is a summary of some of the popular workflows available in the Marketplace. In our estimation, each of these workflows could be customized for any credit union with less than 10 hours effort, with some exceptions, depending on credit union requirements. We encourage credit unions to deploy some of these workflows as part of their initial *jha*Enterprise Workflow Deployment or as Phase 2 deliverables.

The list included in this document is not all-inclusive; clients using and considering EWF should look through the JHA Marketplace for the workflows available, and remember to check back regularly as we're constantly adding new workflows to the Marketplace.

To access the JHA Marketplace and get additional detail on any of these workflows, login to the JHA Marketplace [here](#), and select the product "*jha*Enterprise Workflow" from the product selection dropdown in the upper right hand corner.

## Popular workflows created for Episys®

Skill Level	Workflow Name	Description
Basic	Accounts Payable Process (CU)	This workflow will assist the Back Office Accounting staff in tracking the approval process of vendor invoices.
Intermediate	Address Change (SymXchange)	This workflow will aid the Front Line Staff when a customer requests an address change.
Intermediate	Affidavit of Cash Dispute	This workflow will streamline the Affidavit of Cash Dispute process for the Risk Oversight Department.
Intermediate	Affidavit of Forgery	This workflow will streamline the process for the Risk Department and passing information to the Operations Support Department, if a check return needs to be processed.
Intermediate	Build New Loan Product V2	This workflow will aid the IT staff when a new product loan needs to be created.
Basic	Corporate Credit Card	This workflow will complete the process of requesting a corporate credit card for an employee.
Basic	Garnishments (CU)	This workflow will assist in the process flow for a Garnishment.
Basic	Levy (CU)	This workflow will assist in the process flow for a Levy.
Basic	Subpoena	This workflow will streamline the activities for Legal and Operations Support for processing a Subpoena.
Intermediate	Title Perfected Date	This workflow will start when a Perfected Title is filed into Synergy™.

## Popular general workflows

Skill Level	Workflow Name	Description
Basic	Workflow Start On Recurring Schedule	This workflow will automate the process of starting another workflow(s) on a schedule or specific day of the week.
Intermediate	File Image to Synergy	This workflow automates the filing of an image into the Synergy Document Management™ system and attaches the image to the current flow.
Basic	Advance Date	Workflow process that will find the next valid business day.
Basic	Send Notification	There are times when an email needs to be sent on a calculated date, this process is designed to be launched from another (parent) workflow process.

## Popular workflows customized for Episys®

Skill Level	Workflow Name	Description
Intermediate	Death Certificate	This workflow creates a death certificate once the death certificate document is scanned into Synergy.
Intermediate	Closing Account	This workflow will aid in collecting data to close an account and automates the core updates needed to complete the account closing.
Intermediate	Returned Mail V2	This workflow is used to facilitate address changes required due to returned customer mail.
Advanced	Loan File Maintenance	This workflow definition integrates with Synergy and the JHA core system to maintain the loan account.
Intermediate	Debit Card Travel	This workflow is used to facilitate travel dates and remarks on an EFT debit card.
Intermediate	Debit Card-Temporary Limit Change	This workflow will aid the card services staff when a customer requests a temporary limit change for their debit card.
Intermediate	Stop Payment - ACH	This workflow is used to place a stop payment on an ACH in Core.
Intermediate	New Check Order	This workflow will aid front line staff when a customer submits a request to order checks for the first time.
Basic	Automatic Funds Transfer	This workflow is designed to allow a customer to setup a recurring transfer between accounts.
Intermediate	Mobile Wallet Activation	This workflow will aid the front line staff when a customer submits a request for Mobile Wallet activation.