
DASHBOARD USER GUIDE

illion Decisioning

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OVERVIEW

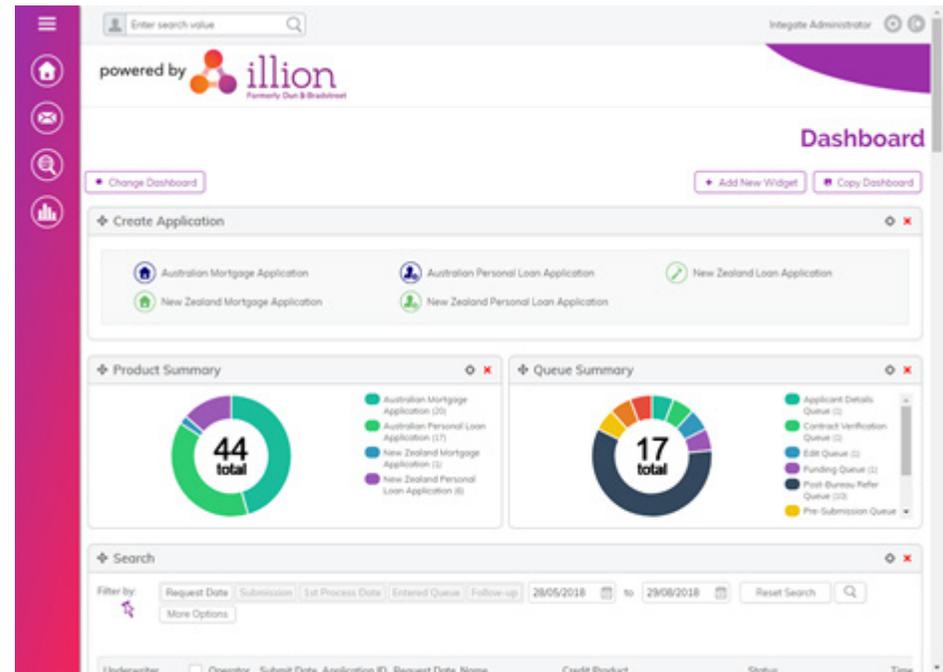
illion Decisioning is the automated credit decisioning and loan origination product from illion Software Solutions. illion Decisioning is extremely versatile and offers multiple configurations and customisation options to fully meet the needs of small and large businesses alike.

The new and improved Dashboard is the initial landing page for the front end screens of illion Decisioning. This modern, mobile-friendly home page enables a bespoke outlook on your credit applications.

Improved navigation and searching ensures efficiency when managing applications, and intelligent visualisation widgets enable informed decision making.

LAYOUT

The layout of the dashboard is broken into three sections.



Sidebar

The left-hand sidebar is used for quick and seamless navigation throughout illion Decisioning.

Header

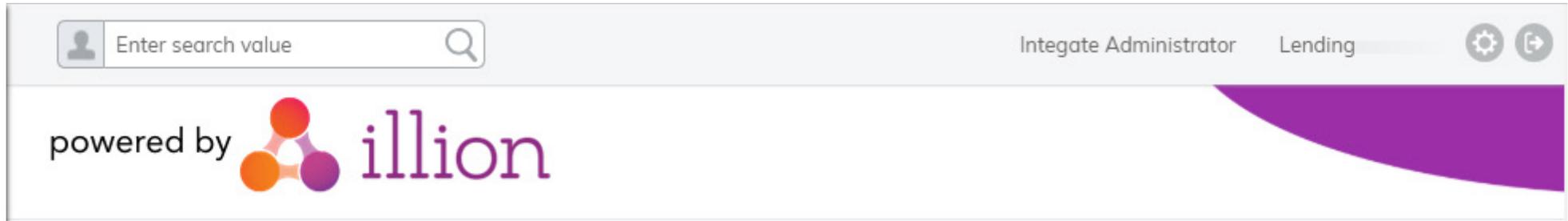
The header contains the easy-access search bar as well as the administration menu and logout button.

Widgets

The body of the page is determined by the selection and arrangement of widgets.

HEADER

The header sits at the top of the page and provides access to the administration menu and search bar.



SEARCH BAR

The search bar allows for quick searching of applications submitted to illion Decisioning, without having to enter the filter details manually.

Searches can be performed against varied application data by entering the value in the text field and selecting the magnifying glass 'search' icon.

Searching by application ID

When an application ID has been entered, the dashboard will search for an application with an ID exactly matching the input. If an application is found, it will automatically direct the user to the data entry screens of that application.

Searching by application data

When free text has been entered into the search field, the dashboard will attempt to find matching applications. Depending on the format of the input, the search bar will search applications by name (individual and company), identification values, ABN and ACN, and other characteristics.

ADMINISTRATION MENU

The gear icon in the right-hand side of the header provides access to the administration menu.

The administration menu provides users with access to the all administration menus, including Company, Merchant, Operator and Product configuration.

The administration menu also provides access to the Help page.

Help Page

The Help Page contains Frequently Asked Questions about illion Decisioning.

LOGOUT

The exit icon in the right-hand side of the header will log the user out of their current session.

SIDEBAR

The illion Decisioning sidebar provides access to the most commonly accessed modules of the illion Decisioning platform.

Access to each specific module is controlled through the privilege configuration of the company and operator. For more information about privileges, or the modules referred to in the sidebar, contact the illion Software Solutions Product Team.

disproductteam@dnb.com.au

Expand Icon

The 'hamburger' icon expands and retracts the sidebar. Expanding the sidebar shows a description in text alongside each icon.

Home Icon

The house 'Home' icon directs the user to the Dashboard.

Contact Us Icon

The envelope 'Contact Us' icon directs the user to the Contact Us Page.

Fraud Manager Icon

The magnifying glass 'Fraud Manager' icon directs the user to the Fraud Manager module.

Reporting Icon

The bar graph 'Reporting' icon directs the user to the Reporting module.



DASHBOARD CONTENT

The content of the dashboard is driven by the configuration of widgets. The arrangement and configuration of widgets collectively form the definition of the dashboard, which can be stored and shared with other users.

Changes made to the contents of dashboards are stored automatically; copying a dashboard allows for favoured configurations to be preserved for later reference.

COPYING DASHBOARDS

Copying dashboards stores a copy of the widget arrangement and configuration to the system under a custom dashboard name. Copying a dashboard can be achieved by selecting the 'Copy Dashboard' button in the top right of the dashboard content.

CHANGING DASHBOARDS

The 'Change Dashboard' button allows users to retrieve and view copied dashboards. On selection, the 'Change Dashboard' popup will be displayed, allowing the user to choose from a selection of copied dashboards.

Removing Dashboards

Copied dashboards can be removed by selecting the 'Remove Dashboard' button from the 'Change Dashboard' popup.

SHARED DASHBOARDS

Shared dashboards are shared with all users for a company. Through shared dashboards, useful dashboards can be across multiple users without requiring individual configuration. Shared Dashboards can be created by selecting the 'Shared Dashboard' button when copying the dashboard.

WIDGETS

The content of the dashboard is driven by the configuration of widgets. Each widget provides a unique piece of functionality, whether it is functional—such as the Application & Customer Search widget—or informational—such as the Alerts Activity and Alert Variations widgets.

Widget Privileges

Access to each widget is controlled through widget privileges. Widget privileges are controlled through the standard privilege security settings.

Create Application

- Australian Mortgage Application
- New Zealand Mortgage Application
- Australian Personal Loan Application
- New Zealand Personal Loan Application
- New Zealand Loan Application

Product Summary

69 total

- Australian Mortgage Application (19)
- Australian Personal Loan Application (21)
- New Zealand Personal Loan Application (29)

Queue Summary

17 total

- Applicant Details Queue (3)
- Application Verification Queue (1)
- Edit Queue (1)
- Funding Queue (1)
- Post-Bureau Refer Queue (2)
- Pre-Bureau Refer

Search

Filter by: Request Date | Submission | 1st Process Date | Entered Queue | Follow-up

28/02/2018 to 1/06/2018

Submit Date	Application ID	Request Date	Name	Credit Product	Status	Time In Queue	Queue
19/04/2018 02:27 PM	11A1CCB4C2	30/05/2018 01:34 PM	Sparks, Bob	New Zealand Personal Loan Application	Withdraw		
19/04/2018 02:31 PM	11A1CCC2D6	30/05/2018 01:31 PM	Sparks, Robert	New Zealand Personal Loan Application	Withdraw		
2/03/2017 01:22 PM	1187FBED1	30/05/2018 10:38 AM	Person, Test	Australian Personal Loan Application	Withdraw		
16/10/2017 10:54 AM	119628C4F3	29/05/2018 02:25 PM	T'est, Test	Australian Mortgage Application	Approved	35d 2h 26m	Funding Queue
12/04/2018 01:39 PM	11A15BF893	29/05/2018 02:09 PM	Procter, Bruce	New Zealand Personal Loan Application	Refer	48d 21h 1m	Post-Bureau Refer Queue
16/05/2018 08:01 AM	11A3670B8D	29/05/2018 02:08 PM	Kennedy, Ruth	Australian Personal Loan Application	Fail	1d 21h 45m	Quote Queue
23/04/2018 01:14 PM	11A20BA121	26/05/2018 11:22 AM	Test, Test	Australian Mortgage Application	Withdraw		
24/05/2018 11:22 AM	11A3E9F7DA	24/05/2018 11:33 AM	Test, Tim	Australian Personal Loan Application	Incomplete	7d 0h 21m	Pre-Submission Queue
8/05/2018 09:39 AM	11A2E87A8E	23/05/2018 02:49 PM	Citizen, John	Australian Personal Loan Application	Incomplete	7d 21h 4m	Applicant Details Queue
19/04/2018 03:52 PM	11A1CDF448	19/05/2018 03:53 PM	Sparks, Robert	New Zealand Personal Loan Application	Withdraw		

Next Page

Applications for all credit products

Status Summary

69 total

Widgets

Adding Widgets

Widgets can be added to the dashboard by selecting the 'Add New Widget' button in the top-right of the dashboard.



A list of widgets to which the user has access will be displayed in the resulting 'Add New Widget' popup.

Configuring Widgets

All widgets can be configured by selecting the 'gear' icon in the top-right of each widget.



Selecting the gear icon will display the settings popup for the widget. Each different type of widget has different settings, however there are two settings that are common to all.

Widget Heading

Determines the heading of each widget, displayed in the top row.

Widget Width

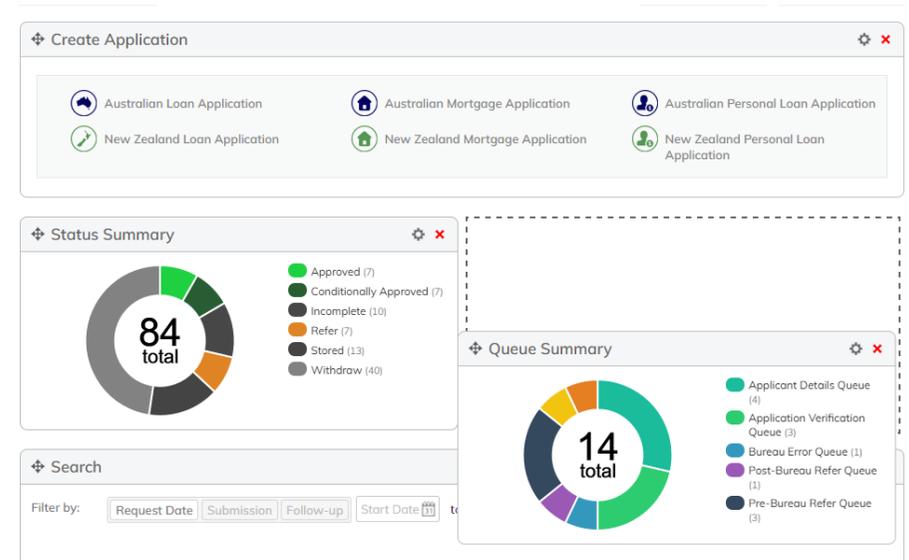
Defines how wide the widget should display on the dashboard. Each widget can be either a quarter, half, three-quarters or the full width of the dashboard.

Widgets that are less than the full width can sit on the same row as other widgets.

Arranging Widgets

Widgets can be arranged by selecting the 'move' icon in the top left of each widget and dragging it into the desired location.

Each available location is illustrated by a dashed box.



Removing Widgets

All widgets can be removed from the current dashboard by selecting the 'gear' icon in the top-right of each widget.



APPLICATION & CUSTOMER SEARCH WIDGET

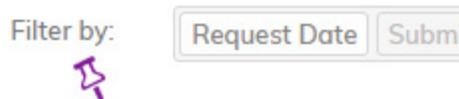
The 'Application & Customer Search' widget is the key functionality of the Dashboard. This widget is multi-functional, allowing users to:

- View submitted applications.
- Search for applications by a number of different parameters.
- Assign and unassign underwriters to applications.

FILTERS AND SEARCH

The filters and search allow for the entries in the table to be reduced to a specific subset of applications.

Filters are cleared when leaving the dashboard by default. Filters can be kept by "pinning" them using the drawing pin icon.



When "pinned", all filters will be kept when leaving the page, and included in any saved dashboard configurations. However, further changes to the filters *after* the selection was pinned will not be preserved.

Standard Filters

The control initially displays a simple date filter that can be used to quickly display applications that have been actioned in the given date range.



The list of applications can be filtered by a number of different date options, as outlined below.

Request Date

The 'Request Date' is the last time the application was modified. This could be a submit, action, save, or any other event that causes an application to store to the database.

Submission Date

The 'Submission' date is the first time an application is stored to the illion Decisioning database. This could be due to a submit or save event.

1st Process Date

The '1st Process Date' is the first time an application is submitted to the workflow for processing. This is typically a 'submit' event. The '1st Process Date' will only be present for applications that have been submitted for processing at least once.

Entered Queue Date

The 'Entered Queue' date is the date a queued application entered the current queue. The 'Entered Queue' date will only be present for applications that are queued.

Follow Up

The 'Follow Up' date can be specified on an application to indicate when it should be reviewed by a user. The 'Follow Up' date will only be present for applications where a follow-up date has been set.

Applications & Customer Search Widget

More Options Filters

Selecting the 'More Options' button displays additional filters that can be used to further filter the list of applications.



Filter by: Request Date | Submission | 1st Process Date | Entered Queue | Follow-up | 28/02/2018 to 1/06/2018 | Reset Search | More Options

Application ID | External Reference

Status | Queue

Credit Product | Select Merchants

Advanced Search

Application ID

Filtering using the Application ID option will display the application with an application ID that exactly matches the input.

External Reference

Filtering using the External Reference option will display applications with an external reference that exactly matches the input.

Status

Filtering using the status filter will restrict the widget to displaying applications with a status from the specified list of statuses.

Queue

Filtering using the queue filter will restrict the widget to displaying applications which are in the specified list of queues.

The 'View Queue Details' privilege controls the visibility of the queue field and column in the widget.

Credit Product

Filtering using the credit product filter will restrict the widget to displaying applications submitted in one of the specified list of credit products.

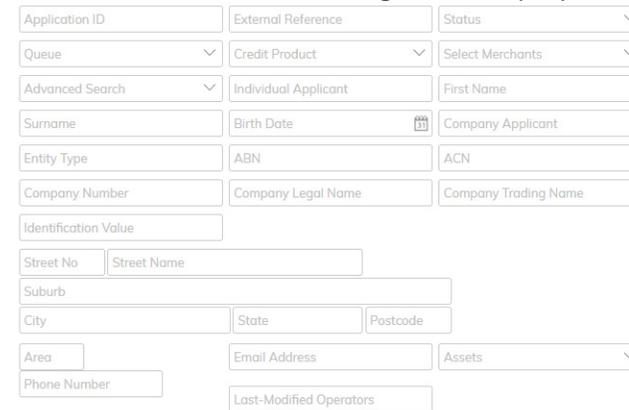
Merchants

Filtering using the merchant filter will restrict the widget to displaying applications submitted using one of the specified list of merchants.

Advanced Search Filters

The Advanced Search option allows for further filtering parameters to be displayed and used.

Selecting a filter from the 'Advanced Search' dropdown causes the field or fields used filtering to be displayed.



Application ID | External Reference | Status

Queue | Credit Product | Select Merchants

Advanced Search | Individual Applicant | First Name

Surname | Birth Date | Company Applicant

Entity Type | ABN | ACN

Company Number | Company Legal Name | Company Trading Name

Identification Value

Street No | Street Name

Suburb

City | State | Postcode

Area | Email Address | Assets

Phone Number | Last-Modified Operators

Applicant Type

Filtering using the applicant type filter will restrict the widget to displaying applications containing an 'individual' applicant with an applicant type exactly matching the input.

First Name

Filtering using the first name filter will restrict the widget to displaying applications containing an applicant whose first name exactly matches the input.

Surname

Filtering using the surname filter will restrict the widget to displaying applications containing an applicant whose surname exactly matches the input.

Birth Date

Filtering using the birth date filter will restrict the widget to displaying applications containing an applicant with a date of birth exactly

Applications & Customer Search Widget

matching the provided date.

Company Applicant

Filtering using the company applicant filter will restrict the widget to displaying applications containing a company applicant with an applicant type exactly matching the input.

Entity Type

Filtering using the entity type filter will restrict the widget to displaying applications containing a company applicant whose entity type exactly matches the input.

ABN

Filtering using the ABN filter will restrict the widget to displaying applications containing a company applicant with an Australian Business Number (ABN) exactly matching the input.

ACN

Filtering with the ACN filter will restrict the widget to displaying applications containing a company applicant with an Australian Company Number (ACN) exactly matching the input.

Company Number

Filtering with the Company Number filter will restrict the widget to displaying applications containing a company applicant with a New Zealand Company Number exactly matching the input.

Company Legal Name

Filtering with the Company Legal Name filter will restrict the widget to displaying applications containing a company applicant with a legal name exactly matching the input

Company Trading Name

Filtering with the Company Trading Name filter will restrict the widget to displaying applications containing a company applicant with a trading name exactly matching the input.

Identification Value

Filtering with the Identification Value filter will restrict the widget to displaying applications containing an applicant with a form of identification with an identification number exactly matching the input.

Address

Filtering with the Address filter will restrict the widget to displaying applications containing an address in which the address details exactly match corresponding address fields in the input.

Partial address can also be used: for example only providing a Street Name will restrict the widget to displaying applications with an address with a street name exactly matching the input.

Phone Number

Filtering with the Phone Number filter will restrict the widget to displaying applications containing a phone number which exactly matches the input.

Email Address

Filtering with the Email Address filter will restrict the widget to displaying applications containing an email address which exactly matches the input.

Assets

Filtering with the Assets filter will restrict the widget to displaying applications with the specified asset types being held as collateral against a loan product. This filter relies on the configuration of Asset Types within illion Decisioning.

Last Modified Operator

Filtering with the Last Modified Operator will restrict the widget to displaying applications that were last modified by the selected operator(s).

Applications & Customer Search Widget

SUBMITTED APPLICATIONS TABLE

The table of submitted applications lists applications that meet the filter criteria.

<input type="checkbox"/>	Application ID	Request Date	Name	Credit Product	
<input type="checkbox"/>	1187FBBED1	8/05/2017 12:31 PM	Smith, John	Australian Personal Loan Application	
<input type="checkbox"/>	118A26C8ED	7/05/2017 07:53 AM	Sample, Sanjay	New Zealand Mortgage Application	
<input type="checkbox"/>	118BDDABBF	3/05/2017 04:03 PM	Chen, Roger	Australian Loan Application	 
<input type="checkbox"/>	1185DD1D37	3/05/2017 08:48 AM	Hussein, Omar	Australian Mortgage Application	
<input type="checkbox"/>	118A580BE1	3/05/2017 08:19 AM	Jones, Tasmania	New Zealand Loan Application	

The columns of the table and the columns displayed are fully customisable through the widget configuration. The columns can be sorted by selecting the column label. When sorting custom fields, applications which do not contain a value for that field are excluded.

Select Box

The check box used to select applications to assign to underwriters.

Application ID

The application ID. The application ID is also a link to open the application from the dashboard.

Channel

The channel used to submit the application, in text.

Contact Merchant

The merchant of the operator that initially created the application.

Contact Operator

The operator ID of the operator that initially created the application.

Country

The country assigned to the credit product of the application.

Credit Product

The credit product of the application.

Custom Fields (ID)

An individual column configured in the custom features node of the application XML

Custom Fields (all)

A set of columns that have been configured in the custom features node of the application XML.

Edit Link

A link to edit the application.

Escalation Flag

An escalation flag image, in the colour specified in the Follow-up configuration in the flow. For more information, refer to the Designer User Guide.

Flow

The Flow ID of the flow used to process the application.

Follow-Up Date

The date on which the application should be followed-up. For more information about Follow-Up configuration, refer to the Designer User Guide.

Merchant

The name of the merchant under which the application was submitted.

Applications & Customer Search Widget

Merchant ID

The ID of the merchant under which the application was submitted.

Name	Credit Product
Alpha, Annie	 Australian Loan Application
Bravo, Billy	New Zealand Personal Loan Application
Charlie, Charlie	 New Zealand Loan Application
Delta, Ravesh	 Australian Personal Loan Application
Echo, Kees	 New Zealand Mortgage Application
Foxtrot, Ursula	 Australian Loan Application 
Golf, Freida	 Australian Mortgage Application
Hotel, Hilton	 New Zealand Loan Application

Name

The first and last name or the legal name of the principal application.

Notes

A true/false flag indicating whether there are notes on the application.

Operator

The operator ID of the operator that last actioned the application.

Queue

The name of the queue in which the application currently sits.

Queue Colour

The colour assigned to the queue in which the application currently sits. For more information about queue colour configuration, refer to the Designer User Guide.

Reference

The external reference number of the application.

Request Date

The time and date the application was last actioned.

Status

The status of the current application, in text.

Status Image

The image associated with the status of the current application.

Submit Date

The time and date the application was submitted to the flow.

Time In Queue

The length of time that the application has been sitting in its current queue.

Underwriter

The ID of the operator that is currently assigned as the underwriter of the application.

Applications & Customer Search Widget

Underwriter Image

A silhouette icon used to indicate whether an application is assigned an underwriter.

The screenshot shows a configuration interface for the widget. On the left, there is a vertical list of available columns: Contact Merchant, Contact Operator, Country, Credit Product, Custom Columns, Edit Link, Escalation Flag, Flow, Follow-up Date, Merchant ID, Merchant, Notes, Operator, and Queue. On the right, there is a list of selected columns, each with a red 'X' icon to its right: Queue Colour, Select Box, Application ID, Request Date, Name, Status Image, and Channel.

CONFIGURATION OPTIONS

The Alert Activity and Alert Variations Widget offer the following settings in addition to the standard 'Widget Heading' and 'Widget Width' settings.

Default Display

Determines whether the configuration of columns on this widget should be used on other pages that implement a search feature, such as the search results page or the bulk actions page.

Automatic Refresh

Determines the frequency with which the widget should reload the results of the search.

Search Results

Determines the number of search results to display in the widget.

Columns

The drag-and-drop boxes determine the columns that are displayed and the order (from left to right) in which they are ordered.

COMMON LINKS WIDGET

The Common Links widget allows users to define a set of external and internal links. These links can be used to speed navigation through the illion Decisioning system, or provide links to other websites used to support the credit decisioning process.

CONFIGURATION OPTIONS

The following settings are available in addition to the standard 'Widget Heading' and 'Widget Width' settings.

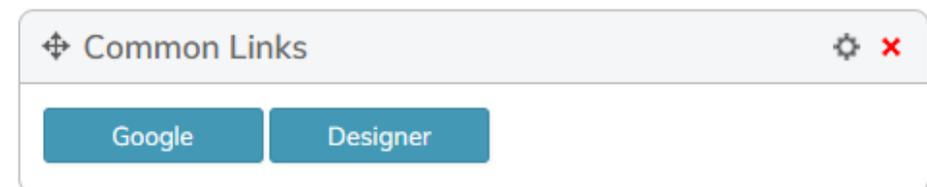
Links

Defines the button text and URL of the link button.

When the link is external, the URL should be prepended with either 'http://' or 'https://'.

When an internal link, the full URL of the page following '/Integate/' in the URL should be inserted.

[.inteflow.com.au/Integate/WorkflowEditor?WFID=705d39cf-fc47-403f-92db-03ce2f08ba38&upid=636300217428930000567903791](http://inteflow.com.au/Integate/WorkflowEditor?WFID=705d39cf-fc47-403f-92db-03ce2f08ba38&upid=636300217428930000567903791)



CREATE APPLICATION WIDGET

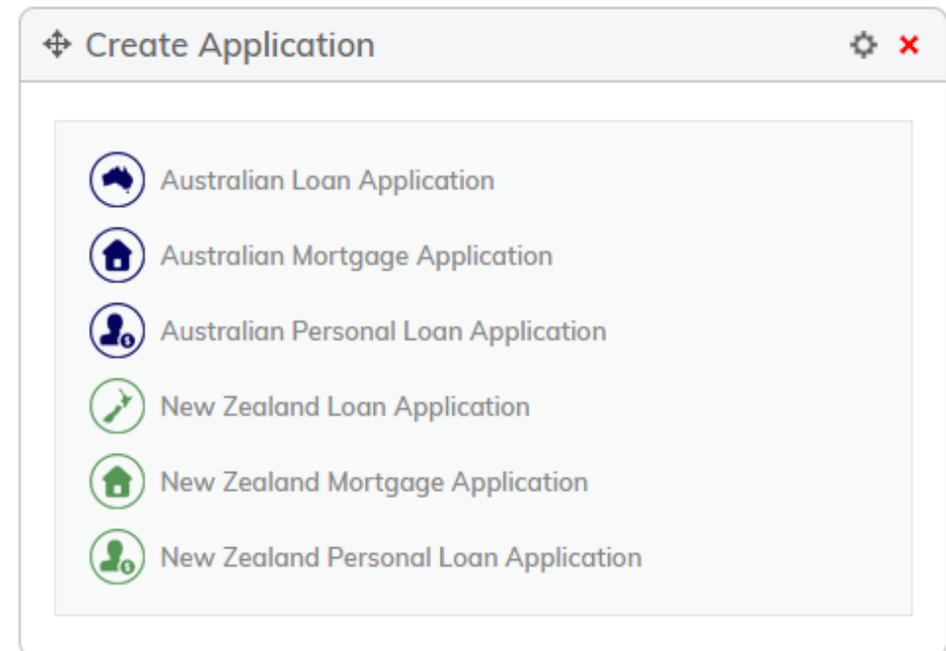
The Create Application widget provides users access to begin applications.

The widget will display a list of credit products to which the operator has access.

The list of credit products will be displayed in alphabetical order alongside the configured product icon (if any).

CONFIGURATION OPTIONS

The only settings available for the create application widget are the standard 'Widget Heading' and 'Widget Width' settings.



ALERT ACTIVITY & VARIATION WIDGETS

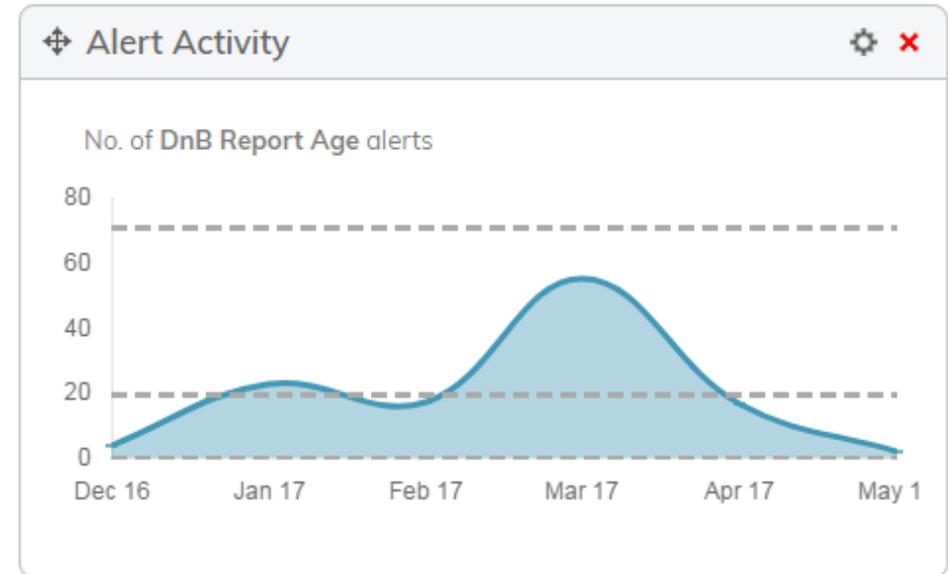
The Alert Activity & Alert Variation widgets form an Individual-x / Moving Range chart.

The Individual-x/Moving Range charts allow for a clear picture of the performance of credit policies over a period of time by considering variations in the number of alerts being triggered by applicants over a period of time.

The widget will calculate the moving average to render control lines on the graph, which represent the upper and lower "control limits". A "stable" process—that is not being affected by external factors—would not exceed these control limits, and values falling outside these limits are indicators of external influences; either to the quality or quantity of applicants, or the logic used to trigger an alert.

Alert Activity Widget

The Alert Activity Widget displays the raw number of alerts being triggered in the period of time specified against a moving average.



The number of times each alert was triggered is plotted on the x-axis of the graph. The grey dashed lines indicate the control limits.

Upper Control Limit

The upper control limit indicates two standard deviations above the mean (or expected) number of alert triggers.

Centre Line

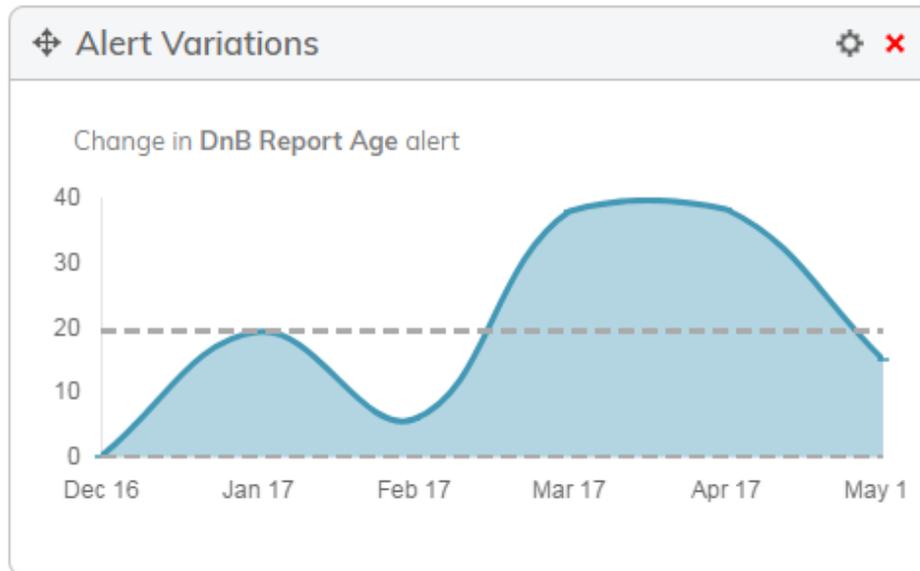
The centre line indicates the mean number of alerts triggered.

Lower Control Limit

The lower control limit indicates two standard deviations below the mean number of alert triggers. Where this value is below zero, the limit will be rendered at zero.

Alert Variations Widget

The Alert Variations Widget displays the variance in the number of times an alert was triggered between date ranges.



The absolute value of the difference between the number of alerts triggered between the date ranges is plotted on the x-axis of the graph. The grey dotted lines indicate the control limits.

Upper control limit

The upper control limit indicates the upper limit of the moving range using an anti-biasing constant of 2.

Centre Line

The centre line indicates the arithmetic mean of the alert variances.

CONFIGURATION OPTIONS

The Alert Activity and Alert Variations Widget offer the following settings in addition to the standard 'Widget Heading' and 'Widget Width' settings.

Date Range

Restricts the widget to displaying applications submitted in the time period specified.

Credit Product

Restricts the widget to displaying applications submitted under the credit products specified.

Result Count

Restricts the number of alerts that are displayed to the user in the widget. The 'Top 5' setting will display the five most commonly triggered alerts; the 'Bottom 5' setting will display the five least-commonly triggered alerts.

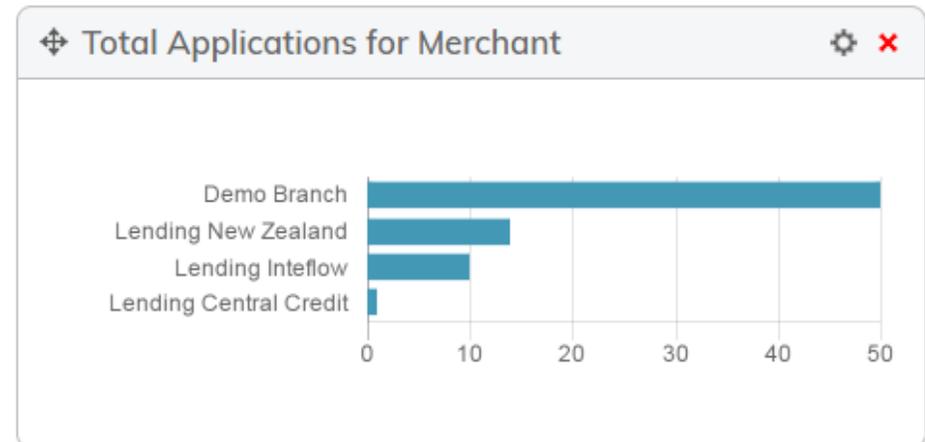
APPLICATIONS FOR MERCHANT WIDGET

The Applications for Merchant widget provides users with a graphical summary of the applications that have been submitted for each merchant.

The widget will display only merchants to which the operator has access.

CONFIGURATION OPTIONS

The following settings are available in addition to the standard 'Widget Heading' and 'Widget Width' settings.



Date Range

Restricts the widget to displaying applications submitted or requested in the time period specified.

Filter By

Determines whether the Date Range should be considered using the Submit Date of the application or the Request Date of the application.

Merchant by no. apps

Determines the order and number of the merchants displayed. The 'Top 5' selection will display the five merchants with the most applications in descending order; the 'Bottom 5' selection will display the five merchants with the least applications in ascending order.

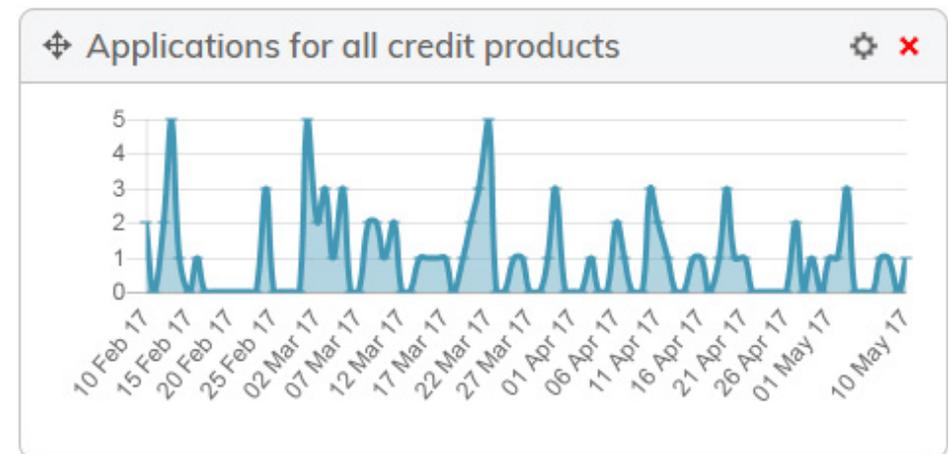
APPLICATIONS FOR PRODUCT WIDGET

The Applications for Product widget provides users with a graphical summary of the applications that have been submitted for each credit product.

The widget will display only merchants to which the operator has access.

CONFIGURATION OPTIONS

The following settings are available in addition to the standard 'Widget Heading' and 'Widget Width' settings.



Date Range

Restricts the widget to displaying applications submitted or requested in the time period specified.

Filter By

Determines whether the Date Range should be considered using the Submit Date of the application or the Request Date of the application.

Credit Products

Restricts the widget to displaying only applications submitted under the specified credit products.

AUTO DECISION & VARIATIONS WIDGETS

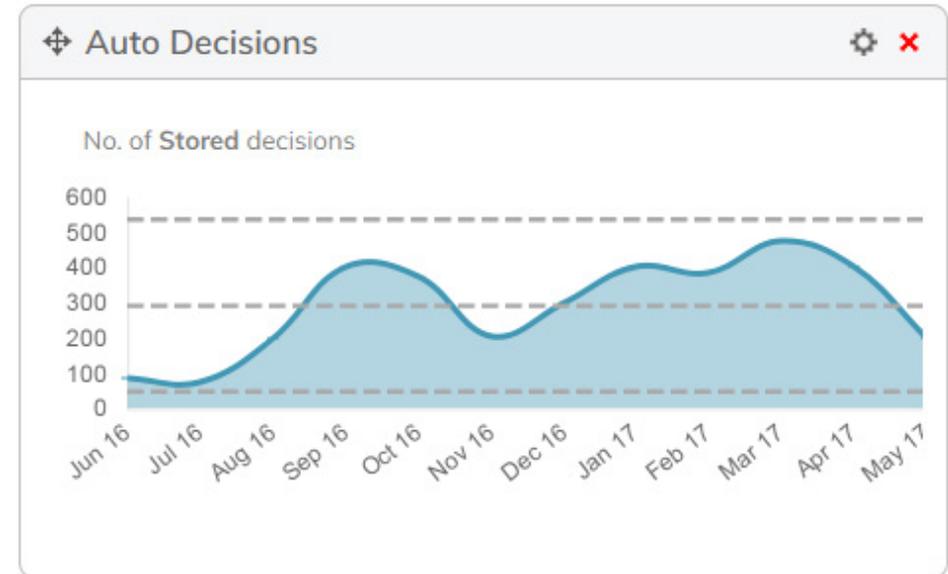
The Auto Decision & Auto Decision Variations widgets form an Individual-x / Moving Range chart.

The Individual-x/Moving Range charts allow for a clear picture of the performance of credit policies over a period of time by considering variations in the number of applications being automatically assigned a decision over a period of time.

The widget will calculate the moving average to render control lines on the graph, which represent the upper and lower "control limits". A "stable" process—that is not being affected by external factors—would not exceed these control limits, and values falling outside these limits are indicators of external influences; either to the quality or quantity of applicants, or the logic used to trigger an alert.

Auto Decision Widget

The Auto Decision Widget displays the raw number of applications being assigned a given decision automatically by the flow.



The number of times an application was assigned a decision is plotted on the x-axis of the graph. The grey dashed lines indicate the control limits.

Upper Control Limit

The upper control limit indicates two standard deviations above the mean (or expected) number of auto decisions.

Centre Line

The centre line indicates the mean number of decisions assigned.

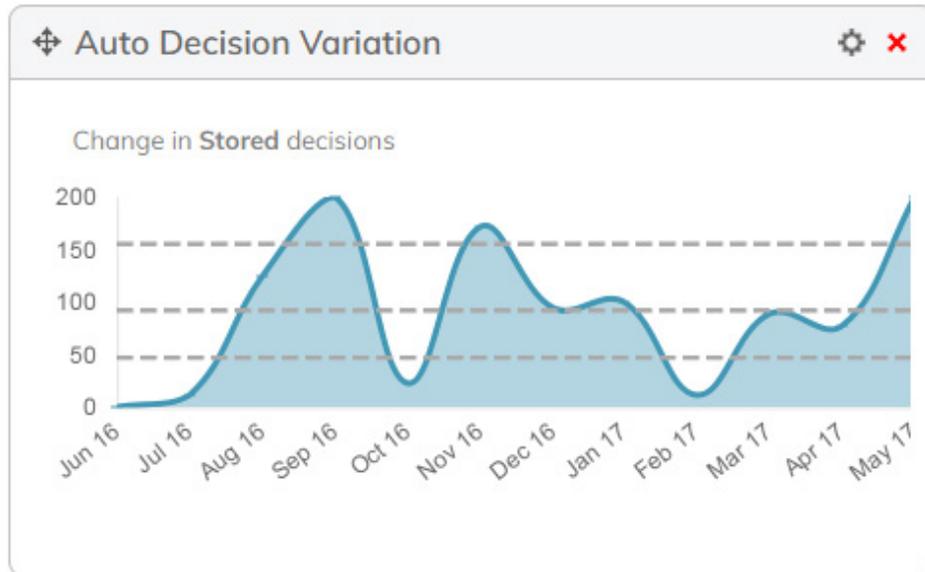
Lower Control Limit

The lower control limit indicates two standard deviations below the mean number of auto decisions. Where this value is below zero, the limit

Auto Decision & Variations Widgets
will be rendered at zero.

Auto Decision Variations Widget

The Auto Decision Variations Widget displays the variance in the number of applications assigned a credit decision between date ranges.



The absolute value of the difference between decisions assigned between the date ranges is plotted on the x-axis of the graph. The grey dotted lines indicate the control limits.

Upper control limit

The upper control limit indicates the upper limit of the moving range using an anti-biasing constant of 2.

Centre Line

The centre line indicates the arithmetic mean of the auto decisions.

CONFIGURATION OPTIONS

The Auto Decisions and Auto Decision Variations Widget offer the following settings in addition to the standard 'Widget Heading' and 'Widget Width' settings.

Date Range

Restricts the widget to displaying applications submitted in the time period specified.

Credit Product

Restricts the widget to displaying applications submitted under the credit products specified.

Result Count

Restricts the number of applications assigned a decision that are displayed to the user in the widget. The 'Top 5' setting will display the five most commonly assigned decisions; the 'Bottom 5' setting will display the five least-commonly assigned decisions.

MERCHANT APPROVAL RATES WIDGET

The Merchant Approval Rates widget provides users with a graphical summary of the percentage of applications processed by a merchant have been approved. The amount approved can be compared to a threshold 'target' percentage as well.

The widget will display only merchants to which the operator has access.

CONFIGURATION OPTIONS

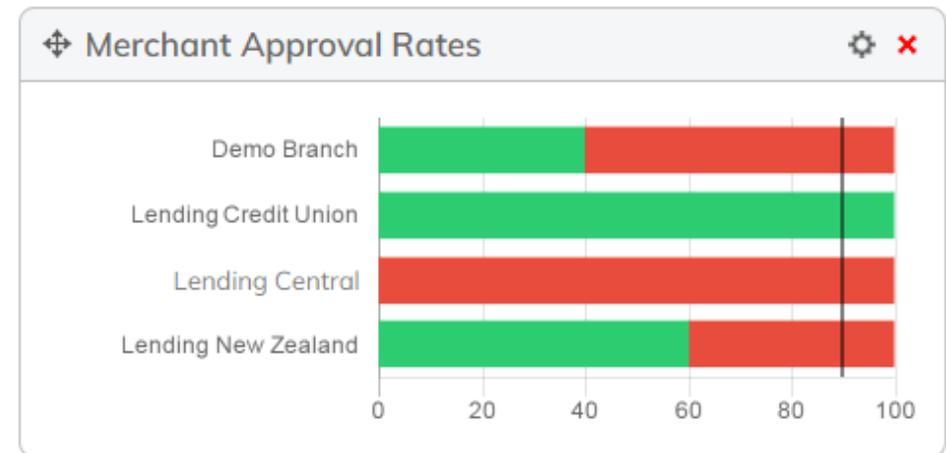
The following settings are available in addition to the standard 'Widget Heading' and 'Widget Width' settings.

Date Range

Restricts the widget to displaying applications submitted or requested in the time period specified.

Display Order

Determines the order of the merchants in the list. When 'Lowest count first' is selected, the merchant with the least number of applications is displayed first; when 'Highest count first' is selected, the merchant with the most number of applications is displayed first.



Cutoff Percent

Determines the position of the threshold 'cutoff percentage' line.

Approved Status List

Determines which application statuses should be considered an "approved" status. Applications with a status in this list will be used to calculate the amount of approved applications.

Declined Status List

Determines which application statuses should be considered an "declined" status. Applications with a status in this list will be used to calculate the amount of declined applications.

UNDERWRITER SUMMARY WIDGET

The Underwriter Application Summary widget provides users with a graphical summary of the amount of applications that are currently assigned to each underwriter, using the colour of each queue to further categorise the underwriter's workload.

CONFIGURATION OPTIONS

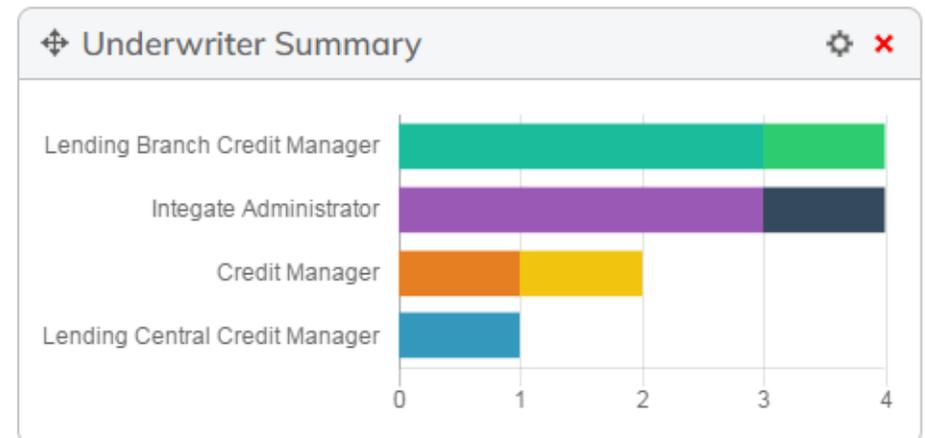
The following settings are available in addition to the standard 'Widget Heading' and 'Widget Width' settings.

Date Range

Restricts the widget to displaying applications submitted or requested in the time period specified.

Display Order

Determines the order of the underwriters. When 'Highest count first' is selected, underwriters are displayed in descending order of number of assigned applications. When 'Lowest count first' is selected, underwriters are displayed in ascending order.



PRODUCT SUMMARY WIDGET

The Product Summary widget provides users with a graphical summary of the amount of applications submitted for each credit product as a doughnut chart.

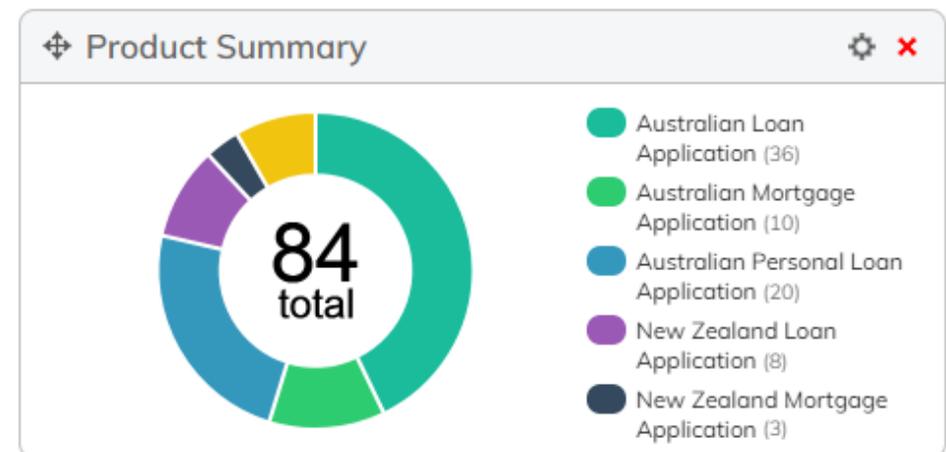
The widget will display only credit products to which the operator has access.

CONFIGURATION OPTIONS

The following settings are available in addition to the standard 'Widget Heading' and 'Widget Width' settings.

Date Range

Restricts the widget to displaying applications submitted or requested in the time period specified.



QUEUE SUMMARY WIDGET

The Queue Summary widget provides users with a graphical summary of the amount of applications sitting in each queue as a doughnut chart.

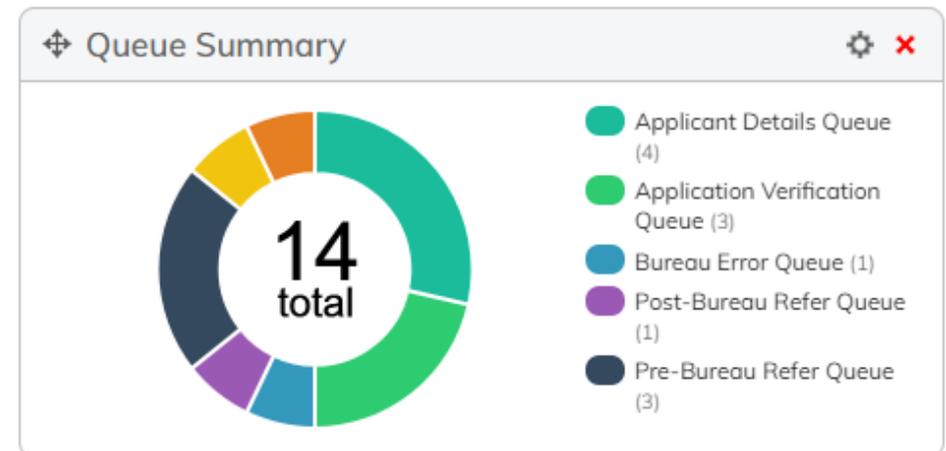
The widget will display only applications to which the operator has access.

CONFIGURATION OPTIONS

The following settings are available in addition to the standard 'Widget Heading' and 'Widget Width' settings.

Date Range

Restricts the widget to displaying applications submitted or requested in the time period specified.



STATUS SUMMARY WIDGET

The Status Summary widget provides users with a graphical summary of the status of applications sitting in each queue as a doughnut chart.

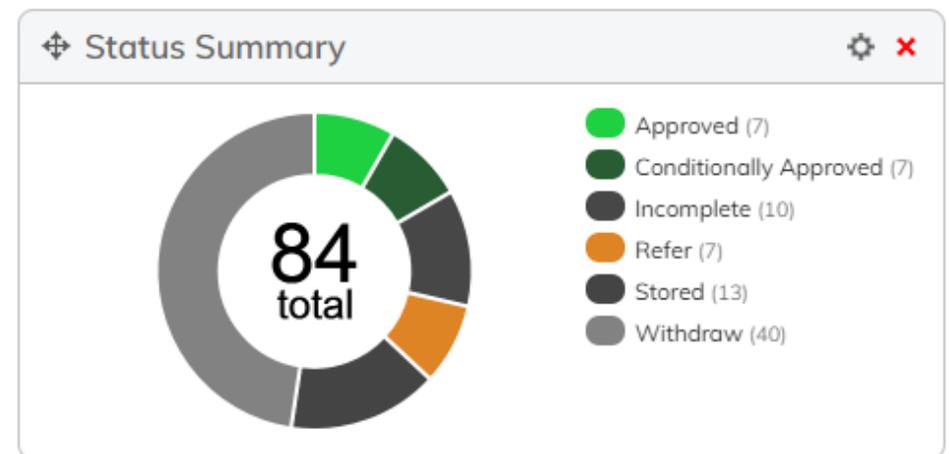
The widget will display only applications to which the operator has access.

CONFIGURATION OPTIONS

The following settings are available in addition to the standard 'Widget Heading' and 'Widget Width' settings.

Date Range

Restricts the widget to displaying applications submitted or requested in the time period specified.



APPENDIX A: DOCUMENT HISTORY

This document is maintained by the illion Software Solutions Product Team:
softwaresolutions@illion.com.au

Version History

DATE	DESCRIPTION	NAME	ALIGNED TO INTEFLOW/ILLION DECISIONING VERSION	DOCUMENT VERSION
12 May 17	Initial Document	M CHASE	5.0.0.12	1.0
29 May 17	Footer Fix Patches 13-18 Updates: <ul style="list-style-type: none"> N/A 	M CHASE	5.0.0.18	1.1
14 Jul 17	Patch 19&20 Updates: <ul style="list-style-type: none"> PDR-2075 	M CHASE	5.0.0.20	1.2
30 Aug 17	Patches 21-27 Updates: <ul style="list-style-type: none"> PDR-2689 	M CHASE	5.0.0.27	1.3
22 Sep 17	Patch 28 & 29 Updates: <ul style="list-style-type: none"> PDR-2740 	M CHASE	5.0.0.29	1.4
6 Dec 17	Patch 29-51 Updates: <ul style="list-style-type: none"> PDR-2853 	M CHASE	5.0.0.51	1.5
15 Dec 17	Patch 52, 53 & 54 Updates: <ul style="list-style-type: none"> PDR-2718 PDR-2922 	M CHASE	5.0.0.54	1.6
4 May 18	Replaced Decision Intellect with illion Pty Ltd	F MAHER	-	2.0

Appendices | Document History

DATE	DESCRIPTION	NAME	ALIGNED TO INTEFLOW/ILLION DECISIONING VERSION	DOCUMENT VERSION
31 May 18	Patch 29 Update <ul style="list-style-type: none"> • PDR-3570 Up to date	F MAHER	5.0.1.29 5.0.1.59	2.1
28 Aug 18	Updated Help page description, product team email address and illion based screenshots.	F MAHER	5.0.1.59	2.2
28 Feb 19	Rebranding – replaced Inteflow with illion Decisioning	F MAHER	-	2.3