

Introducing Origo's Flexible Integration Toolkit (FIT)

You're only limited
by imagination...



What is the Flexible Integration Toolkit?

The Flexible Integration Toolkit (FIT) enables you to improve your 'speed to market' and your Straight-Through Processing (STP) by reducing development and operating costs, with integrated plug and play solutions.

In a nutshell, FIT is a group of adaptable Origo Standards designed to be used across various business processes over and over again. FIT enables you to use the various elements that make up the Origo Standard independently, giving you the essential building blocks you need to build entirely new messaging solutions that suit you and your various trading partners' processes and technologies.

This ability to use and reuse individual elements of FIT enables a smooth, uninterrupted flow of information in an industry accepted framework that you can mould to the unique business processes of your organisation.



What makes it different?

You're still getting the same high quality and robust specifications you expect with Origo Standards, only now with the introduction of FIT, you have even more flexibility. The ability to use specific selective elements enables your business to build messaging functions quickly, flexibly and efficiently, providing your clients with an improved, seamless online service.

Limited only
by imagination,
discover how the
FIT Standard can
work in practice...

FIT in practice

The array of different systems that an adviser can encounter as part of their normal business processes, means that the same data is required over and over again, and with each system application the data begins to accumulate.

For example: an initial Fact Find is added to an Adviser's Back Office System for record keeping, this same data can then be taken through a number of steps on the way to being part of a new business application. Once the application is accepted this same data would then be used to drive a Portfolio Analysis Tool which would allow you to produce a Quote for your client. The client would then review it and, once they're happy, you can then

submit the new business for processing. At each stage data is reused and accumulates. FIT enables this electronic transition of data, in a standard format, supporting the user's end-to-end journey across system boundaries which reduces rekeying and errors all the while saving you and your client's time.

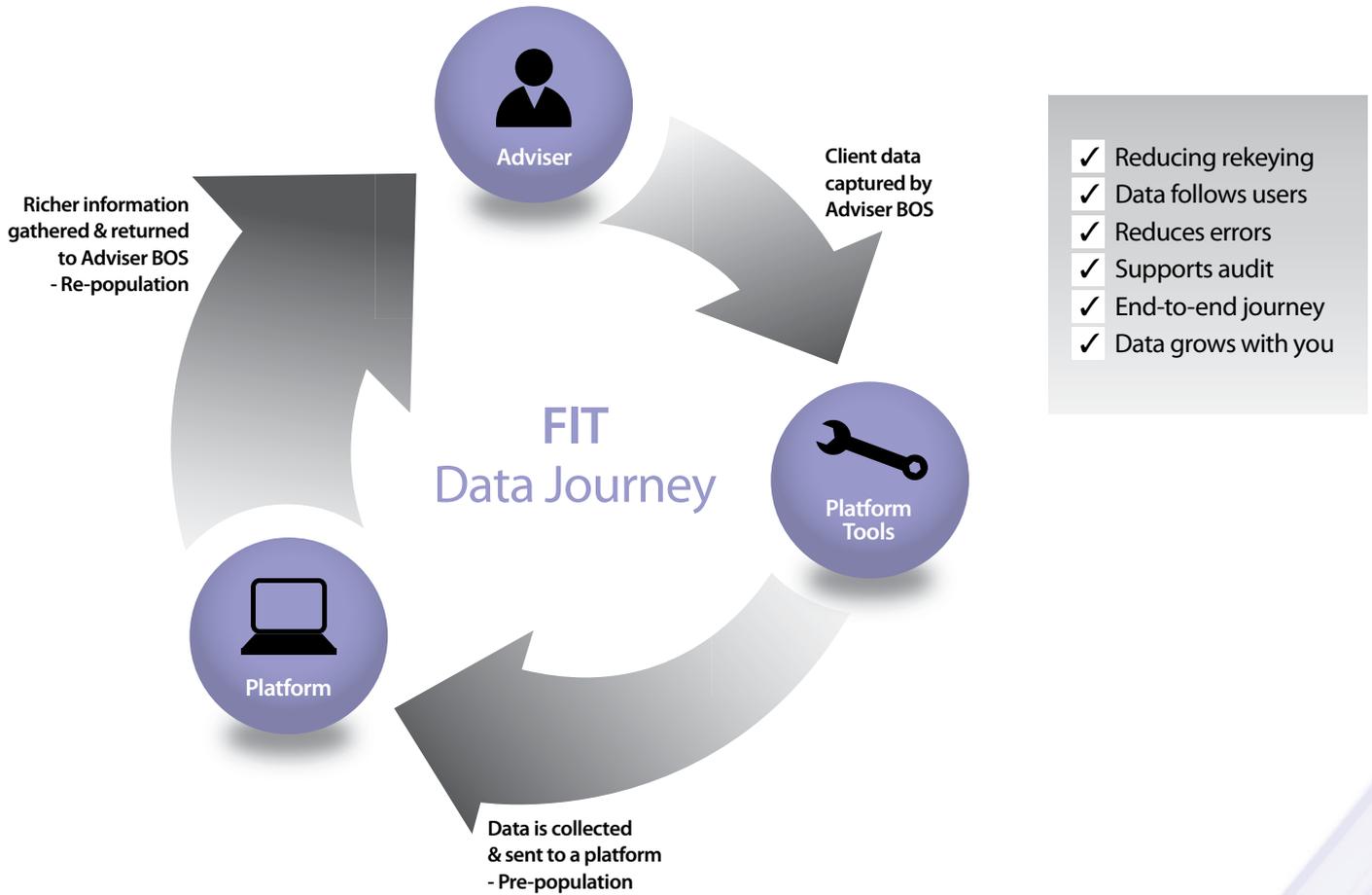
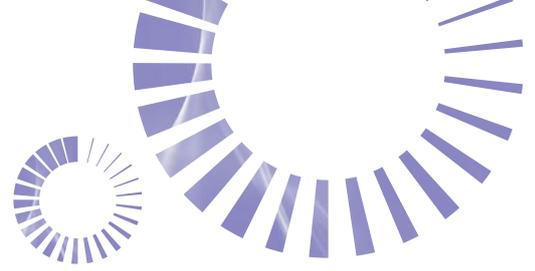
The scenario outlined above is just one example of how FIT works in practice. As well as supporting the transfer of information between different organisations (e.g. Provider to Platform or Adviser to Platform), FIT can also be used between the same type of organisations (e.g. Platform to Platform) to gain communication efficiencies.

Benefits of FIT

Designed specifically to meet the needs of the financial services industry, FIT can be used by Platforms, Providers, Adviser Back Office Systems and Fund Manager Systems. By using Standards, you will gain 'build once, use often' efficiencies during your system build phase, enabling you to get to market faster, and so realise the benefits much more quickly.

FIT offers many benefits; below are just a few...

- Ability to reuse messaging functions;
- Defining quick, compliant and effective data transfers;
- Standardising eCommunications throughout the business;
- Available to be reused within many business processes;
- Continuously developed and improved to meet industry compliance requirements;
- Greater flexibility – giving you the parts you need to build the communications you want;
- Reducing development and operating costs with 'plug and play' solutions.



Pre-population and Re-population: The original FIT Standard

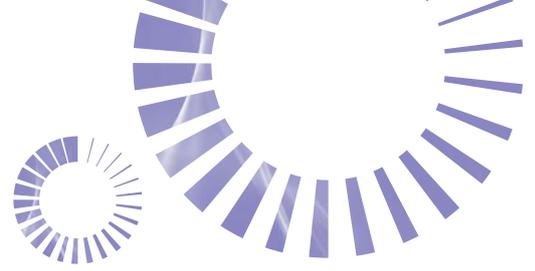
Pre-population and Re-population is the first set of Standards that form part of FIT. Pre and Re-population plays an important role in creating streamlined Straight-Through Processing (STP) with extra flexibility. It ensures that the movement of data between Advisers, Providers and Platforms is controlled, accurate and efficient.

Designed for the pre-sales environment where it supports other Origo Standards, such as Quotations, it works as part of a larger standardisation of processes.

How does it work?

From the initial collection of client data - from an Adviser's Back Office System for example - the data collected would then be sent to a receiver, such as a Platform. This is 'Pre-population'. After the Platform is finished with the client data they may then send it back to the Adviser's system including any amended or additional information gathered. This is 'Re-population'. Reducing rekeying and driving the next steps in the business process, Pre and Re-population also creates an auditable record of everything that has taken place.

The ability to determine the timing of any data movements provides added control and security at every stage. Reliable system integrations also means reduced rekeying and increased accuracy and process efficiencies, ultimately providing an improved customer experience.



Key Benefits of Pre and Re-population

- Reduces rekeying errors;
- Improves speed of transactions and data transfers;
- Can be used in various business processes;
- Supports other Origo Standards;
- Saves time spent typing and re-typing information;
- Controls the event/timing of data transfers.

About Origo Standards

Origo has been developing Standards for the financial industry for over 20 years. These Standards are electronic data patterns which underpin and define the exchange of data and information between Platforms, Providers, Portals and Advisers within the financial services industry. Using Origo Standards to define how information is exchanged within and between companies saves businesses time and money, which otherwise might have been spent on building bespoke collaborative software.

As the industry changes so do Origo Standards. New Standards are continuously being developed to meet the ever growing needs of businesses within the financial sector. Current Standards are maintained to ensure they remain compliant and continue to meet business processing requirements. Most recently we developed solutions to RDR which include updates to existing standards such as Quotes, New Business, including for SIPP and Annuities. During this update we also produced the new RDR Remuneration Statement Standard to enable the industry to process the new adviser charges in a compliant manner.

Getting started

To start using our Standards is easy. Register your Unipass digital certificate on our website

www.origoservices.com

If you'd like to find out more about Origo Standards please visit:

www.origoservices.com/FIT

Call: 0131 451 5181

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