

Business Activity Monitoring (BAM)

**Sorina Costin, Business Analysis Manager
BPMWave International**

Agenda

1. **Why a BAM solution?**
2. **What can you do with a BAM solution?**
3. **Who needs a BAM Solution?**
4. **How can you use a BAM Solution?- Key Features**
5. **Benefits for individuals and organizations**

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Why a Business Monitoring Solution?

@ Project Management is a critical activity

- Process management is our business

@ Knowledge – Project and Process Management are linked and at times are synchronous.

- Dependent and sometimes sequential activities
- Project components have approvals
- Governance requirements within projects
- Stop and go nature of Project Management without workflow

@ Gaps in Market Systems

- Lack of workflow automation on tasks
- Lack of governance over critical PM areas (cost, time, project methodology)
- Minimum visibility into roadblocks
- Lack of automated quality control mechanism
- No means to measure human performance for improvement
- No monitoring....just record, update and check



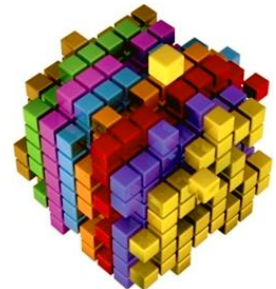
APERTIX What can you do with a Business Activity Monitoring solution?

@ **Orchestrate, Monitor and Measure all Critical Work Activity**

- Insure best practice adherence in activity definition and orchestration
- Measure and monitor activity duration and cost
- Automated escalation on all proposed activity alterations
- Generates alerts on activity delays, time or budget overages
- Best practice libraries for each type of work plan
- Interactive activity optimization
- Document forwarding and approvals on all work
- Full audit trail on all work performed, time, costs and approvals
- With transparency for customers if desired

@ **Monitor and Measure all Human Activity within Work Activity**

- In terms of time, cost and quality of outputs
- Understand true headcount capacity
- Measure performance for individuals and teams
- Insure quality of outputs
- Identify organizational skill gaps



@ Mission critical work activities that require:

- Consistency in execution (What exactly needs to be executed and in what order and by whom)
- Strong need for adherence to time and cost
- Automated approvals on work completion, time and deliverables
- Strong interest in activity and work plan optimization for continuous improvement
- Need to measure human performance within context of work performance
- Legislative or industry specific requirement for electronic audit trail on work activities

High Governance Markets

- Pharmaceuticals
- Public Funded Entities
- Energy , Oil and Gas & Construction
- Aviation
- Professional Service Firms
- Banking

@ Easy and Intuitive Setup

- Replicate organizational framework, add users and project roles, create projects
- No coding involved and internal administration is straight forward

@ End to end process orchestration

- Assignment of tasks, requests for reporting and approvals, project team assignments, project plan development.

@ Continuous System Monitoring vs Continuous Human Monitoring

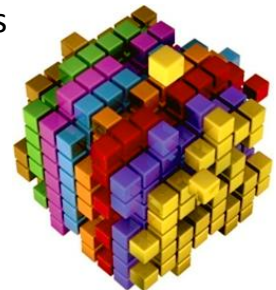
- Automatic escalations for exceeding of KPI's on time and cost and changes in project methodologies or other project red flags
- Creating full management by exception

@ Advanced Project Analytics and Reporting

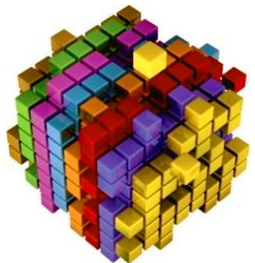
- Real time and retrospective metrics on project efficiency, cost and profitability
- Real time and retrospective reporting on efficiency and profitability for project employees

@ Leveraging of other Mission Critical Technology Systems

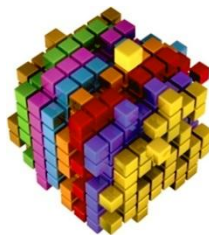
- ERP's, CRM's, Other



Demonstration




- ② Ability to monitor project and human performance in a single platform
- ② Real time transparency to all projects in play
- ② True management by exception
- ② The ability to manage projects in terms of time, cost and quality of outputs
- ② Insures deadlines are met along with driving best practice adherence, rules enforcement auditability and security
- ② End to end governance over internal and external PM & Administration



Thank you!

**Sorina Costin, Business Analysis Manager
BPMWave International**




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- 1 Genders
- 2 Positions
- 3 Project Types
- 4 Reject Reasons
- 5 Statuses
- 6 Task Categories

Catalogs

Project Types							
	Code	en-US	Fr-FR	ro-RO	ru-RU	Active	Edit
1	M	Mergers & Acquisitions				<input checked="" type="checkbox"/>	
2	PHI	Pharma				<input checked="" type="checkbox"/>	
3	Software Implementation	Software Implementation				<input checked="" type="checkbox"/>	
4	Technology Transfer	Technology Transfer				<input checked="" type="checkbox"/>	



APERTIX


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Catalogs

Positions							
	Code	en-US	Fr-FR	ro-RO	ru-RU	Active	Edit
1	AP	Associate				<input checked="" type="checkbox"/>	
2	AS	Accounting Specialist				<input checked="" type="checkbox"/>	
3	ASM	Area Sales Manager				<input checked="" type="checkbox"/>	
4	BA	Business Analyst				<input checked="" type="checkbox"/>	
5	BDM	Business Development Manager				<input checked="" type="checkbox"/>	
6	BPM	Back-up Project Manager				<input checked="" type="checkbox"/>	
7	CFO	Chief Financial Officer				<input checked="" type="checkbox"/>	
8	CL	Clerical				<input checked="" type="checkbox"/>	
9	COO	Chief Operating Officer				<input checked="" type="checkbox"/>	
10	CPT	Comptroller				<input checked="" type="checkbox"/>	
11	DM	Department Manager				<input checked="" type="checkbox"/>	
12	EX	Executive				<input checked="" type="checkbox"/>	
13	FA	Financial Analyst				<input checked="" type="checkbox"/>	
14	FC	Floating Clerical				<input checked="" type="checkbox"/>	
15	GM	General Manager				<input checked="" type="checkbox"/>	

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**APERTIX**

1 Languages

2 Labels Administration

3 Settings

4 Error Log

5 Users administration

Administration

1

2

3

4

	Code	Language	Culture	Active	Edit
1	en-US	English	en-US	<input checked="" type="checkbox"/>	
2	fr-FR	French	fr-FR	<input checked="" type="checkbox"/>	
3	ro-RO	Romana	ro-RO	<input checked="" type="checkbox"/>	
4	ru-RU	Russian	ru-RU	<input checked="" type="checkbox"/>	

**APERTIX**

1 Languages

2 Labels Administration

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Administration

1

2

3

4

5

6

7

8

9

10

11

12

	Last Name	Name	Email	Uusername	Language	Active	Edit
1	Apertix	Admin	manuela.vedes@edata.ro	apertix_admin	English	<input checked="" type="checkbox"/>	
2	Bradley	Shelly	manuela.vedes@edata.ro	shelly.bradley	English	<input checked="" type="checkbox"/>	
3	Brown	Monique	manuela.vedes@edata.ro	monique.brown	English	<input checked="" type="checkbox"/>	
4	Davies	Ethan	manuela.vedes@edata.ro	ethan.davies	English	<input checked="" type="checkbox"/>	
5	Kelly	Albert	manuela.vedes@edata.ro	albert.kelly	English	<input checked="" type="checkbox"/>	
6	King	Martin	manuela.vedes@edata.ro	martin.king	English	<input checked="" type="checkbox"/>	
7	Little	John	andrei.postoiu@edata.ro	john.little	English	<input checked="" type="checkbox"/>	
8	Lynch	Kimberly	manuela.vedes@edata.ro	kimberly.lynch	English	<input checked="" type="checkbox"/>	
9	Mayer	Ruth	manuela.vedes@edata.ro	ruth.mayer	English	<input checked="" type="checkbox"/>	
10	Robinson	Sarah	manuela.vedes@edata.ro	sarah.robinson	English	<input checked="" type="checkbox"/>	
11	Stephenson	Tyler	andrei.postoiu@edata.ro	tyler.stephenson	English	<input checked="" type="checkbox"/>	
12	Wagner	Polly	manuela.vedes@edata.ro	polly.wagner	English	<input checked="" type="checkbox"/>	

English

English

French

Romana

Russian

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Multi-language feature to a
multi-national users population
&
Easy users administration

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Organizational Structure					
Organizational Structure					
Name	Code	Active	SD	GM	
Goldenlane	GLDL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Accounting	ACC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Accounting Specialist	AS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Mayer Ruth	manuela.vedes@edata.ro	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Department Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Board		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
General Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Wagner Polly	data.ro	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Steering Comittee		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Business Architecture		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Business Development		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Business Development Manager	BDM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Little John	andrei.postoiu@edata.ro	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Department Manager	DM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Finance	FIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Infrastructure	IF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Legal	LGL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Operations	OPS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Patents	PT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Project Management Office	PMO	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Quality Assurance	QA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sales	SLS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Area Sales Manager	ASM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Expand All
Collapse All
Add Department
Edit Department
Add Position


Tree style organization,
easy to be set up
through 'Right Click'
capabilities











Expand All
Collapse All
Add Employee







Projects






Project List							
Code	Name	Type	Category	Project Manager	Back up PM	Active	
API	Apertix Implementation	Software Implementat	Billable	Albert Kelly	Sarah Robinson		
DoA	Delegation of Authority	Software Implementat	Billable	Ethan Davies	Kimberly Lynch		
ONP	Opening new Pharmacy	Pharma	Billable	Albert Kelly	Sarah Robinson		
PHI	Phantom Implementation	Software Implementat	Billable	Sarah Robinson	Polly Wagner		
WTT	Wireless Technology Transfer	Technology Transfer	Billable	Martin King	Monique Brown		



Project Setup



+




Project Settings
Roles Settings
Project Plan
Gantt Chart

Project Name: Opening new Pharmacy
Project Code: ONP
Project Type: Pharma
Billing Category: Billable
Financial Responsible: Lynch Kimberly
Core Business: ☒


Project Manager: Albert Kelly
Backup PM: Robinson Sarah
Start Date: 15.06.2011
End Date: 08.12.2011
Legal Responsible: Bradley Shelly

Project Options

☐
☐ Opening new Pharmacy.xml

☐ Import Roles
☐ Force Import

Logo



THE PROCESS MASTERMIND

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Project Setup

Project Settings | **Roles Settings** | Project Plan | Gantt Chart

Role Name

Associate

BPM Architect

BPM Designer

BPM Developer

Business Analyst

Business Development Manager

Chief Financial Officer

Chief Financial Officer

Chief Operating Officer

Chief Operations Officer

Clerical

Comptroller

Financial Analyst

Floating Clerical

General Manager

Human Resource Manager

Key Account

Key Account Manager

Legal adviser

Managing Partner


National Sales Manager

<input type="checkbox"/>	Role Name	No. of Roles	Edit
<input type="checkbox"/>	Legal adviser	1	
<input type="checkbox"/>	Business Development Manager	1	
<input type="checkbox"/>	Accounting specialist	1	
<input type="checkbox"/>	Area Sales Manager	1	
<input type="checkbox"/>	National Sales Manager	1	
<input type="checkbox"/>	Financial Analyst	1	
<input type="checkbox"/>	General Manager	1	
<input type="checkbox"/>	Steering Committee	1	
<input checked="" type="checkbox"/>	Human Resource Manager	1	

Project Roles assignment through 'Drag & Drop' functionality

Save Cancel

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Project Setup

Project Settings
Roles Settings
Project Plan
Gantt Chart

Project Plan

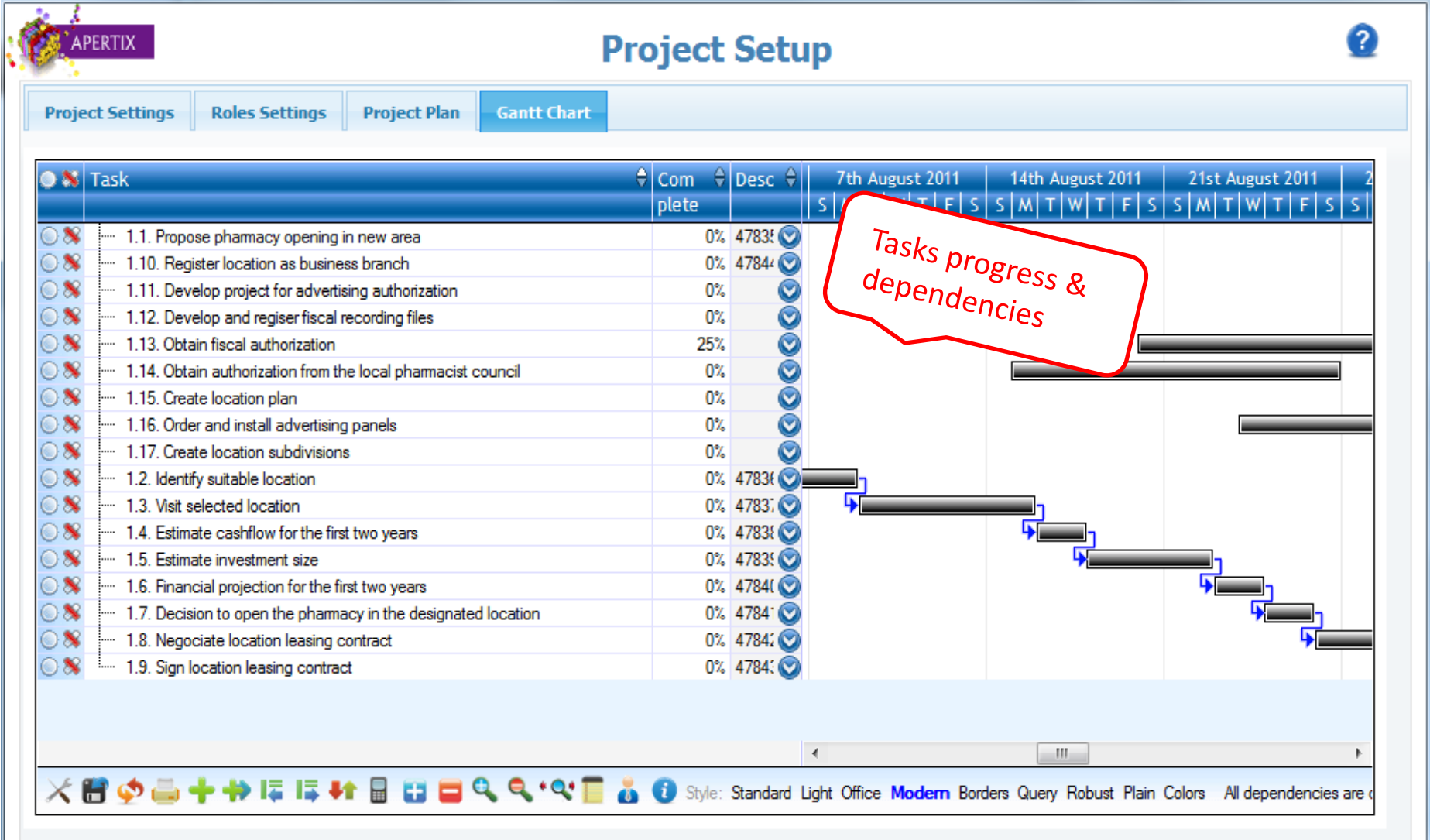
	Code	Category	Duration	Estimated budget	Start Date	End Date	Role
▼ Opening new Pharmacy	ONP	Billable	4520.00	155150.00	15.06.2011	31.12.2012	
○ Propose pharmacy opening in	1.1	Activity	248.00	124000.00	16.05.2011	27.06.2011	Steering Committee 1
○ Identify suitable location	1.2	Activity	247.00	2470.00	28.06.2011	08.08.2011	Area Sales Manager
○ Visit selected location		Activity	40.00	1000.00	09.08.2011	15.08.2011	Business Development
○ Estimate cashflow for the first two years		Activity	16.00	160.00	16.08.2011	17.08.2011	National Sales Manager
○ Estimate investment size		Activity	40.00	1000.00	18.08.2011	22.08.2011	Business Development
○ Financial projection for the first two years		Activity	16.00	192.00	23.08.2011	24.08.2011	Accounting specialist
○ Decision to open the pharmacy in the designated location		Activity	16.00	8000.00	25.08.2011	26.08.2011	Steering Committee 1
○ Negotiate location leasing contract		Activity	88.00	880.00	27.08.2011	06.09.2011	National Sales Manager
○ Sign location leasing contract		Activity	16.00	640.00	07.09.2011	08.09.2011	General Manager 1, M
○ Register location as business branch		Activity	48.00	480.00	09.09.2011	14.09.2011	Legal adviser 1
○ Develop project for advertising authorization		Activity	48.00	1200.00	15.09.2011	20.09.2011	Business Development
○ Develop and register fiscal recording files		Activity	32.00	128.00	15.09.2011	19.09.2011	Accounting specialist
○ Obtain fiscal authorization		Activity	96.00	960.00	20.08.2011	05.09.2011	Area Sales Manager
○ Obtain authorization from the local pharmacist council		Activity	88.00	880.00	15.08.2011	27.08.2011	Area Sales Manager
○ Create location plan	1.15	Activity	208.00	5200.00	09.09.2011	14.10.2011	Business Development
○ Order and install advertising panels	1.16	Activity	312.00	7800.00	24.08.2011	16.10.2011	Business Development
○ Create location subdivisions	1.17	Activity	16.00	160.00	09.09.2011	08.12.2011	National Sales Manager

Expand All
Collapse All
Add Task
Add SubTask
Add Deliverable
Edit Node
Delete Node
Expand Node
Collapse Node

Roles & deliverables assignments


Resources and Roles


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3. Working in an active project


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Daily report for Monique Brown - 2011-08-30


Report Hours

Activity	Role	Hours	Meeting	Progress (%)	Status	Actions
▼ Opening new Pharmacy						
▼ Obtain fiscal authorization	ASM	5:00		65		 
○ Meeting the fiscal authorities	ASM	3:0	<input checked="" type="checkbox"/>			 
○ Preparing the requested material	ASM	2:0	<input type="checkbox"/>			 
○ Meeting for documents validation	ASM	2:00	<input checked="" type="checkbox"/>			 



Add Records


Details Meeting for documents validation


Hours 16:00 18:00


Meeting ☒

Comments All documents have been revised.

Save **Cancel**


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Upload Fiscal Authorization


Document	Filer	Data Upload	Edit
1 Fiscal Authorization	Fiscal Authorization.docx		

Fiscal Authorization

What do you want to do with Fiscal Authorization.docx?

Size: 102 KB
Type: Microsoft Word
From: 2011/08/30

 Open
 Save
 Save as...

CONTENTS

- 1 INTRODUCTION AND SUMMARY
- 2 ELIGIBILITY CRITERIA
- 3 1 Assessment of Qualification
- 3.2 Documents Required to be Submitted
- 3.3 Certification
- 3.4 Fee
- 3.5 Appeal against Assessment Process
- 3 APPLICATION FOR APTS
- 4 ENGLISH LANGUAGE REQUIREMENT
- 4.1 Occupational English Test (OET)
- 4.2 International English Language Testing System (IELTS)
- 5 KNOWLEDGE ASSESSMENT OF PHARMACEUTICAL SCIENCES (KAPS)
- 5.1 Subject Areas
- 5.2 Other Relevant Tests
- 5.3 Structure of KAPS Assessment Questions
- 5.4 Sample Information
- 5.5 Fees
- 5.6 How to Contact Us for KAPS

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 Reject
  Approve
  N/A


Total: 7:00

Save

Submit










Cancel

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Daily Activity Review

Activity Review

Activity Name	Details	Role	Hours	Meeting	Progress (%)	Approve	Reject	Status	Actions
Opening new Pharmacy/Estimate cashflow for the first two years	cashflow report draft	ASM	3:00	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Opening new Pharmacy/Estimate cashflow for the first two years	Report presentation & Gap analysis	ASM	2:00	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Opening new Pharmacy/Obtain authorization from the local pharmacist council	Authorization from the Local Pharmacists Council	ASM	0:00	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		 
Opening new Pharmacy/Obtain authorization from the local pharmacist council	Framework agreement draft	ASM	3:00	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Fill in the reason for rejecting a task

Edit record

Reason

Exceeding allowed duration
Others

History


Unrealistic small effort reported
Wrong Activity Reported


Comments


Please provide more info on this

Save

Cancel

 N/A

 Approved

 Rejected

Approve All

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Total: 8:00

Save

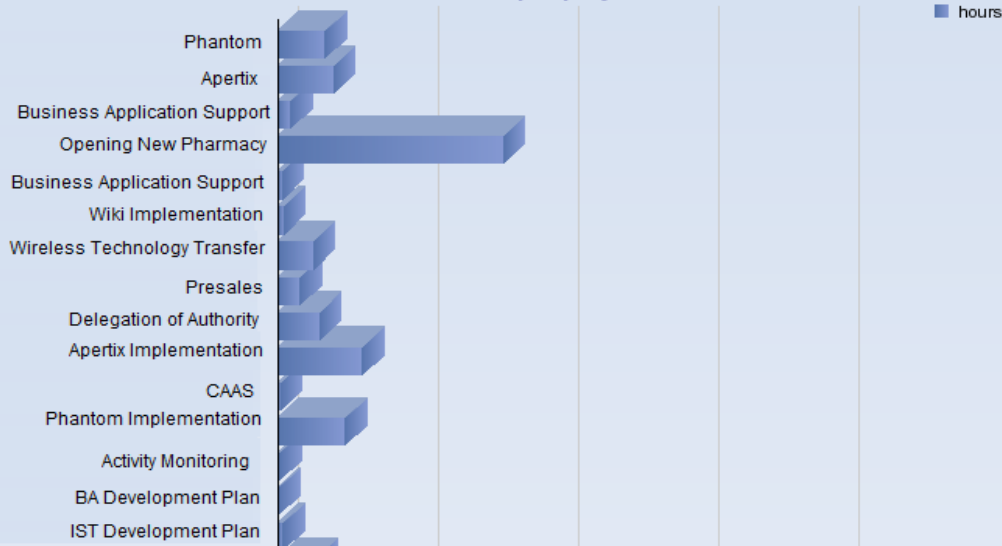
Submit

Cancel

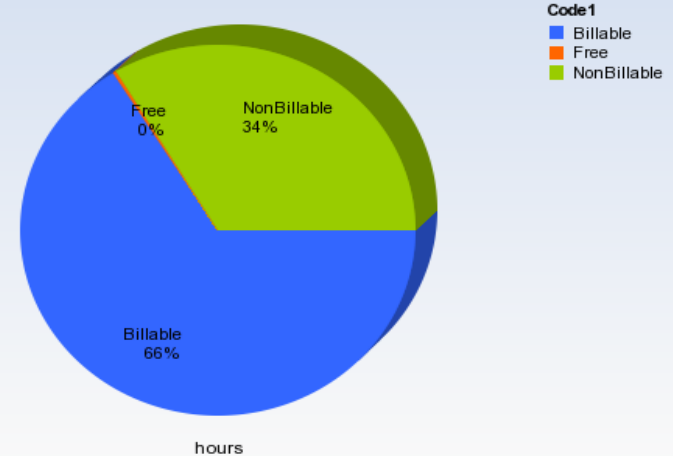
Projects Dashboard

Start Date: Nov 14, 2011 End Date: Dec 14, 2011 Refresh

Worked hours per project



Worked hours per project categories



Worked hours per project

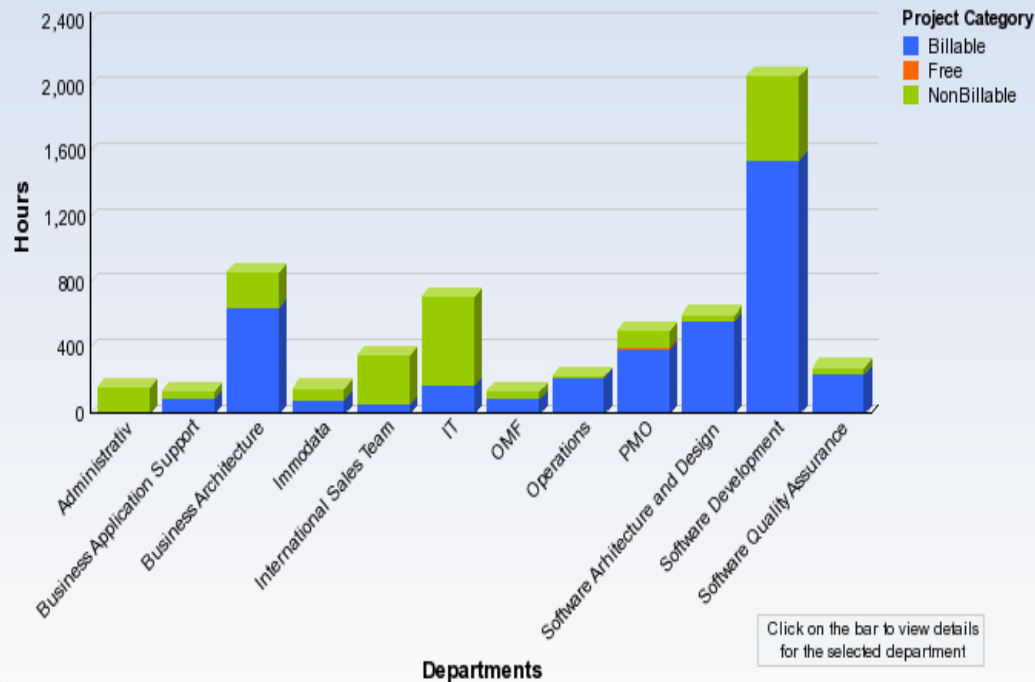
Project Name / Code		Start Date	End Date	Duration	Project Manager	BK Project Manager	Hours
Phantom - PG	PhPG	Apr 1, 2011		257	Joseph Hanna	Kathy Logan	4
Apertix - APX	APX	Dec 2, 2011	Jan 31, 2012	60	Miranda Byrne	Michael Smith	5
Wireless Technology Transfer	BDP	Dec 6, 2011	Mar 31, 2012	116	Jerry Logan	Terry Stevenson	36
Billable - Total							4,112.5
IST Development Plan	ISTDP	Jul 18, 2011	Nov 18, 2011	123	Monique Brown		10
BA Development Plan	BADP	Aug 1, 2011	Nov 18, 2011	109	Alan Marty		2.5
Free - Total							12.5
Presales	PSL	Feb 28, 2011	Dec 31, 2011	306	Kelly Little		373

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Departments Worked Hours

Start Date End Date

Total worked hours per departments



Department/Hours	NonBillable	Billable	Free	Total
Administrative	160.0	0	0	160
Business Application Support	46.0	88.0	0	134
Business Architecture	211.5	652.5	0	864
Immodata	67.0	85.0	0	152
International Sales Team	295.5	58.0	0	353.5
IT	542.0	172.5	0	714.5
OMF	48.0	88.0	0	136
Operations	8.0	224.0	0	232
PMO	104.5	392.0	12.5	509
Software Architecture and Design	40.8	565.5	0	606.25
Software Development	516.8	1,549.8	0	2,066.5
Software Quality Assurance	45.0	237.2	0	282.25