

# PROCESS DIRECTOR

## MANAGEMENT SUMMARY

BP Logix Process Director is a BPM product that provides a unique approach to define, automate and report on business processes. Process Director uses a patent-pending technology that fuses Project Management methodologies with BPM. As a result, and for the first time, sophisticated business processes can now be defined and modeled through a project management like interface. More than just another new interface, the product has been designed to address activity-based non-linear processes – those that traditionally have been forced to fit into traditional flowcharts.

The modular design of Process Director means that organizations, large and small, can easily and affordably deploy the product to manage their current needs – and also easily scale to meet new and changing requirements as they grow. Designed for business and operations managers, line of business managers, business analysts and IT professionals, Process Director is easy to implement and administer, providing a rapid return on investment.

What makes Process Director unique is its ability to automate complex, non-linear processes **without requiring users to change the way they do business**. Process Director incorporates electronic forms, rules management and process automation and integrates easily with existing applications and data sources. Based on a deep understanding of both business and IT roles, Process Director provides business users with a robust infrastructure that addresses the needs of today's organizations.

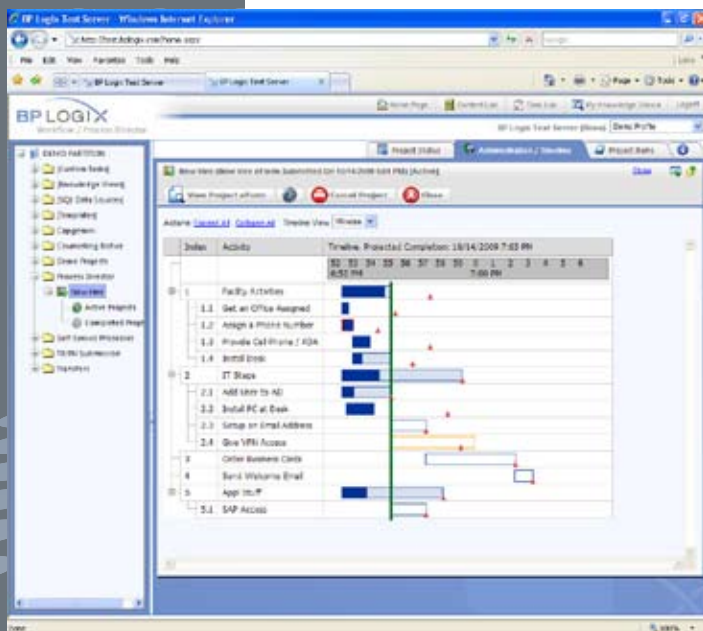
Process Director can be deployed to address any business process that requires automation, tracking and reporting. However, processes that are non-linear or activity/checklist-oriented are best suited to this new approach. Such processes include HR On-boarding (integrating new employees into a work force), IT provisioning and sales order processing.

# BP Logix Process Director

## THE FUSION OF BPM AND PROJECT MANAGEMENT METHODOLOGIES

By fusing Project Management methodologies with BPM, business users finally have a tool that allows them to model processes the way they view them: as lists of activities with dependencies, conditions and timelines. Through Process Director, users can define all activities that comprise their specific business processes and can simply and easily identify the dependencies of any given activity, just as they would within a project plan. Processes no longer have to be constrained within a serial flow chart – nor must they be defined in rigid sequences. Process Director automatically models, automates and graphically depicts the business process as a Gantt chart, accurately detailing the dependencies and the duration of each activity within the process.

As a result of Process Director combining Project Management methodologies with BPM business users can now rapidly implement more complex, “non-linear” business processes. The integration of the Project Management features with the BPM base also accelerates the implementation of “activity-oriented” processes.



### What Makes Process Director Unique:

- Addresses “activity-based” processes (versus traditional flow or approval-based BPM)
- Exists as a layer on top of BPM and workflow automation functions
- Specifically designed to automate, track and report on complex, non-linear processes
- Provides predictive analysis of processes to alert to future problems
- Delivers timeline-based automation
- Offers a distinctive approach to process management that incorporates project management methodologies

### Process Director Features:

- Provides a 100% web-based interface to create and model processes through the project management interface
- Easy-to-define activities with assigned users, dependencies, conditions and timelines
- Running processes are represented and administered from Gantt charts
- Enables users to make changes to project plans and to have those changes immediately take effect on running processes
- Provides a rules-based evaluation of project activities
- Defines Key Performance Indicators (KPI) that provide thresholds and triggers associated with activities for reporting
- Built on rules-based business logic that controls process routing
- Offers “due date” management and escalation
- Provides electronic signatures and audit trails
- Can be customized by business users without requiring programming
- 21 CFR Part 11, HIPAA and SOX-compliant
- Provides built-in integration with many third-party and in-house applications and databases

## eFORMS PROCESSING

Process Director's eForms component is an easy-to-use web-based solution for creating, deploying and routing electronic forms (eForms.) eForms enable organizations to easily route electronic forms in accordance with defined business processes, minimizing the need for handling paper, decreasing the need for manual routing, eliminating errors and reducing the lifecycle of mission-critical forms processing. Process Director's eForms component allows business users to pre-populate forms, make changes to isolated sections of the form, automatically kick-off a review and approval cycle, instantaneously track and audit all tasks involved with that form, and execute changes automatically (once all approvals have been obtained.)

### *eForms Processing Features:*

- A 100% web-based platform – no client software required
- Form fields can be linked to external databases
- Real-time validation of input data
- Automatically pre-populates form fields
- Forms dynamically controlled through rules-based business logic
- Forms can be easily built using the BP Logix eForm Builder and Microsoft Word or existing ASP.NET tools
- Dynamic presentation through AJAX-enabled eForms
- Seamless integration with the core document management system
- Electronic signatures and detailed auditing for approvals

## BPM / PROCESS AUTOMATION

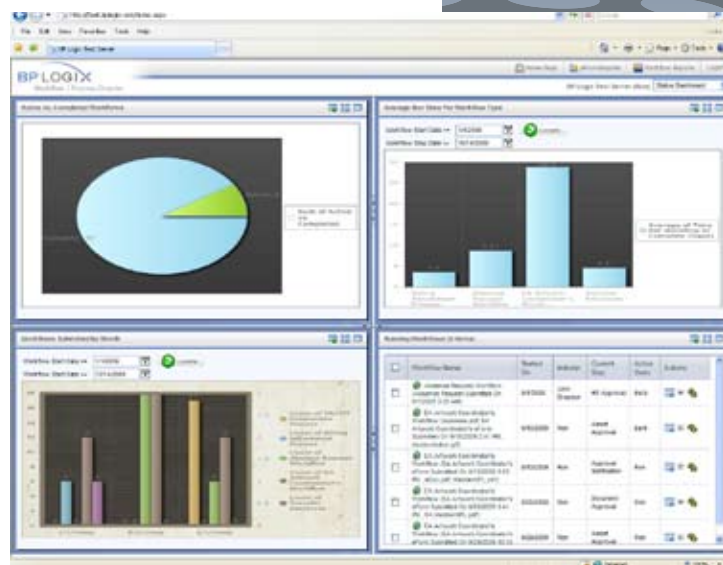
Process Director contains a powerful process engine capable of managing critical business processes. The process engine is designed for business users, enabling them to easily model their specific review and approval procedures, automate the routing process, monitor results and satisfy their content management requirements.

### *Process Automation Features:*

- Ability to automate complex, non-linear processes
- Rules-based business logic controls process routing
- "Due date" management and escalation
- Can be customized by business users without requiring programming
- 21 CFR Part 11, HIPAA and SOX compliant
- Provides electronic signatures and audit trails

## REPORTING / ACTIVITY MONITORING

Process Director tracks and audits all processes, form data and user actions. All data and metrics are stored in a relational database. Reports and information can either be displayed in real-time or scheduled for automatic distribution, placing both the process and auditing data in the hands of business users. Authorized users also can gather the information they need for reports quickly and easily without requiring the assistance of IT.



**Reporting Features:**

- Predictive analysis alerts managers to problems and issues before they occur
- Eliminates dependency on IT staff
- Automatic graphing of measurements/thresholds and triggers/events that identify information critical to the business
- Browser-based charting and graphing of business metric data on a dashboard
- Real-time report integration with Microsoft Excel

Integrated Knowledge Management functions simplify the search for information

**BUSINESS RULES ENGINE**

Process Director incorporates a business rules engine that empowers users to rapidly implement more complex business processes. Business rules are re-useable objects that can be embedded within the process or used to conditionally control what is displayed on the eForms.

**Business Rules Features:**

- Business users can modify rules frequently without the need for IT resources
- Rule definitions are reusable
- Business Rules are seamlessly integrated into eForms, process and reporting functions
- Changes to business rules immediately take effect on running processes
- Provides a rules-based evaluation of activities and process tasks
- Enables users to define exceptions to Key Performance Indicators (KPIs)

**APPLICATION INTEGRATION**

Process Director provides built-in integration with many third-party and in-house applications and databases. An SDK is provided for integrating with web services and for advanced product customization.

- Microsoft Active Directory (AD)
- ERP Applications
- SQL-Compliant Databases
- PDAs and Mobile Devices (e.g. Blackberry, PocketPC, Palm)
- Web Portals (e.g. MS SharePoint, IBM WebSphere)
- Single Sign-On (SSO) Products
- Integration with Web Services

**PLATFORMS**

Microsoft Windows 2003/2008 Server and Windows 7 (all service packs are supported, 32 and 64bit); Microsoft SQL Server 2000 or higher, Oracle 9i or higher, or the Microsoft SQL Server Express Edition packaged with Workflow Director; .NET Framework 3.5 on the server; .NET Framework 2.0 on the client when using the BP Logix eForm builder.

Supports all web browsers as well as mobile devices, such as Palm, Blackberry, Symbian OS, Windows Mobile (PocketPC), and other PDA web browsers that support JavaScript and style sheets.

**SUMMARY**

BP Logix provides web-based software that enables business users to be more agile while also giving them greater visibility into their business processes. As infrastructure products Workflow Director and Process Director address the needs of business users to manage, automate, track, audit and report on critical business processes. Both products incorporate workflow, forms processing and content management and can be deployed either as stand-alone products or integrated to better address the business processes required of today's global companies.

Process Director and Workflow Director integrate with both on-demand and on-premise applications. BP Logix understands the needs of Human Resources, IT, Purchasing, Accounting and Finance to administer and process changes – and how to translate that to solutions for business users. As a result, BP Logix software enables users to direct, drive, and automate their business processes.



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