



# ProcessMate Cloud App – Managing Business Processes in Cloud

Whitepaper

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## 1 Executive Summary

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ProcessMate Cloud App is a web-based software that helps businesses keep track of their recurring processes, handle documents and communication, and be informed of current progress at any time. Aside from that, it provides managers with valuable insights on the efficiency of processes in a visual form such as reports and graphs, so to help optimize the business and cut costs.

It helps companies deal with such problems as lack of status and visibility, miscommunication between departments or workgroups executing processes, excessive effort and in-process waiting time.

The ProcessMate cloud-based application does not require any IT or Business Analysis skills and therefore is very inexpensive to set-up and run. Since it is web-based, it does not need physical hardware and the deployment process. Organizations of any size can afford to use ProcessMate.

## 2 Concept

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### 2.1 Problems Targeted

ProcessMate Cloud App is based on the Fact-based Process Improvement methodology and is focused on the problems of recurring human-driven processes in organizations, such as financial, administrative, HR-related and service fulfillment processes. It addresses the following problems, all related to process efficiency:

- Unclear Status & Progress

In order to determine the process status and progress one needs to communicate a number of people and search through emails and documents. Every external request, be it from another department or from a client, such requests take time or resources.

- Poor In-process Communication

Communications are handled in multiple disparate tools, such as emails, spreadsheets and paperwork. Such communication means are not easily traceable and introduce delays when a process is passed from hands to hands.

- Lack of information on efficiency

Lack of information on processes, its bottlenecks and necessary statistics prevents managers from making competent improvement decisions. Even if process maps exist, the actual execution statistics that can help switching from “guesstimate” mode to fact-based decision making.

- Extra time and effort spent

Inefficient process causes extra time and unneeded effort that frustrate the team and introduce delays. Such key efficiency problems as waiting, lack of communication and unclear visibility for managers are key points of improvement.

### 2.2 Software Product

ProcessMate Cloud App is a next-generation business process management tool. It helps businesses keep track of recurring processes, track documents and communication, and inform of current progress at any time. Additionally, it provides managers with valuable fact-based insights on efficiency of processes in a visual form (such as gantt charts, reports and graphs), so to help optimize the business and cut costs.

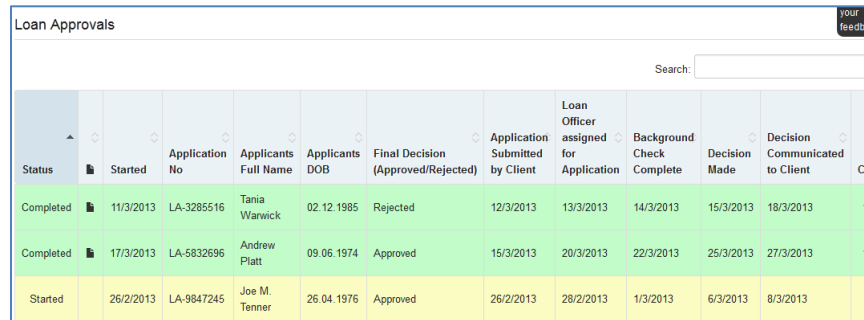
Its key advantages are in the following:

- It's completely web-based (no installations or downloads are required)
- It's very easy to configure, 3 minutes and you are good to go
- The license is usage and user-based, so you can afford it with any budget

## 3 Features

### 3.1 Process Engine

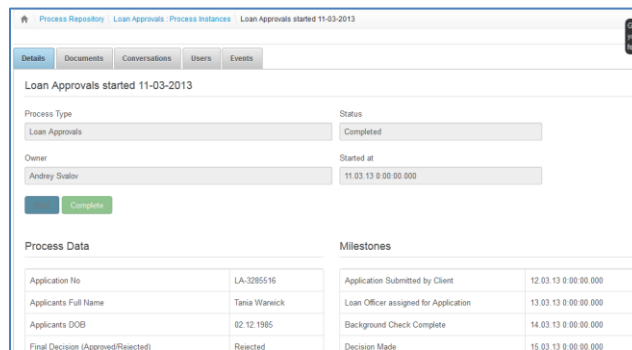
ProcessMate tracks processes and displays the progress report in a simple and clear way.



Status	Started	Application No	Applicants Full Name	Applicants DOB	Final Decision (Approved/Rejected)	Application Submitted by Client	Loan Officer assigned for Application	Background Check Complete	Decision Made	Decision Communicated to Client	Co
Completed	11/3/2013	LA-3285516	Tania Warwick	02.12.1985	Rejected	12/3/2013	13/3/2013	14/3/2013	15/3/2013	18/3/2013	1
Completed	17/3/2013	LA-5832696	Andrew Platt	09.06.1974	Approved	15/3/2013	20/3/2013	22/3/2013	25/3/2013	27/3/2013	1
Started	26/2/2013	LA-9847245	Joe M. Tenner	26.04.1976	Approved	26/2/2013	28/2/2013	1/3/2013	6/3/2013	8/3/2013	

Figure 1 Progress Report, showing progress and key information for a number of processes

Individual process can be viewed in details and modified in the Process Cockpit. The execution information can be modified at any point of time and rolled back, should it be required. All involved users are immediately notified of the new developments in the process, so no time is lost in communication.



Process Data		Milestones	
Application No	LA-3285516	Application Submitted by Client	12.03.13 0:00:00.000
Applicants Full Name	Tania Warwick	Loan Officer assigned for Application	13.03.13 0:00:00.000
Applicants DOB	02.12.1985	Background Check Complete	14.03.13 0:00:00.000
Final Decision (Approved/Rejected)	Rejected	Decision Made	15.03.13 0:00:00.000

Figure 2 Information of Individual Process - status, key data

### 3.2 Business Intelligence

ProcessMate users can use preconfigured dashboards that display both process-specific information, such as bottlenecks, average time taken, and cross-process charts that show statistics across all types of processes.

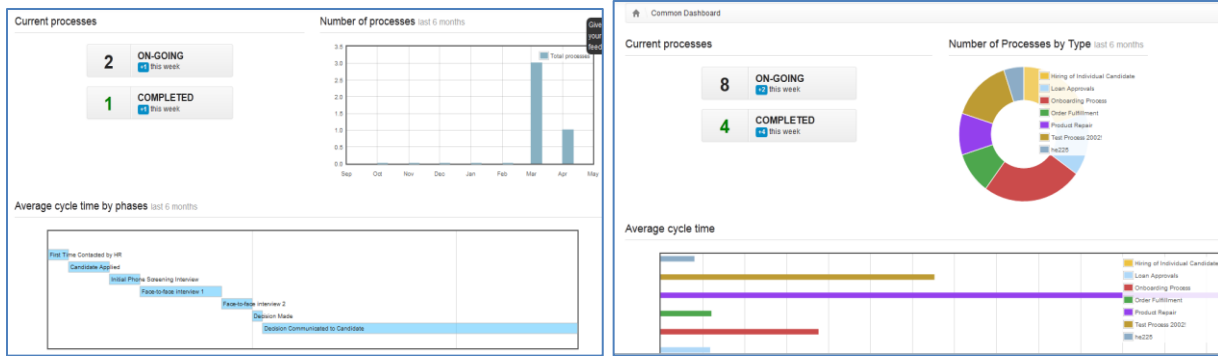


Figure 3 Dashboards displaying statistics-based insights on process execution

### 3.3 Collaboration

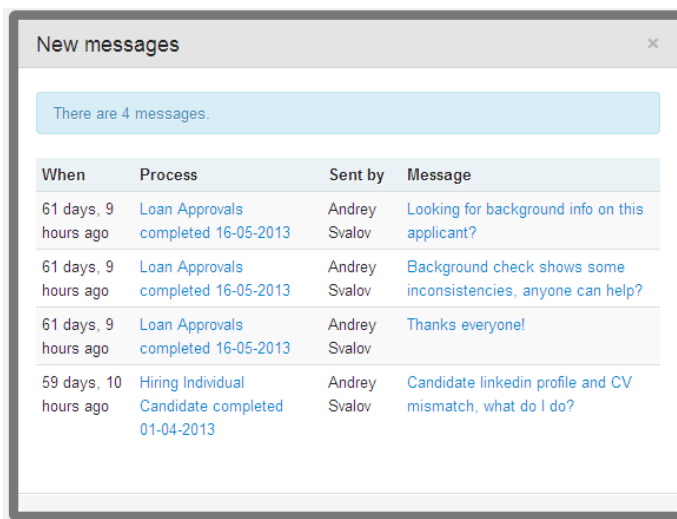


Figure 4 In-process Messages Posted by Users

ProcessMate delivers collaboration support through the built-in communication module. Communication threads are attributed to processes, so to keep this vital information at hand along with execution history.

### 3.4 Document Management

ProcessMate manages in-process documentation is “attached” to processes along with communication, so that all vital documents, such as Invoice and Quotations would be easily accessible together with other process information.

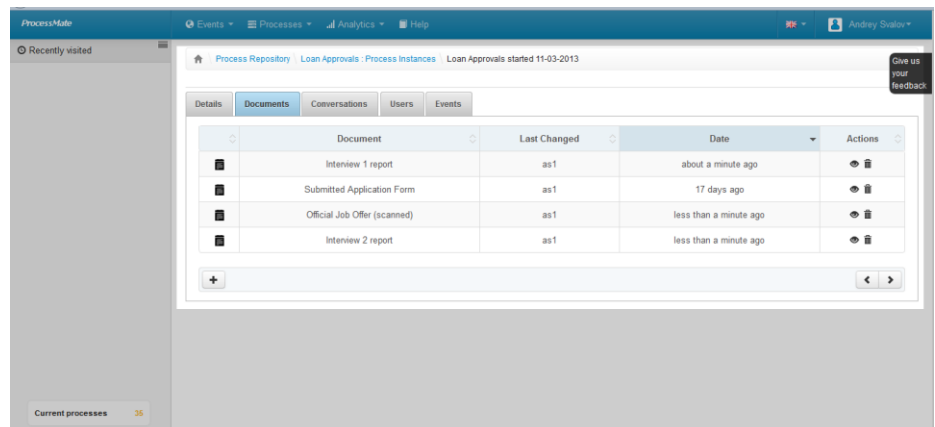


Figure 5 In-process generated documentation is easy to handle and track

### 3.5 Process Design

ProcessMate process configuration tool is an easy-to-use visual environment for design of processes,

including its milestones and other information fields. It does not require any expert skills and is intuitive. In ProcessMate, a moderately complex process can be designed in 3 minutes end-to-end.

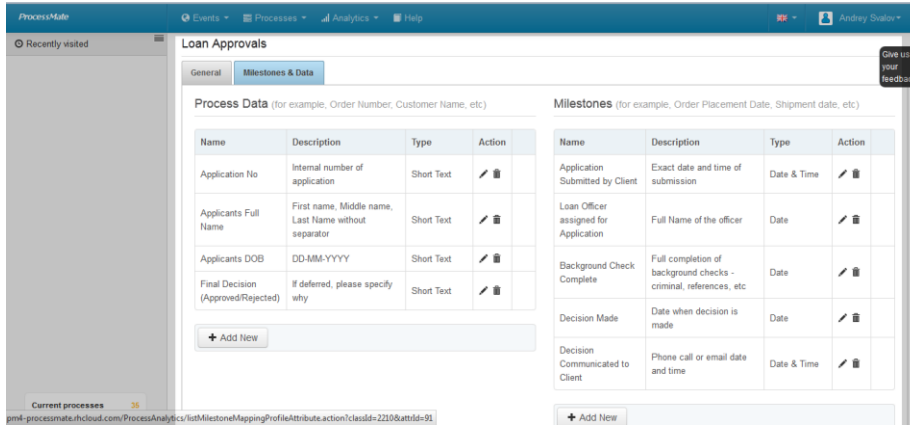


Figure 6 Process Designer: There are no complex maps or form designers.



## 4 What's Next

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- Read Our Methodology whitepaper at <http://processmate.net>
- Sign-up for a free trial of the application
- Review the step-by-step video <http://processmate.net/process-management-product-features/>