

Deloitte.

GlobalManager

Think out of the box

Automate, control and monitor workflows
efficiently



Think out of the box

Global Manager is a process orchestrator, a solution that integrates and automates processes, providing control and monitoring in real time and ensuring the optimum use of resources.

At Deloitte we have combined our technical knowledge and expertise in processes to offer a tool for business users (actuarial, financial, internal audit, risk management, PMOs) that brings technological power to bear on your day-to-day processes. As a result, your calculations can be coordinated with the computational resources made available to you by the company, and the processes reflected in workflows.

This global vision is what has led us to develop a solution that can be adapted to any type of environment/software configuration for the calculations of the processes to be carried out.

At Deloitte we have combined our technical knowledge and expertise in processes to offer a tool that brings technological power to bear on our day-to-day processes

Global Manager was designed to respond to the implementation of IFRS 17, although it can also be applied to other areas of process orchestration. Following the first wave of implementations by leading insurance companies, numerous problems arose when it came to going live with the processes that had been identified during development:

- A multitude of intermediate steps to generate an end-to-end process.
- A high demand for computational capacity in companies' infrastructures.
- A multitude of users coinciding in the same environment.
- A multitude of regulations coexisting in the closing processes.

The decision was therefore taken to create a solution that would enable the coordination and automation of processes, providing fluid workflows and optimising efficiency. The result was Global Manager: a tool designed to simplify, optimise and automate the management of key processes, guaranteeing the efficiency and control of each process using exhaustive data validation.

Think out of the box

Global Manager offers flexibility for the execution of processes by different teams and departments without any loss of control, while enabling the whole process to be monitored.

It is a web-based, on-premises solution that permits profile-based user access according to the allocated processes.



Process management optimisation

It facilitates the automation of complex tasks, reducing manual intervention and improving consistency in the execution of the critical processes to attain the required objectives.



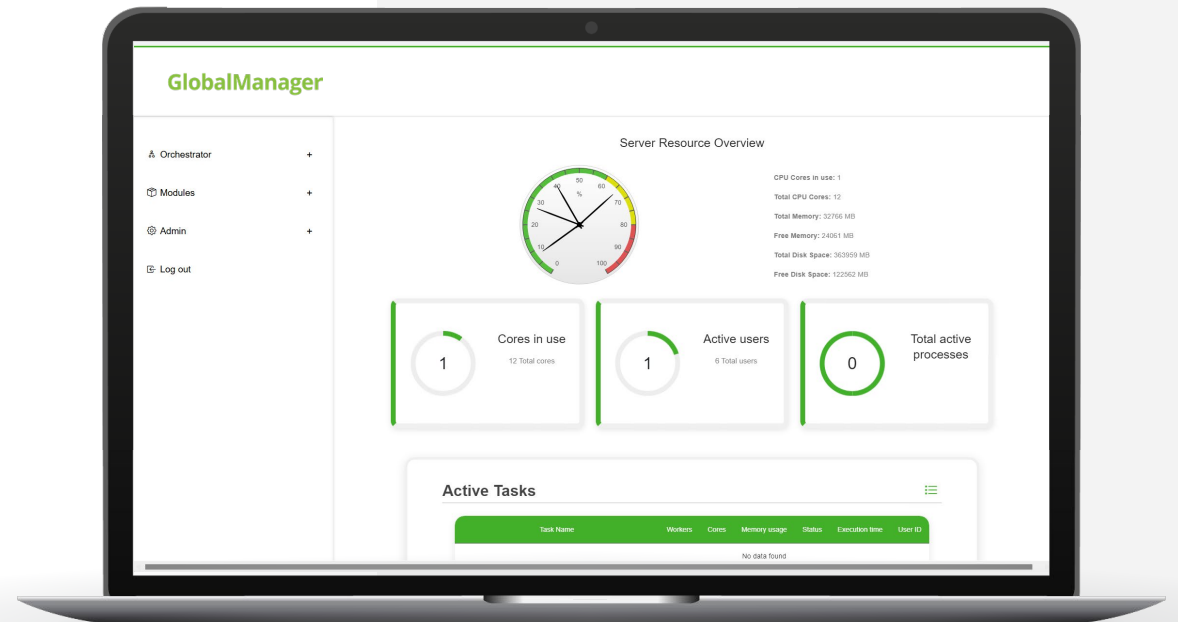
Greater operational efficiency

It accelerates task execution, reducing human error and enabling the efficient allocation of technological and human resources.



Continuous monitoring

It provides a real-time overview of the status of processes, enabling the proactive management of errors (monitoring resolution and allocation to the AM service team) and a rapid response to identified variances.



Process management optimisation

Automated workflows



CREATION

It enables new workflows to be designed simply, allocating controls for monitoring, local parameters to facilitate the inclusion of routes and other static and global parameters to improve the parametrisation of the entire execution process (dates, structure, etc.)

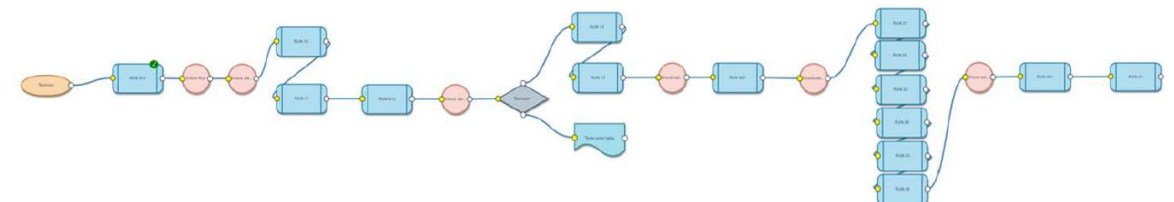
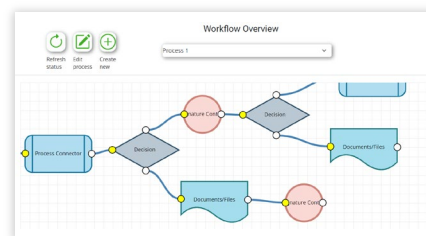
- **Decision trees:** it enables workflows to be created based on the results of the established controls.
- **Allocation of resources:** it allocates cores by task in an efficient way, enabling “terminals” to be used to identify limits for the use of resources.



SELECTION AND EXECUTION

It facilitates the selection, categorisation and execution of any workflow or previously created process, parametrising the defined global variables. It also enables the efficient consumption of resources, identifying how many cores are available and prioritising executions according to availability.

- **Parametrisation:** it enables a configuration of variables to adapt to various operational scenarios.
- **Flexibility:** it executes pre-defined workflows easily, adjusting parameters as needed.



Process management optimisation

Automated workflows



DRAG&DROP
INTERFACE

Intuitive and flexible experience. Users can combine different objects to generate automated workflows that optimise the execution of defined processes. Objects:

- **Process connector:** this is the main object where the scripts automating the tasks are embedded. This connector enables the scripts to be called up directly from Global Manager, facilitating the orchestration of the processes and their automatic execution .
- **Binomial decisions:** here which flow should be followed is decided according to the results (OK or KO) of the allocated controls. This tool is key to redirecting the processes dynamically according to the validations performed.
- **Controls:** such controls as may be necessary can be allocated to a process connector. These controls are responsible for reading the status of the associated block of code (status: OK o KO) and enable the different parts of a task to be segmented and validated. This facilitates a rapid view of the status of the processes, providing transparency at each stage of the workflow.
- **Documentation:** it links relevant files to the workflow and enables direct observation of the generation of those files during the execution. This ensures that all the documentation generated during the process is available and organised.
- **Terminals:** they indicate the start and end of a workflow. They are also used to define the reserve of cores, thereby optimising the use of the environment's resources. This ensures that the most demanding processes have the necessary resources for execution without affecting the system's performance.

Variables in the workflow

- **Local:** variables used solely within the specific workflow, which enable the processes to be adjusted precisely, according to the needs of each task.
- **Global:** variables which can be parametrised by the users from the execution panel and facilitate process standardisation and adaptation in each closing.

Improved operational efficiency

User profiling

Global Manager enables the coexistence of different environments (development, testing and production) and of different teams by department in each environment. Also, within each team, different workflows can be allocated to each of the users.

Correct user management is vital to ensure that each team has controlled and secure access to the processes corresponding to them. For that purpose, a permissions parametrization structure is offered which guarantees the security and control of the executions.



Manage Users Manage Roles

Manage Users

Users	super-administrator	administrator	manager	head-runner	runner	developer
amonedero@deloitte.es	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ejimenezsandoval@deloitte.es	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
fagullarpozo@deloitte.es	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
gcamachofernandez@deloitte.es	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
igallarretapena@deloitte.es	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
jsanchezblanco@deloitte.es	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



SUPER-ADMINISTRADOR

- **Privileges:** complete access to all the system's functionalities.
- **Differentiation:** exclusive privileges over the development panel, unlike the Administrator.



ADMINISTRADOR

- **Privileges:** full access with the exception of the development panel.
- **Responsibilities:** manages the allocation of user permissions, explicitly defining each role's visible operating abilities.



HEAD-RUNNER

- **Privileges:** view and supervision of executions of processes.
- **Management:** manages and controls the executions within their specific team.
- **Restrictions:** no permission to manage user profiles.



RUNNER

- **Privileges:** access to executions and view of associated metrics.
- **Restrictions:** cannot manage executions of other team members. Manager/PMO.
- **Profile:** strictly view only.
- **Restrictions:** no permission to edit processes.



DEVELOPER

- **Privileges:** identical to Runner's with the additional ability to develop and design new processes within the system.

Continuous monitoring

Control functionalities

Global Manager receives KPIs from the environment in real time to be able to manage the launches required by all the users operating on the platform, which maximises its operational efficiency by ensuring that all the processes are executed optimally.

It offers reporting schedule control and monitoring functionalities. It allows different controls to be defined per task, the real-time monitoring of their execution and the management of any errors that might arise, providing an integrated solution for the administration and supervision of processes.

The persons responsible for the processes have an advanced technological tool at their disposal, which is designed for their day-to-day needs, and means they do not need to depend on other teams. In addition, the application not only manages the orchestration of processes, it also channels all requests requiring computational resources. If the requests for launches exceed the cores in the environment, they will be put on hold until the necessary resources for their execution are available



Last errors

Account Status	Task name	User assigned	Control
Solved	Actuals Load	john@example.com	Ct_102
In review	Step 35_ Pol info	jane@example.com	Ct_23
Solved	AoC_Load_SQL	alice@example.com	Ct_09
In review	MPF_AoC_VFA	bob@example.com	Ct_21
In review	Asset DB prep.	bob@example.com	Ct_87

View More

Definition and monitoring of controls: the controls for each task can be defined and monitored, identifying and managing errors in real time. The controls associated with the tasks enable monitoring and ensure the rapid resolution of incidents.

- Functional controls: specific controls per task are allocated and monitored.
- Error management: errors can be viewed and monitored in real time.

Automatic generation of evidence and raising of reports: generation of evidence for each execution generated, allowing the identification of evidence for audits and internal reviews. The information can be viewed and identified according to the parameters of global variables defined and parametrised to the execution to enable improved traceability.

Automated incident management: configuration of automatic alarms. This enables incidents to be escalated to the corresponding management levels, ensuring that any error or deviation is dealt with efficiently and without compromising delivery deadlines.

Think out of the box

Global Manager enables the efficient automation, orchestration and monitoring of processes and controls. It enables calculations to be executed and when the computational limits are reached, it manages the queue of processes according to priority and the assignation of authorised users.

Benefits



Interconnectivity

Fluid communication and total connection between teams and departments.



Assured data quality

Validations at each stage, with automated alerts.



Efficiency and scalability

Optimisation of the use of computational infrastructure, guaranteeing that the processes are adapted to the available resources.



Unlimited adaptability

Modules that can be personalised and configuration of existing processes without the need for re-initiation or re-design.



Robust regulatory compliance

Control of roles and audits aligned with the strictest standards, such as SOX.



Connectivity with the different platforms using APIs

Connection with PP, PE, SAS, SAP and other platforms using ad-hoc scripts.

GlobalManager



Simplify, optimise and control:
automate workflows and
transform process
management in one step to
maximise your operational
results



Contact person



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