

BPM (Business Process Management)

How to build a plan

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BPM Versions

Modules	Version	Downloadable	
BPM Windows Control	1.1.5	https://www.acombpm.com	
BPM Apple IOS	1.1.4	Apple Store	
BPM Android	1.1.2	Google Play Store	

Certifications

CMMC	Security Level One	6/1/2025	
CMMC	Security Level Two	In-process	
Enterprise Readiness Overview	ACOMdev Security Statement	Appendix A	

A Simplified Example Flow

Here's a simplified example of what that coordination looks like:

1. **Facility management** verifies stable power and environmental conditions.
2. **Hardware technician** replaces failed components, powers up, and confirms basic operation.
3. **System administrator** restores system services and recovers lost data.
4. **DBA** validates database integrity and confirms readiness.
5. **ERP administrator** verifies application functionality end-to-end.
6. **Manager** communicates service restoration and authorizes user access.

These people don't just have specific tasks to accomplish, they need to be dispatched as needed, but not all at once.

The Takeaway

Disasters are high-pressure events. But with:

- a solid plan
- well-trained people
- clearly defined roles and responsibilities
- and tasks dispatched in a controlled, coordinated sequence.

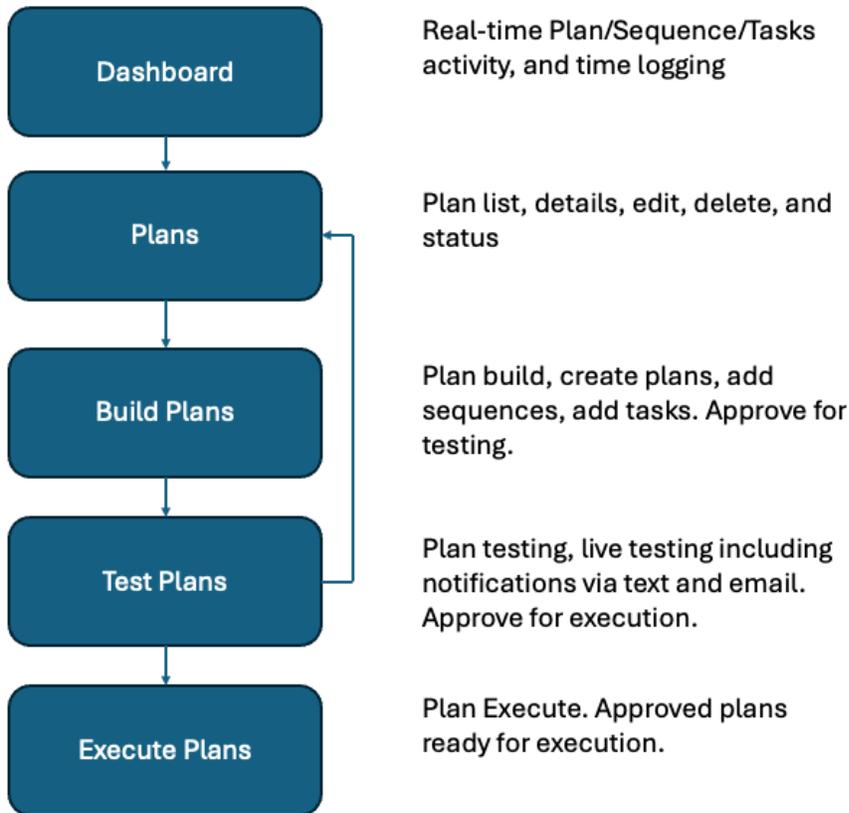
...you can turn a chaotic recovery into a disciplined execution.

That experience is where BPM became real for me, not as theory, but as a practical method for coordinating complex work when the stakes are highest.

BPM Workflow

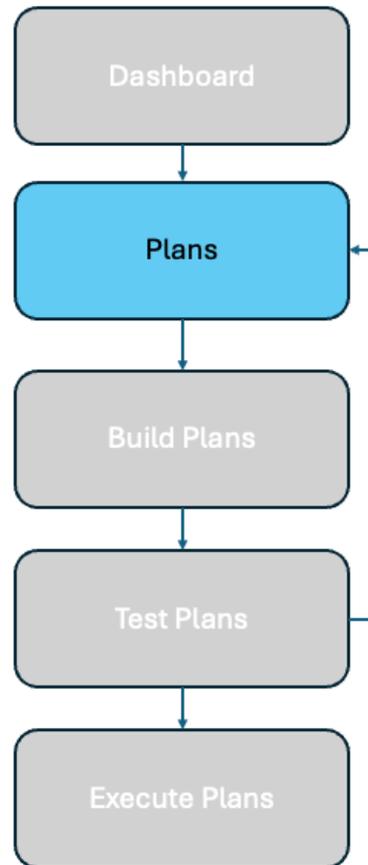
BPM supports the creation of complete disaster recovery plans and emergency management strategies, from initial planning through testing, certification, and promotion to executable status.

Below is a high-level flow chart showing the steps BPM uses to build, test, certify, and promote a plan to executable status. Also included is a dashboard view for real-time status and updates.



(The administrative functions, user management, permissions, and supporting reference data are documented at the end of this document.)

View a Plan



A list of active plans in various stages of completion are displayed on the desktop and mobile views of BPM “Plan” menu: Plan Name, Creation Date, Plan Status, along with Action/Delete/Rebuild options.

In the following example, we will view a plan called “*Marketing First Contact*,” which is highlighted in red on both views. Please note the status is “**PlanTestInProgress**.”

Plan: *Marketing First Contact*
Desktop View

Mobile View

Plan Name	Created Date	Plan Status	Action	Delete	Rebuild
Plan Test 9	1/6/2026	PlanExecuted			RE-BUILD
UI Test Plan	1/6/2026	PlanBuildInProgress			
Registration EM Procedures	1/4/2026	PlanExecuted			RE-BUILD
Gene test plan	12/23/2025	PlanTestInProgress			RE-BUILD
Test Plan SMS	10/31/2025	PlanBuildInProgress			
Plan Test 8	10/24/2025	PlanBuildInProgress			
Plan Test 7	10/23/2025	PlanBuildInProgress			
Marketing First Contact	10/13/2025	PlanTestInProgress			RE-BUILD
test09.28.25	9/29/2025	PlanTested			RE-BUILD
ERP system restore	9/13/2025	PlanBuildInProgress			

Test Plan SMS	Testing plan for SMS and backup member notification and tiny url	PlanBuildInProgress
Plan Test 8	Testing plan for shorten URL and sending SMS to international numbers	PlanBuildInProgress
Plan Test 7	Testing short url and sending sms to international numbers	PlanBuildInProgress
Marketing First Contact	This will be a first contact test.	PlanTestInProgress

The left view is the desktop view of BPM, and on the right the mobile view(s). Desktop views use a horizontal landscape, and Mobile views Vertical. With mobile views, at times depending on the application in order to show the entire mobile screen there may be two mobile views, this is due to mobile device formatting. The plan name is displayed in both the desktop and mobile views, highlighted with a blue outline – **Marketing First Contact**. The area marked with red shows the plan’s current status, in this case “**PlanTestInProgress**.” Green outline show assigned users and activity dates, yellow the tasks list.

Plan: *Marketing First Contact*
Desktop View

The desktop view shows the 'Plan Details' for 'Marketing First Contact'. The plan name is highlighted in blue. The status 'PlanTestInProgress' is highlighted in red. The plan level 'Marketing' and last changed date '12/26/25, 3:49 PM' are highlighted in green. The sequence list 'SEQ001' is highlighted in yellow and contains four tasks:

Task No	Task Title	Attachment	Status
Task001	T1 - Identify marketing leads and create a group	ACOMdev Intro.docx	InTestCompleted
Task002	T2 - Draft Marketing email	Not available	InTestCompleted
Task003	T3 - review list of new leads and send marketing emails	Not available	InTestDispatched
Task004	T4 - another tasks	Not available	InBuildNew

Mobile View #1

The mobile view #1 shows the 'Plan Details' for 'Marketing First Contact'. The plan name is highlighted in blue. The status 'PlanTestInProgress' is highlighted in red. The plan level 'Marketing' and last changed date '12/26/25, 3:49 PM' are highlighted in green. The sequence list 'SEQ001' is highlighted in red.

Mobile View #2

The mobile view #2 shows the task list for 'SEQ001'. The tasks are: T1 - Identify marketing leads and create a group (InTestCompleted), T2 - Draft Marketing email (InTestCompleted), T3 - review list of new leads and send marketing emails (InTestDispatched), and T4 - another tasks (InBuildNew).

Highlighted in yellow, the “Marketing First Contact” plan had one sequence named “SEQ001” and embedded within SEQ001 are four tasks: T1, T2, T3, and T4. BPM plans can manage multiple threads of tasks activity. Tasks that can operate in parallel are maintained in a separate sequence, i.e. SEQ001, SEQ002...

For example, if a workflow is managing the construction of a building, while carpenters are doing finish work inside the new building, managed by Sequence #1, brick masons could be laying brick on the exterior of the building, this could be Sequence #2, and so on.

In the *Marketing First Contact* example, only one sequence was needed which is SEQ001. Within SEQ001 are four tasks, listed below. In this “snapshot” view, the first two tasks are complete, and third is dispatched via text and email, and the fourth tasks waiting to execute.

As tasks execution status is tracked and catalogued, along with execution times: how long did it take to dispatch the task, when did the team member accept it, and when was it completed?

Note that task T1 has an attachment, each task description field allows for 500 characters, attachments are used when more detail information is needed for a given task. Documents supported: Word, PDFs, spreadsheets, videos, photos, etc.

Plan: <i>Marketing First Contact</i>		
Tasks	Status	Attachment
T1	InTestCompleted	Yes
T2	InTestCompleted	
T3	InTestDispatched	Means task sent via email and text to team member
T4	InBuildNew	Waiting to execute

Workflow Details

By drilling down on a given task, we can see more details. Highlighted in green is the task name, a short description. Red highlights the primary and backup team members. Every task in all plans requires a primary team member and backup. Highlighted in blue are time loggings of task activity. The data and time of when the task was dispatched and when the team member accepted the task is logged and displayed on the dashboard.

Plan: *Marketing First Contact*

Desktop View

The desktop view shows a sidebar with navigation options: Dashboard, Plans (highlighted), Build Plan, Test Plan, Execute Plan, Task Actions, and Admin. The main content area displays the following task details:

- Task Title:** T1 - Identify marketing leads and create a group (highlighted in green)
- Description:** Identifying marketing contacts for first contact, create group
- Status:** InTestCompleted
- Attachment:** ACOMdev Intro.docx (highlighted in green)
- Task Estimate (hours:minutes):** 00:20
- Acknowledged By:** shenbagara_X@trigent.com
- Completed Date/Time:** N/A
- Primary Team Member:** Krishna Reddy (highlighted in red)
- Backup Team Member:** Shenbaga Raj K TM (highlighted in red)
- Actual Response Time:** 61:54 (highlighted in blue)
- Actual Time to Completion:** 00:00 (highlighted in blue)
- Acknowledged Date/Time:** 12/26/2025, 9:29:24 AM (highlighted in blue)
- Completed By:** N/A
- Reported Problem By:** N/A
- Problem Reported Date/Time:** N/A

Mobile View

The mobile view displays the same task details in a compact format:

- Task Title:** T1 - Identify marketing leads and create a group (highlighted in green)
- Description:** Identifying marketing contacts for first contact, create group
- Status:** InTestCompleted
- Attachment:** ACOMdev Intro.docx (highlighted in green)
- Task Estimate (hours:minutes):** 00:20
- Acknowledged By:** shenbagara_X@trigent.com
- Completed Date/Time:** N/A
- Primary Team Member:** Krishna Reddy (highlighted in red)
- Backup Team Member:** Shenbaga Raj K TM (highlighted in red)
- Actual Response Time:** 61:54 (highlighted in blue)
- Actual Time to Completion:** 00:00 (highlighted in blue)
- Acknowledged Date/Time:** 12/26/2025, 9:29:24 AM (highlighted in blue)
- Completed By:** N/A
- Reported Problem By:** N/A
- Problem Reported Date/Time:** N/A

Workflow Options

A new plan can be created using the “New Plan” button circled in red. Plans can be deleted via the trash-can button, highlighted in yellow. Additional task detail can be viewed by clicking the “Action” button on the main menu. And if modification are required click the “Re-Build” button highlighted in green. More on Build or Re-build in the next section.

Desktop View

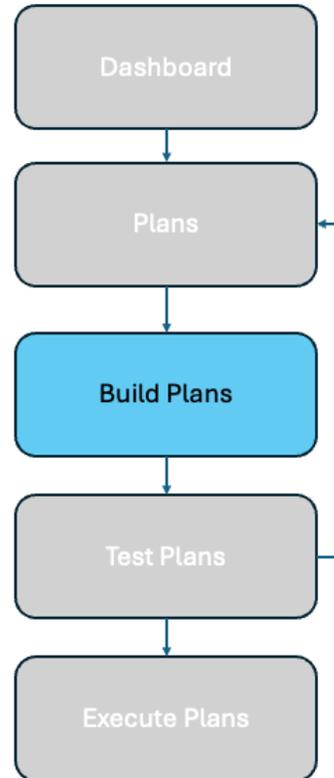
The desktop view shows a 'Plans' management interface. On the left is a navigation sidebar with 'Plans' highlighted. The main area contains a 'Plans List' table with columns for Plan Name, Created Date, Plan Status, Action, Delete, and Rebuild. A 'NEW PLAN' button is circled in red at the top right of the table. In the 'Marketing First Contact' row, the 'Action' button is circled in blue, the 'Delete' button is circled in yellow, and the 'Re-BUILD' button is circled in green.

Plan Name	Created Date	Plan Status	Action	Delete	Rebuild
Plan Test 9	1/6/2026	PlanExecuted	[Action]	[Delete]	RE-BUILD
UI Test Plan	1/6/2026	PlanBuildInProgress	[Action]	[Delete]	
Registration EM Procedures	1/4/2026	PlanExecuted	[Action]	[Delete]	RE-BUILD
Gene test plan	12/23/2025	PlanTestInProgress	[Action]	[Delete]	RE-BUILD
Test Plan SMS	10/31/2025	PlanBuildInProgress	[Action]	[Delete]	
Plan Test 8	10/24/2025	PlanBuildInProgress	[Action]	[Delete]	
Plan Test 7	10/23/2025	PlanBuildInProgress	[Action]	[Delete]	
Marketing First Contact	10/13/2025	PlanTestInProgress	[Action]	[Delete]	RE-BUILD
test09.28.25	9/29/2025	PlanTested	[Action]	[Delete]	RE-BUILD
ERP system restore	9/13/2025	PlanBuildInProgress	[Action]	[Delete]	

Mobile View

The mobile view shows a 'Plans' list on a smartphone. A context menu is overlaid on the screen, showing 'Edit', 'Delete', and 'Re-build' options. The 'Delete' option is highlighted in yellow, and the 'Re-build' option is highlighted in green. The 'Plans List' includes items like 'Plan Test 9', 'UI Test Plan', and 'Registration EM Procedures'.

Build a Plan



Building a plan

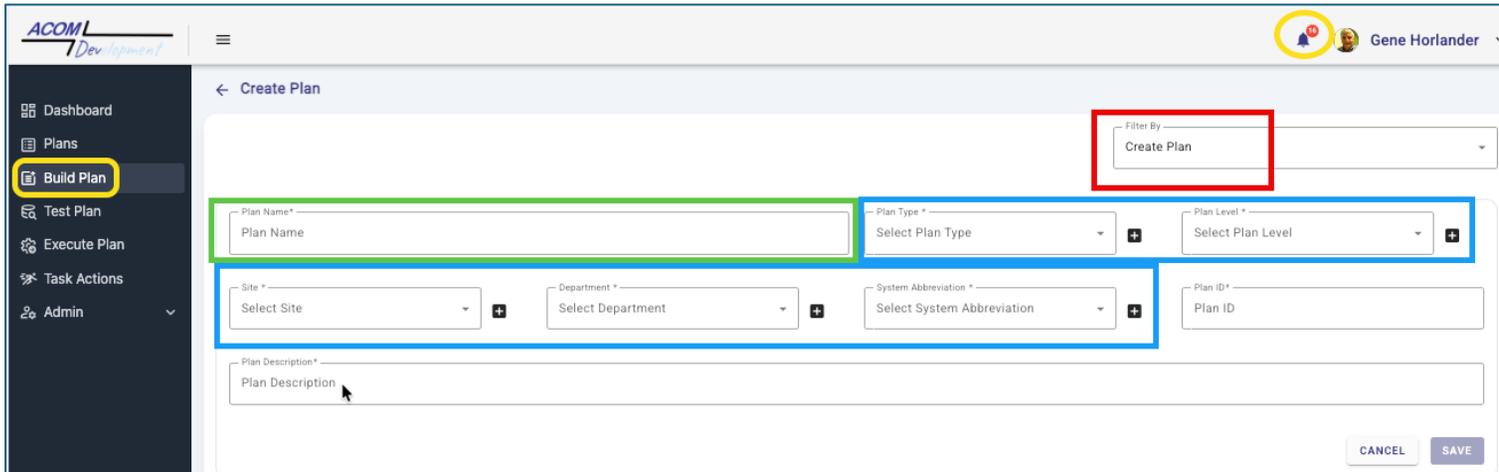
Building a plan in BPM whether it's for a disaster recovery, business continuity, cyber incident, emergency response by police and fire or military the overall concept and flow is similar. BPM houses a sequence of steps in a plan that will guide assigned users during a stressful emergency situations with clear instructions of each step sequentially dispatched in an orderly fashion.

The typical flow is **Build** a plan, **Test** a plan, then **Execute** a Plan. There is additional functionality for viewing plans in all stages, tracking activities using the dashboard, and administrative functions.

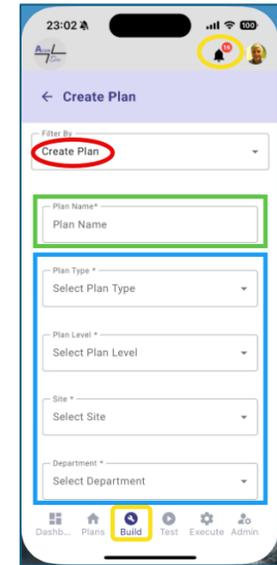
To create a new workflow/plan there are two options:

- 1) From the desktop version of BPM select the “New Plan” option in the “Plans” menu previous page, highlighted in red.
- 2) From both the mobile and desktop applications, select the “Build” menu, and choose “Create Plan” also circled in red.
- 3) Highlighted in yellow is a reminder icon, click this to see any outstanding messages from BPM.

Desktop View



Mobile View



Fields required to complete a workflow/plan are listed below:

- Plan Type, Plan Level, Site, Department, and System – *
- Description (500 characters)
- Creation Date (auto created)
- Last Modification Date. (auto updated)
- Plan ID (a computer-generated ID number)

* These fields can be edited in the administrative section or during the creation of a plan by clicking the “+” shortcut button to the right of available fields allowing new values to be created on the fly.

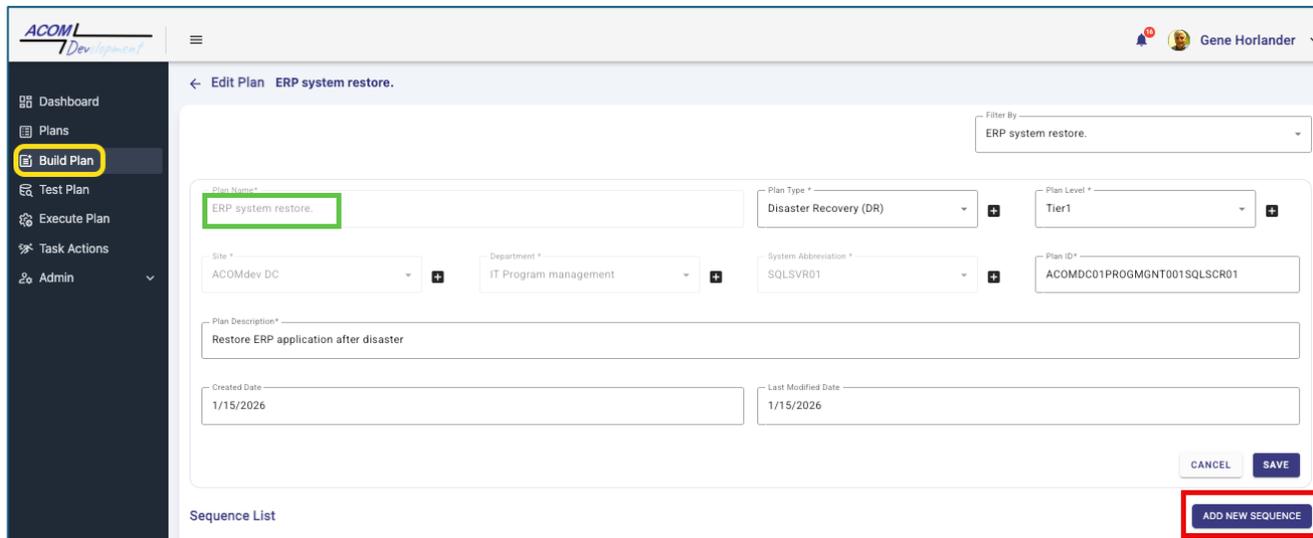
Adding a Sequence

BPM organizes plans made up of sequences and tasks. A sequence can be thought of as a group of tasks that must be executed in a sequential order. Each tasks dependent on the previous tasks.

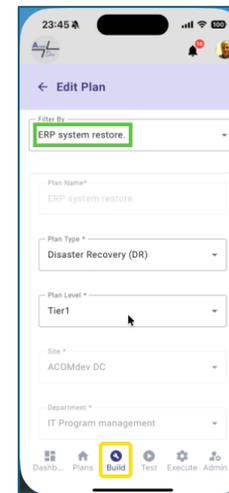
Groups of tasks that can be executed in parallel are managed by the creation of additional sequences (containers). A workflow/plan can have any number of sequences, and each sequence can have multiple tasks. When BPM executes a plan with multiple sequences it will dispatch tasks serially in each sequence, multiple sequences can be executing simultaneously.

Below is a newly created disaster recovery plan. Once the plan is created, various fields are used to document plan type, plan level, site (location), department, and system.

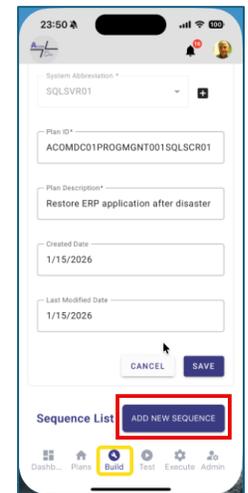
Desktop View



Mobile View #1



Mobile View #2



Adding Tasks

After a sequence is created tasks can be added.

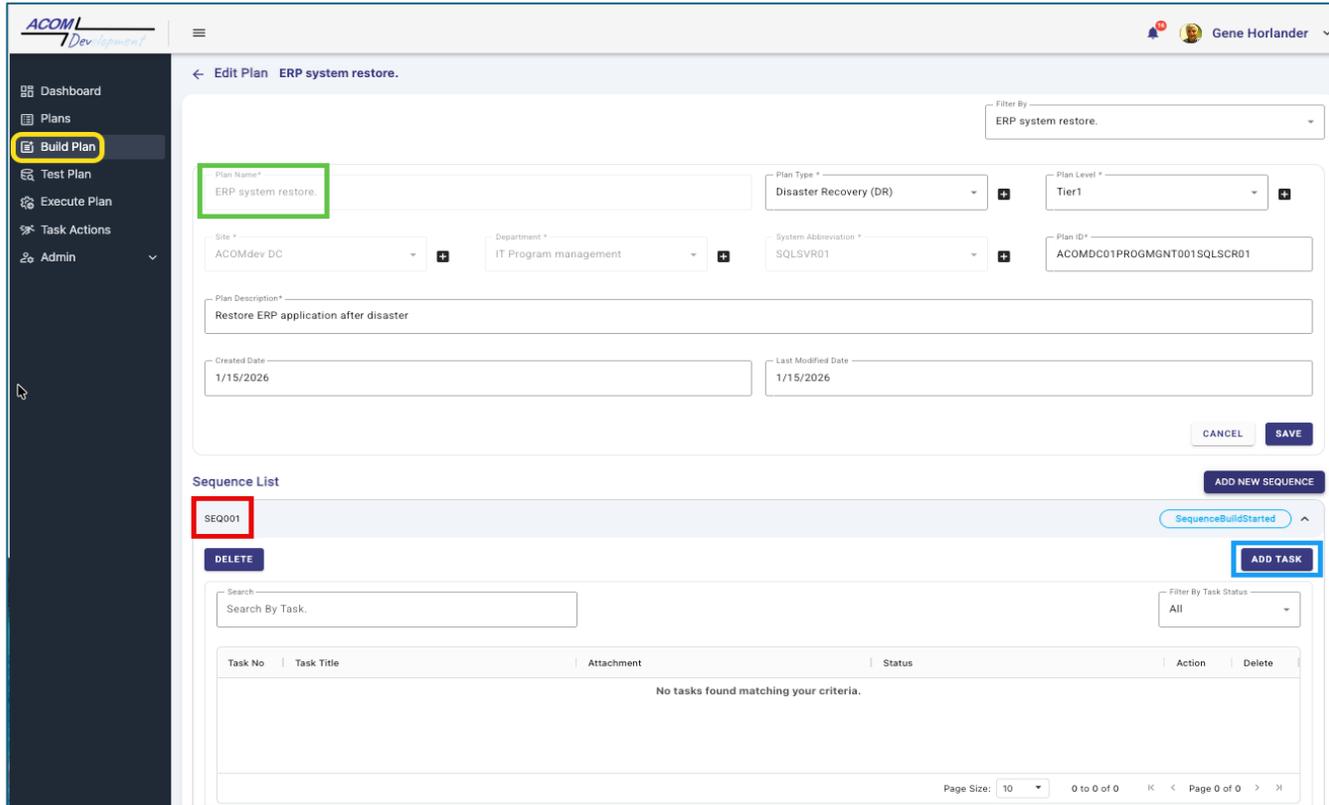
A task contains a description describing the work to be performed. A task identifies the primary team member assigned to the task; each primary team member will also have assigned a backup team member. Stored in the administrative section are all the details required to communicate instructions to both the primary and backup team members.

Task descriptions are included, in some cases the description is all that is needed, however, on more complex tasks BPM supports adding attachments. Most documents are supported: Word, Text, PDF, Excel, Power Point, Videos, and Photos.

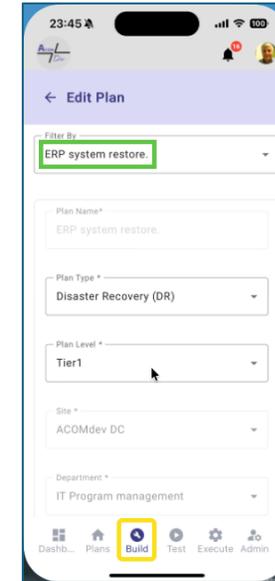
The tasks are generally created by a subject matter expert with extensive understanding of the tasks to be executed during a disaster recover, as the task is created a time estimate is requested of how long these tasks should take. When a task is accepted by the team member the time estimate is used to track progress. Task execution time is tracked on the dashboard in real time allowing the team manger to monitor progress, if the actual time exceeds the estimate an alert is generated. The timing of task completion for a plan provides an indicator of overall plan completion. Typically, during a disaster recovery, timing of the recovery can mean the difference between thousands of dollars of penalties or lost sales.

In the below screen, the plan has been completed, with sequences, and now tasks creation is next. In this plan we created one sequence, SEQ001 (highlighted with red), now to add tasks click the “Add Task” button, highlighted with blue.

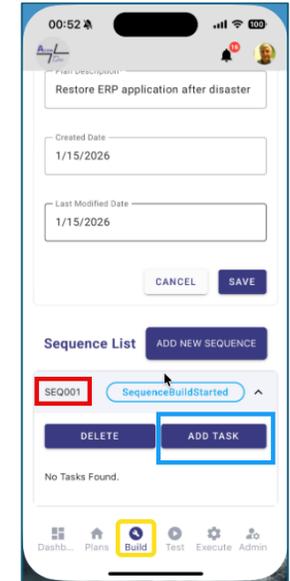
Desktop View



Mobile View #1



Mobile View #2



The Plan name is outlined in green, sequence name with red, and the button to add a task is blue.

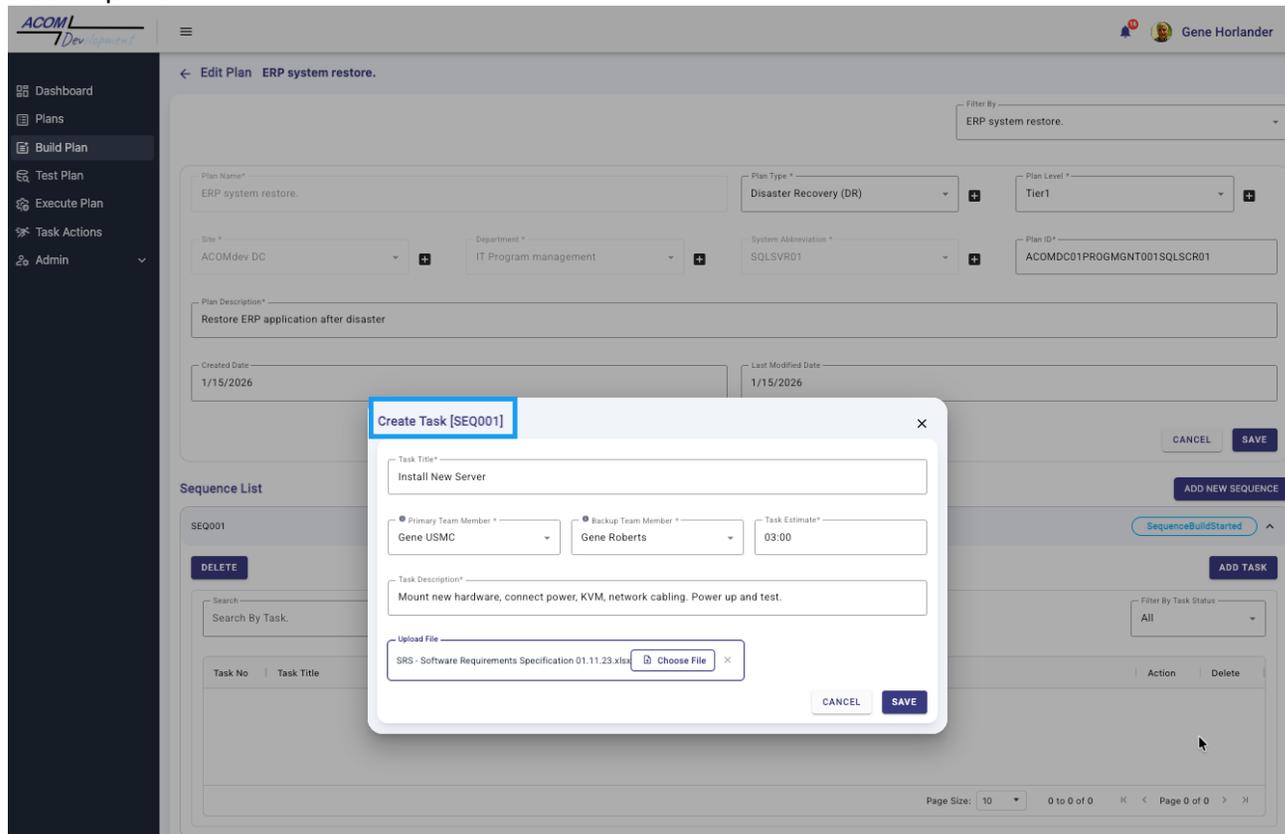
A best practice: While building plans, click “Save” often.

Adding Tasks Details

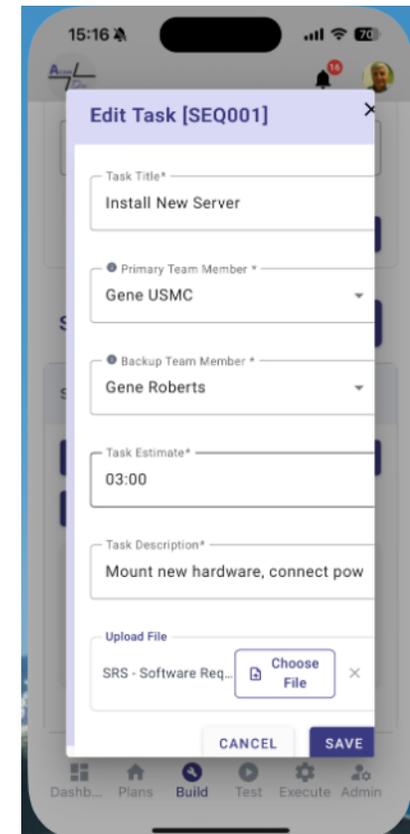
Click on the “Add Task” button, highlighted in blue. The below window opens ready to accept tasks details.

Task T1 – Install New Server

Desktop View

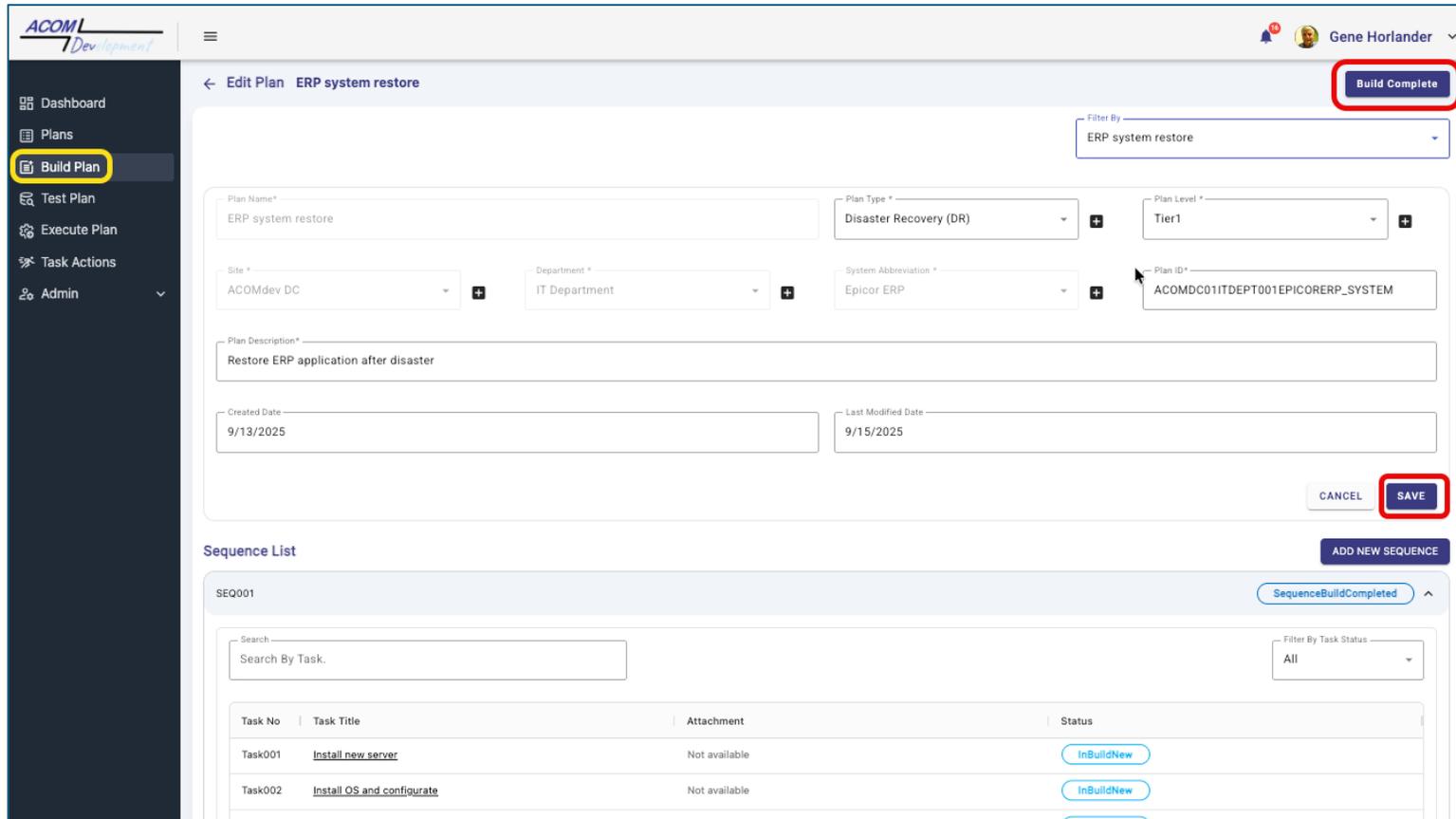


Mobile View

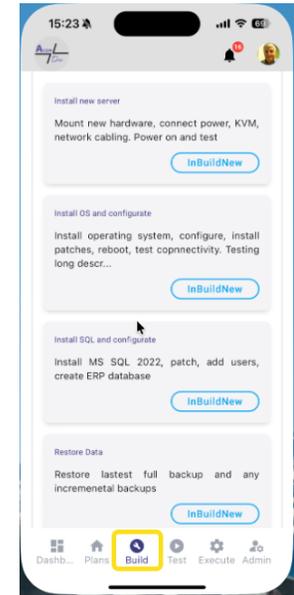


Completed Plan - Build Complete

Desktop View



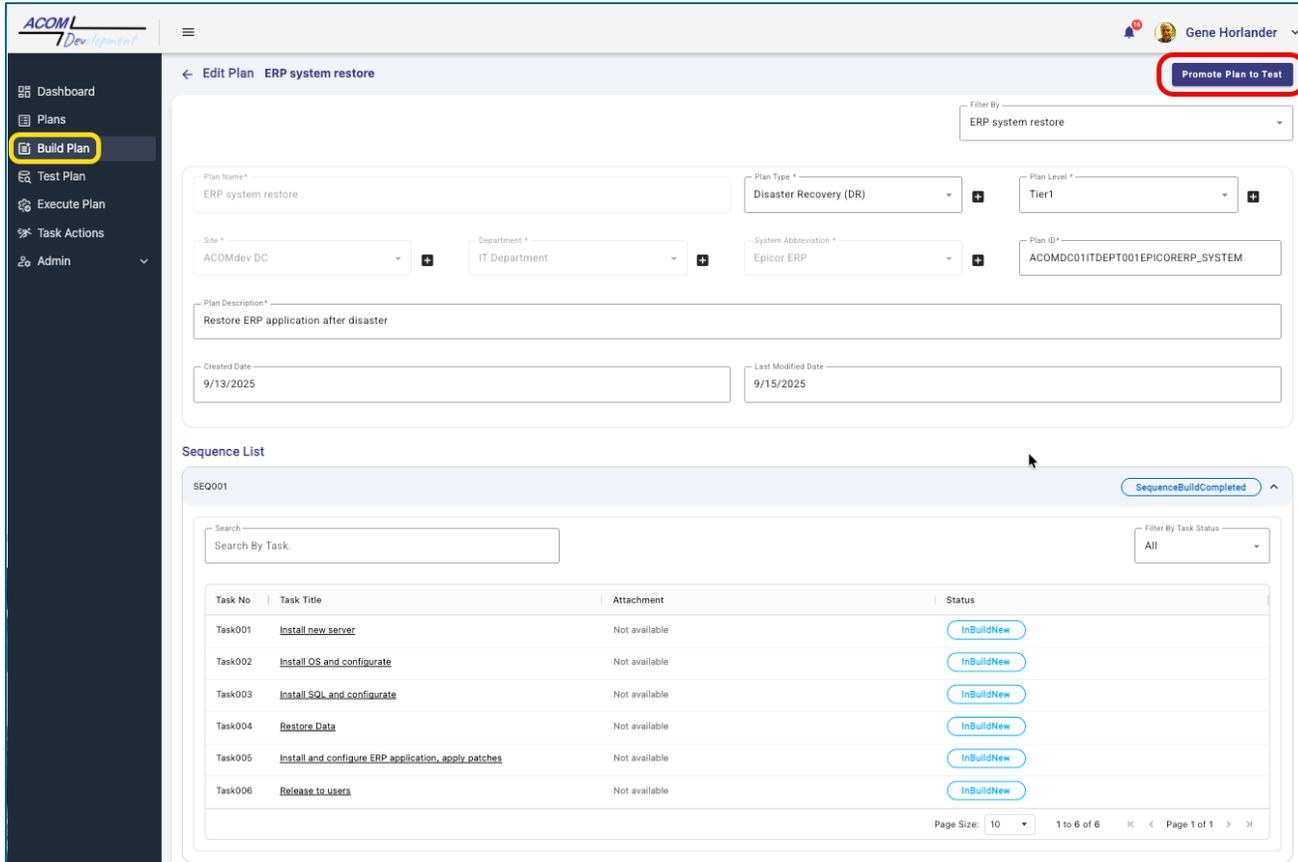
Mobile View



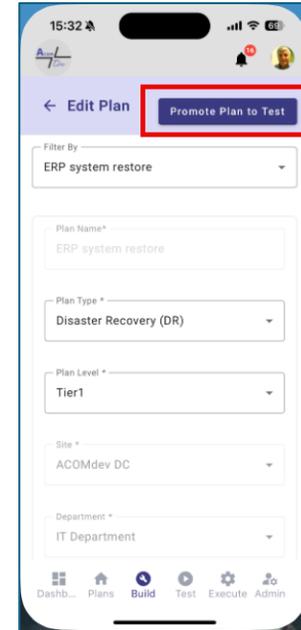
Assuming no other sequences are desired, or tasks, at this point to complete the build process click “Save” then “Build Complete,” circled in red. If more sequences are desired after testing, the plan can be edited. After saving you are presented with an updated screen that includes a button at the top of the screen called “Promote to Test”.

Completed Plan - Promote to Test

Desktop View



Mobile View

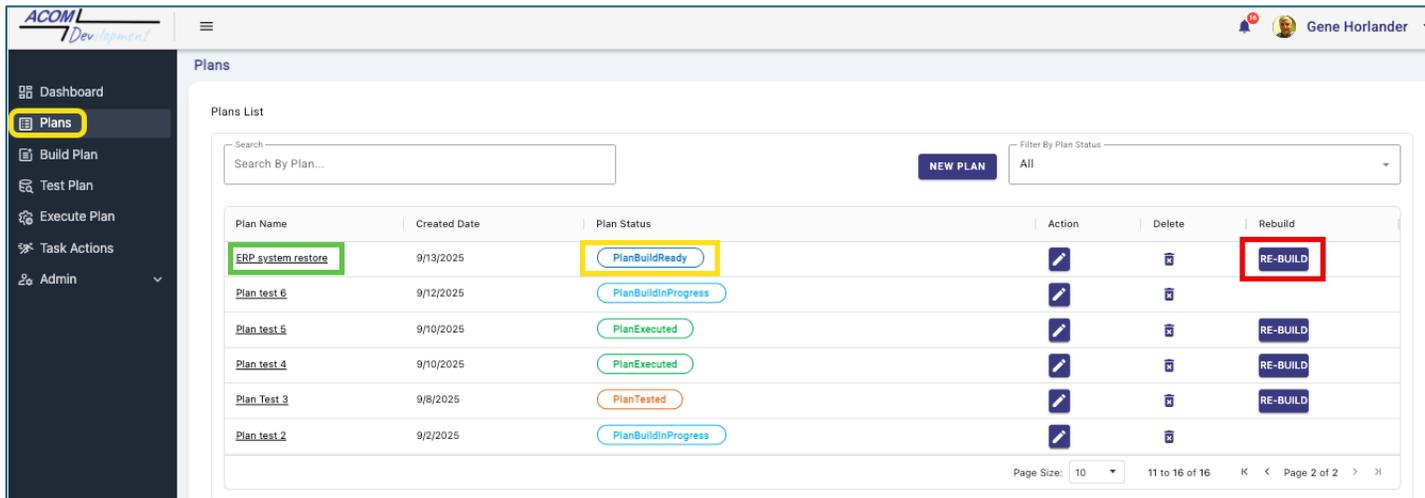


Last step is to click on “Promote Plan to Test.”

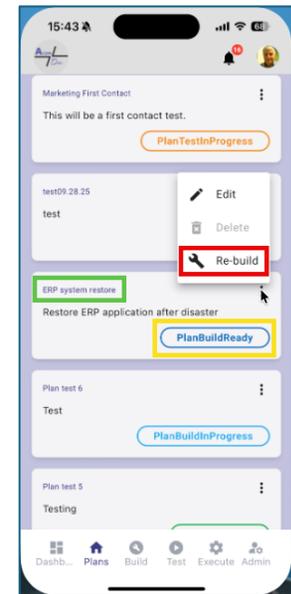
At this point the plan status has been updated to “PlanBuildReady,” and the plan can be scheduled for testing.

Note: the “Re-build” option allows making changes if required after testing. Sometime testing reveals changes or modifications that are needed. This option allows modifications to an existing plan.

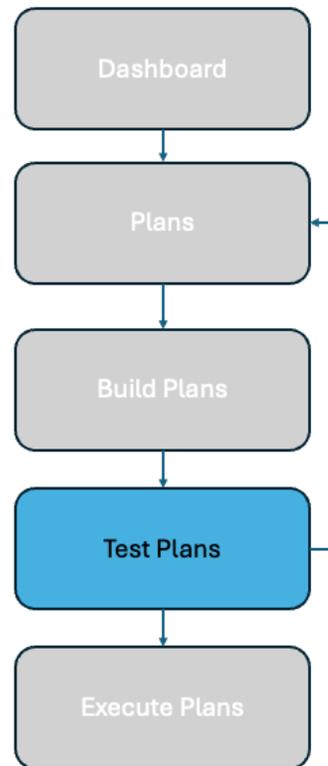
Desktop View



Mobile View



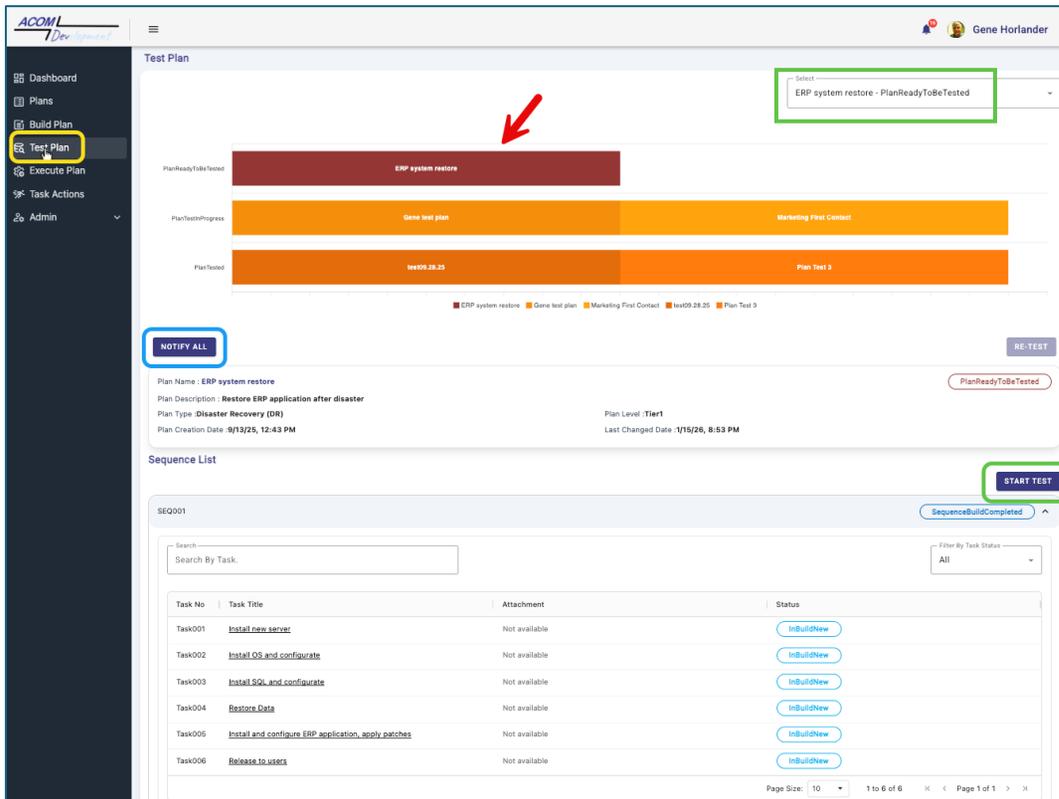
Test a Plan



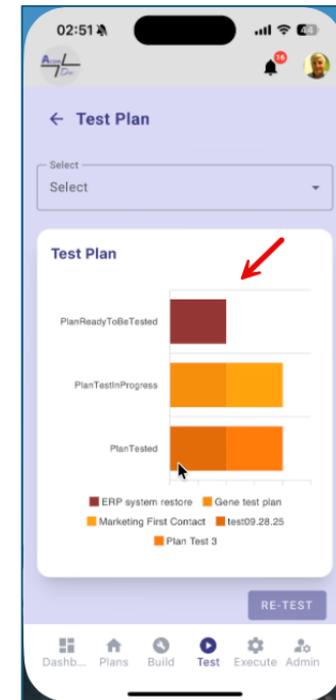
After a plan is built. Any plans that are ready for testing will appear on the “Test Plan” menu screen.

- Plans Ready to be Tested
- Plan Test in Progress
- Plans Tested

Test Plans Menu
Desktop View



Mobile View



Select Plan to be Tested

Click on the workflow/plan “ERP system restore” from the “Plans Ready to be Tested” category, on the **Test Plan** screen. Selecting the plan loads the sequence(s) and tasks.

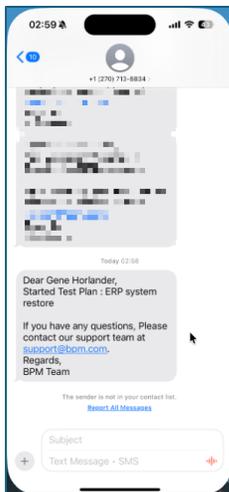
A good practice before starting a test is to notify all users that a test will be starting with the “**Notify All**” button, blue circle on the “Test Plan” menu on previous page - click “Notify.”

When ready click the “Start Test” button, on the **Test Plans** menu (previous page), circled in green.

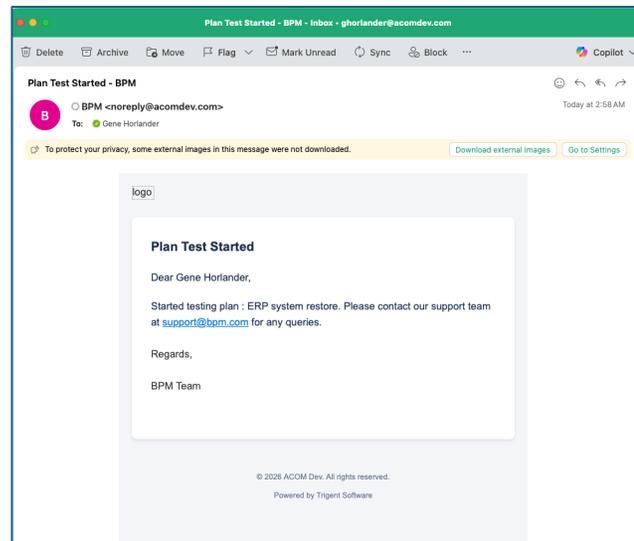
Notify Team Members

All team members, including managers and directors that have been assigned as participants in the plan will receive the same notification via email and text. Note: in this example, the **Team Manager - Gene Horlander** received a text via an **Apple** iPhone and **Outlook** email notification.

Mobile Text Notification



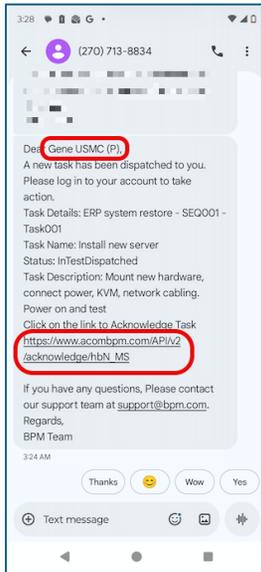
Desktop Email Notification



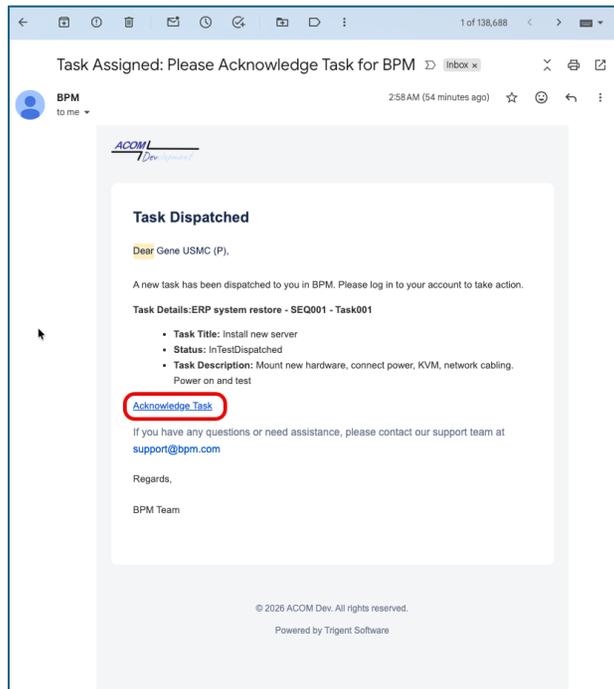
Team Member receives task update

The **Team Member - GeneUSMC** received a Task #1 text notification (left image) and via email. Note, his mobile device is an **Android** phone and email is **Gmail**. Gene’s email address also contains an identifier (P), meaning GeneUSMC is the primary assignee of this task. The Backup Team Member will also receive a copy of all text sent. The text on the right to the backup team member Gene Roberts, note next to his name is the designation (S), for secondary or backup.

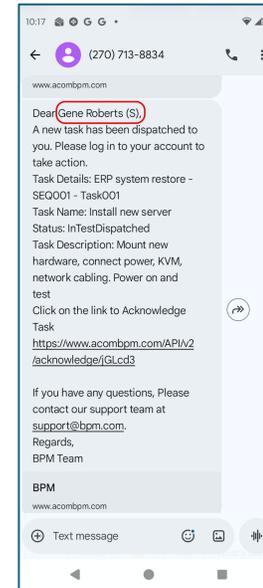
Mobile Text Primary



Desktop Email Notification



Mobile Text to Backup

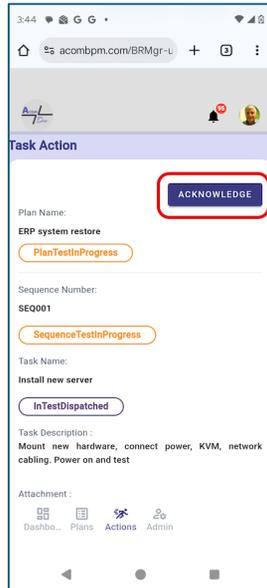
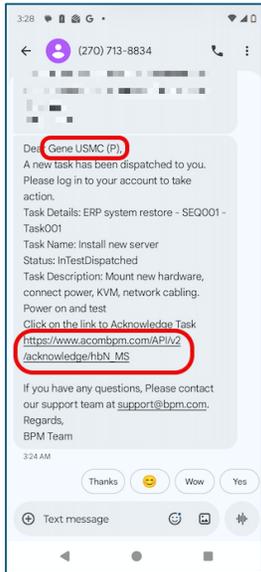


Task Accepted

GeneUSMC clicks the link in the text to accept the task on his Android phone and is then routed automatically to the task in the BPM application to complete the acknowledgement (right image).

Mobile Text Notification

After clicking link, user is routed to BPM to confirm task acceptance.

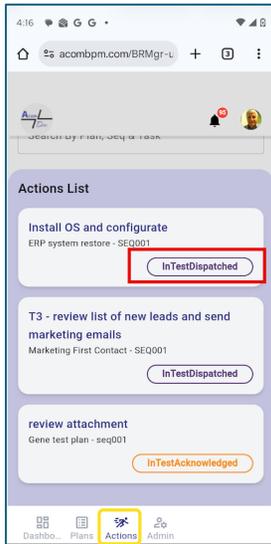


Task Completion

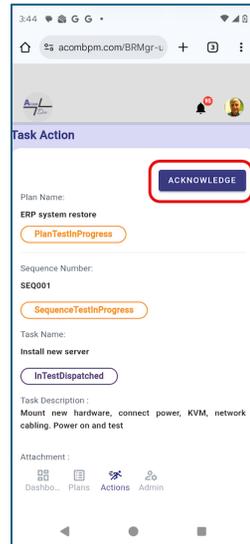
During the activities associated with a disaster recovery or any plan execution, as technicians are working to complete a task mobile device(s) may time out, thus getting back to the right sequence in BPM can be confusing.

BPM allows for these situations, during the execution of a plan sequence an additional menu item will appear titled “**Actions**.” Click on “Actions” anytime to return to the last open task activity. On the left image below notice multiple open tasks items, this exercise is testing the plan “ERP system restore,” and still performing task within the sequence SEQ001, and currently on Task 1 “Install new server.” The function “Actions” will show the most recent open task at the top of the list, “ERP system restore.” Click on the status highlighted in red – InTestDispatched, and BPM resumes. Now, GeneUSMC can click “Complete.”

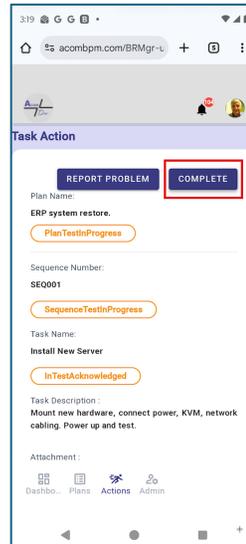
Mobile Action to resume



BPM resumes task

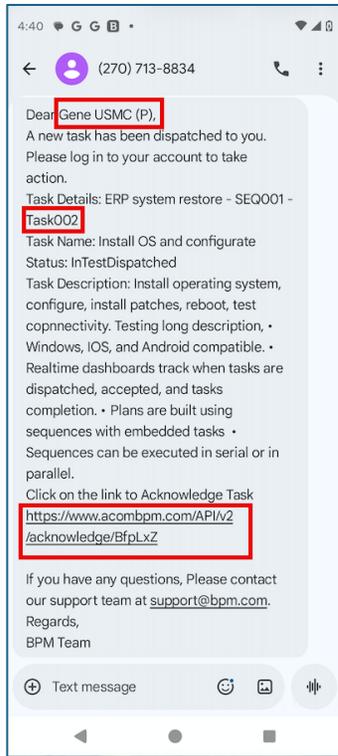


Click Complete when finished

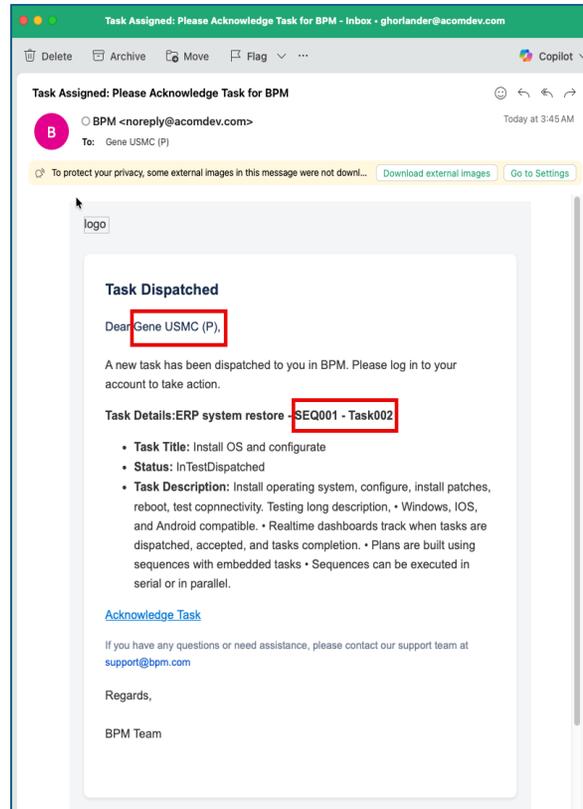


When a task is completed, BPM dispatches the next tasks.

Mobile Dispatch Task #2



Email notification for Task #2



Go to “Test Plan” menu for status of tasks, note as task are being executed status is updated and displayed. Task #1 is marked “InTestCompleted,” and Task #2 “InTestDispatched.”

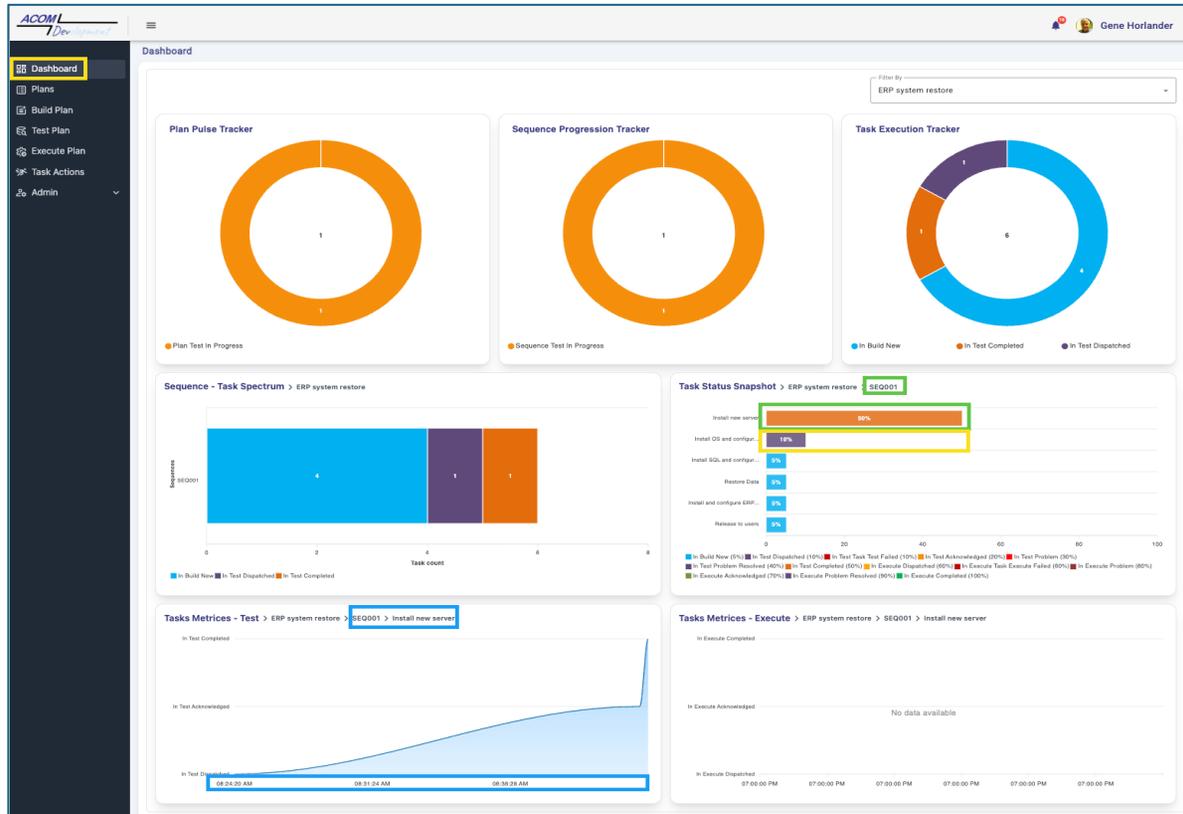
The screenshot shows the 'Test Plan' interface in the ACOML system. The left sidebar contains navigation options: Dashboard, Plans, Build Plan, Test Plan (highlighted), Execute Plan, Task Actions, and Admin. The main area displays a progress bar for the 'ERP system restore - PlanTestInProgress' plan. The progress bar is divided into three segments: 'Gene test plan', 'Marketing First Contact', and 'ERP system restore'. Below the progress bar, there is a 'Sequence List' section for 'SEQ001' with a search bar and a filter dropdown set to 'All'. The table below lists tasks with their titles, attachments, and status. Task #1, 'Install new server', has a status of 'InTestCompleted' (circled in green). Task #2, 'Install OS and configure', has a status of 'InTestDispatched' (circled in yellow). Other tasks have a status of 'InBuildNew'.

Task No	Task Title	Attachment	Status
Task001	Install new server	Not available	InTestCompleted
Task002	Install OS and configure	Not available	InTestDispatched
Task003	Install SQL and configure	Not available	InBuildNew
Task004	Restore Data	Not available	InBuildNew
Task005	Install and configure ERP application, apply patches	Not available	InBuildNew
Task006	Release to users	Not available	InBuildNew

Dashboard - Task Status (real-time)

Dashboard – Plan “ERP system restore”

Notes



Task #1 in SEQ001 marked complete – green box.

Task #2 in SEQ001 is dispatched – yellow box.

Task Metrics for Task #1 show the following time increments – blue box:

Dispatched
08:24:20

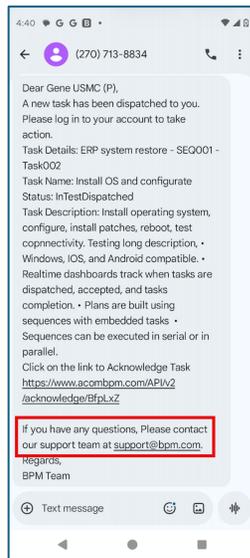
Acknowledged 08:45:06

Completed
08:45:32

BPM dashboard tracks every plan, sequence, and tasks activities and time stamps. This information is logged to the audit file and used for Power BI reporting. The time logging is real-time, allowing teams to compare and verify time executions. Since the dashboard is available to all users, it can also be used to monitor a disaster recovery plan in progress.

Problem Alerting

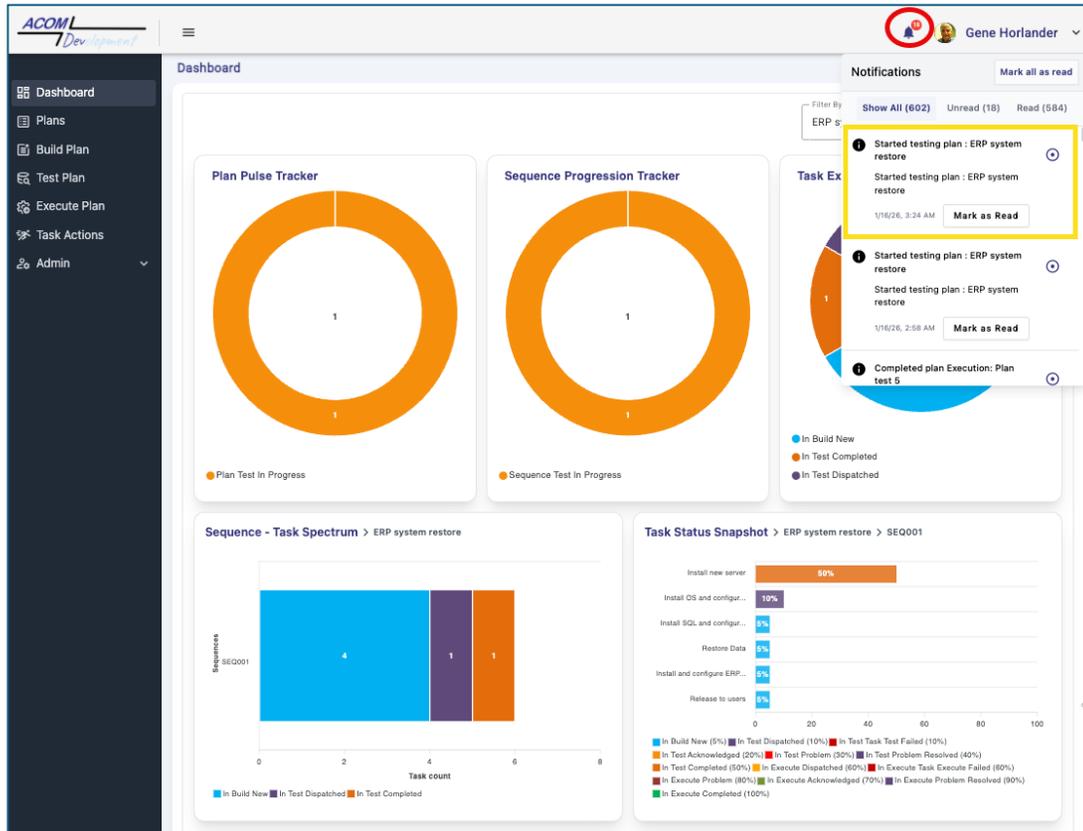
During the execution of tasks should a problem develop preventing a team member from completing the task, the user can click on the support@bpm.com link to alert management of issues. Each task dispatched contains a support/help alert link.



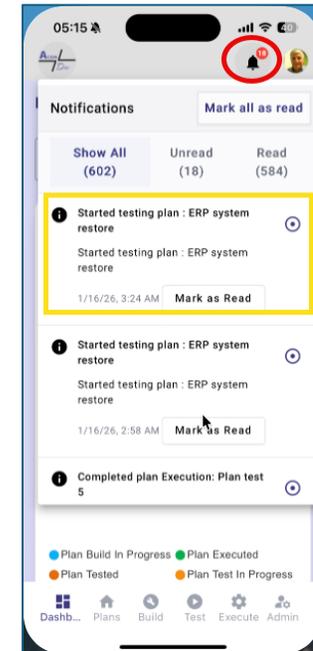
Reminders / Notifications

Please note, task reminders are also dispatched periodically via text and email. To view alerts or reminders click on the “Bell” icon see the upper right-hand corner highlighted in red.

Alerts / Notifications Desktop View



Mobile View



Task Actions

The “Task Actions “options are available anytime from the admin menu or during plan execution. During plan execution BPM enables the menu item on the left menu.

Desktop View – Task Actions

Plan Name	Sequence Name	Task Name	Task Status	Dispatched Date	Action
Marketing First Con...	SEQ001	T3 - review list of n...	InTestDispatched	26-12-2025 11:19	[Action Icon]
Gene test plan	seq001	review attachment	InTestAcknowledged	23-12-2025 16:29	[Action Icon]
ERP_system restore	SEQ001	Install OS and confi...	InTestDispatched	15-09-2025 16:19	[Action Icon]

Mobile View

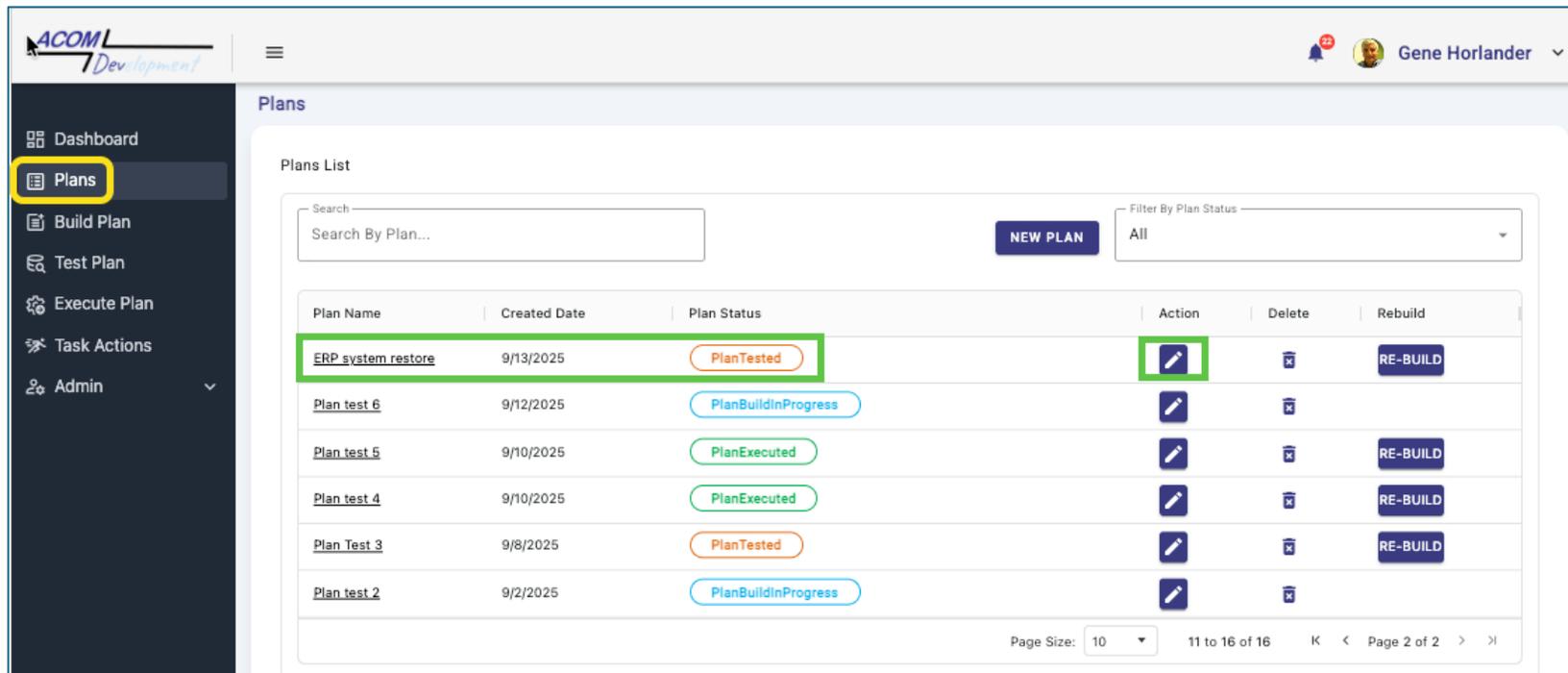
Retesting

The Plan can be tested again by clicking on the “Re-Test” button, highlighted in yellow.

The screenshot displays the ACOML Development Test Plan interface. On the left, a navigation menu includes 'Dashboard', 'Plans', 'Build Plan', 'Test Plan' (highlighted in yellow), 'Execute Plan', 'Task Actions', and 'Admin'. The main area shows a 'Test Plan' for 'ERP system restore - PlanTested'. A Gantt chart visualizes the test execution timeline with the following steps: 'Marketing First Contact', 'Gene test plan', 'test09.28.25', 'ERP system restore' (highlighted in yellow), and 'Plan Test 3'. A 'RE-TEST' button is highlighted in yellow at the bottom right. Below the chart, plan details are provided: Plan Name: ERP system restore, Plan Description: Restore ERP application after disaster, Plan Type: Disaster Recovery (DR), Plan Level: Tier1, Plan Creation Date: 9/13/25, 12:43 PM, and Last Changed Date: 1/16/26, 8:45 AM. A 'PlanTestInProgress' status indicator is also visible.

Workflow Promoted to Execution Status

Viewing the “Plans” menu, the “ERP system restore” plan is Complete with status of “PlanTested.” Plan can now be promoted to “Execute Status” by clicking the “Action” button.



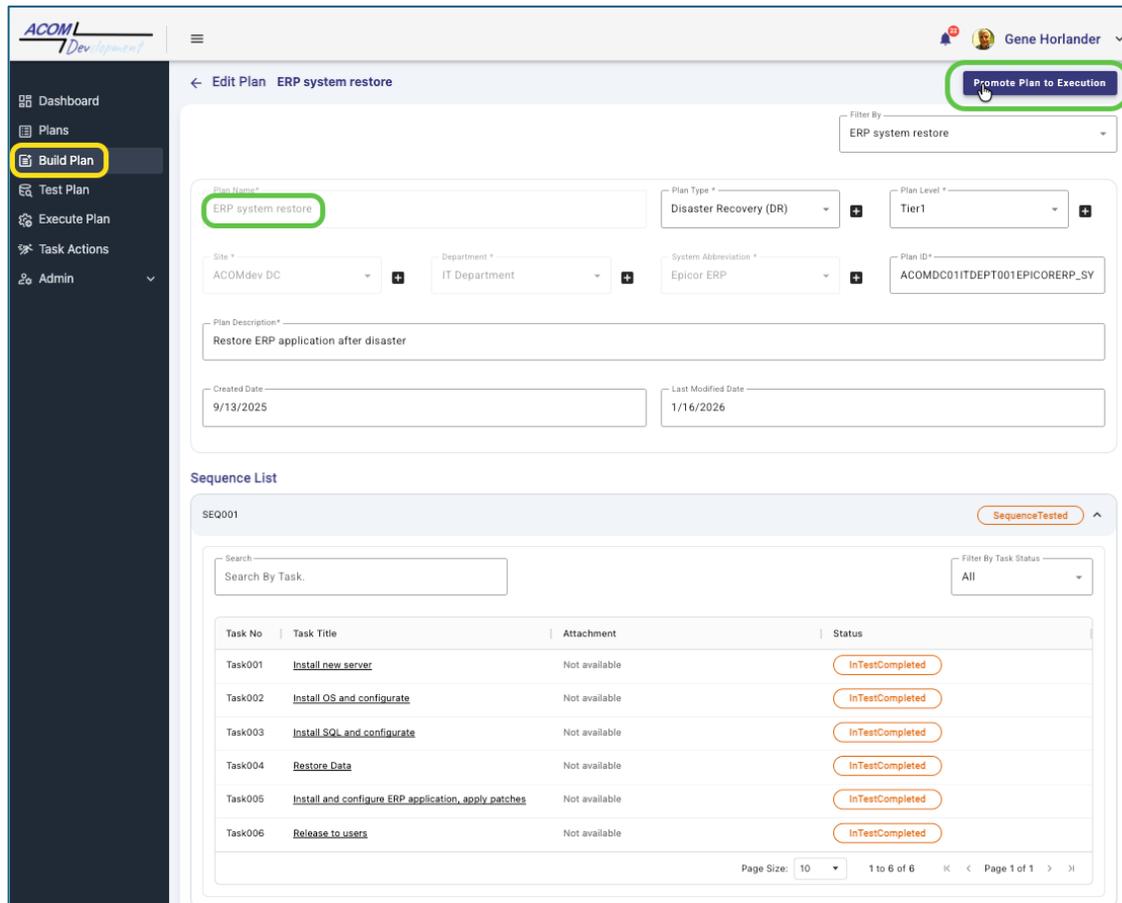
The screenshot shows the 'Plans' menu in the ACOML Development application. The 'Plans' menu item is highlighted in the left sidebar. The main content area displays a 'Plans List' table with the following data:

Plan Name	Created Date	Plan Status	Action	Delete	Rebuild
ERP system restore	9/13/2025	PlanTested			RE-BUILD
Plan test 6	9/12/2025	PlanBuildInProgress			
Plan test 5	9/10/2025	PlanExecuted			RE-BUILD
Plan test 4	9/10/2025	PlanExecuted			RE-BUILD
Plan Test 3	9/8/2025	PlanTested			RE-BUILD
Plan test 2	9/2/2025	PlanBuildInProgress			

The 'ERP system restore' plan is highlighted with a green border, and its 'Action' button is also highlighted with a green border. The table includes search and filter options at the top, and pagination information at the bottom.

Approve and Promote Plan

Clicking the Action button brings up the “Build Plan” menu, and the disaster recovery plan can be promoted to execution status by clicking “Approve Plan” highlight by green box next slide.



The screenshot shows the 'Edit Plan' interface for 'ERP system restore'. The left sidebar has 'Build Plan' highlighted in yellow. The main area features a 'Promote Plan to Execution' button highlighted in green. Below this, the plan details are shown, including Plan Name, Type, Level, Site, Department, System Abbreviation, and Plan ID. A 'Sequence List' section below shows a table of tasks with their status.

Task No	Task Title	Attachment	Status
Task001	Install new server	Not available	InTestCompleted
Task002	Install OS and configure	Not available	InTestCompleted
Task003	Install SQL and configure	Not available	InTestCompleted
Task004	Restore Data	Not available	InTestCompleted
Task005	Install and configure ERP application, apply patches	Not available	InTestCompleted
Task006	Release to users	Not available	InTestCompleted

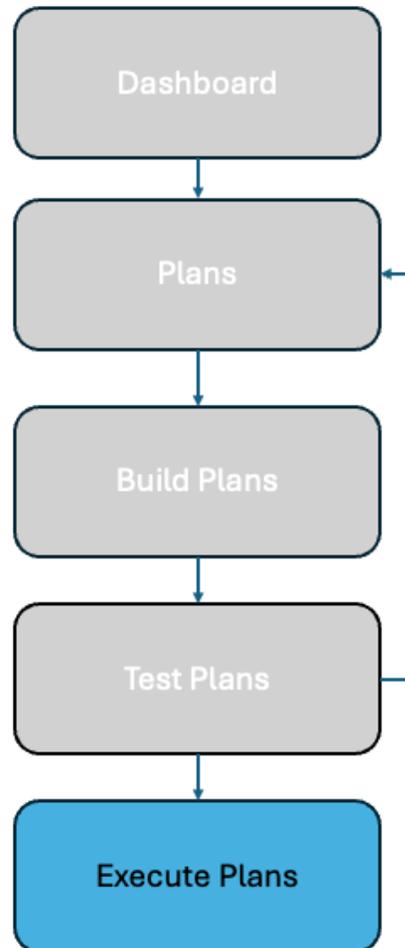
View “Plans” menu, plan is ready to be executed.

The screenshot displays the ACOML Development web application interface. On the left, a dark sidebar contains a navigation menu with the following items: Dashboard, Plans (highlighted with a yellow box), Build Plan, Test Plan, Execute Plan, Task Actions, and Admin. The main content area is titled 'Plans' and features a 'Plans List' section. At the top of this section, there is a search bar labeled 'Search By Plan...' and a 'NEW PLAN' button. To the right, there is a 'Filter By Plan Status' dropdown menu currently set to 'All'. Below these elements is a table with the following data:

Plan Name	Created Date	Plan Status	Action	Delete	Rebuild
<u>ERP system restore</u>	9/13/2025	PlanReadyToBeExecuted			RE-BUILD
<u>Plan test 6</u>	9/12/2025	PlanBuildInProgress			
<u>Plan test 5</u>	9/10/2025	PlanExecuted			RE-BUILD
<u>Plan test 4</u>	9/10/2025	PlanExecuted			RE-BUILD
<u>Plan Test 3</u>	9/8/2025	PlanTested			RE-BUILD
<u>Plan test 2</u>	9/2/2025	PlanBuildInProgress			

At the bottom of the table, there is a pagination control showing 'Page Size: 10', '11 to 16 of 16', and 'Page 2 of 2'.

Execute a Plan

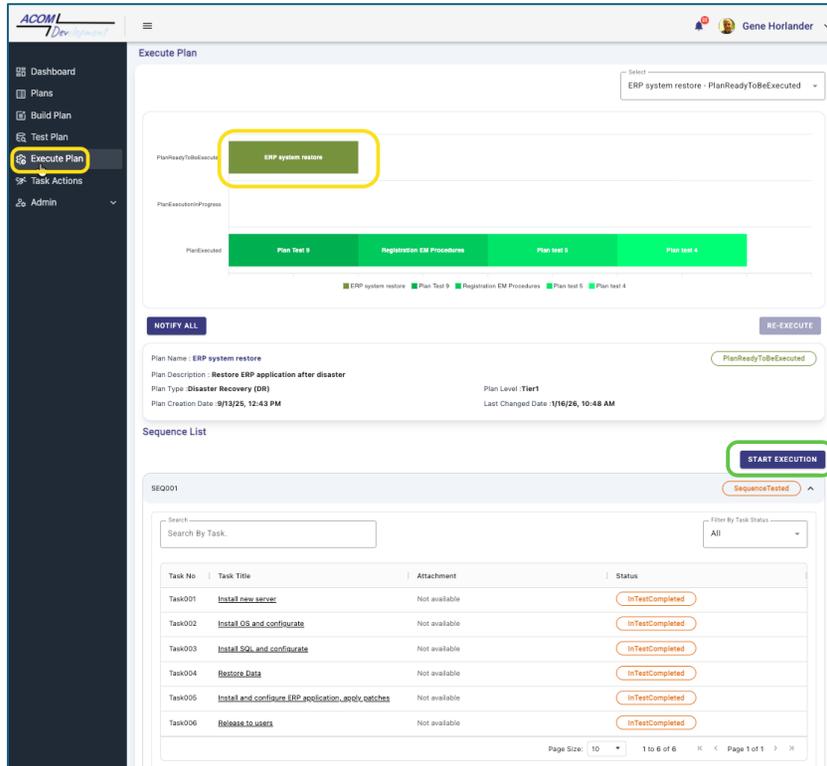


Execute a Workflow/Plan

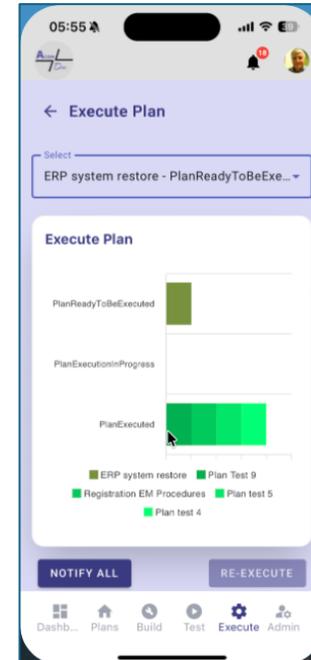
The execution process for a workflow/plan in BPM is almost identical to the test execution, so no need to go through this again in detail. BPM allows all plans to be re-executed with no limit; there is also no limitation on the number of plans.

Shown below is the “Execution Plan” menu. The recently tested plan “ERP system restore” has completed testing, is approved, and has been promoted to Execution. To start an execution, click on “Start Execution” button. Team members can be alerted in advance using the “Notify All” button, as before when testing.

Desktop View



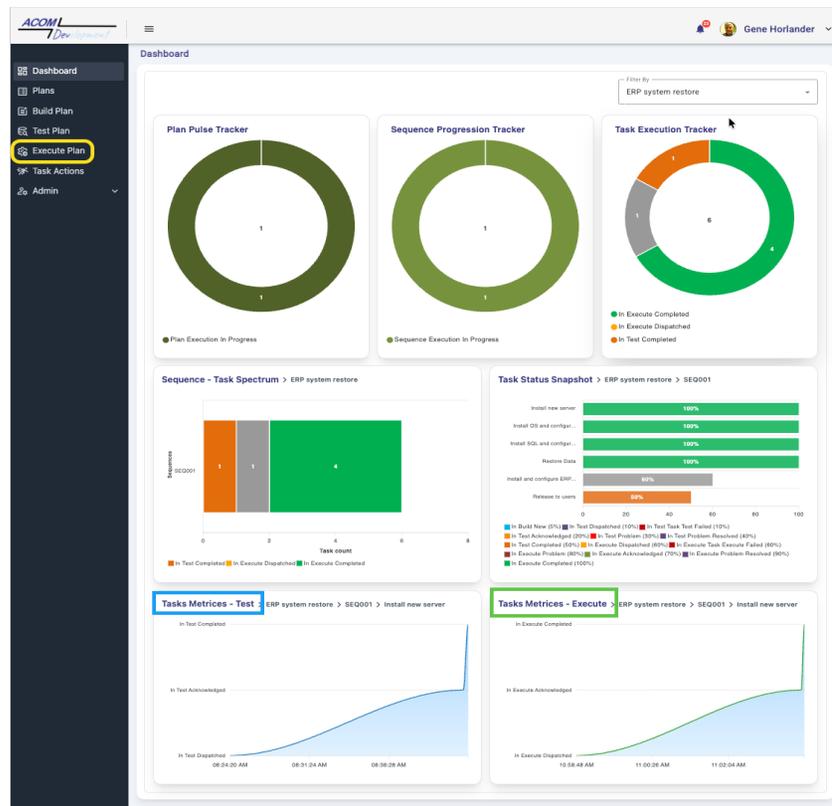
Mobile View



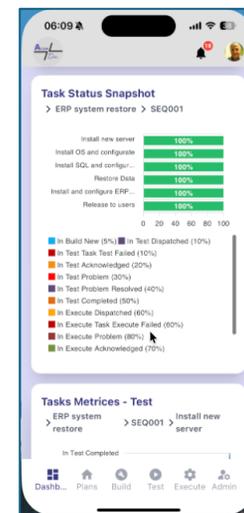
Workflow Execution Dashboard Metrics

Dashboard view of Disaster Recovery plan “ERP system restore” showing overall task snapshot data, “testing” metrics bottom left (blue), and “execution” metrics bottom right (green).

Dashboard View



Task status snapshot



Mobile View
Test Metrics



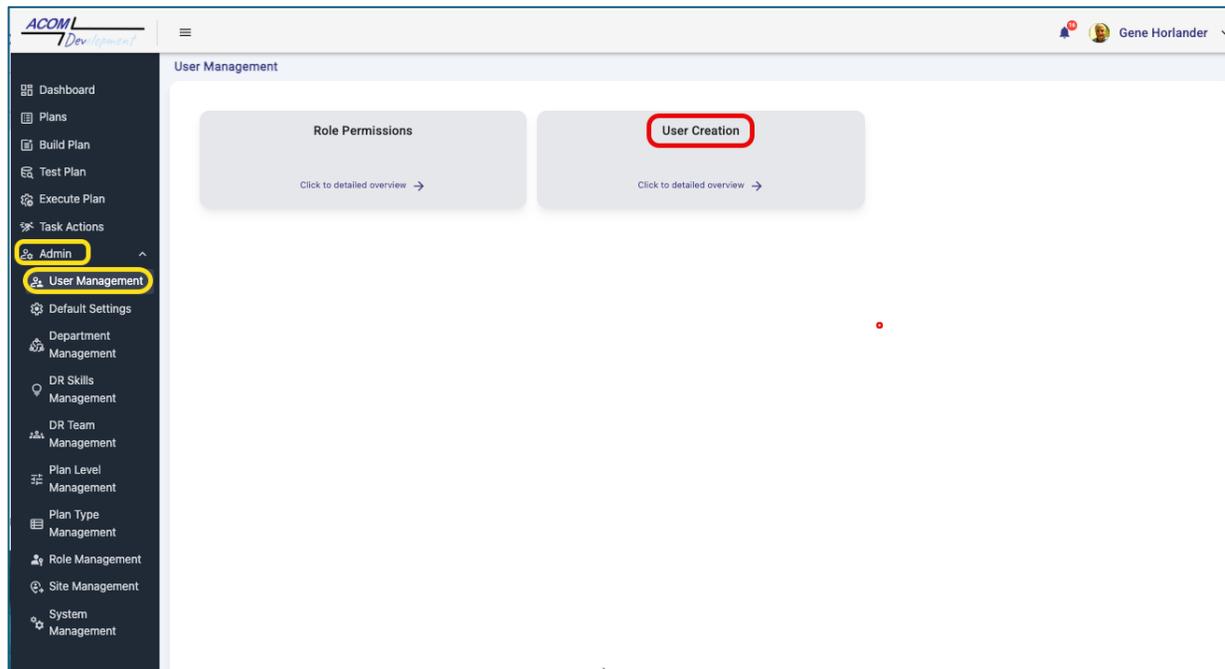
Execution Metrics



Administrative Section

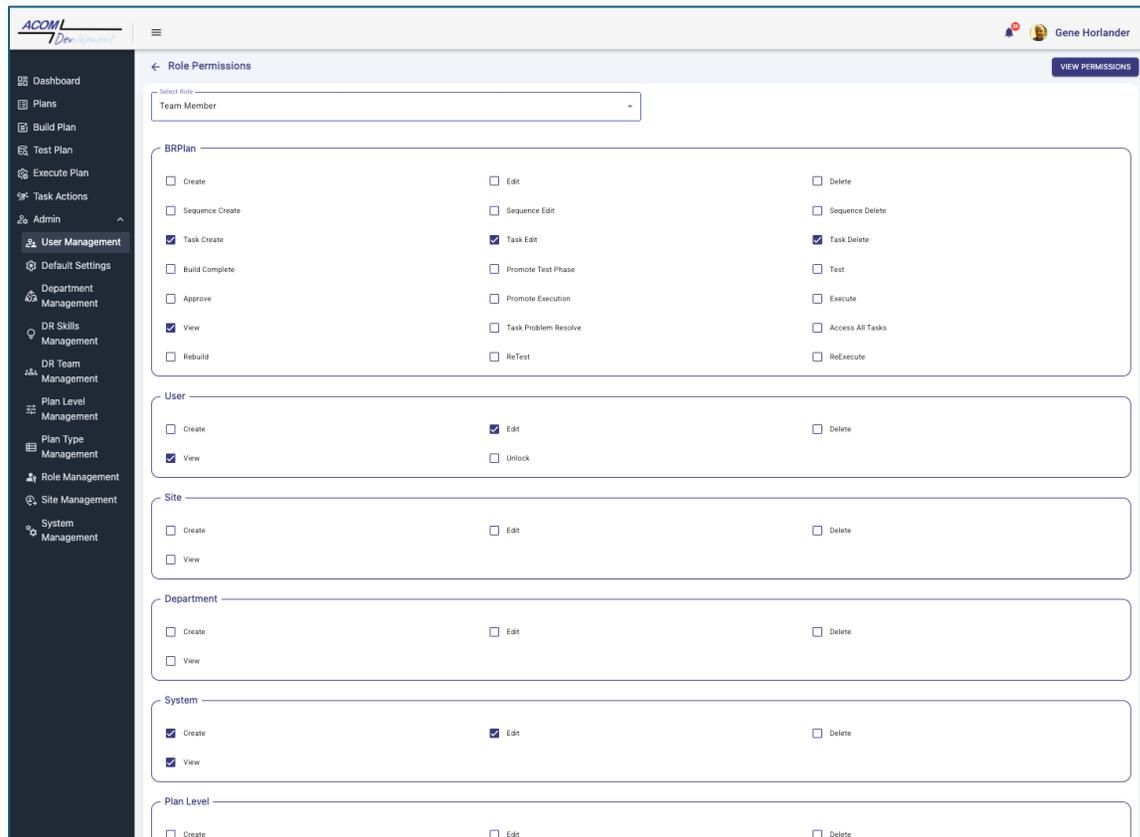
User Setup

Add users ... BPM is free for the first 5 users. To add a user, select Admin from the main menu, then User Management, and then User Creation.



When creating a user account, there is also a menu option for Role Permissions,

For now, you can bypass Permissions and use the default settings. Going forward as your requirements become more complex permissions is an extensive area of policy management with an array of rules that allow extensive control and fine tuning of user's access and capabilities in BPM.



Role Permissions: (view only)

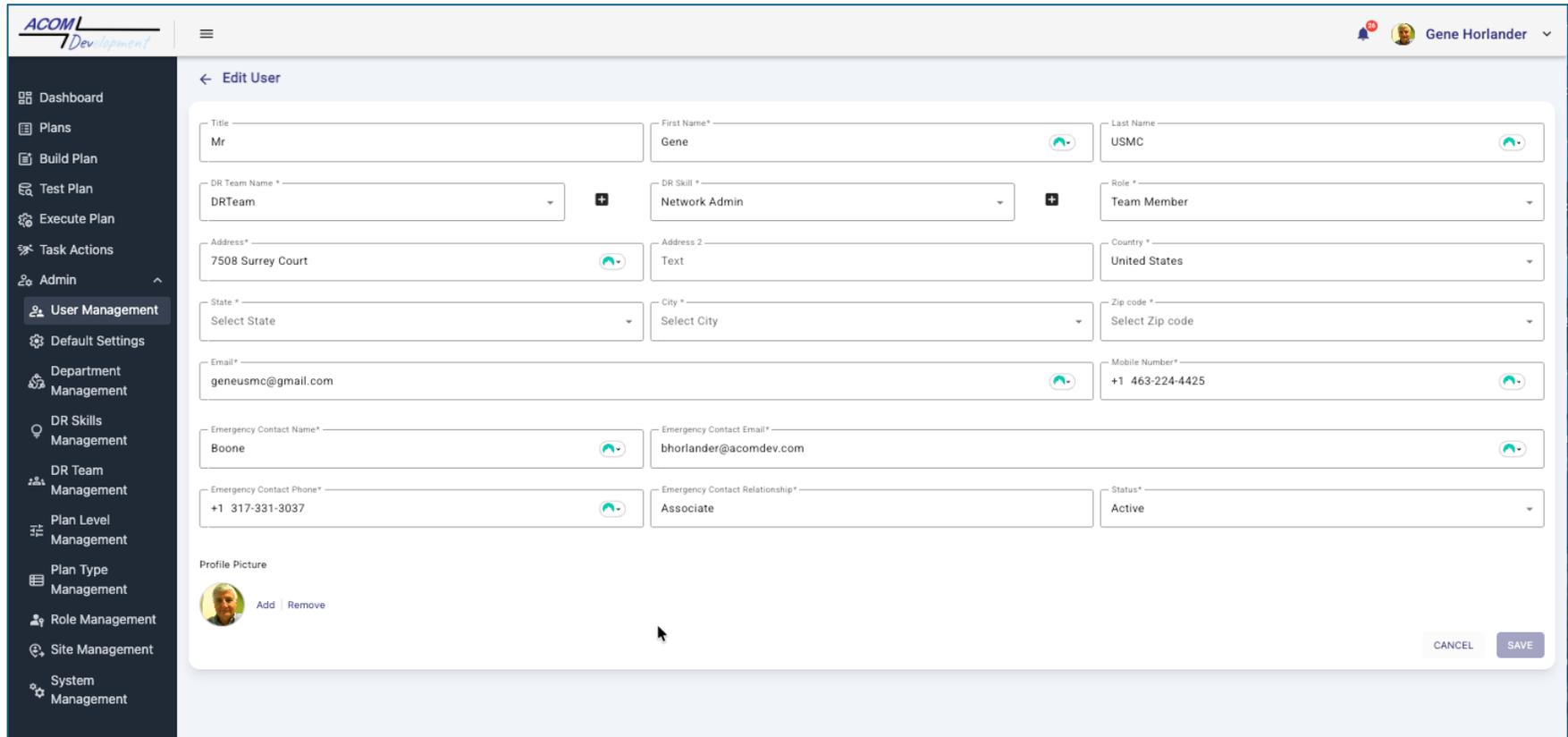
Select Role: dropdown.

Displays:

- BRPlan
- Site
- Department
- System
- Plan Level
- Plan Type
- Other
- Default Configuration
- DR Skill
- DR Team
- System Type
- History/Log (system only)

Adding Users:

Adding a user is a straightforward process with several unique topics related to BPM. International texting is also supported.



The screenshot shows the 'Edit User' interface. On the left is a navigation menu with options like Dashboard, Plans, Build Plan, Test Plan, Execute Plan, Task Actions, Admin, User Management (selected), Default Settings, Department Management, DR Skills Management, DR Team Management, Plan Level Management, Plan Type Management, Role Management, Site Management, and System Management. The main content area is titled 'Edit User' and contains the following fields:

- Title: Mr
- First Name: Gene
- Last Name: USMC
- DR Team Name: DRTeam
- DR Skill: Network Admin
- Role: Team Member
- Address 1: 7508 Surrey Court
- Address 2: Text
- Country: United States
- State: Select State
- City: Select City
- Zip code: Select Zip code
- Email: geneusmc@gmail.com
- Mobile Number: +1 463-224-4425
- Emergency Contact Name: Boone
- Emergency Contact Email: bhorlander@acomdev.com
- Emergency Contact Phone: +1 317-331-3037
- Emergency Contact Relationship: Associate
- Status: Active

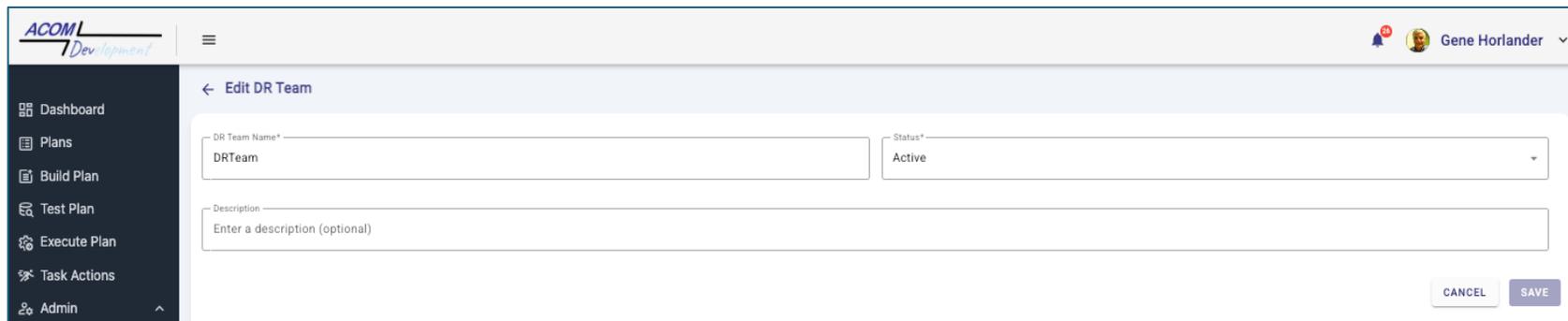
At the bottom left, there is a 'Profile Picture' section with a small image and 'Add | Remove' links. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

BPM Key Fields:

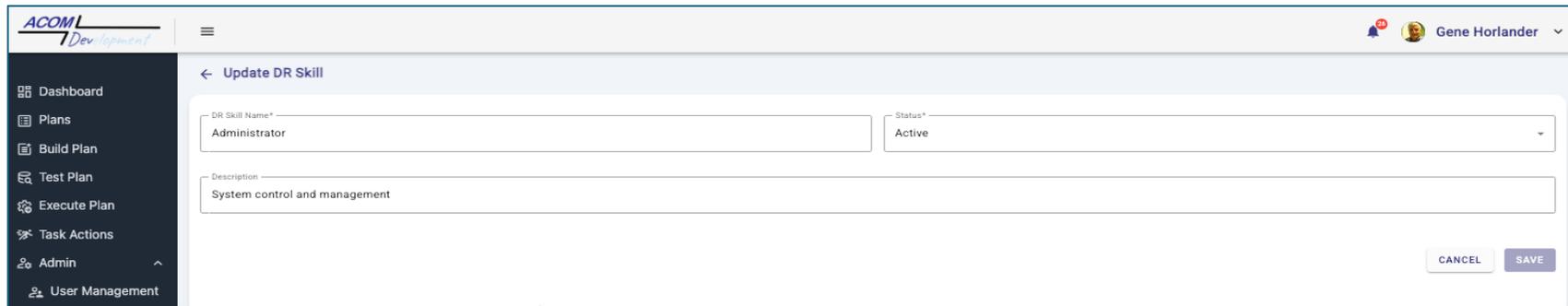
BPM provides the ability to add or edit key field entries via the administrative menu. Each key field has corresponding menu selection that will guide the user through this process.

A convenient feature provided by BPM is the ability to use shortcuts during the build process. Should a new field entry be required during the build process, rather than exit the build process, create the new field, then restart the build. Users can click on the “+” icon located to the right of a field. By clicking on the + icon, the corresponding entry creation functionality pops-up in the middle of the build process screen allowing the entry to be created, then returns to the build process.

DR Team name: You can create any number of teams, and then select team members to the DR team. You can use the default team name, going forward you may desire additional team assignments as workflows increase in complexity.



DR Skill: Defines the skill required for certain functions.



Roles:

Roles: Used to further refine a user’s skills and capabilities within BPM. Select a role which is displayed in the forementioned permissions menu option. By default, you already have the administrator role which is the highest level. Other common roles are:

- **Team member**, role for a member of your DR Team
- **BR Manager** is for the team manager and will have access above the role of Team member.
- **BP Executive Director** is the only role authorized to declare a disaster.

The balance of the fields in the User’s record relates to the user address, email, and phone number for text messages. BPM supports international text messaging.

Emergency contact information, address, and relationships to the user are required.

Default Settings:

- Acknowledge Time – the time period in minutes allowed to accept task, typically 15-minutes.
 - History/Log (system only)
- TBD
- TBD

Department:

Create/Edit /Delete departments:

- Title
- Department Code; 9 digits alphanumeric
- Status: Active / Inactive
- Description: 256 alphanumeric characters
- History/Log (system only)

Skills:

Create/Edit/Delete DR Skill

- DR Skill Name
- Status: Active / Inactive
- Description: 256 alphanumeric characters
- History/Log (system only)

Team:

Create/Edit/Delete DR Team

- DR Team Name
- Status: Active / Inactive
- Description: 256 alphanumeric characters
- History/Log (system only)

Plan Type:

Create/Edit/Delete DR Plan Type

- DR Plan Type Name
- Status: Active / Inactive
- Description: 256 alphanumeric characters
- History/Log (system only)

Site:

Create/Edit/Delete Site

- Site Name
- Site Code – 50 alphanumeric characters
- Street Address
- Country
- State
- City
- Zip code
- Status: Active / Inactive
- Description: 256 alphanumeric characters (optional)
- History/Log (system only)

Role:

Create/Edit/Delete Role

- Role Name
- Status: Active / Inactive
- BR Plan Permissions
- User
- Site
- Department
- System
- Plan Level
- Plan Type
- Other
- Default Configuration
- DR Skill
- DR Team
- System Type
- History/Log (system only)

Plan Level:

Create/Edit/Delete Plan Level

- Plan Level Name
- Status: Active / Inactive
- Description: 256 alphanumeric characters
- History/Log (system only)

System:

Create/Edit/Delete Plan Level

- System Name
- System Code: 9 alphanumeric characters
- Description: 256 alphanumeric characters
- Status: Active / Inactive
- History/Log (system only)