Business Improvement Management

CERRIX B.V.
Version 6.2
May, 2021

Confidential

This standard is used by:

CERRIX B.V.

CERRIX Version	6.2
Document Version	0.1
Date	26-05-2021
Classification	Confidential
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1. Introduction

This manual describes the function and roles for the Business Improvement Management module (BIM) for CERRIX. The BIM module consists of three levels:

1. Finding report
2. Assessment report
3. Measure of Improvements (MOI)

1. A Finding report is a report in which results of an investigation are summarized and scored. A Finding report can contain one or more assessment reports.

2. The assessment is used to report results, for example models assessed as part of the Finding report or a subset of audit themes assessed in the Finding report.

3. A MOI can be defined as an action for realizing improvements to: mitigate risks, imperfections in a process or activity within the organization. A MOI refers to a single improvement in the organization. The MOI can be coupled to either a Finding report, an Assessment report, Risk, Control or Event. A finding report, assessment, risk, control or event can have multiple MOIs linked. Also MOIs can have different people as responsible to realize different goals or improvements.

Finding reports, Assessments reports and MOIs are initiated by a BIM auditor, Risk or Control (un)restricted writer or Event Responsible/Assessor. MOIs are delegated to a MOI responsible (i.e. process or risk owner). In some cases, the responsible (process or risk owner) will delegate the MOIs to a different person, who then updates the progress of the improvements. The BIM module distinguishes for these roles: a BIM auditor, a MOI responsible and a MOI delegate.

2. User Roles

There are five different types of users in the Business Improvement module, represented by user roles. Each role has certain rights predefined, which allows the users to use specific parts of the module. These roles need to be assigned to the user. In order to give one user more rights, multiple roles can be selected. The roles that can be selected are: BIM Administrator, BIM Auditor, MOI Responsible, MOI Delegate and Responsible Supervisor. For an overview of the roles and rights, see table 1.

	BIM Administrator	BIM Auditor	MOI Responsible	MOI Delegate	Responsible Supervisor
Audit					
Select organizations outside of own	✔	✔			
View and edit MOI for global organization	✔	✔			
Create finding reports	✔	✔			
Create assessments	✔	✔			
Create MOI	✔	✔			
Accept or reject MOI	✔	✔			
Close MOI	✔	✔			
Operational					
View own MOIs			✔	✔	✔ (Also from his responsibles)
Confirm MOI	✔		✔		✔
Appoint delegate	✔		✔		✔
Add progress	✔		✔	✔	✔
Add comment	✔	✔	✔	✔	✔
Modify due date when in status "Ready for acceptance" or "Confirmed".	✔		✔	✔	
Settings					
Assign users	Application admin				
Create Periods	✔				
Modify mail messages	✔				
Irrevocably delete MOI	✔				

Table 1: Roles and rights of BIM

2.1. BIM Administrator

The administrator is the user who will set up and keep the complete overview of this module. Therefore this role has rights to all functionality in this module. With this role it possible to see all MOIs in the module and edit them. Furthermore this role can set up mail messages, create periods and delete any MOI for this module. When the user is checked as an application admin, it is also possible to assign user roles in the BIM module. Finally, an administrator is allowed to add or edit any finding report, assessment and MOI

2.2. BIM Auditor

The BIM Auditor is the user who initiates a Finding report and will set up the assessments and MOIs. He is also the person who can approve or reject the results of the MOI. Therefore the role of BIM Auditor gives you the right to create, edit, approve, reject and close MOIs for the entire organization. An auditor is able to add comments, however he is not capable to adjust the progress of a MOI.

As mentioned before also Risk and Controls (un)restricted writer and Event MOI roles can initiate MOIs within CERRIX. These roles get Auditor right on Risk, Control and Event MOIs. There is no difference in rights with the BIM Auditor on MOIs.

2.3. MoI responsible

The MOI responsible is the user who is responsible for the actual implementation of the MOIs. He is assigned to MOIs by the BIM Auditor or requester of the MOI. With the MOI responsible role you can confirm MOIs, update the progress and delegate the implementation of the MOI to a different person, the MOI delegate. A responsible is also allowed to modify the due date if the MOI is in the status “Ready for acceptance” or “Confirmed”. The initial due date is not adjustable and will remain the same.

2.4. MoI delegate

The MOI delegate is assigned by the MOI responsible and is the user who implements the MOI. With this role you can add comments and update the progress. A delegate is also allowed to modify the due date, in case that the MOI status is “Ready for acceptance” or “Confirmed”. The initial due date is not adjustable and will remain the same.

2.5. Responsible Supervisor

The responsible supervisor is the user who will keep an overview of the MOIs assigned to responsibles he supervises and of the MOIs within its own organization. Furthermore, he has the right to appoint delegates to different MOIs and update the progress.

The different roles can be linked to different function as seen in figure 1.

2.6. MOI requester

The requester isn’t an actual role within CERRIX. However, it is important to know that the requester can initiate MOIs, but can assign different colleagues as Auditor within the MOI.

2.7. Roles outside BIM module

Outside the BIM module, there are other roles that can participate in a MOI as MOI Auditor. The roles Risk (un)restricted writer, Control (un)restricted writer, Event Assessor or Event Responsible get auditor rights on MOIs in their module.

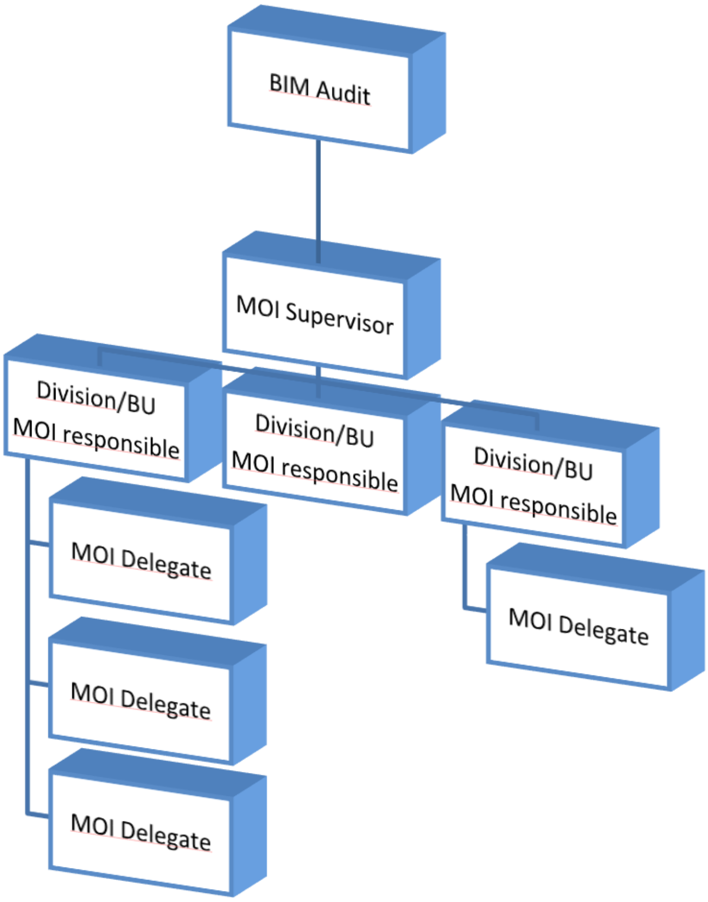


Figure 1 Roles linked to functions

2.8. Staff/External Roles: BIM auditor

Within finding reports and assessments, it is possible to select an auditor. However, there are cases when the auditor should not have a role as described in the previous paragraphs. An external auditor for example could not be allowed within the CERRIX application. In this case the Staff/External role “BIM Auditor” can be used (available on the user card, see figure 2).

The staff/external role **“BIM Auditor”** can be activated for users with and without an account. For users with an account, the staff/external role only needs to be activated when the user should not have access to the BIM module. A user with no access to CERRIX can be created by unchecking the **“Has account’’-**checkbox. The log in credentials fields will then be removed.
The organization can be left empty when it concerns an external user. On finding reports or assessments these external users can be found when leaving the “Auditor/Assessor organization”-field empty.

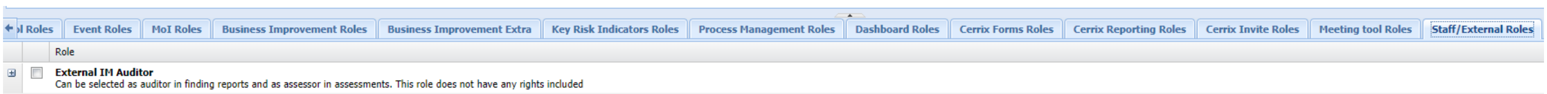


Figure 2 Staff/External roles

Once set up, the “Auditor/Assessor name” on the finding report and assessment will show the list with the role “BIM Auditor” and the staff/external role “BIM auditor”.

3. Finding Report

A Finding report is to state and summarize the findings of a research or realizing specific projects or goals. These can be based on (thematic) issues, for example Audit, Compliance, Model validation or Internal control purposes. An analysis for one of these cases can be reported and scored through a Finding report.
A Finding report can be created by the BIM Auditor and or BIM administrator. A BIM Auditor is also capable to attach an assessment and a MOI to a Finding report.

3.1. Add Finding report

A report can be added by opening the *Findings Report Workspace* (see figure 3).

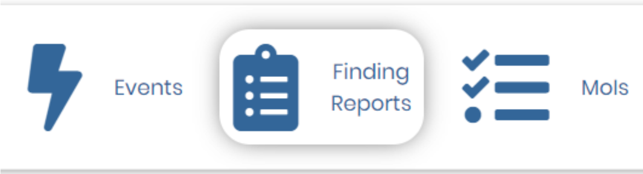
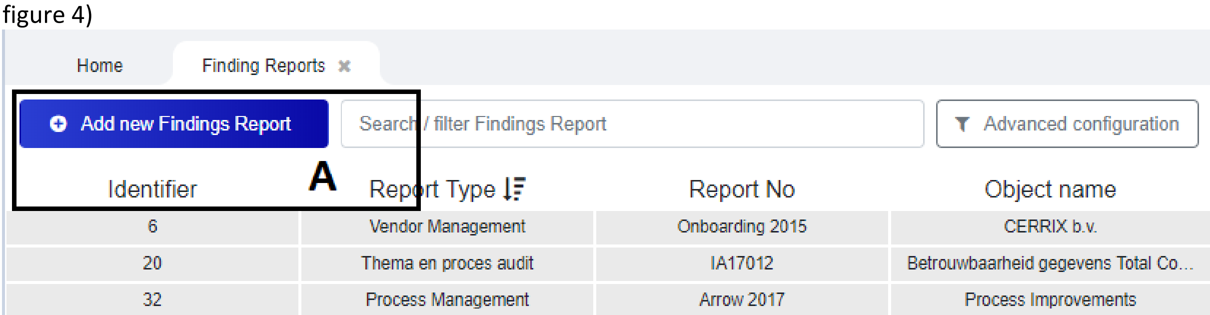


Figure 3 Finding report overview

In the Findings Report Workspace, a report must be added through the “**Add new Finding Report**”-button (see figure 4)



Identifier	Report Type	Report No	Object name
6	Vendor Management	Onboarding 2015	CERRIX b.v.
20	Thema en proces audit	IA17012	Betrouwbaarheid gegevens Total Co…
32	Process Management	Arrow 2017	Process Improvements

Figure 4 Add Finding Report

Data Fields, see figure 5:

- **Report Type:** Select a type[1] for the report (see “A”).
- **Report No.:** Enter a number to reference to the report (see “A”).
- **Object name:** Enter the name of the object which will be analyzed (see “A”).
- **Object sub name:** Enter a possible addition to specify the object (see “A”).
- **Overall score:** Select the overall score[1] of the report. This will be the basis for further action (see “A”).
- **Validation Type:** Select the validation type[1] of the Finding report (see “A”).
- **Report url:** It is optional to add a url to the location of the report/object (see “A”).
- **Report Date:** Enter the date of reporting (see “A”).
- **Report Due date:** Enter the date this report should be completed(see “A”).

[1] *Must be defined in standing data, see chapter 7*

- **Organization responsible**: Select the relevant organization of the responsible (see "B").
- **Name responsible:** Select the responsible person for this report (see "B").
- **Auditor organization:** Select the organization of the auditor[2] (see "B").
- **Auditor name:** Select the auditor for this report (see "B").
- **Scope & objective:** Enter the scope and objective of the report (see "C").
- **Conclusion:** Enter the conclusion of the report (see "C").

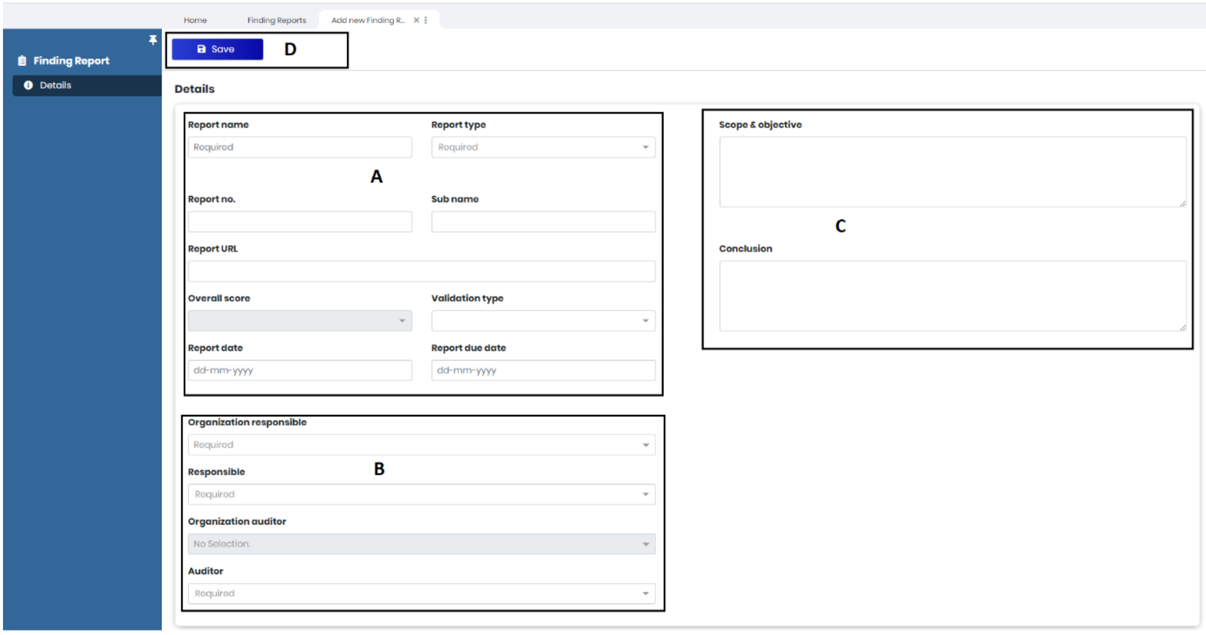


Figure 5 Finding report page

The auditor of a finding report can be a user who should not be allowed to access CERRIX. This can be the case when it concerns an external audit. This person can be added by creating a user without account who has the external role "BIM Auditor". The instructions how to set this up can be found in paragraph 2.8

When the data fields are filled in you can save the report by pressing the "**Save**"-button (see "D" figure 5). The report is then stored. It is also possible to delete the entire report by clicking on the "**Delete"-button**, this is available under '**Options**'. The BIM Auditor is then able to attach an assessment, a MOI and a document to the Finding report. From this same location you can also edit or delete assessments, MOIs and documents related to this Finding report. After the report is finished, the report can always be found in the Finding report overview. To cancel any actions taken on the Finding report, you can press the "**Cancel**"-button (see "E" figure 5).

[2] *Can be left empty. See paragraph 2.6.*

3.2. Finding reports Workspace

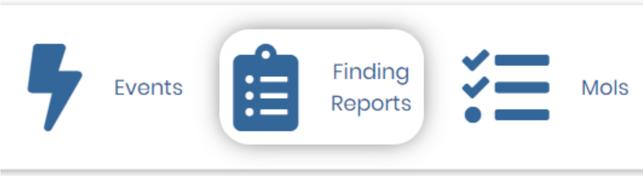
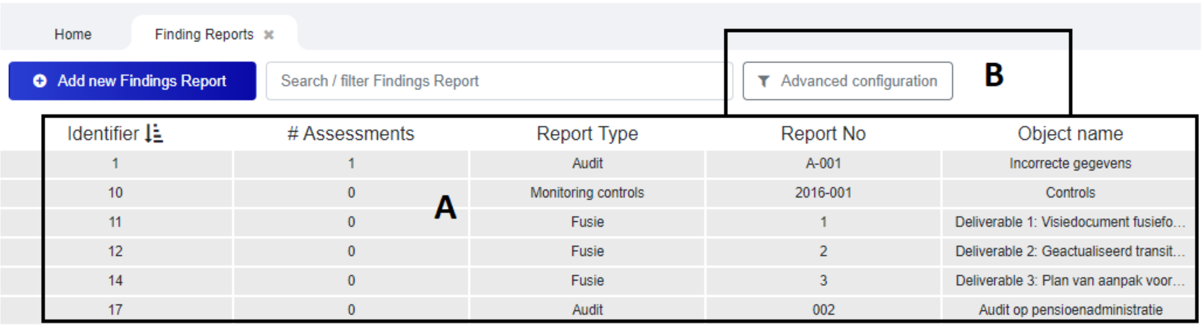


Figure 6 Start page Finding Reports

The workspace screen is a quick way to view which events are Finding Reports in the database and who is assigned. If you have access to multiple modules the “Finding Reports” icon (see figure 6).

When the Finding Reports Workspace is opened, the overview list provides the Finding Reports and its data. Below you’ll see the Finding Reports Workspace (see figure 7).



Identifier	# Assessments	Report Type	Report No	Object name
1	1	Audit	A-001	Incorrecte gegevens
10	0	Monitoring controls	2016-001	Controls
11	0	Fusie	1	Deliverable 1: Visiedocument fusiefo...
12	0	Fusie	2	Deliverable 2: Geactualiseerd transit...
14	0	Fusie	3	Deliverable 3: Plan van aanpak voor...
17	0	Audit	002	Audit op pensioenadministratie

Figure 7 Finding Reports list

The shown result can also be adjusted by using filters. The filters are available at ‘Advanced configuration’ (see “B” figure 7). When opening the Advanced configuration, you can filter on structures like Organization and Business Dimensions (see “A” figure 8). It is also possible to filter on fields of the event (see “B” figure 8).

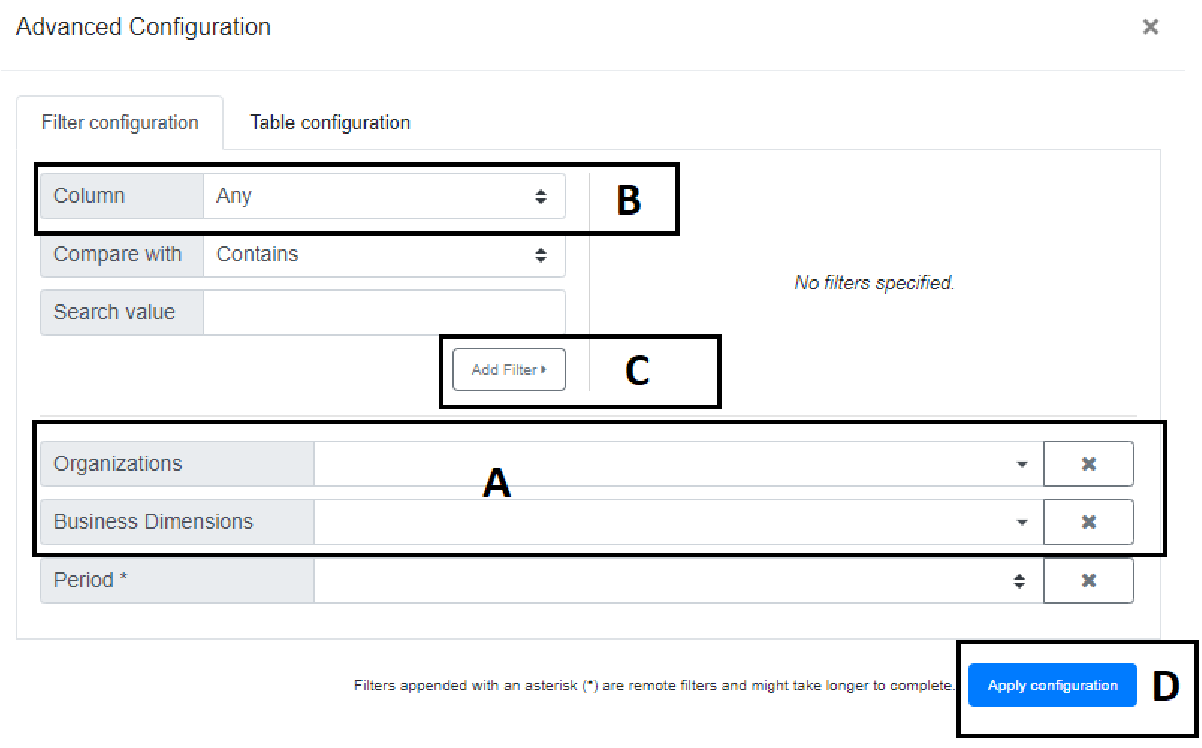


Figure 8 Advanced Configuration

It's possible to filter on every column with info of the Event. First choose a column you want to filter on (see "A" figure 8) and then fill the value you want to search on. When this is done, click 'Add value' (see "C" figure 8). After the value has been added, click on 'Apply configuration' (see "D" figure 8) to search with the add filters.

It is also possible to arrange the columns you want to see. Choose ‘Table configuration’ (see “A” figure 9) to setup your workspace with your own preferences.

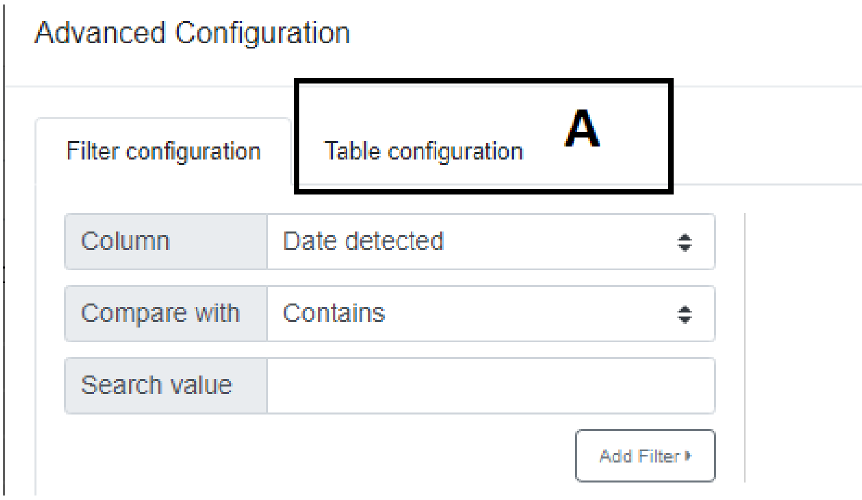


Figure 9 Table Configuration

Table configuration is possible by dragging a field type to the place you want to see it on your Workspace (see “A” figure 10). It is also possible to hide a field by clicking on it, you can see the field change to ‘Hidden ‘Headers’ (see “B” figure 10). When you have the right order of active columns click on ‘Apply configuration’ (see “C” figure 10). After this the Workspace will change to your preferences.

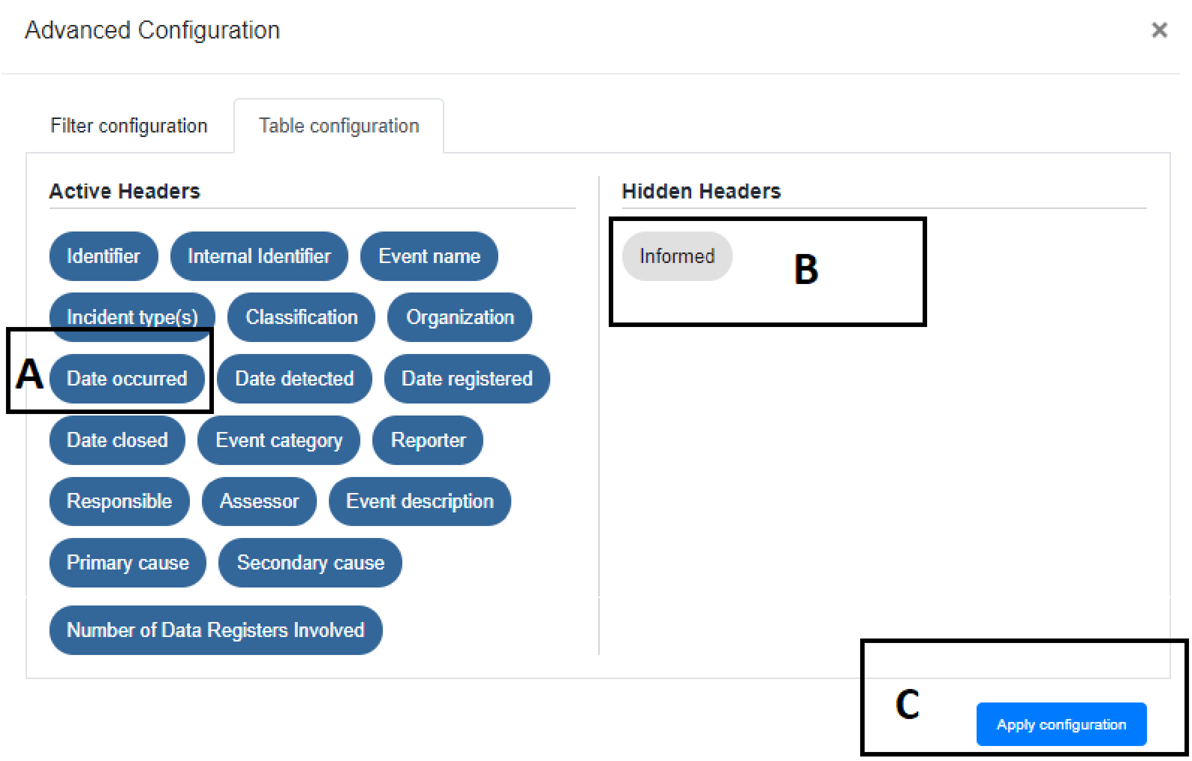


Figure 10 Table Configuration setup

4. Assessments

After the subject, objective and the overall assessment has been described in the Finding report, it is possible to define your assessments. With an assessment you can zoom in into different aspects/subjects of the Finding report. For example, within a finding report on the subject of IT processes an assessment can be performed on the process access management. The assessment is used to give a qualified opinion on this subject (in this case access management)

The BIM Auditor can attach an assessment by going to the assessment tab (see "A" figure 11) and then clicking on '**Add**'-button(see "B" figure 11). An assessment is therefore always directly linked to a Finding Report. This means that it is not possible to create an assessment without a report.

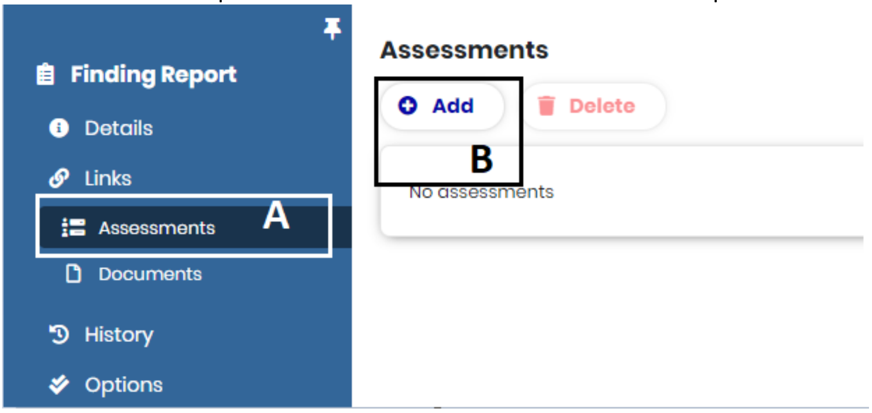


Figure 11 Assessment block in finding report

Data Fields, see "A" figure 8:

- **Assessment date:** Enter the date on which the assessment has taken placed.
- **Assessment type:** Select the assessment type[3].
- **Organization assessor:** Select the organization of the assessor.
- **Name assessor:** Select the name of the assessor.
- **Assessment score:** Select the assessment score[3] of this assessment.
- **Comments assessor:** Enter the comments of the assessor.
- **Assessment url:** It is optional to add a URL.

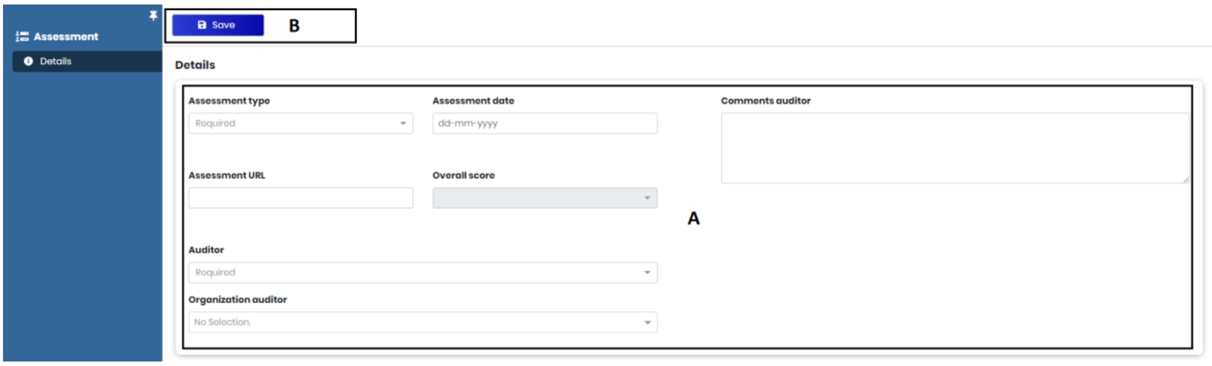


Figure 12 Assessment page

When the data fields are filled in you can save the assessment by pressing the "**Save**"-button (see "B" figure 12). The assessment is then stored.

[3] *Must be defined in standing data, see chapter 7*

After saving, the BIM Auditor is able to attach a MoI to the assessment by click on Measure of Improvement (see "A" figure 13). From this same location you can also edit MoIs related to this assessment. After the assessment is finished, the assessment can always be found back in the relevant Finding report.
To create a MoI, or delete a MoI, use the "**Add MoI**"-button (see "B" figure 13).

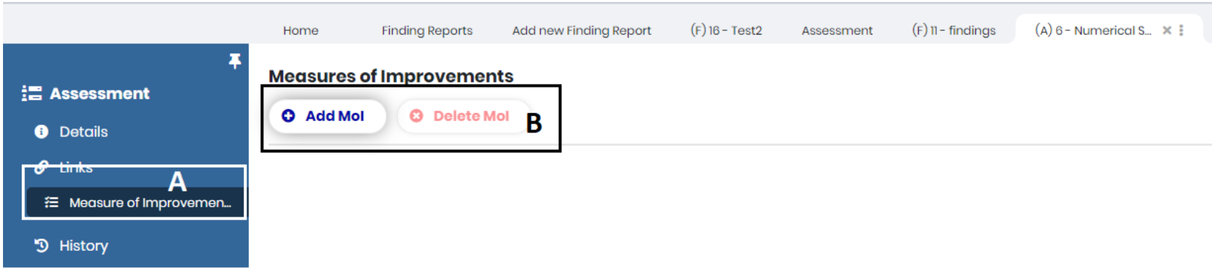


Figure 13 Linked MOI on assessment

5. Measures of Improvement

A MOI refers to a single improvement in the organization. A MOI can be linked to the following items:

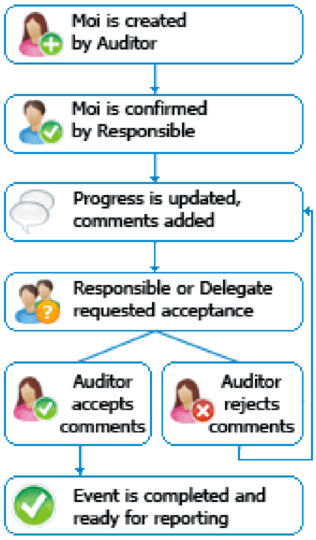
- Finding report
- Risk
- Control
- Event
- Assessment report(optional)

Multiple MOIs can be linked to a report or other item. MOIs can have different responsibles to realize different goals or improvements. All MOIs have a lifecycle that consists of different states.

5.1. Measures of Improvement Workflow

The MOI follows a certain workflow, see figure 14:

1. **Create MOI**: The Auditor creates a new MOI and assigns it to a responsible.
2. **Confirm MOI**: The user responsible for the MOI logs in and confirms the MOI. Optionally a delegate can be assigned afterwards.
3. **Updating progress**: The user responsible or his delegate updates the progress on the MOI and adds comments. The BIM Auditor can provide feedback by adding comments.
4. **Request acceptance**: The user responsible or his delegate informs the BIM Auditor that the MOI is completed.
5. **Accept or Reject**: The BIM Auditor can either agree or reject with the progress on the MOI. When the auditor rejects the MOI, it will be set back to 'Updating progress' state.
6. **Closed**: Throughout the lifecycle of a MOI the BIM Auditor can choose to close the MOI.



5.2. Measures of Improvement screen

A CERRIX user can create a MOI via the Workspace. A risk (un)restricted writer can create a MOI for risks, a control (un)restricted writer can create a MoI controls, and event responsible/assessor can add MOIs for their events.

When the user adds a MoI via the Workspace a pop-up is shown where the source of the MOI has to be chosen(see "A" figure 14). If there are too many items to choose from, the user can use the search bar(see "B" figure 14). If a source is chosen, the user can open the new MOI by clicking on the '**Link source**'-button(see "C" figure 14).

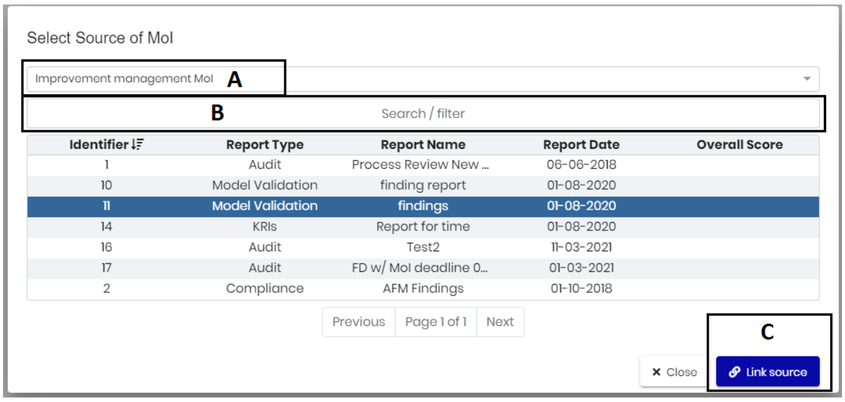


Figure 14 MOI Block in the Finding report

Data Fields

De details of the MOI are for every MOI type the same. So, this can be explained in general. De details of the MOI contains the following data (see figure 19):

Summary(see "A" figure 15)

- **MOI ID:** The MOI ID is automatically generated.
- **MOI name: T**he name of the MOI.
- **Requester:** The user who initiates the MOI.
- **Due Date:** The deadline that the improvement action should be concluded.
- **Initial due date:** Is automatically created based on the first due date you enter.
- **Date created**: The date created is automatically created (see "B").

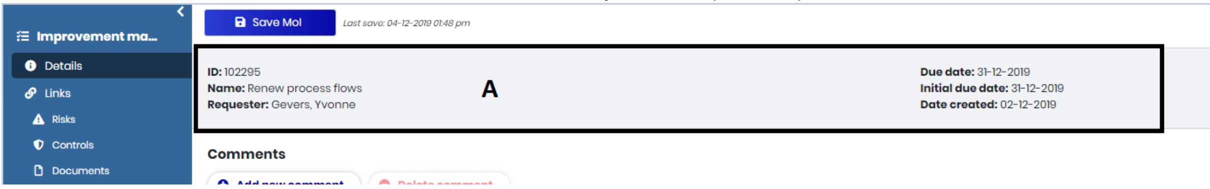


Figure 15 MoI Summary

Details(see figure 16)

- **Status:** This is a read-only field and shows the status of the MOI, see previous paragraph for the workflow (see "A").
- **MOI name:** Enter the name of the MOI (see "B").
- **Subject:** Select the subject of the MOI (see "B").
- **Priority:** Select the priority (see "B").
- **Implementation score:** Select the implementation score of the MOI (see "B").
- **Start date**: Enter the date on which the activities of the recommendation should start (see "B").
- **Finding Description:** Enter a description of the findings (see "C").
- **Recommendation:** Enter a description of the recommendation (see "C").

- **Organization responsible:** Select the organization of the responsible (see “D”).
- **Responsible:** Select the responsible of the report (see “D”).
- **Delegate:** It is optional to select a delegate, who will then execute the improvement (see “D”).
- **Business Dimensions:** Enter the management response to this improvement (see “D”).
- **Organization auditor:** Select the organization of the auditor (see “D”).
- **Auditor:** Select the auditor (see “D”).
- **Management Response:** Enter the management response to this improvement (see “E”).

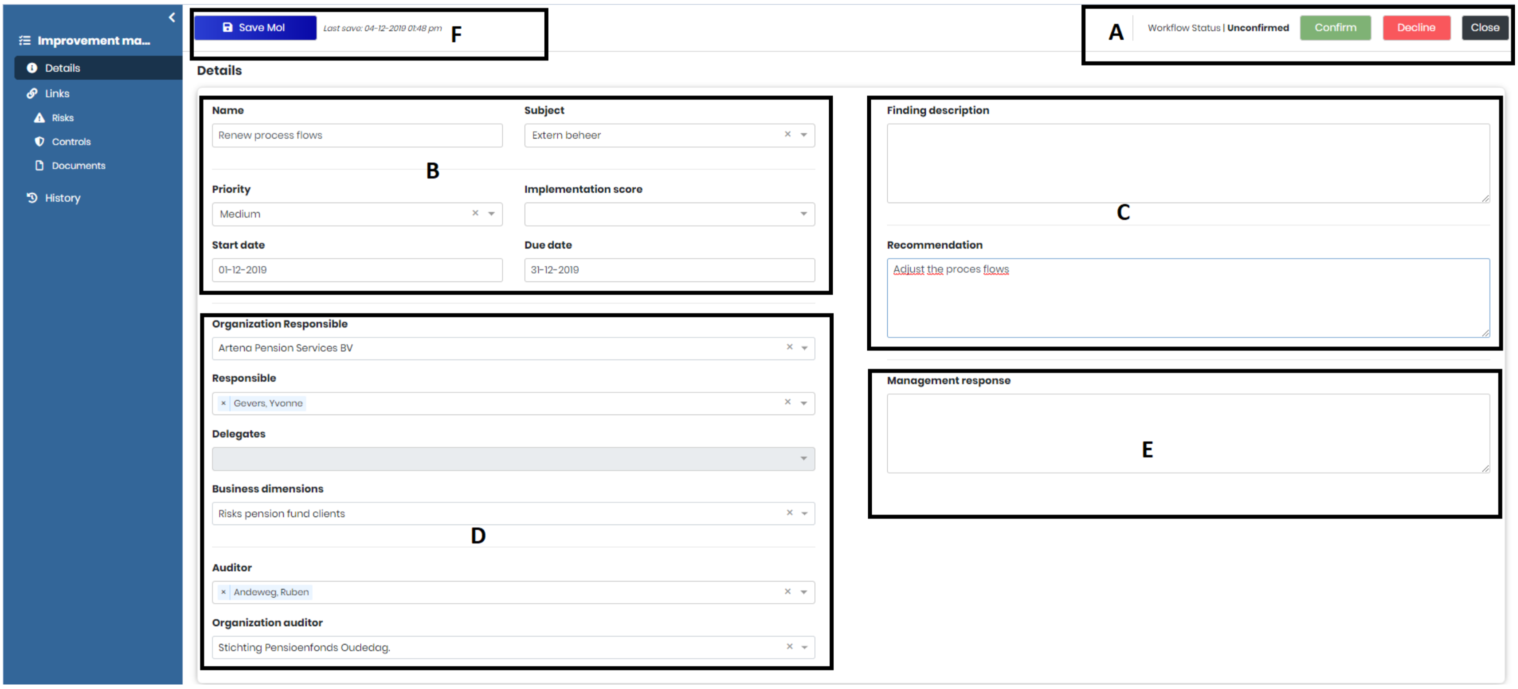


Figure 16 MOI Details

When the data fields are filled in you can save the MOI by pressing the “**Save**”-button (see “F” figure 16). The MOI is then stored. After the MOI is finished, the MOI can always be found back in the relevant Finding report and, if linked, in the assessment.

After you saved the MOI for the first time, you can add comments to the MOI. Responsible and delegates can also add or update the progress of the MOI. Both can be done by pressing "**Add new comment**"-button in the "*Comments*"-block (see "A" figure 17).

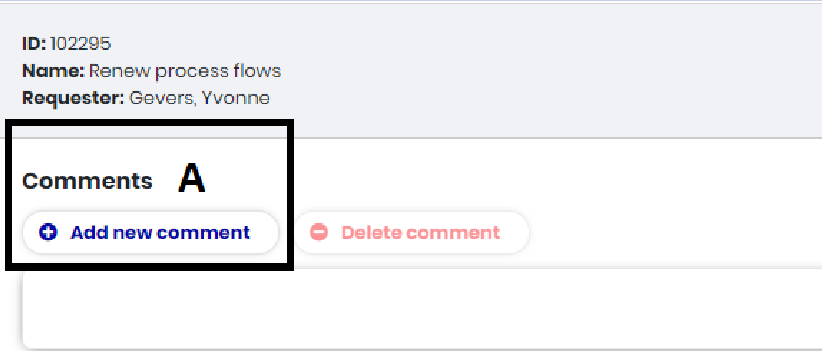


Figure 17 Add new comment

The progress can be set per steps of 5% by using the slider (see "A" figure 18). It is also possible to set the process back to a lower value. Furthermore, the feasibility of the MOI can be set at that time. When you fill the comment(see "B" figure 18), you can press the "**Add**"-button in the comment pop up, the comment will directly be saved (see "B" figure 20).
All comments will be visible in the comment overview of the relating MOI. To cancel any actions taken on the comment, you can press the "**Cancel**"-button (see "B" figure 18).

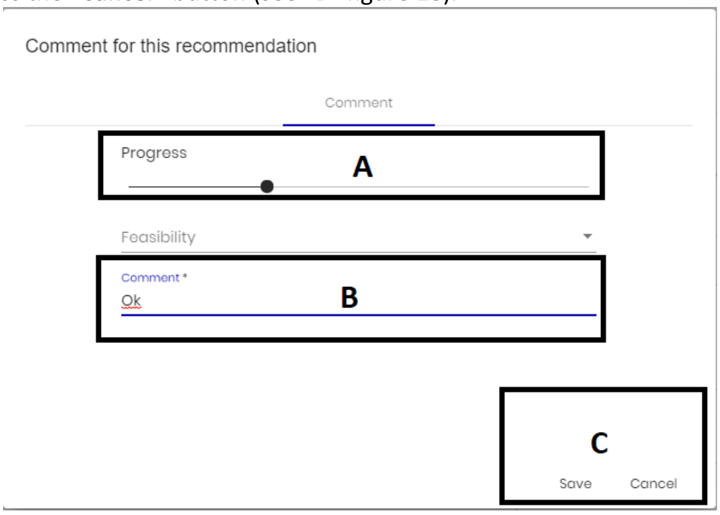


Figure 18 Comments screen

5.3. Workflow in the screen

After submitting the MOI, a responsible need to confirm the MOI. This can be done by pressing the "**Confirm MOI**"-button next to the status field (see figure 19). Once you confirmed the MOI, you are able to assign a delegate.

Figure 19 Waiting for confirmation

If the Responsible declines the assigned MOI the MOI does get the status declined. The Auditor of the MOI can **resubmit** the MOI by using the button. The MOI will be sent back to the responsible.

Figure 20 Declined

When the MOI is ready to be reviewed by the BIM Auditor, the state can be set to "Ready for acceptance". This can be done by pressing the "**Ready for acceptance"**-button next to the status field (see figure 21). You will get a confirmation pop up before the status is changed.

Figure 21 In Progress

The BIM Auditor can either Accept or Reject the MOI at this stage. This can be done with the "**Accept**"-button and "**Reject**"-button next to the status field (see figure 22). For both statuses changes the auditor is required to leave a comment. This will be done via a pop up. Rejecting the MOI will be returned to the "*In Progress*"-state.

Figure 22 Waiting for acceptance

At all times the BIM Auditor can decide to close the MOI by pressing the "**Close"**-button (see figure 22).

Figure 23 Close the MOI

After Closing the MoI, the option "Reopen" will appear in order to undo the closed state. The MoI will reopen on the last known status.

Figure 24 Reopen the MOI

Finding Report MoI

When the user has added a MoI via the Finding reports Workspace, the Auditor first has to select the linked Finding Report before filling the MOI details (See figure 25). When the Finding Report is linked, the report type, overall score, Report No. Report object name, conclusion and Report date are given.

For this type of MOI, it's optional to link an attached assessment to the MOI. You can only add the assessment of the linked Finding report (See "B" figure 25).

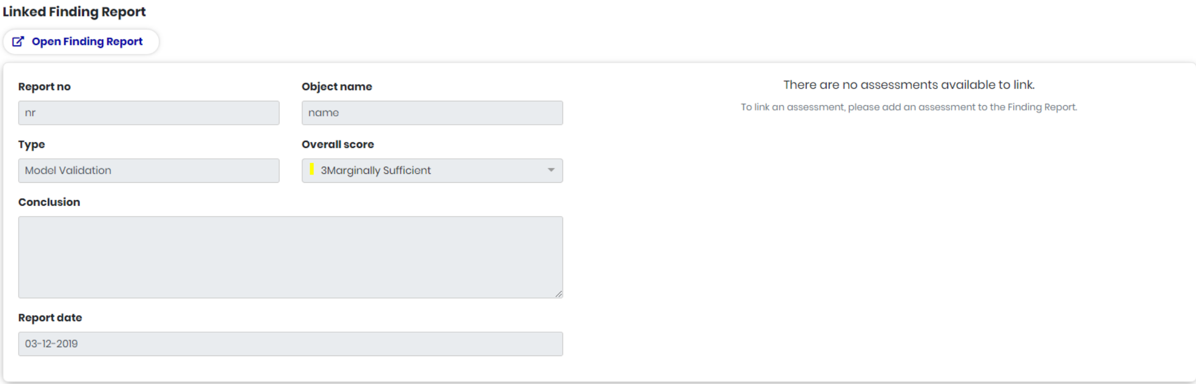


Figure 25 Finding Report MoI

Risk, Control, Event MOI

Risk, control and Event MOIs are the essentially the same, only given details from the linked items differs. The following figures will explain this.

Risk MoI

When a Risk MOI is added the Risk ID, Risk name and description of the risk is given. Also the selected business dimension of the risk are given (see figure 26).

Figure 26 Risk MoI

Control MoI

A Control MOI shows the Control ID, Control name, description, control frequency, mitigated risks are shown. Also, the business dimensions of the control are shown (see figure 27).

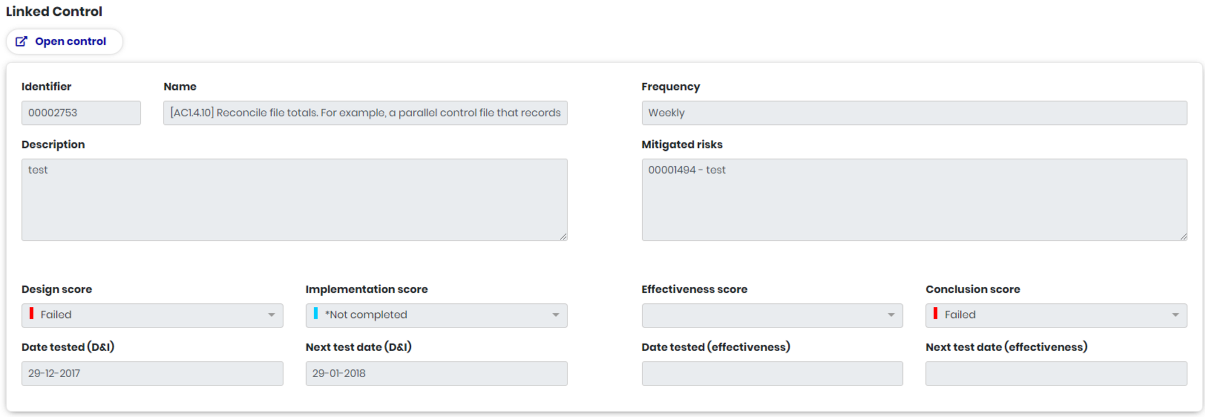


Figure 27 Control MoI

Event MoI

The Event MoI shows the Event ID, Event name, description, Date occurred, and data detected. Also the linked business dimensions of the event are shown (see figure 28).

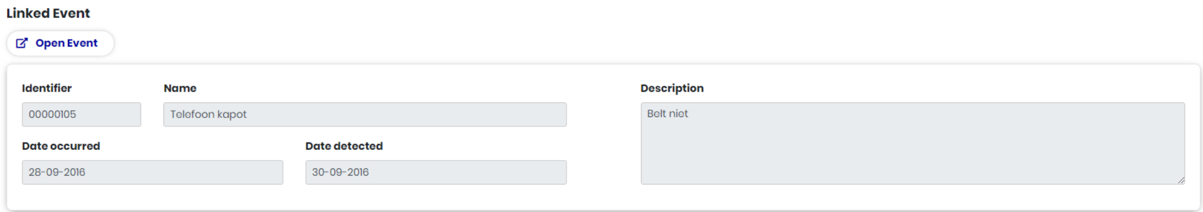


Figure 28 Events MoI

5.4. Link a risk / control

When a MoI is added, that is linked to a Finding Report it is possible to link risks and controls. On the tab “Risks” and “Controls”, it is possible to add controls with their risks (see “A” figure 29). To establish a link, click on the arrow of a risk or control (see “B” figure 29).

In order to remove a link that was created, select the control that should be removed and click the “**Remove**”-button (see “A” figure 29).

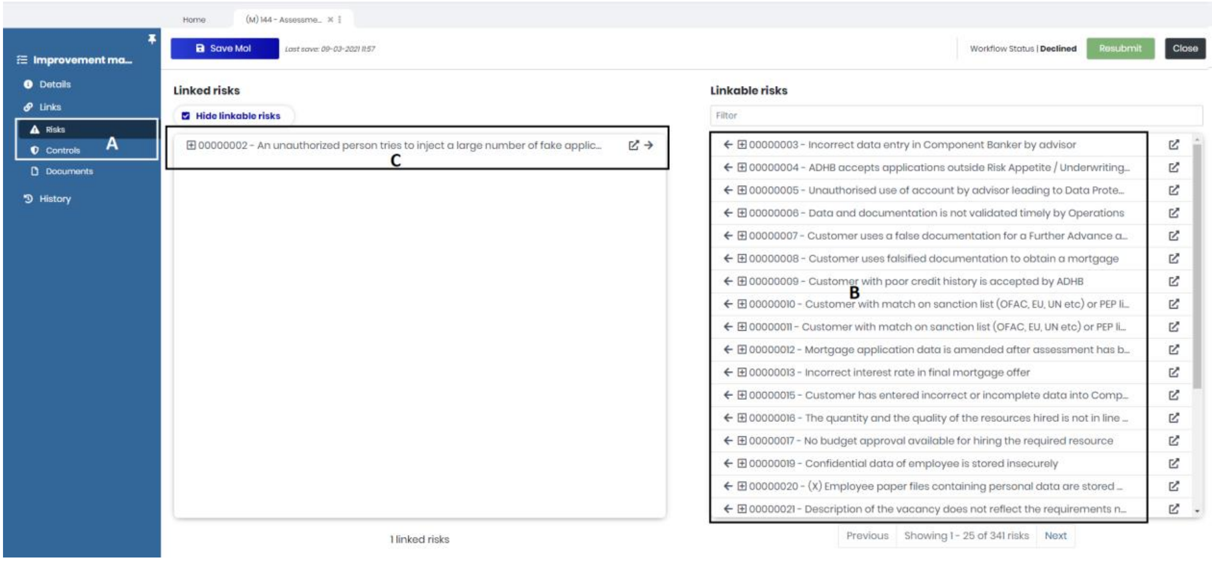


Figure 29 Tab Linked Risks & controls

6. Standing data

The Finding reports, assessments and MOIs all have certain fields where lists should be defined. These lists can be defined under Standing data on the homepage (see figure 30). You can only adjust standing data if you have administrator rights for this module[4].

Figure 30 Standing Data

The standing data for the BIM module can be found underneath the header 'Business Improvement Management'. Depending on where you want to add or edit data you can open standing data from the modules "Finding reports", " Assessment " or "MI-details " (see figure 31).

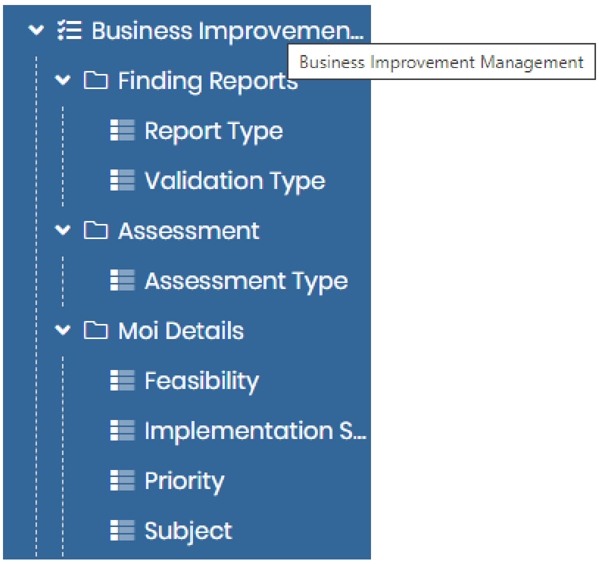


Figure 31 BIM Standing Data

[4] *See paragraph 2.1*

6.1. Finding report data

There are three standing data lists to be defined for Finding reports.

- Report type
- Validation type

Report Type

In the standing data of “**Report type**” you can define the types under which the report can be categorized (see “A” figure 34). In this screen you can add a new report type (see “B” of figure 34) by clicking on the “**Add**”-button. Per entry a name and description are required (see “D” figure 34). To delete a report type click on the “**Delete**”-button (see “C” of figure 34).

A restriction for access to the information of the reports can be set up by using the organization selection (see “E” figure 34). The selected organization(s) will affect the users (only with auditor role) within that organization, as they are allowed to see reports and register input for that report type. This also effects the visibility of the assessments and MoIs belonging to the report of that certain type. When selecting the organization (see figure 36), all the organization linked on a higher level will be linked automatically. Users in organizations lower than the selection do not see the report type. If no organization is selected, all users can see the report type. The restriction does not apply for users with the BIM administrator role, neither will it affect the visibility of MoIs for users with the Responsible, Delegate or Supervisor role.

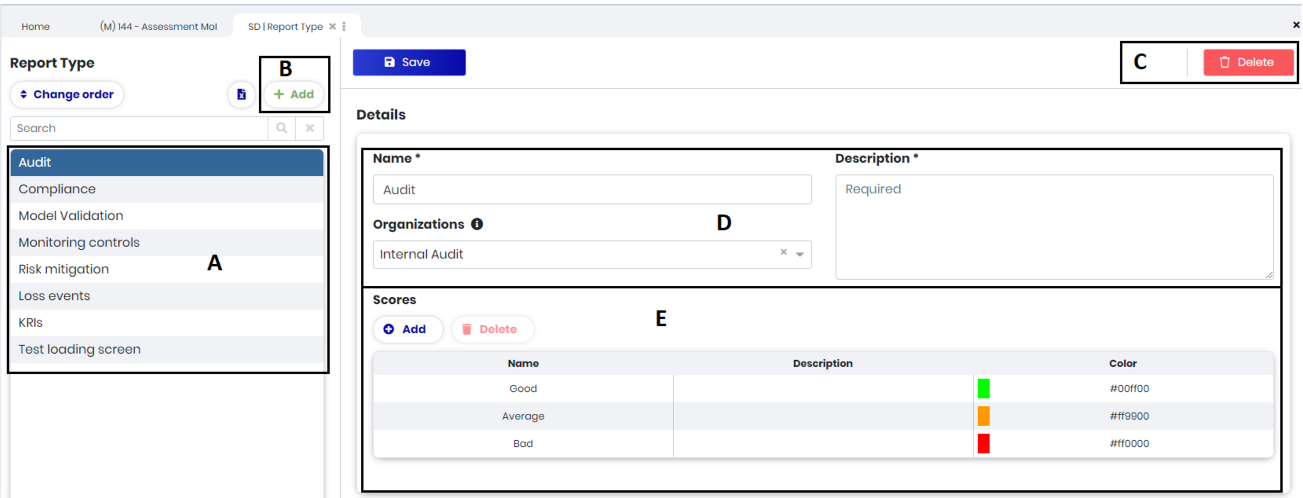


Figure 34 Report Type

In the case of figure 34, the reports with report type “Audit” will only be visible for auditor users who have been placed in organization “Internal Audit”.

In the standing data of “**Report Type**”, you can also define a list of scores to rate your findings. Because the report type influences the categorization of the scores, you can define these scores per report type.
To begin adding data, first select a report type (see “A” of figure 34). Then click on the “**Add**”-button in the Score paragraph (see “E” figure 34). To switch to a different report type simply select the report type list again and select a different entry. The list of scores will be updated automatically. You can sort this list to your preference by clicking on “**Change order**”.

Each entry requires a name, a color to differentiate the score with and optionally you can add a description (see figure 35).

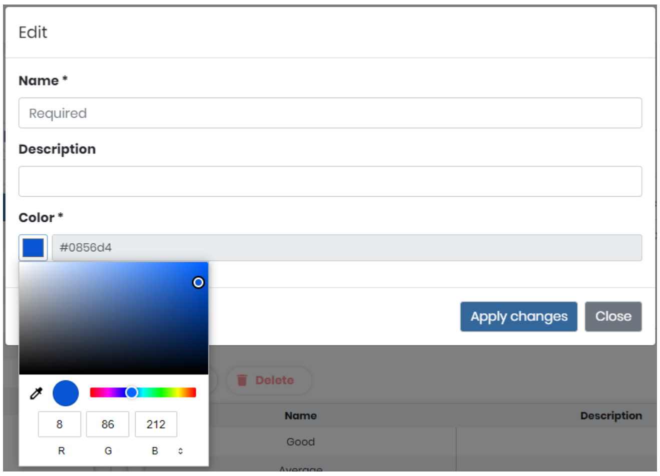


Figure 35 Report Score

Validation type

In the standing data of "**Validation type**" you can define the types of validations that are applicable to a Finding report (see A figure 36). In this screen you can add a new validation type (see "B" of figure 36). A name and description are required for every validation type (see "C" figure 36). Save the new validation type by clicking on the "Save"-button (see "D" figure 36). To delete report types a Validation type click on the "**Delete**"-button (see "E" of figure 37).

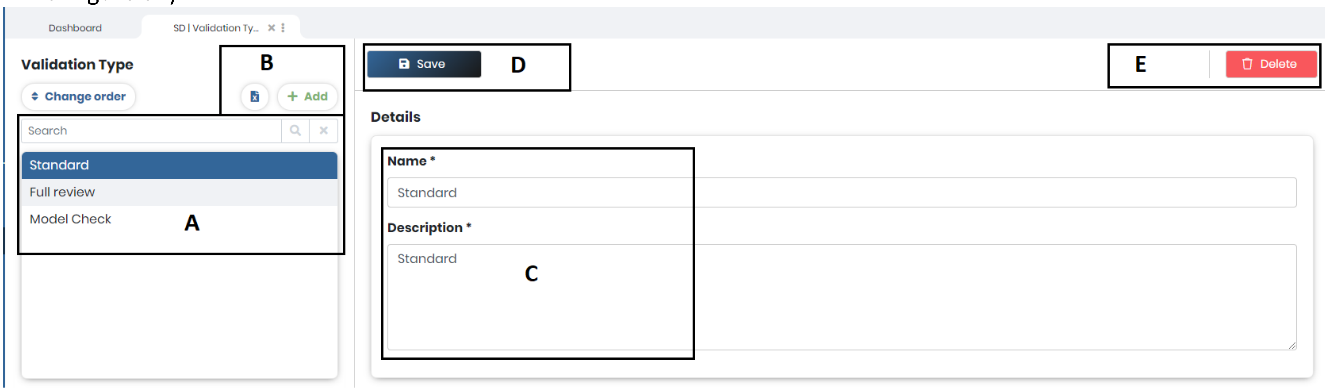


Figure 36 Validation type

6.2. Assessment data

There are two standing data lists to be defined for assessments.

- Assessment type
- Assessment score per assessment type

Assessment type

In the standing data of "**Assessment type**" you can define the types under which the assessments can be categorized(see "A" of figure 37). In this screen you can add a new assessment type (see "B" of figure 37). To delete an assessment type click on "**Delete**"(see "C" of figure 37).

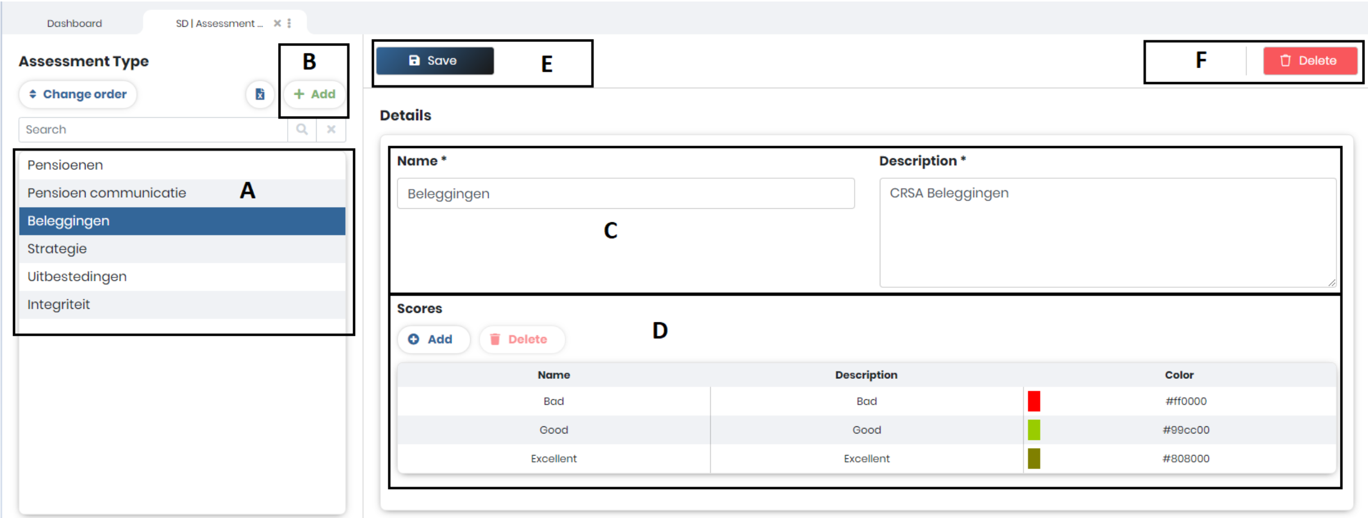


Figure 37 Assessment type

Because the assessment type influences the categorization of the scores, you can define these scores per assessment type. To begin adding data, first select an assessment type (see "A" of figure 37). When data for this assessment type was already filled in, this will be shown (see "D" of figure 36). Any modifications made in this shown list will only be reflected for that assessment type. To add a new score click on "Add" (see "D" figure 37). Each entry requires a *name*, a *color* to differentiate the score with and optionally you can add a *description*. You are able to *sort* this list by dragging the scores.

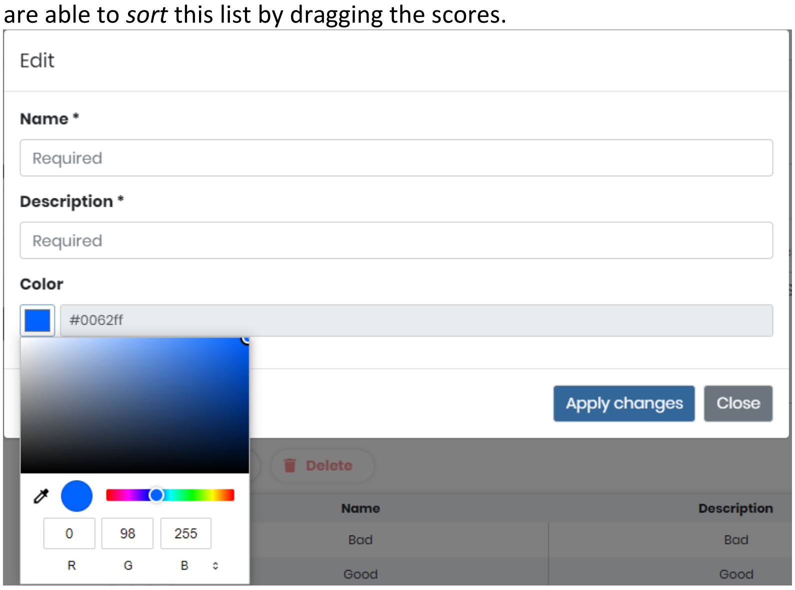


Figure 38 Assessment score

6.3. MOI-details data

There are three standing data lists to be defined for MOIs.

- Implementation score
- Feasibility
- Priority
- Subject

Feasibility

In the standing data of “**Feasibility**” you can define the types of feasibility that are applicable to the comments of MOI(see “A” figure 39). You can add data (see “B” figure 39). A name is required for every feasibility (see “C” figure 36). Save the new feasibility by clicking on the “**Save**”-button (see “D” figure 39). You can sort this list with the “**Change order**”-button (see “E” of figure 39). To delete the standing data item, click on “**Delete**” (see “F” figure 39).

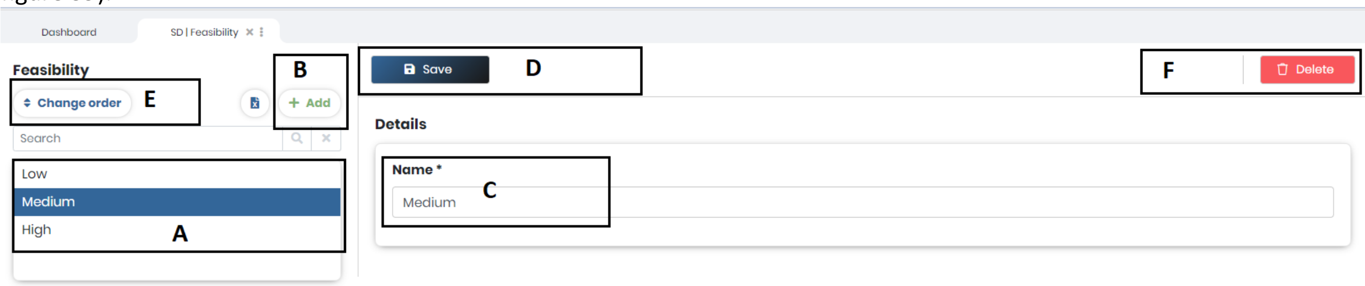


Figure 39 Feasibility

Implementation score

In the standing data of “**implementation score**” you can define the types of scores that are applicable to MOIs (see “A” figure 40). You can add data (see “B” figure 40). A name, color and value is required for every implementation score (see “C” figure 40). Value is used for report in embedded Power BI.
Save the new implementation score by clicking on the “**Save**”-button (see “D” figure 40). You can sort this list with the “**Change order**”-button (see “E” of figure 40). To delete the standing data item, click on “**Delete**” (see “F” figure 40).

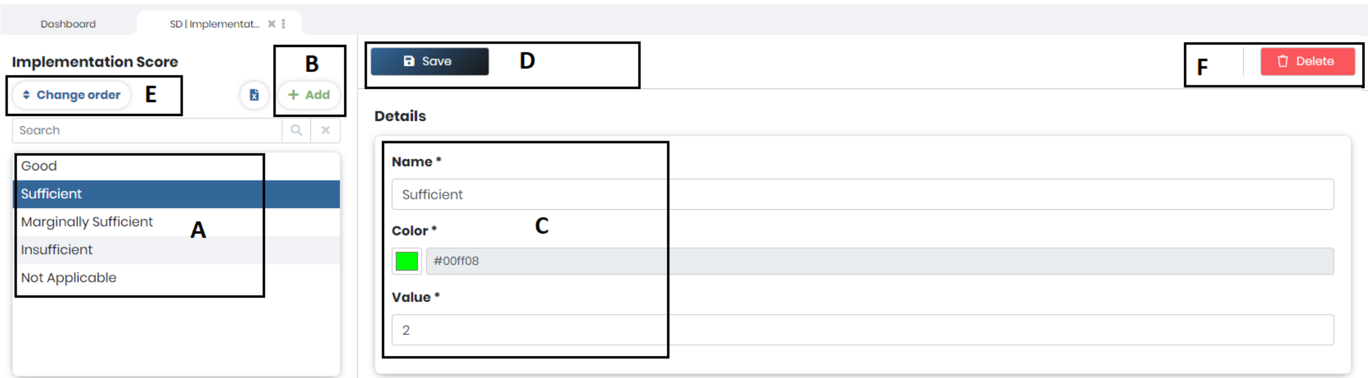


Figure 40 Implementation score

Priority

In the standing data of "**Priority**" you can define the types of scores that are applicable to MOIs (see "A" figure 41). You can add data (see "B" figure 41). A name is required for every priority (see "C" figure 41).
Save the new priority score by clicking on the "**Save**"-button (see "D" figure 41). You can sort this list with the "**Change order**"-button (see "E" of figure 41). To delete the standing data item, click on "**Delete**" (see "F" figure 41).

Figure 41 Priority

Subject

In the standing data of "**Subject**" you can define the types of scores that are applicable to MOIs (see "A" figure 42). You can add data (see "B" figure 42). A name is required for every subject (see "C" figure 42).
Save the new subject score by clicking on the "**Save**"-button (see "D" figure 42). You can sort this list with the "**Change order**"-button (see "E" of figure 42). To delete the standing data item, click on "**Delete**" (see "F" figure 42).

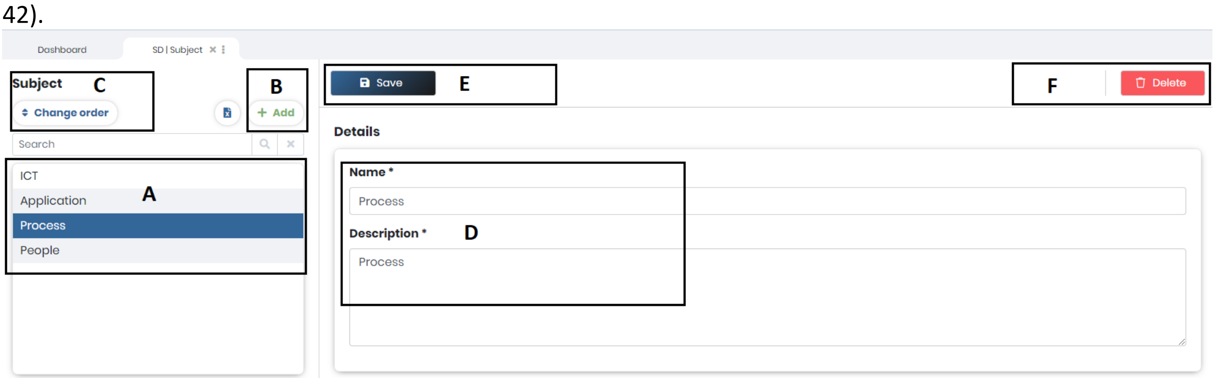


Figure 42 Subject

7. MoI Workspace

The MoI workspace provides an overview of all relevant MoIs for a user. If you have access to multiple modules (i.e. KRI module / Event module) in the application, you might need to select the '*MoIs*' tab (see figure 43).

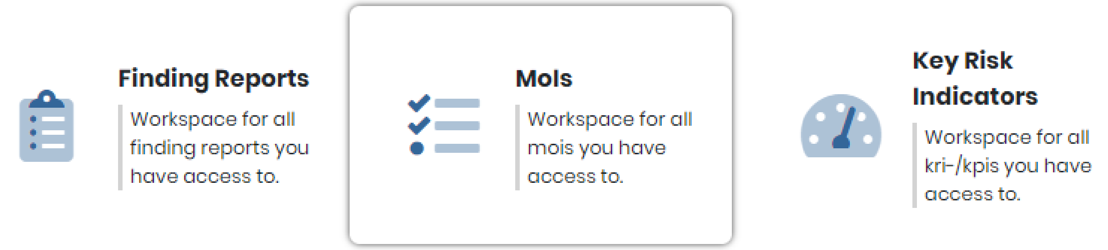


Figure 43 MoI Workspace

When the MoI Workspace is opened, the overview list provides the MoIs the user selected. A MoI can be in the following filter groups: All MoIs, open MoIs, unconfirmed MoIs, declined MoIs, in progress MoIs, Ready for acceptance MoIs, accepted MoIs and closed MoIs (see "A" figure 44). The user starts with 'All MoIs', all MoIs that the user is allowed to see. When choosing one of the other point of views, the list with MoIs will change (see "B" figure 43). If the user wants to sort order a column, click on the header of the column.

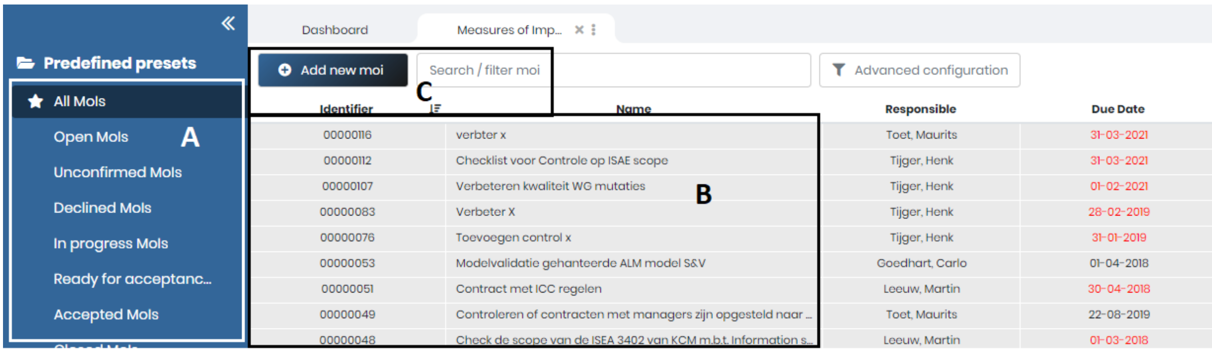


Figure 44 MoI list

The shown result can also be adjusted by using filters. The filters are available at 'Advanced configuration' (see "C" figure 44).

When opening the Advanced configuration, you can filter on structures like Organization and Business Dimensions (see “A” figure 45).

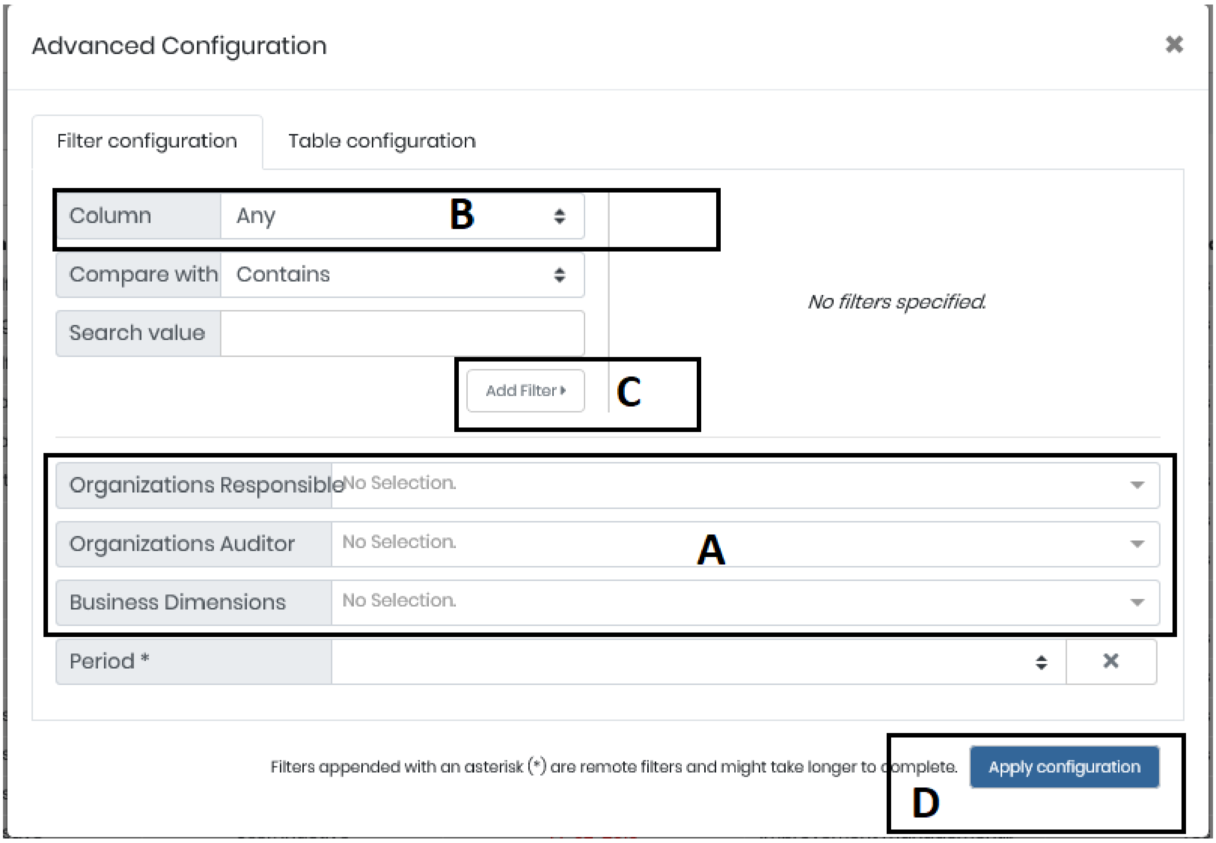


Figure 45 Advanced Configuration

It’s possible to filter on every column with info of the MoI. First choose a column you want to filter on (see “A” figure 45) and then fill the value you want to search on. When this is done, click ‘Add value’(see “C” figure 45). After the value has been added, click on ‘Apply configuration’ (see “D” figure 45) to search with the add filters.

It is also possible to arrange the columns you want to see. Choose ‘Table configuration’ (see “A” figure 46) to setup your workspace with your own preferences.

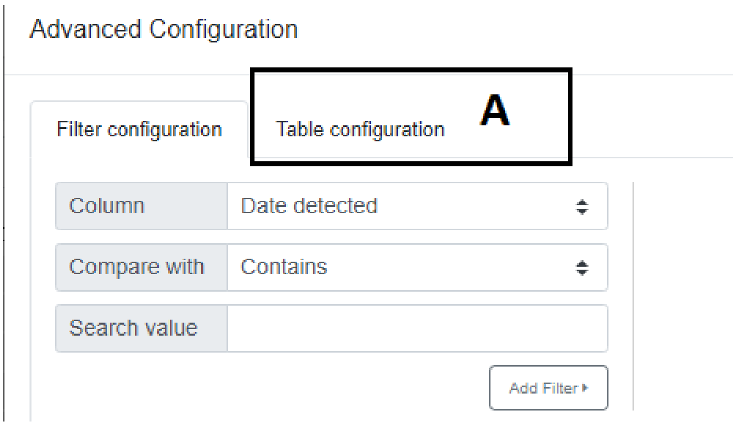


Figure 46 Table Configuration

Table configuration is possible by dragging a field type to the place you want to see it on your Workspace (see "A" figure 47). It is also possible to hide a field by clicking on it, you can see the field change to 'Hidden 'Headers' (see "B" figure 47). When you have the right order of active columns click on 'Apply configuration' (see "C" figure 47). After this the Workspace will change to your preferences.

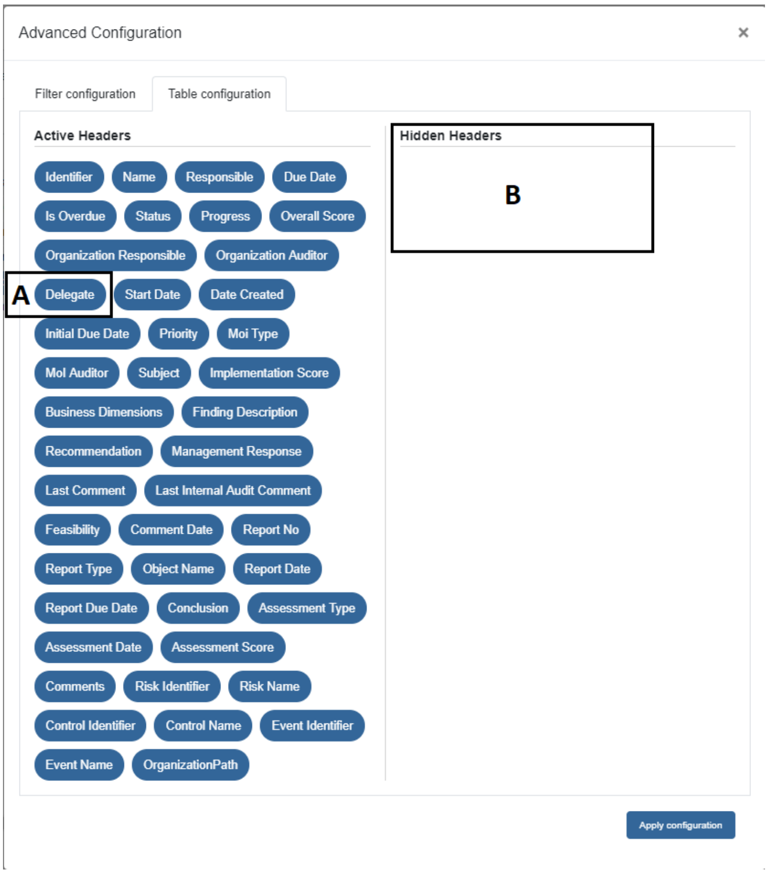


Figure 47 Table Configuration setup

When an item of the overview is selected (double click) the grid and the bottom of the screen will change to an overview list with more detailed information.