



AM·iTech
Activity Manager

A solution for the planning, execution and supervision of tasks, as well as for productivity, effectiveness and performance analysis.

► Efficient organization of work

The Activity Manager provides the support for the provision of services to clients, allowing the creation of requests, the **planning and monitoring** of activities according to their **deadline and priority**, and the subsequent registration of the hourly dedication by officer.

► Inbox

The inbox displays all the activities under the responsibility of the user. Activities contain the information on the requests to be fulfilled, their due date and the staff involved. It is possible to **attach files** which are relevant to the task to be undertaken, to manage **reminders** and **recurrent activities**.

► Guides the execution of tasks

It is possible to create checklists that serve as guidelines for the execution of tasks according to established procedures. In addition, the activities follow a sequence of states which can be configured to match the reality of the Organization.

► Automatic generation of activities from administrative and transactional information

By integrating to systems like CAMS-iTech and IBS-iTech, the Organization makes the most of the operational information by automatically generating tasks into the Activity Manager:

- ◆ Maturity of Powers of Attorney issued by administered companies
- ◆ Follow-up of pending or expired documents
- ◆ Tax Payment
- ◆ Submission of formal required documents to Authorities
- ◆ Maturity of Fixed Term Deposits
- ◆ Operations to be settled

► Integration with Messaging

The system allows the creation of activities from the messaging service (for example a received e-mail) and enables the sending of e-mails from the activities.

From an activity the user can decide to send a report with different levels of detail to a group of receivers or even set the system so that it automatically sends e-mails to all the users involved in a task upon the occurrence of a given event.

► Quick entry mode

The quick entry mode allows the agile recording of time dedicated to an activity, maintaining the necessary detail and parametrization for later reporting and analysis.

► Analytical capacity for quality management

The solution's design ensures the availability of the data for the analysis of productivity, efficiency and performance for the implementation of quality management processes.

► A supervision and management solution

The systematization of the registration of business related activities, in addition to the parametrization capacity, grants the Organization interesting supervision tools, among which we can name the following:

- ◆ Know the state of outstanding tasks in real time.
- ◆ Know the state of the tasks assigned to each officer and their maturity.
- ◆ Assign tasks among staff according to hierarchy and security criteria defined by the Organization.
- ◆ Calculate the effort (time and resources) necessary to undertake different kind of activities.
- ◆ Establish invoicing criteria according to the actual efforts required to the provision of services.
- ◆ Acknowledge the dedication required by each client and calculate their profitability.
- ◆ Obtain quantitative indicators for the evaluation of staff and business areas.

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A solution that automates the processes of **Compliance and Money Laundering Prevention**.

Assists and guides the implementation and control of KYC procedures, Risk evaluation, search for suspicious names and monitoring of unusual activities.



A comprehensive financial and banking solution developed for a wide range of services (Banking, Broker-Dealer, Investment Funds Administration, Fiduciary and Corporate Services provision, etc.)



TIM implements a workflow for the verification of transfer instructions, which is integrated to SWIFT and incorporates overdraft, AML, Risk and Compliance (KYC) controls as well as crosscheck with the most important sanctions lists.

