

■ / the power to make it happen



---

## Contents



### Contents: Knowledge Location

---

TaskCentre® v4: Executive Summary.....	1
▶ Today's Imperative	1
▶ Historical Response	1
▶ Response of Orbis Software	1
▶ Benefit Key	1
TaskCentre® v4: Business Process Management Suite.....	2-13
▶ Advanced Business Alerts	2-3
▶ Workflow	4-5
▶ Document Automation	6-7
▶ Web Content Publishing	8-9
▶ Subscriptions and Requests	10-11
▶ Integration	12-13
TaskCentre® v4: Technical Overview.....	14-15
▶ Product Overview	14
▶ Technical Overview	15
About Orbis Software.....	16
▶ The History and Experience	16
▶ Talk to Us	17



## THE ONLY BUSINESS PROCESS MANAGEMENT SUITE

### Executive Summary: TaskCentre® v4

#### Today's Imperative

Organisations need their software applications to deliver: The agility required to respond instantly to changing legislation and customer preferences; reduced operational costs and savings in time through the automation of repetitive business processes; revenue generation through customer service excellence; perfect visibility of critical information; optimisation of valuable relationships and a dynamic connection between people, processes and information.

#### Historical Response

Traditional application vendors have failed to respond to these demands by continuing to deliver restrictive, application-centric business process management capabilities. They have also ignored the need for greater connectivity and integration between both software applications and external information sources and services. This has encouraged the proliferation of information islands that hinder commercial growth and performance.

#### Response of Orbis Software

TaskCentre® v4 is a powerful suite of Business Process Management (BPM) technologies that enables organisations to realise their corporate vision. With organisations now looking to connect and automate business processes, they are seeking technology that will transform all of their distinct applications into a single, event-driven, service-oriented management solution.

#### Benefit Key



Agility



Visibility



Cost Reduction



Relationship Optimisation



Revenue Generation



Time

## Advanced Business Alerts



### ▣ BPM Suite: Advanced Business Alerts

Organisations today need to ensure that they are instantly notified of situations before or as they happen, enabling them to make better informed decisions based upon critical data events.

In today's information age, organisations now manage an ever increasing array of information systems, which inherently possess little or no functionality to generate notifications based upon data events or criteria.

TaskCentre® provides comprehensive tools and design capabilities to integrate with any number of existing applications or systems to provide people with the information needed to make timely and accurate decisions; whenever and wherever they are located.

Illustrations of how TaskCentre®'s *Advanced Business Alerts* are in operation in organisations today are:

<b>Finance</b> <ul style="list-style-type: none"><li>▶ Bank Overdraft within 15% of limit</li><li>▶ Key customer put on credit hold</li></ul>	<b>Human Resources</b> <ul style="list-style-type: none"><li>▶ Health and safety training overdue</li><li>▶ Sick days abnormally high</li></ul>	<b>Manufacturing</b> <ul style="list-style-type: none"><li>▶ High set-up time</li><li>▶ New drawing revision</li></ul>
<b>Customer Services</b> <ul style="list-style-type: none"><li>▶ Contract expires in 2 months</li><li>▶ New call assigned to agent</li></ul>	<b>Logistics and Operations</b> <ul style="list-style-type: none"><li>▶ Delivery due date in 2 days</li><li>▶ Rescheduled delivery</li></ul>	<b>Sales and Marketing</b> <ul style="list-style-type: none"><li>▶ Overdue contact activities</li><li>▶ Inbound call volume high</li></ul>

#### Example Channels

Email, SMS, MMS and WAP Push

YOU WANT.... TO KNOW BY  
EXCEPTION AND BY THE  
RULE....



## Featured Company: SEL Imperial

SEL Imperial, the leading UK importer and distributor of automotive panels and lamps, wanted to streamline its business processes to sustain its competitive position through increased operational efficiencies and improved visibility over the organisation.

To achieve this SEL Imperial needed to automatically extract critical business data from its Microsoft Navision® system to create real-time *Advanced Business Alerts*. Realising that bespoke development of its ERP system would be unacceptable in terms of cost and time it turned to Orbis TaskCentre® for a solution.

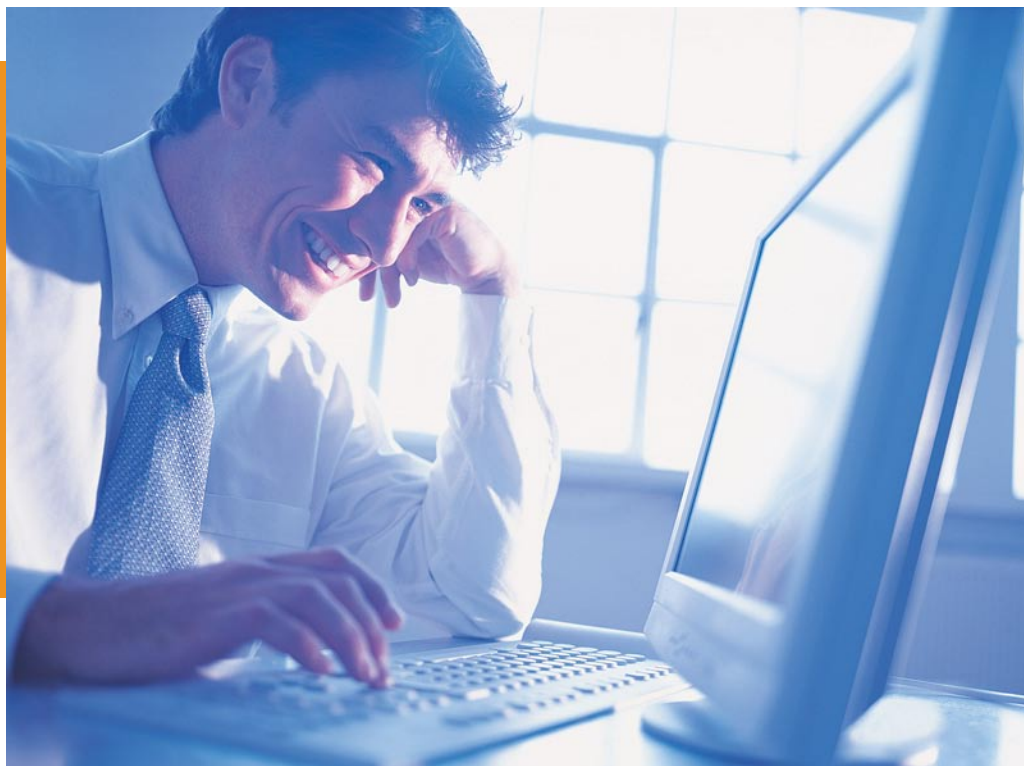
TaskCentre® integrates with its ERP system and enables SEL Imperial to monitor and generate real-time notifications on over 50 business processes throughout the entire organisation. Across a range of departments, TaskCentre® ensures that Key Performance Indicator (KPI) data, such as profitability of vehicles, bank balances, daily revenue, inventory levels and credit violations, is automatically sent to Directors by email.

Michael Bourne, IT Director for SEL Imperial comments, “TaskCentre®’s capability to monitor and generate reports on critical business processes gives our management team a ‘real’ view of the organisation and allows them to make decisions on exception-based events immediately. On top of this we’ve already realised significant time and cost savings.”

### Benefits Achieved



## Workflow



### ▣ BPM Suite: Workflow

More than ever, organisations today are striving to achieve efficient, consistent and measurable processes as a pre-requisite to delivering quality to their customers. Maintaining alignment with, and auditing of (Quality) Management System without the right technology foundation is a challenging, time consuming and costly endeavour

*Workflow* enforces consistency in the organisation's processes and can therefore play a fundamental part in the acceleration of company performance and the development of a sustainable competitive advantage. Yet, to date, most traditional *Workflow* systems are reliant on the individual to identify and start a workflow process rather than this being dynamic, event-driven and integrated with their own systems.

The problems caused by traditional approaches to *Workflow* are also exacerbated by the number of people and departments that business processes can cross and, therefore, the requirement for intelligent *Workflow* functionality is high on the IT agenda.

Through TaskCentre®, organisations are able to add *Workflow* capabilities to their existing software applications, which immediately increases productivity, eradicates administrative waste and enhances stakeholder relationships.

Illustrations of how TaskCentre®'s *Workflow* capability has helped existing clients include:

<b>Finance</b> <ul style="list-style-type: none"><li>▶ Increased credit limit acceptance</li><li>▶ Funds transfer approval</li></ul>	<b>Human Resources</b> <ul style="list-style-type: none"><li>▶ Holiday sign-off consent</li><li>▶ Expenses approval</li></ul>	<b>Manufacturing</b> <ul style="list-style-type: none"><li>▶ Production schedule approval</li><li>▶ Product returns agreement</li></ul>
<b>Customer Services</b> <ul style="list-style-type: none"><li>▶ Call allocation and acceptance</li><li>▶ Spare part authorisation</li></ul>	<b>Logistics and Operations</b> <ul style="list-style-type: none"><li>▶ Confirm delivery schedule receipt</li><li>▶ Purchase order authorisation</li></ul>	<b>Sales and Marketing</b> <ul style="list-style-type: none"><li>▶ Marketing budget approval</li><li>▶ Account manager change request</li></ul>

#### Example Channels

Email, SMS, MMS and WAP Push and Web Browser



## YOU REQUIRE.... MULTIPLE LEVELS OF AUTHORISATION AND CONTRIBUTION MANAGEMENT

### Featured Company: TidyCo Ltd

As one of the UK's leading providers of fluid and pneumatic systems, plant and equipment and with an enviable reputation for high quality and best value products and services, TidyCo understood that accurate and timely communication with company stakeholders is a critical success factor for the industry. However, the associated human resource effort and cost were considerable.

TidyCo required a solution that would help it to build *Workflow* processes, enabling personnel to contribute and be drawn into various feeds of information, without committing valuable human resources.

TaskCentre® was selected to integrate *Workflow* processes with TidyCo's Sage® Line 500 ERP system by identifying impending business events. In turn, personnel are now driven to specific records in Sage® Line 500, which match event criteria and enable them to contribute, authorise or manage items appropriately.

James Tidy, Director of TidyCo said, "Asking personnel to adhere to contribution processes is not an option and is open to inconsistencies and mistakes. We need to be able to enforce the business rules. Our stakeholder communication must be on time and accurate and by deploying TaskCentre® to manage this we have eradicated mistakes and rework."

#### Benefits Achieved



Cost Reduction



Relationship Optimisation



Revenue Generation

---

## Document Automation



YOU WISH..... DOCUMENTS WERE  
CREATED AND DISTRIBUTED  
AUTOMATICALLY.....

### ▣ BPM Suite: Document Automation

---

The creation, distribution and management of business documents are commonplace activities for management personnel and administrative staff alike. Traditional document concepts still form the backbone of structured business communications and transactions.

TaskCentre® *Document Automation* functionality provides tools that enable organisations to connect existing applications and systems, which can automatically generate and distribute document flows, to all the company's stakeholders and trading partners. Whether they are reports, letters, order acknowledgements, invoices or statements, structured and repetitive documents can be automatically generated, presented and delivered via a variety of formats and channels.

Illustrations of how TaskCentre®'s *Document Automation* is operating in organisations today are:

<b>Finance</b> <ul style="list-style-type: none"><li>▶ Monthly statement distribution</li><li>▶ Credit control letters</li></ul>	<b>Human Resources</b> <ul style="list-style-type: none"><li>▶ Job specification circulation</li><li>▶ T&amp;Cs of employment</li></ul>	<b>Manufacturing</b> <ul style="list-style-type: none"><li>▶ Job ready for collection</li><li>▶ Job status report</li></ul>
<b>Customer Services</b> <ul style="list-style-type: none"><li>▶ Welcome pack and SLAs</li><li>▶ Monthly support calls report</li></ul>	<b>Logistics and Operations</b> <ul style="list-style-type: none"><li>▶ Loading instructions</li><li>▶ Transport requests</li></ul>	<b>Sales and Marketing</b> <ul style="list-style-type: none"><li>▶ New product introductions</li><li>▶ End-of-line specials</li></ul>

#### Example Channels

Email, Fax, Print, PDF, Microsoft Excel, HTML, XML, CSV, Microsoft Word, TAB Separated, RTF and Crystal Reports



## Featured Company: Kern Ltd

To sustain its market leading position Kern Ltd, provider of mailroom and packaging technology, needed to be able to consistently ensure excellent customer service. Working to tight deadlines, Kern needed to guarantee that accurate, time-critical information is available to both internal and remote personnel when it is needed.

Kern selected Orbis TaskCentre® to connect to its Access Accounts® application and Crystal® Report Writer to automate the generation and distribution of both customer documentation and critical business information.

Utilising TaskCentre®'s *Document Automation* functionality, time-consuming and repetitive business processes are automated. Documents such as contract renewals and invoice reminders are automatically created and sent to customers and, in addition, TaskCentre® monitors and reports on business critical issues and ensures that reports are automatically sent to key decision makers.

Sandra Richardson, Finance Manager for Kern Ltd explains the importance of *Document Automation*, "Our business operates in a commercial environment where customer service is paramount. Members of the management team need to receive time-critical information efficiently and rapidly. It quickly became apparent that TaskCentre®'s intelligent automation capabilities could save us time and money, not just on the issues of report generation and distribution, but across wider areas of the business."

### Benefits Achieved



Cost Reduction



Relationship Optimisation



Visibility



Time

## Web Content Publishing



### ▣ BPM Suite: Web Content Publishing

Communicating with company stakeholders and ensuring that they have access to and visibility of relevant information is vital in the current competitive environment. Cost-effective communication will help to develop long-term beneficial relationships and contribute to future organisational growth.

Within an organisation, valuable knowledge typically resides in ring-fenced information 'islands', often within departmental or organisational boundaries. However, making this information more widely accessible to employees, partners, customers and other stakeholders is labour-intensive and cost prohibitive.

Using TaskCentre®'s *Web Content Publishing* capabilities, online information can be automatically generated, published and updated according to user-defined rules.

Illustrations of how clients are using TaskCentre®'s *Web Content Publishing* capability include::

<b>Finance</b> <ul style="list-style-type: none"><li>▶ Publishing of KPIs</li><li>▶ Live customer account statements</li></ul>	<b>Human Resources</b> <ul style="list-style-type: none"><li>▶ Holiday entitlements</li><li>▶ Company car association/details</li></ul>	<b>Manufacturing</b> <ul style="list-style-type: none"><li>▶ Job status information</li><li>▶ Capacity levels</li></ul>
<b>Customer Services</b> <ul style="list-style-type: none"><li>▶ Current queue status</li><li>▶ Outstanding support calls</li></ul>	<b>Logistics and Operations</b> <ul style="list-style-type: none"><li>▶ Drop history</li><li>▶ Manifest lists</li></ul>	<b>Sales and Marketing</b> <ul style="list-style-type: none"><li>▶ End-of-line items</li><li>▶ Inactive clients</li></ul>

#### Example Channels

FTP, HTML, XML, MS Word, MS Excel, PDF and Flat file



YOU EXPECT ..... WEB-PORTALS TO BE UP-TO-DATE AND SYNCHRONISED

## ▣ Featured Company: Gaskells PLC

To enhance communication with both internal and external employees and improve employee motivation, Gaskells Plc, an experienced UK manufacturer of floor coverings, needed to ensure the complete visibility of business critical information.

Having implemented an ERP and a CRM solution which contained valuable information, Gaskells realised that both its internal and external employees needed access to and visibility of some of the information. Historically, it had been resource intensive to communicate this constantly changing information.

Gaskells turned to TaskCentre® and utilised the *Web Content Publishing* functionality to provide business critical information from its Sage® Line 500 ERP and SalesLogix® CRM systems to all employees. The information is automatically extracted, formatted and posted to the company intranet and extranet and automatically updated if there is a change in the data. Gaskells can be sure that all of its employees, whether internal or external, have access to and visibility of real-time information.

Gary Moorhouse, Group IT Manager for Gaskells Plc comments, "Through TaskCentre®'s ability to extract, format and publish information from our ERP application to an extranet, we've been able to publish sales performance statistics for our representatives to access remotely. Not only does this mean that representatives can now access this information without a huge amount of training and support but it has also eradicated the amount of paper and associated materials that were historically produced to achieve this."

### Benefits Achieved



Visibility



Relationship Optimisation



Cost Reduction

## Subscriptions and Requests



### BPM Suite: Subscriptions and Requests

Today's consumers and business partners want information on demand. We require specific data as it becomes relevant and demand that it is sensitive to the channel through which we make the requests. Fuelled by our increasing reliance upon the internet and the expansive growth in mobile devices, information on demand is expected in every dimension.

For an organisation, supplying dynamic information services places considerable strain on its human resources, but to ignore these needs and not develop an offering would be to risk losing out to competition. For example, the speed and accuracy of the response to an initial enquiry forms the very first impression of your organisation.

TaskCentre® provides a range of tools to develop and maintain highly configurable and user defined '*subscription based services or request-response*' mechanisms that integrate tightly into any organisation's databases and information systems. The development of a 'self-service' infrastructure to automate the delivery of information is accelerated. Furthermore, TaskCentre® enables any organisation to easily adapt and evolve to the constantly changing face of customer requirements.

*Subscriptions and Request* services developed through TaskCentre® include:

<b>Finance</b> <ul style="list-style-type: none"><li>▶ Balance enquiry</li><li>▶ Credit status</li></ul>	<b>Human Resources</b> <ul style="list-style-type: none"><li>▶ Holiday availability</li><li>▶ Training course subscriptions</li></ul>	<b>Manufacturing</b> <ul style="list-style-type: none"><li>▶ Job completion date changes</li><li>▶ Employee shortfalls</li></ul>
<b>Customer Services</b> <ul style="list-style-type: none"><li>▶ Next support call request</li><li>▶ Overdue support calls</li></ul>	<b>Logistics and Operations</b> <ul style="list-style-type: none"><li>▶ Current stock availability</li><li>▶ Overdue orders subscription</li></ul>	<b>Sales and Marketing</b> <ul style="list-style-type: none"><li>▶ Price changes</li><li>▶ Property details</li></ul>

**Example Channels**  
SMS, Email and Fax

YOU CALL..... FOR BETTER WAYS TO PROVIDE CLIENTS WITH INFORMATION AND RELEVANT DATA.....



## ▣ Featured Company: Roberts Property Solutions

Roberts Property Solutions required an application that would revolutionise the way people enquire about property. Specifically, the company wanted to provide an initial engagement service which eliminated the need for prospective buyers to telephone or visit the estate agent.

Roberts selected Orbis TaskCentre® to connect to its property management software application, so that it could place unique short-codes on its property billboards, thus enabling prospects to request property details from outside the property location itself.

Using TaskCentre®'s *Subscription and Requests* functionality, prospects have the ability to send an SMS message, incorporating the property billboard short-code, which subsequently returns back instant details on the specified property. TaskCentre® also automatically creates an activity record of the SMS request in the property management software application, ensuring that a property consultant will follow up the enquiry.

Jeremy Seear, Senior Partner for Roberts Property Solutions, highlights the impact TaskCentre® has made on the business, "Convenience and the availability of information are probably the most important factors to people searching for property today. What could be more convenient than being able to stand outside a property you like and send an SMS message for its details. The direct result of TaskCentre®'s *Subscriptions and Requests* capabilities has seen a noticeable increase in property viewings and the speed in which we are able sell vendors' property."

### Benefits Achieved



Visibility



Relationship Optimisation



Revenue generation

# Integration



## ▣ BPM Suite: Integration

Organisations need systems that support end-to-end efficiency for their business processes, whilst ensuring that all complexities remain absolutely invisible to operators and external partners alike.

*Integration* interfaces are developed and delivered by software vendors within their own individual API's, toolsets and formats. More often than not, there is very little standardisation across systems and therefore integration becomes a matter of hard-coded development or low-level scripting.

TaskCentre® bridges the gap between disparate information systems, by providing a graphical process modeller and comprehensive operating environment that either dramatically reduces, or totally eliminates the need for complex *integration* development. By design TaskCentre® delivers and manages process *integration*, ensuring that systems 'talk to each other', no matter how complex the requirements.

*Integration* services developed through TaskCentre® include:

<b>Finance</b> <ul style="list-style-type: none"><li>▶ Updated supplier contacts</li><li>▶ Lodge a payment dispute</li></ul>	<b>Human Resources</b> <ul style="list-style-type: none"><li>▶ Update personnel details</li><li>▶ Employee payment data</li></ul>	<b>Manufacturing</b> <ul style="list-style-type: none"><li>▶ New product specifications</li><li>▶ Changes to raw material prices</li></ul>
<b>Customer Services</b> <ul style="list-style-type: none"><li>▶ Self-service ticketing</li><li>▶ Customer satisfaction feedback</li></ul>	<b>Logistics and Operations</b> <ul style="list-style-type: none"><li>▶ Preferred delivery dates</li><li>▶ Undelivered/faulty materials</li></ul>	<b>Sales and Marketing</b> <ul style="list-style-type: none"><li>▶ Automated unsubscribes</li><li>▶ Update name &amp; address</li></ul>

### Example Channels

VB Script, COM, OLEDB, ODBC and XML



YOU MUST..... HAVE BUSINESS APPLICATIONS THAT INTEGRATE AND TALK WITH EACH OTHER

## ▣ Featured Company: M:Science

As a leading provider of end-to-end text messaging solutions to both the public and private sectors, M:Science was keen to release more revenue-focused time for its sales team. In one example, it wanted to decrease the amount of administrative tasks the sales team was required to conduct on receipt of a lead, as well as provide a comprehensive method of audit and visibility through all email communication.

Not wanting to embark on an *Integration* project that involved proprietary hard-coding, M:Science selected TaskCentre® to tightly integrate the company's CRM application, its website and groupware application.

Using TaskCentre®'s *Integration* functionality, all new enquiry-based inbound e-mails generated from the M:Science website, now result in the automatic creation of a new account and setting of a follow-up activity. In situations where the e-mail address matches an existing account but includes a new contact, TaskCentre® simply creates a new contact and follow-up activity for that account. In addition, TaskCentre®'s *Integration* capability facilitates the automatic archiving of all inbound and outbound e-mails so that M:Science has a complete audit trail of e-mail communications with prospects and existing clients.

Dan Hobson, Sales Director of M:Science, commented on the impact of TaskCentre®'s *Integration* capability, "The results have been outstanding both in terms of productivity and financial performance. Being able to integrate our website with our CRM application has saved a significant number of hours spent on administrative processes by our sales team. The e-mail archiving capability has also removed the reliance on sales team members to manually record their communication exchanges, thus providing the senior management team with a complete audit trail on which to base decisions."

### Benefits Achieved



Visibility



Relationship Optimisation



Cost Reduction

---

## ■ Technical Overview



### ▣ BPM Suite: Product Overview

---

TaskCentre® offers a unique, state-of-the-art Business Process Management (BPM) Suite enabling organisations to cost effectively build, operate and maintain any number of automated processes. TaskCentre® brings people, organisations, systems and information together through the acquisition, manipulation, dissemination and integration of information, offering a generic approach to automated processes specifically designed to meet precise business requirements.

#### Tasks

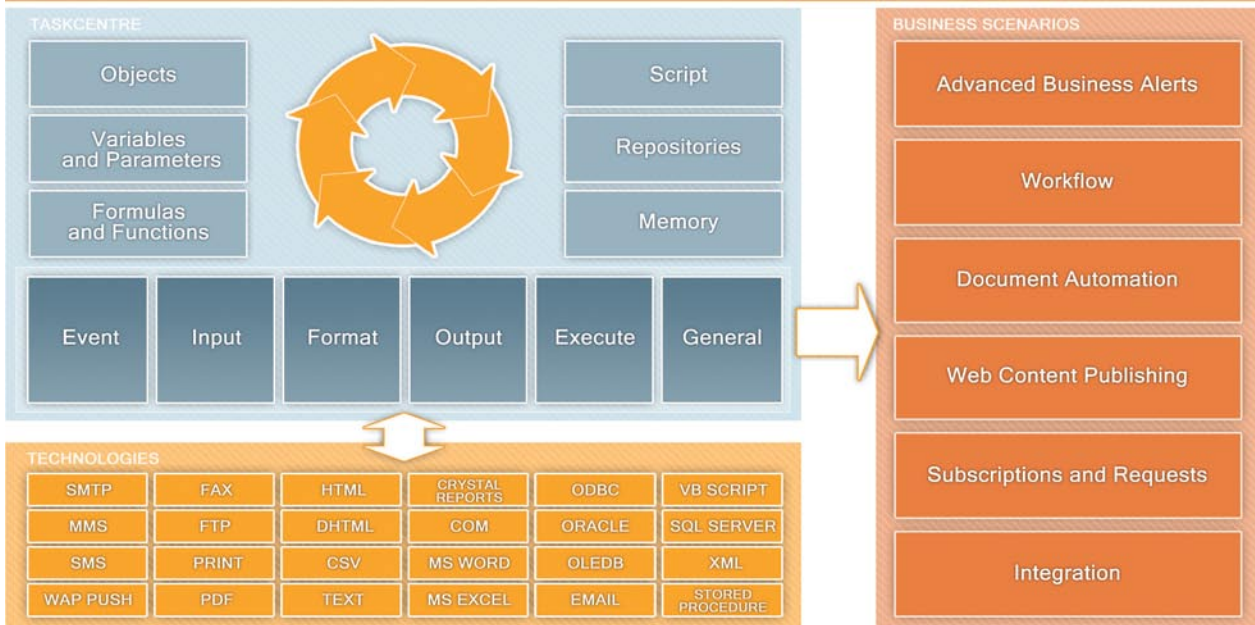
▶ TaskCentre® is based on the central concept of the Task, which performs part or all of a business or technical process triggered by one or more Events. Designed visually in a drag & drop interface, each Task can contain any number of interrelated and sequenced Steps, which are created using a wide range of highly-functional Tools. The range of Tools available provides pre-built, flexible and seamless integration with existing information sources, applications, technologies, formats and communication channels, without the need for complex programming.

#### Tools

▶ Tools are arranged into 6 distinct categories which are: Event, Input, Format, Output, Execute and General. They expose and consume information to and from each other and can be used in almost limitless combinations and sequences to provide for the business requirement in-hand.

Tools are provided as plug-and-play components, so that the breadth of functionality of any implementation can be easily expanded as and when required.

YOU NEED..... BUSINESS PROCESSES TO BE MANAGED AND EASILY ADAPTED



## TaskCentre® v4: Product Overview

TaskCentre® is 32-bit Software for the Windows platform, utilising a true distributed n-tier client server model over TCP/IP, with its server and distributed components running as native Windows Services. The Client provides all administrative and Task design capabilities, whilst the Server provides the client connectivity and manages the processing of Tasks.

### Distributed Model

TaskCentre® employs a distributed architecture to implement Agents that notify the TaskCentre® Server of Events. These Agents communicate the Event to the TaskCentre® Server with context information, so that Tasks can behave in context with the Event in hand.

### Resilience

The TaskCentre® Server utilises out-of-process Server technology to isolate a Task instance from both the TaskCentre® Server and other Task instances. This means that external inconsistencies such as exceptions caused by third-party technology, applications or other system APIs, do not affect ongoing TaskCentre® operations beyond that Task instance. Furthermore, such occurrences are logged immediately by TaskCentre® and notifications are sent to the Administrator and Task Owner.

### Performance

TaskCentre® demonstrates superb performance due to its highly-optimised, small-footprint architecture and use of cutting-edge development techniques, which optimise multi-processor support and minimise processor context-switching.

---

## ■ About Orbis Software



WE HAVE.....THE POWER  
TO MAKE IT HAPPEN

### ▣ Orbis Software: The History and Experience

---

#### Background

► Founded in 1997, UK-based Orbis Software has pioneered the development of business process automation solutions. Today, Orbis provides the leading pure-play Business Process Management Suite TaskCentre® enabling organisations to drive efficiency and save time, reduce costs, generate revenue, optimise relationships and improve visibility and agility through collaborative process automation.

There are more than 4000 customers worldwide already using Orbis products, ranging from diverse global organisations to the small local enterprise.

#### Research and Development

► Since inception, product development has been driven by researching the market and listening carefully to the needs and wants of our valued customers. We work closely with our customers and partners to constantly improve our products.

The products are developed by an extensive team of developers based in the UK and in Continental Europe. With a wealth of experience in programming languages, applications, information systems and platforms, our development team is at the leading edge of modern development techniques.

#### Experience and Expertise

► Orbis solutions are delivered through a worldwide network of highly-trained, accredited partners, each of whom has experience of specific vertical markets or application systems and expertise in the installation, implementation and customisation of Orbis TaskCentre®. Our partners work with each individual customer to ensure that their business process management needs are met and that TaskCentre® connects with existing information systems and applications to provide a complete solution.



▣ The Next Step: Talk to Us

---

what **do you** want to **automate?**

# / HEADQUARTERS

Orbis Software (UK)  
Bourne Gate  
25 Bourne Valley Road  
Poole, Dorset  
BH12 1DY  
United Kingdom  
Tel: +44 (0) 1202 241115  
Fax: +44 (0) 1202 241116  
Web: [www.orbis-software.com](http://www.orbis-software.com)