

taskcentre
BUSINESS PROCESS MANAGEMENT SUITE

FOR
SAP Business One

 **orbis software**
THE POWER TO MAKE IT HAPPEN



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INTRODUCTION

Executive Summary

TaskCentre® for SAP Business One offers a unique state-of-the-art Business Process Management (BPM) Suite for the market leading SAP Business One solution; enabling organisations to cost effectively build, operate and maintain any number of automated processes. The TaskCentre BPM Suite leverages the powerful capabilities of SAP Business One to bring people, systems and information together within an organisation through the acquisition, manipulation, dissemination and integration of information; offering a generic approach to automated processes specifically designed to meet precise business requirements.

Organisations running SAP Business One use the globally recognised TaskCentre for SAP Business One BPM Suite to address complex Integration, Data Services and Workflow requirements because of its easy-to-use drag and drop user interface and proven reputation for delivering a high ROI from day one of its deployment.

TaskCentre for SAP Business One

TaskCentre for SAP Business One is the Business Process Management Suite for SAP® Business One. It offers the ability to extend and automate the processes within SAP® Business One in order to provide workflow, data services & integration, subscription and request mechanisms, advanced business alerts, document automation, and web content publishing.

By providing an established technology framework on which to visually build, design and deliver Business Process Management functionality it eliminates the need to invest in expensive bespoke programming to deliver such functionality.



SAP®

SAP® is the recognised leader in providing collaborative business solutions for all types of industries in every major market. With over 12 million users in 120+ countries, 100,600 installations, and more than 1,500 partners worldwide, SAP® is the world's largest inter-enterprise software company and the third largest independent software supplier.

For over thirty years, SAP® has specialised in what it does best - delivering industry-leading business solutions that enable organisations to respond to the challenges they face. That stability and experience is one of the primary reasons why businesses large and small choose SAP®.

SAP® solutions were once seen as the sole preserve of large companies. Today nothing could be further from the truth. SAP® doesn't just produce cut-down versions of enterprise products for the small and midsize market. With an annual R&D spend at over \$1.2bn, it has re-engineered them to provide a portfolio of solutions that meet the specific needs of every size and type of business across multiple industry sectors.

Orbis Software

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.

More than 4000 customers worldwide already use Orbis products, ranging from diverse global organisations to the small local enterprise and clients include HSBC, BP, NASDAQ, BUPA, Rolls Royce and Lloyds TSB.

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.

KEY DIFFERENTIATORS

Active over Passive

Traditional business systems are essentially passive, that is to say, they perform an action or respond to an enquiry when a user asks them to. As a contrast, imagine for a moment an Active business system that based on your business rules, can reach beyond its own boundaries to inform people of situations or trigger other processes in real-time, because it is pre-configured to know what to do in given scenarios.

Preventative rather than remedial action

Once a business rule is broken, it cannot be reversed. Therefore TaskCentre for SAP Business One can be implemented in such a way as to be pre-emptive of problem scenarios thus enabling preventative action to be taken rather than remedial action after the event.

Diverse Channels and Formats

There are many Channels and Formats in which information can be received, distributed and consumed but most traditional systems support precious few. TaskCentre for SAP Business One can enable your business system to utilise the channels that meet your precise needs.

Connect Systems without Ground-Up Bespoke

TaskCentre for SAP Business One has a myriad of Tools to enable Systems to be connected without the need to produce bespoke systems from the ground-up.

Summary

In this way, TaskCentre for SAP Business One represents a paradigm-shift in the way we think about how our systems can add value to our businesses beyond basic operations and storing information.



BUSINESS BENEFITS

TaskCentre for SAP Business One represents an essential and highly acclaimed addition to SAP Business One and System One, enabling your organisation to benefit through a powerful toolset, with which to build and easily maintain any number of automated business processes.

Increase Revenue

By delivering information based upon the exception and by the rule, existing business processes can be vastly improved, whilst additional ones can be easily developed to maximise opportunities and produce new revenue streams.

Reduce Costs & Improve Efficiency

The most significant benefit of automating manually operated and cumbersome business processes is indeed cost reduction; making many repetitive and mundane manual tasks a thing of the past and saving both time and money.

Security & Auditing

TaskCentre for SAP Business One can be setup to deliver 'big brother' types of services, watching and monitoring data input and editing, as well as ensuring unusual or abnormal transactions can be escalated and notified to managers and directors.

Maximize Relationships

Your data is your most valuable asset and by leveraging the underlying information stored within your SAP Business One database, TaskCentre for SAP Business One can provide both dynamic and personalized communication services to stakeholders and business partners alike, thus ensuring that relationships are maximized and that your organisation is communicating in the most effective way.

Utilise Existing Systems & Infrastructures

TaskCentre for SAP Business One is designed to integrate with existing systems and infrastructures. It can provide seamless integration to a myriad of standard data and communications services, networks and online portals.

Return on Investment

Many applications claim significant ROI, but in true terms the majority of these are very difficult to substantiate. TaskCentre for SAP Business One provides a highly visible ROI from the very first moment it goes Live. Each process it's asked to automate can be easily measured against its manual predecessor and any associated costs can be determined immediately. (Orbis provides an associated calculator to determine each process cost)

Get Access to Local Support

Orbis Software provides a range of sophisticated and flexible support products with features designed to meet the needs of our varied customer base, including state-of-the-art remote access to any machine, customer support portal and flexible SLAs.



PRODUCT OVERVIEW

TaskCentre for SAP Business One offers a state-of-the-art Business Process Management (BPM) Suite enabling organisations to cost effectively build, operate and maintain any number of automated processes. TaskCentre for SAP Business One 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 requirements.

Advanced Business Alerts

Receive real-time alerts of critical events; ensuring your organisation is compliant and always one step ahead.

Workflow

Optimise employee productivity by intelligently routing workflow tasks to individuals or teams to gather valuable input decisions and response feedback.

Document Automation

Save time and money by automating the creation & distribution of everyday company documentation and reports.

Web Content Publishing

Keep your web portals synchronised and up-to-

date by automating company web content.

Subscriptions & Requests

Empower stakeholders to request and receive information without employee intervention.

Data Services & Integration

Transform all of your company applications into one event-driven, service-oriented management solution.

Tasks

TaskCentre for SAP Business One 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 provide 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 7 distinct classes which are: Event, Input, Format, Output, Execute General and a specific SAP Business One category. 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 process 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.

The SAP Business One specific tools were produced by an accredited SAP Business One development team to ensure tight integration.



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 for SAP Business One 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 for SAP Business One's *Advanced Business Alerts* are in operation in organisations today:

Finance

- Bank Overdraft within 15% of limit
- Key customer put on credit hold

Human Resources

- Health and safety training overdue
- Sick days abnormally high

Manufacturing

- High set-up time
- New drawing revision

Customer Services

- Contract expires in 2 months
- New call assigned to agent

Logistics and Operations

- Delivery due date in 2 days
- Rescheduled delivery

Sales and Marketing

- Overdue contact activities
- Inbound call volume high

Example Channels: Email, SMS, MMS and WAP Push



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 Management Systems 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 within 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 for SAP Business One, organisations are able to add *Workflow* capabilities to their existing software applications which immediately increase productivity, eradicate administrative waste and enhance stakeholder relationships.



Illustrations of how TaskCentre for SAP Business One's *Workflow* capability has helped existing clients include:

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

Example Channels: Email, SMS, WAP Push and Web Browser

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 for SAP Business One *Document Automation* functionality provides tools that enable organisations to connect existing applications and systems, which can automatically generate and distribute document flows, to all of 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 for SAP Business One's *Document Automation* is operating in organisations today:

Finance

- Monthly statement distribution
- Credit control letters

Human Resources

- Job specification circulation
- T&Cs of employment

Manufacturing

- Job ready for collection
- Job status report

Customer Services

- Welcome pack and SLAs
- Monthly support calls report

Logistics and Operations

- Loading instructions
- Transport requests

Sales and Marketing

- New product introductions
- End-of-line specials

Example Channels: Email, Fax, Print, PDF, MS Excel, HTML, XML, CSV, MS Word, TAB Separated, RTF and Crystal Reports



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 for SAP Business One's *Web Content Publishing* capabilities, online information can be automatically generated, published and updated according to user-defined rules.

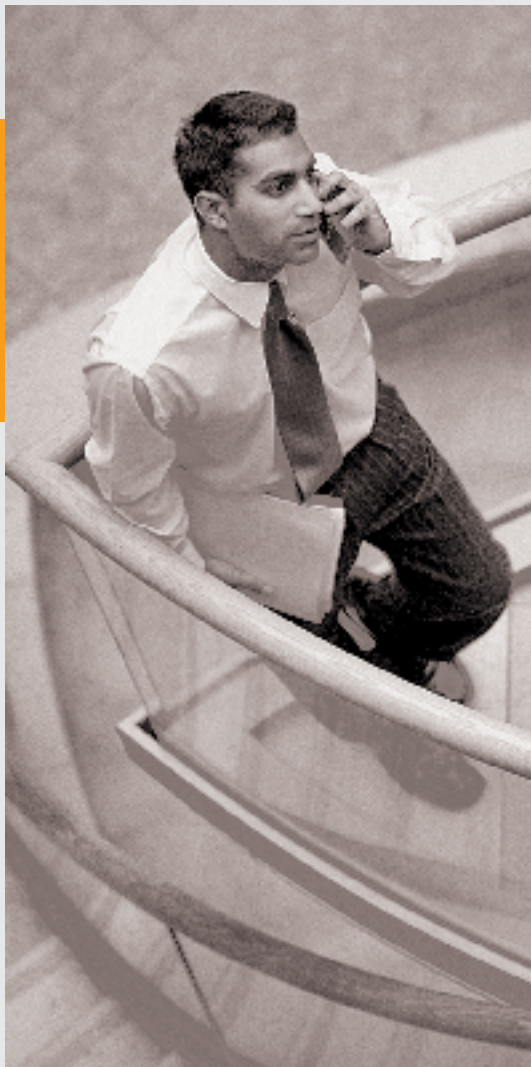


Illustrations of how clients are using TaskCentre for SAP Business One's *Web Content Publishing* capability include:

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

Example Channels: FTP, HTML, XML, MS Word, MS Excel, PDF and Flat File

SUBSCRIPTIONS & 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 any 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 the competition. For example, the speed and accuracy of the response to an initial enquiry forms the very first impression of your organisation.

TaskCentre for SAP Business One provides a range of tools to both 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 for SAP Business One enables any organisation to easily adapt and evolve to the constantly changing face of customer requirements.

Subscriptions and Request services developed through TaskCentre for SAP Business One include:

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

Example Channels: SMS, Email, Fax and IP

DATA SERVICES & 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 for SAP Business One 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 for SAP Business One delivers and manages process *integration*, ensuring that systems 'talk to each other', no matter how complex the requirements.



Integration services developed through TaskCentre for SAP Business One include:

<p>Finance</p> <ul style="list-style-type: none"> ▪ Update supplier contacts ▪ Credit checks via web services 	<p>Human Resources</p> <ul style="list-style-type: none"> ▪ Employee self-service ▪ Employee holiday/sickness updates 	<p>Manufacturing</p> <ul style="list-style-type: none"> ▪ Product detail updates ▪ Currency updates via web services
<p>Customer Services</p> <ul style="list-style-type: none"> ▪ Self service ticketing ▪ Field updates of support issues 	<p>Logistics and Operations</p> <ul style="list-style-type: none"> ▪ Delivery date updates ▪ Undelivered/faulty materials 	<p>Sales and Marketing</p> <ul style="list-style-type: none"> ▪ E-commerce integration ▪ Inbound sales leading handling

Example Channels: VB Script, COM, OLEDB, ODBC and XML

SYSTEM REQUIREMENTS

Server

Supported Operating Systems / Minimum Service Pack	As Per SAP Business One
CPU	As Per SAP Business One
RAM	As Per SAP Business One
Hard Disk Free Space	As Per SAP Business One
CD-ROM	As Per SAP Business One
Display	1024x768 with 256 colours or higher
Browser	Internet Explorer 6 or higher

SAP Business One Version and Licensing Requirements

SAP Business One 2005 SP01 minimum with MS SQL Server 2005

DI Server Licence

Client

Supported Operating Systems / Minimum Service Pack	Microsoft Windows XP Professional SP2 Microsoft Windows 2003 Server Microsoft Windows Vista
CPU	600MHz PIII compatible or higher
RAM	256MB
Hard Disk Free Space	250MB
CD-ROM	Yes
Display	1024x768 with 256 colours or higher
Browser	Internet Explorer 5.5 or higher



TECHNICAL OVERVIEW

TaskCentre for SAP Business One is a business process management application for SAP Business One, offering a host of powerful tools in which build and maintain automated business processes, allowing administrators to reproduce and enhance the natural steps of existing manual processes.

Integrated Access Control

Enables secure access by either application-centric or windows based authentication methods.

Group Based Security

Control security to functionality and information through the definition of flexible User Groups.

Graphical Process Builder

Design and build processes through a graphical process builder, supporting state-of-the-art drag and drop technology and functionality.

Manage and Organise

A user definable folder organiser enables administrators to manage and organise processes into departments, systems or groups.

Plug & Play Tools

A host of powerful Tools enable administrators to build business process through inter-related steps. In association new Tools are under constant production, offering further integration with new and improved technologies.

Agents

Agents provide the ability to start an event in TaskCentre for SAP Business One. Agents are distributed components of TaskCentre for SAP Business One and can reside and attach to other systems such as a mail Server's SMTP service or a database that provides a trigger based service such as Microsoft SQL.

Event Log

Store and reference process activity with comprehensive drill-down to individual steps.

Repositories

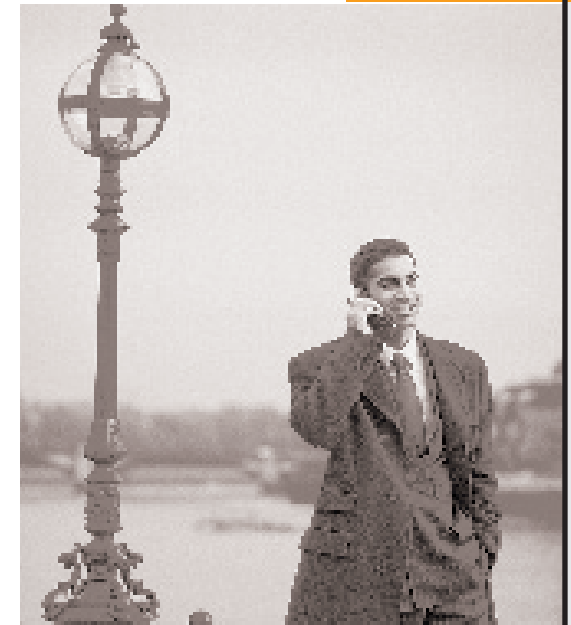
Store recordsets that have been processed within a specific automated business process and thereafter use a specific Tool to reference the store so as record by record comparison can be made from one business process operation to another.

Functions & Formulas

Create individual global or process specific Functions and Formulas through VB script, which can thereafter be used within existing process steps to provide almost limitless possibilities.

Script

VB Script is utilised throughout TaskCentre for SAP Business One, offering absolute flexibility and agility in the design of each automated business processes.



TECHNICAL OVERVIEW

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

Resilience

The TaskCentre for SAP Business One Server utilises out-of-process Server technology to isolate a Task instance from both the TaskCentre for SAP Business One 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 for SAP Business One operations beyond that

Task instance. Furthermore, such occurrences are logged immediately by TaskCentre for SAP Business One and notifications are sent to the Administrator and Task Owner.

Performance

TaskCentre for SAP Business One 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.





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