

# taskcentre<sup>®</sup>

ENTERPRISE AUTOMATION AND ALERTING PLATFORM



Streamlining your business processes





## analyst view

“ Business Activity Monitoring (BAM) can provide significant business benefits to enterprises. By alerting managers and the operations staff to business events in real time, BAM allows them to focus more on their work and spend less time worrying about repetitive problems or opportunities cropping up unnoticed. ”

**Bill Gassman** - *Research Director, Gartner*



## customer view

“ Accurate and timely management information is vital to the success of our business. It builds trust with our business partners and allows us to grow our business at a faster pace. TaskCentre® has been crucial to the efficient production and distribution of information. ”

**Rob Proudman** - *Director, R3 Group*

## academic view

“ Companies worry too much about the cost of doing something. They should worry about the cost of not doing it. ”

**Professor Philip Kotler** -  
'Business The Ultimate Resource'  
Published by Bloomsbury



## streamline business processes



*A senior executive of a major oil and gas company said “we have found a product that is enabling us to move our organisation into the 21st century”. He continued “ ...since implementing Orbis TaskCentre® we have driven down the costs of several processes by over 50% and provided our key personnel with information based upon the exception and not the rule”.*

Organisations today are under increasing pressure to streamline business processes, improve interaction with customers and suppliers and reduce the cost of operations. Adapting to these new dynamics presents a significant challenge to the enterprise.

Businesses rely on repeatable and consistent procedures. Most organisations use sophisticated applications to house and manage corporate data but still rely on antiquated manual processes to retrieve, manipulate and disseminate information.

These manual processes are not only error-prone and open to exploitation but consume valuable personnel time and associated costs. Customers and partners sense inefficiency and consider this as poor service. In addition, manual systems often generate high volumes of paper and rely heavily on printing and postage.

Through Orbis TaskCentre®, organisations from the SME to the large enterprise have discovered that they can drive efficiency and save costs. Orbis Software is leading the way in business process automation, connecting people, organisations and information together in real-time and accelerating business within the corporate enterprise.



## customer view

“TaskCentre® has enabled us to increase efficiency in several areas of our organisation as well as establish new processes that are generating additional profit.”

**Jeremy Seear** - Senior Partner,  
Roberts Property Solutions

## operational ROI

By design, TaskCentre® enables organisations to automate business processes, thus reducing costs, driving efficiency and reducing human error. The table below illustrates the potential return on investment by comparing the costs involved in manually chasing outstanding and overdue customer invoices against those achieved through automation of the process.

Savings were made through reductions in associated overheads and overall staffing levels.

### metrics

|   | costsbefore<br>Manual Process | costsafter<br>Automated Process |
|---|-------------------------------|---------------------------------|
| <b>Personnel</b>  |                               |                                 |
| <i>No. of Employees</i>   | 5                             | 2                               |
| <i>Annual Salary</i>  | 18,000                        | 18,000                          |
| <b>Personnel Costs Over 1 Year</b>  | <b>£101,520.00</b>            | <b>£40,608.00</b>               |
| <small>Assumptions: Employers NI calculated at 12.8%</small>  |                               |                                 |
| <b>Saving Over 1 Year</b>   |                               | <b>£60,912.00 (60.00%)</b>      |
| <b>Communications</b>   |                               |                                 |
| <b>Telephone Calls</b>  |                               |                                 |
| <i>Calls per Day per Individual</i>   | 20                            | 20                              |
| <b>Cost Over 1 Year</b>   | <b>£9,120.00</b>              | <b>£3,648.00</b>                |
| <small>Assumptions: There are 228 working days in 1 year allowing for 25 days holiday and 8 Bank Holidays. Average business telephone call charged at £0.40.</small>                              |                               |                                 |
| <b>Faxes</b>  |                               |                                 |
| <i>Faxes per Day per Individual</i>   | 8                             | 2                               |
| <i>Automated Faxes</i>  | 0                             | 50                              |
| <b>Cost Over 1 Year</b>   | <b>£1,824.00</b>              | <b>£2,792.40</b>                |
| <small>Assumptions: There are 228 working days in 1 year allowing for 25 days holiday and 8 Bank Holidays. There are 261 weekdays in 1 year. Average business facsimile charged at £0.20.</small> |                               |                                 |
| <b>Saving Over 1 Year</b>   |                               | <b>£4,503.60 (41.15%)</b>       |
| <b>Print/Stationery</b>   |                               |                                 |
| <i>Letters per Individual per Day</i>   | 4                             | 2                               |
| <b>Costs Over 1 Year</b>  | <b>£2,280.00</b>              | <b>£456.00</b>                  |
| <small>Assumptions: There are 228 working days in 1 year allowing for 25 days holiday and 8 Bank Holidays. Costs of envelopes @ £0.13EA, inserts @ £0.09 and postage @ £0.28.</small>             |                               |                                 |
| <b>Saving Over 1 Year</b>   |                               | <b>£1824.00 (80.00%)</b>        |
| <b>Totals</b>   | <b>£114,744.00</b>            | <b>£47,504.40</b>               |
| <b>Saving Over 1 Year</b>   |                               | <b>£67,249.60 (58.60%)</b>      |

## customer view

“ We depend on the accuracy and completeness of key data for the effective and efficient running of our business. TaskCentre® has provided us with the tools and information to achieve this in a very efficient manner and without disruption to our staff or existing systems. ”

**Alec Harcus** - Senior Manager,  
Anderson Anderson and Brown



## customer case study

Roberts Property Solutions is comprised of four divisions, UK Sales, European Sales, Lettings and Maintenance. The organisation is faced with an ever-increasing need to provide unprecedented client service, to maintain and enhance its market position.

### Benefit Summary

- ▾ Improved speed of communications with prospects, clients, landlords, partners and personnel
- ▾ Reduced errors due to lost or incomplete information
- ▾ Reduced labour costs through the automation of repetitive manual tasks
- ▾ Generated additional revenue through dynamic information delivery

### Sales Divisions

Through a simple registration process, Roberts Sales welcomes all new potential buyers via an automated SMS (Text Alert) and associated printed letter. Thereafter, when a new property with suitable criteria is placed in the database, it is either automatically emailed, SMS'd or faxed to associated prospects. It was also essential that Roberts provided real-time information on their web site and therefore, when a new property is placed in the database, TaskCentre® triggers a process that updates their web site with the new details. Other triggers ensure web site changes to price and sales status are constantly maintained too. In addition 'Confirmation of offer' letters are automatically generated and sent to a printer when an offer is received and logged.

### Lettings Division

Tenants are automatically notified about potential property meeting their criteria, whilst Email Alerts notify Roberts personnel of important dates like agreement end dates, inspections and safety matters. Documents such as contract renewals, payment notifications and termination notices are automatically printed and distributed. Finally, TaskCentre® provides cohesion between data within the sales management and Lettings applications, thereby matching potential tenants to new and available property.

### Maintenance Division

Mobile maintenance personnel are now continuously informed about impending service dates by SMS Texts. When a job is completed they have the ability to send a text message back to the office which in turn triggers a process that updates the job status to complete or incomplete. This process totally eliminates the need for costly telephone calls to branch personnel to update a job status.





## customer view

“TaskCentre® produces in excess of 300 emails a day, informing us of all exceptions that relate to keeping our delivery vehicles loaded to capacity and keeping a sharp eye on profit per vehicle. TaskCentre® also automatically distributes reports, orders and any other exceptions that require immediate action to the relevant directors and management.”

**Michael Bourne** – IT Director,  
SEL Imperial

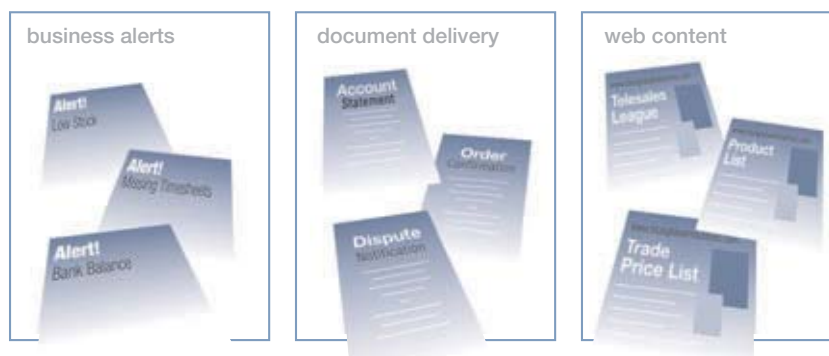


## operational schematic

Orbis TaskCentre® brings people, organisations and information together through the automated acquisition, manipulation and dissemination of information. The product provides sophisticated functionality for a plethora of automation requirements including Business Alerting, Document Generation and Delivery, Data-Driven Web Content, Business Transactions and Request-Response Mechanisms. Its generic approach enables automated processes to be designed specifically to meet precise business requirements.



For example, in a simple Business Alerting scenario, TaskCentre® will periodically interrogate an information system for exceptions utilising specific criteria, format the results using an HTML template and finally deliver them via email to designated recipients.



## customer view

“ Norco Energy uses TaskCentre® to notify our UK depots and field service personnel of changes to workscope and availability of rental assets. The ability to reflect these changes immediately, via Internet and Web mail, from a single source entry, has dramatically improved our customer service response times and enhances our reputation as the UK's premier stored energy solutions provider. ”

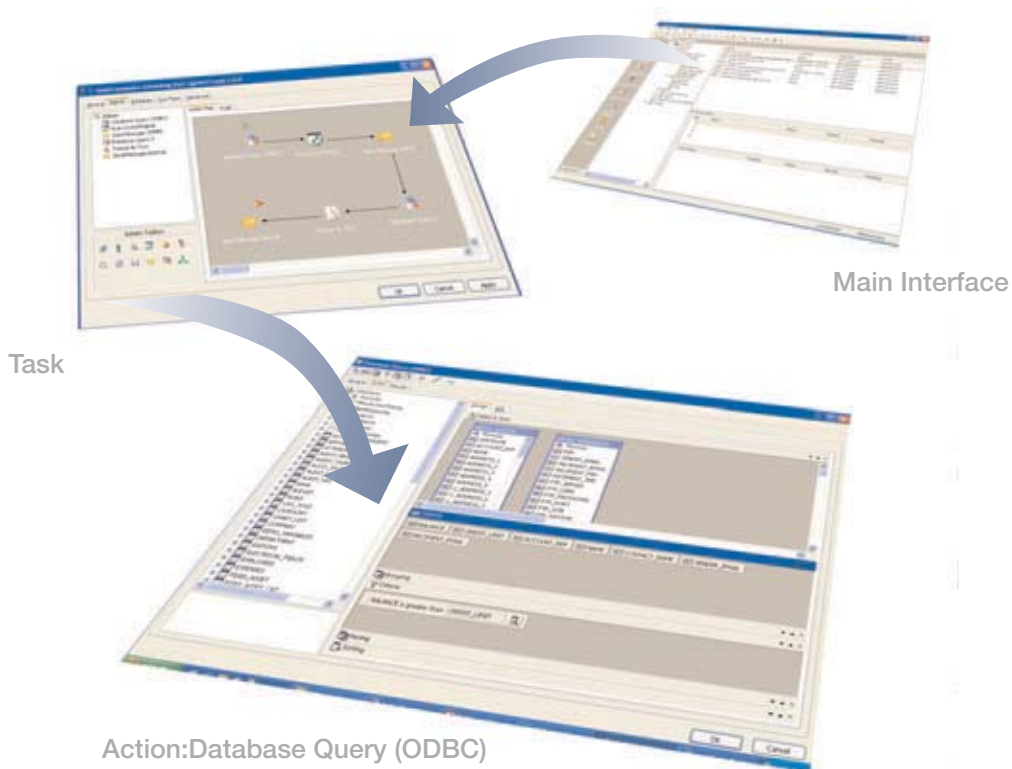
**Stephen Park** - Chief Executive,  
Norco Energy



## technical focus product

TaskCentre® is based on the central concepts of Tasks, Actions and Events which provide the ability to build ultimately flexible automation processes with logical building blocks. These building blocks integrate seamlessly with existing information sources, applications, infrastructure and communications without the need for complex programming. The functional components of the product are provided as 'plug-ins', so that the breadth of functionality of any implementation can be expanded as and when required in a modular approach.

Orbis TaskCentre® is 32-bit Windows based software, utilising a true three-tier client server model over TCP/IP, with a resilient multi-threaded server running as a Windows Service. For a more detailed discussion of the product architecture, please see the TaskCentre® Technical White Paper available at [www.orbis-software.com](http://www.orbis-software.com).





## customer view

“By supplying targeted and up-to-date information, TaskCentre® not only allows our portfolio managers to appreciate the dynamics of our business more keenly, but also gives them the opportunity to take more timely action than was previously possible. The efficiency of our practice has increased measurably, administrative input has reduced and client response times have significantly improved.”

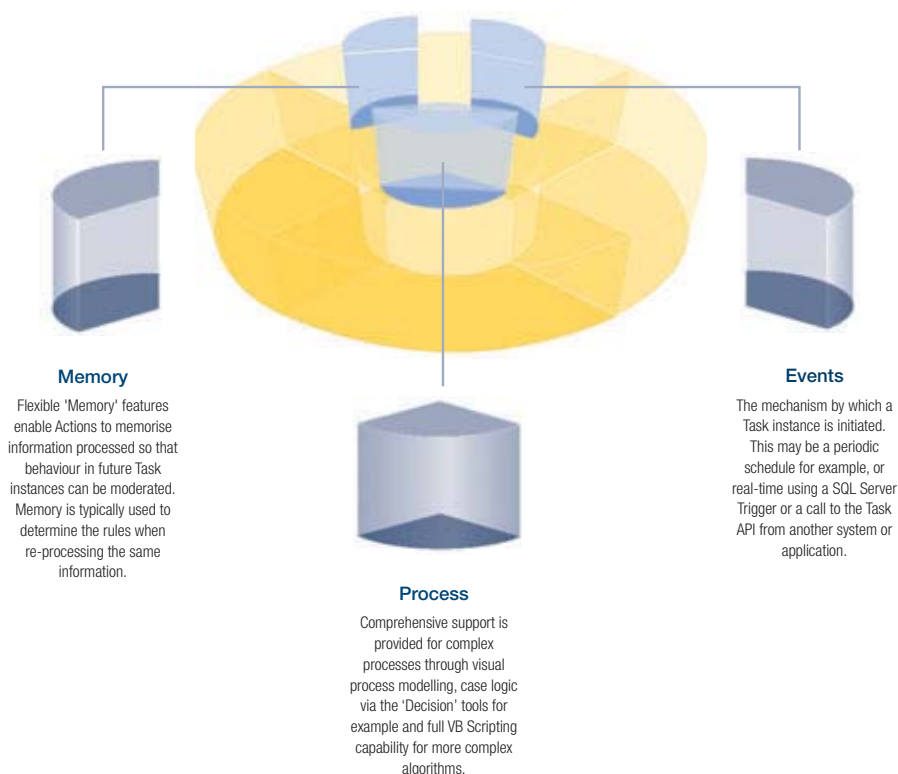
**Simon Plummer** – Practice Manager,  
Bolton Colby

## technical focus tasks

The 'Task' is the primary entity within TaskCentre® which represents part or all of the distinct business process being automated. Each Task contains a sequence of Actions which represents the process flow and is designed using an intuitive visual modelling interface. As the Task is built visually, the product generates VB Script code which, if required, can be amended directly for ultimate flexibility.

Tasks can be triggered by one or more 'Events' such as a periodic Schedule, a Database Trigger or a call to the API from another application or system for example.

When a Task runs, it generates a full audit trail of its activity so that each Task is accountable and Task owners and Administrators have a thorough, central point of reference. If a warning or error occurs the system can generate real-time administrative alerts for total visibility. A Task instance is completely isolated from other TaskCentre® operations so that if an external system causes an irrevocable error, only that Task instance is affected and all other processing continues normally.





## customer view

“TaskCentre® now updates our Intranet every 30 minutes with details about orders moving in and out of our warehouse, drastically reducing the number of phone calls our logistics department has to handle. Using the scheduler overnight to send emails to our Customers & Suppliers enhances our reputation as a 24/7/365 operation.”

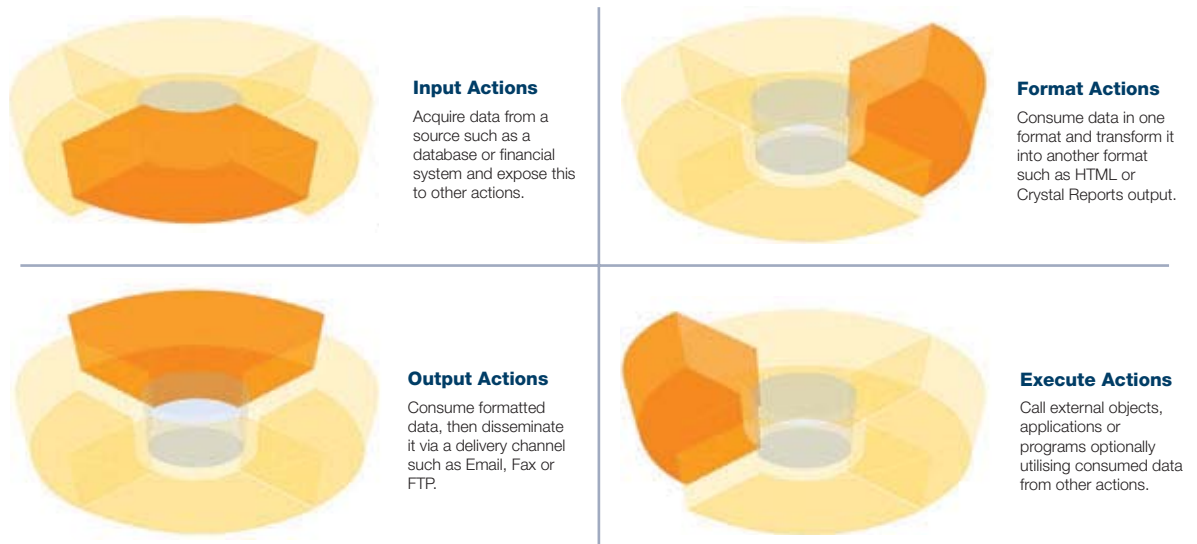
**Tim Loughlin** – Finance Director,  
Esteem Systems plc



## technical focus actions

Actions are the individual, interrelated steps within a Task. There are a multitude of Action Providers available, offering comprehensive and flexible support for many common technologies, systems and applications. Action Providers are categorised as Input, Output, Format or Execute.

For example, popular Action Providers include Database Query (ODBC), Call Procedure (OLEDB), Format as Text, Run Crystal Report, Format as HTML, Save as File, Send Message (SMTP), Send SMS (M:Science SMS Server), File Transfer (FTP), Send Fax (Tobit), Print Document, Call COM Object and Run Program. For a full listing or information regarding a particular Action Provider, visit [www.orbis-software.com](http://www.orbis-software.com).



In our simple Business Alerting example, the Task consists of three Actions, namely Database Query (ODBC), Format as HTML and Send Message (SMTP), in that sequence.

## customer view

“ We have greater clarity over our project management than ever before. Our project managers are kept up-to-date, on-site, all over the world by SMS and email. As costs are incurred and shipments are late, project managers can act and resolve issues before they become a problem. ”

**Mark Matthams** – Financial Director,  
Cimac



## product range

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Orbis TaskCentre® is provided in four editions.



### Small Business Edition

The entry level solution to introduce your organisation to automation and alerting. The product is administered centrally by a single user.



### Standard Edition

The client server solution for the smaller organisation with the benefits of unlimited users, 3-tier architecture and user based security.



### Professional Edition

A fully featured product for the medium sized business with the added benefits of NT authentication, multi-threaded (asynchronous) processing and dual processor support.



### Enterprise Edition

The most powerful edition of the range, designed for the enterprise implementation with demanding automation requirements and more complex environments. This edition includes support for multi-processor systems, multi-domain network topologies and VB script.

taskcentre®

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## who uses Orbis products ?

With over 3000 clients worldwide, Orbis products are used by some of the world's most prestigious organisations. Clients include Rolls-Royce, Skandia Life, Jaguar, Allied Irish Banks, Rank, General Electric, Lloyds TSB, BUPA, and Chevron Texaco Global Lubricants.

## why Orbis ?

Orbis solutions are delivered through an extensive worldwide network of highly trained partners and professionals. This community advocates the full commercial value of Orbis products, whilst future development and commercial direction are driven through listening carefully to our valued clients.



## customer view

“ Orbis TaskCentre® is helping to streamline our quality assurance controls and standards by automating a number of our key business processes. Now, many of our repetitive and manual tasks have been eliminated.

Furthermore, by dynamically reacting to critical data requirements, such as incomplete fields in our database records, TaskCentre® notifies key personnel of incomplete data and further escalates notifications to managers if the data remains incomplete for a given period of time. TaskCentre® is also being employed to automatically share minutes and documentation whilst chasing any outstanding items and associated action points. ”

**Stephen Lester** – Quality and Business Support Manager, Chevron Texaco Global Lubricants

# Increase your organisation's efficiency and profitability



Orbis Software is the market leader in enterprise business alerting and automation software, helping organisations drive efficiency and streamline business processes.

Founded in 1997, Orbis Software Ltd provides a scalable suite of applications to suit any size of organisation. There are more than 3000 organisations around the world already using Orbis products today.

For more information please contact us at [www.orbis-software.com](http://www.orbis-software.com).



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