

AUTOMATING ERP PROCESSES

TaskCentre®

Automation and Workflow Module for ERP Solutions - A Guide to Creating an Event-Driven ERP Solution



Event-Driven ERP

TaskCentre® for ERP Solutions

Delivering the untapped capability of your ERP application

Business Application Enhanced

Enterprise Resource Planning (ERP)

Module

Business Process Management with Interactive Workflow

Business Goal

Increased Competitiveness and Cost Reduction

The knowledge you will gain from this paper:

- ⇒ The benefits ERP solutions have delivered
- ⇒ The limitations of 'first generation' ERP applications
- ⇒ The importance of business processes to company success
- ⇒ The options open to ERP professionals seeking to optimise their company processes
- ⇒ Business benefits achieved by companies using the leading Business Process Management and Interactive Workflow solution, TaskCentre.
- ⇒ The functionality available to ERP professionals seeking to reduce costs and increase productivity through the automation of their business processes.

Introduction

The 1990's gave rise to one of the most fundamental technological advancements to hit the business IT arena: Enterprise Resource Planning (ERP) solutions.

ERP solutions revolutionised the way organisations conducted business. Their saleability meant that all organisations could standardise the way they conduct business, access business information and manage business transactions.

The ability of ERP applications to seamlessly unify the information produced by all departments meant that for the first time company decision-makers could access a true picture of their exact business position. Indeed, the unification of business information, through ERP solutions, has significantly aided lean manufacturing, Just-In-Time (JIT) production, Total Quality Management and the pursuit of Six Sigma.

To support this unquestionable advancement in business software and the subsequent management of commercial organisations, leading vendors such as Sage have focused hard on delivering new 'core' and 'complementary' modules to meet the needs of specific business functions.

This increasing width of ERP solution capabilities has also been supplemented by more focused companies such as HR or Supply Chain Management vendors. Indeed, this additional support to mainstream ERP solutions has, without doubt, entrenched this technology as fundamental to the performance of today's business.

Yet, as with all product lifecycles, there comes the point where technological advancements and changes in commercial conditions demand a need for product evolution. This is now the case for ERP solutions and the time has come for vendors to systematically address all of today's business drivers

TaskCentre Examples

- **Advanced Business Alerts:** Be alerted on stock levels, large product movements, KPI's such as production output per hour/day/week, the alteration of sensitive company data, missing/uncompleted timesheets, employee jobs not completed, daily profit levels, unfulfilled orders or department expenditure exceeding "x" amount.
- **Document Automation:** Automate the dynamic creation and delivery of sales reports, order confirmations, production reports, welcome letters/e-mails, credit control documentation, contractual information, product literature and compliance documents.

and their impact on the required development of ERP solutions.

So what's missing from today's ERP solutions?

The wide-scale emergence and adoption of ERP solutions throughout the global business community was, with hindsight, a significant turning point for many of today's organisations. Indeed, users of ERP solutions will openly testify that without this application their business would struggle to keep up with the commercial and regulatory forces that surround and govern their day-to-day operations.

Yet, ERP professionals will also readily concede that there are a number of inherent problems with "first generation" ERP applications. Yes, ERP solutions have delivered greater visibility of critical information like stock levels, order processing, cost centres or distribution schedules, whilst providing the functionality to formalise and process business transactions, but they still remain user driven, departmentalised in their focus and disconnected from external business events.

It is the three aforementioned problems of user dependency, departmental isolation and disconnection from external business events that is causing today's organisation problems. 'Information Islands' or 'Stakeholder Disconnect' are widely used terms by ERP professionals to describe the symptoms of an evolved marketplace and the inability of "first generation" ERP solutions to meet these changes.

The response by ERP vendors has been to develop additional functionality and/or modules that users can utilize to conduct their business. Yet, it is this 'ideological misunderstanding' or '1990's methodology' that is perpetuating the problem further for ERP professionals.

The speed of commerce means that today's ERP professionals do not have the time to fully utilise their existing portfolio of functionality let alone find the time and capital to use additional user-driven functionality.

Just like Customer Relationship Management, Accounts, Supply Chain Management, Project Management or indeed any industry specific application the problem is the same; user-driven functionality is no longer able to meet the speed and demands of today's business.

Traditional ERP solutions are static information sources that will only act when prompted. They are dependent on the user to extract and deliver value from the application and this approach to conducting business processes has outlived its usefulness.

In short, ERP solutions are now facing a critical phase in their life: reinvention.

Custodians of ERP solutions no longer want their users to have the 'ability' to manually process an order or the 'opportunity' to check stock levels of a particular product line. Neither do they want applications that do not have the capability to automatically identify and respond to the real-time needs of external stakeholders such as trading partners, important clients or contractors.

ERP vendors and the seasoned professionals who utilise their technology are now steering away from manual intervention. They are demanding ERP applications that not only provide the

Tip

Free-up much-needed employee time through the organisational-wide automation of report writing and distribution. TaskCentre Tools you could use: **Schedule - Query ODBC - Run Crystal Report - Send SMTP**

'opportunity' to do something but applications that will automatically 'do it' for them.

This is why many ERP vendors are promoting the importance of eradicating information islands, through the automation of business processes, as a key factor in the attainment of a sustainable competitive advantage.

What's needed and what are your options?

The answer to what is need is simple to explain but difficult to deliver for ERP vendors. Companies now require sophisticated business process automation capabilities that not only cross departments but have the ability to cross multiple applications and include both internal and external stakeholders.

They also want their ERP application to intelligently deal with business events and dynamically deliver real-time information to people when they need it most.

Clients are demanding and actively seeking Business Process Management capabilities to release the untapped power of their ERP applications as virtually any ERP user-driven activity can now be automated, thus creating immense opportunities for operational savings and increases in efficiency.

With ERP professionals now seeking Business Process Management capabilities within their application, many are faced with 4 clear options:

- ⇒ Wait for your ERP vendor to provide BPM capabilities
- ⇒ Bespoke development of isolated BPM capabilities
- ⇒ Consider upgrading to another vendor's ERP solution
- ⇒ Deploy the pure-play Business Process Management and Interactive Workflow solution, TaskCentre.

TaskCentre Examples

- **Subscriptions & Requests:** Enable key customers to request and automatically receive account details or product availability information via SMS/E-mail or allow customers to subscribe to company news services like product updates or special promotions.
- **Integration:** Synchronise record data within separate databases, 'loosely couple' all your company applications and use them as information services or archive all employee e-mail communications with trading partners or customers.

Option 1: Wait for your ERP vendor to provide BPM capabilities.

ERP Vendors, have yet to develop sophisticated business process management capabilities within their ERP solutions. Admittedly, some vendors have added small elements of BPM functionality to their solutions, such as real-time business alerts, but even these are hard coded, predefined and tied to one particular application.

Today's organisation is unlikely to want to automate the same business processes as their competitors or indeed other unrelated organisations, so these 'pre-defined' capabilities are not only basic but restricted to the vendor's predefined ideas of what they think is important to your company.

Furthermore, real-time business alerts or 'alerts,' as they are more commonly known, are no more than a generic communication output for a sophisticated event-driven, BPM solution like TaskCentre.

Option 2: Bespoke development of isolated BPM capabilities.

Increasingly over the last 3-4 years, many IT professionals have become frustrated with the lack of Business Process Management and Interactive Workflow capabilities within their ERP application. As a result, they have resorted to writing bespoke SQL triggers, VB script or manually coding write back capabilities so that information can be passed to other company applications.

The time and costs absorbed to achieve this isolated and restricted amount of business process automation functionality is considerable. Furthermore, adding additional code to ERP applications causes a number of headaches when major upgrades or new or improved modules are released.

Yes, companies who utilise an ERP solution will continue to modify their application but the demands for end-to-end business process automation is now such that a pure-play BPM solution is the only viable option.

Option 3: Consider upgrading to another vendor ERP solution.

Its true that the further you move up the vendor food chain the more process automation capabilities you will find. Consequently, many ERP solution owners think that an expensive upgrade to a more powerful ERP solution is a natural direction for their company. Yet, this could not be further from the truth.

Yes, a more powerful ERP solution may have some business process automation capabilities but once again these will be restricted to the ERP solution itself and hard coded i.e. rigid and not open to manipulation to meet your business needs.

The real power of a BPM solution lies within its ability to connect to and automate business process across multiple applications. Indeed, how may medium, large or global organisation do you know that run a single application?

So, not only will upgrading to another vendor ERP solution be costly and disruptive to the company, it won't actually address the fundamental capability that businesses now need; event-driven, business process automation.

Tip

Reduce service costs and increase trading partner satisfaction by automatically fulfilling real-time SMS requests for deliver information. TaskCentre Tools you could use: **Receive SMS - Text Parser - Data Filter - Query ODBC - Format as Plain Text - Send SMS.**

Option 4: Deploy the pure-play Business Process Management and Interactive Workflow solution, TaskCentre.

Through the deployment of TaskCentre, companies can eradicate the problems of user dependency, information islands and stakeholder disconnect.

Through TaskCentre's ability to connect to any ODBC data source, organisations can automate virtually any user driven business process. This enables companies to radically reduce their operational costs whilst increasing the visibility of critical information.

In addition, the BPM and Interactive Workflow capabilities of TaskCentre enable external stakeholders such as trading partners or customers to access stock availability/levels, delivery times, order dates or service date information in real-time and without human intervention.

At the very heart of this rapid up take of TaskCentre is the product's ability to effortlessly transform static ERP applications into real-time, event-driven applications that address the unique needs of every business. This is made possible by the four arenas of functionality that TaskCentre brings to the ERP application:

⇒ **Advanced Business Alerts**

Advanced Business Alerts enable ERP users to automatically monitor and report on information that is critical to the company, department or decision-maker. **Illustration:** Be notified of decreasing stock levels before your company is unable to fulfil an order.

⇒ **Document Automation**

Document Automation enables ERP application users to automate document creation and delivery activities. **Illustration:** Automate the construction of hourly/daily/weekly/monthly sales

TaskCentre Examples

- **Web Content Publishing:** FTP real-time product prices or availability to the company web site, publish telesales league scorecards to a company intranet, synchronise trading partner portal information with the company's ERP and CRM applications, publish delivery times or current call centre telephone waiting times.
- **Workflow:** Intelligently route insurance quotations, product status reports, purchase order authorisations or compliance and ISO documentation to employees so that they can contribute or provide authorisation.

reports and free-up time for decision-makers and senior staff.

⇒ **Web Content Publishing**

TaskCentre will dynamically publish real-time company information from your ERP (or indeed any other application) to the company Web Site, Intranet or Partner/Customer Portal. **Illustration:** Have real-time product availability levels or prices published to the company web site and enhance your reputation amongst customers.

⇒ **Workflow**

Workflow enables ERP application users to remove the costly monitoring of data changes and subsequent users actions from their daily routine. **Illustration:** Enable budget holders to dynamically receive and authorise/decline purchase order requests.

⇒ **Subscriptions & Requests**

Subscriptions & Requests enable stakeholders to request and receive specific information without employee intervention or subscribe to a company SMS or E-mail news service. **Illustration:** Enhance your marketing advertising campaigns by adding interactive SMS short codes that instantly deliver information back to the person sending the SMS text message.

⇒ **Integration**

TaskCentre's Integration capability

enables organisations to 'loosely couple' all company applications into one, event-driven solution. **Illustration:** Ensure compliance procedures are followed and audit trails are created by using TaskCentre's Integration capabilities to write-back data to another database or to automatically archive e-mails.

Business Benefits

The benefits that companies can achieve through TaskCentre are immediate and endless. However, below are just a few illustrations of what other companies using TaskCentre have achieved: -

- ⇒ Reduction in operational costs by 35-47%
- ⇒ Automated stock control
- ⇒ Increased cash flow through automated credit control procedures
- ⇒ Increased trading partner satisfaction via intelligent, event-driven communications
- ⇒ Protection and monitoring of company-critical data
- ⇒ Greater visibility, tracking and accountability of departmental or employee activities
- ⇒ Real-time production of trading information on the company web site
- ⇒ The paperless office
- ⇒ Significant increase in available time for decision-makers and key staff.
- ⇒ Real-time delivery of Key Performance Indicators (KPI's)
- ⇒ Improved asset management
- ⇒ True connectivity between all the company's software applications

Tip

Decrease aged debtor times and increase cashflow through automating the company's credit control procedures. TaskCentre Tools you could use: **Schedule - Query ODBC - Format as HTML - Send SMTP**

About the Company | Orbis Software

Orbis Software provides the leading pure-play Business Process Management and Interactive Workflow solution, TaskCentre, enabling organisations to drive efficiency and reduce costs through collaborative process automation.

Founded in 1997, Orbis Software Ltd provides a scalable suite of applications to suit any size of organisation. There are more than 4000 organisations around the world already using Orbis products, including such names as Nasdaq, Telstar, BP, BDO Stoy Hayward, GE Capital Equipment, The Rank Group, Salomon Brothers, Zenith, BUPA, Jaguar, Lloyds TSB, and Rolls Royce.

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