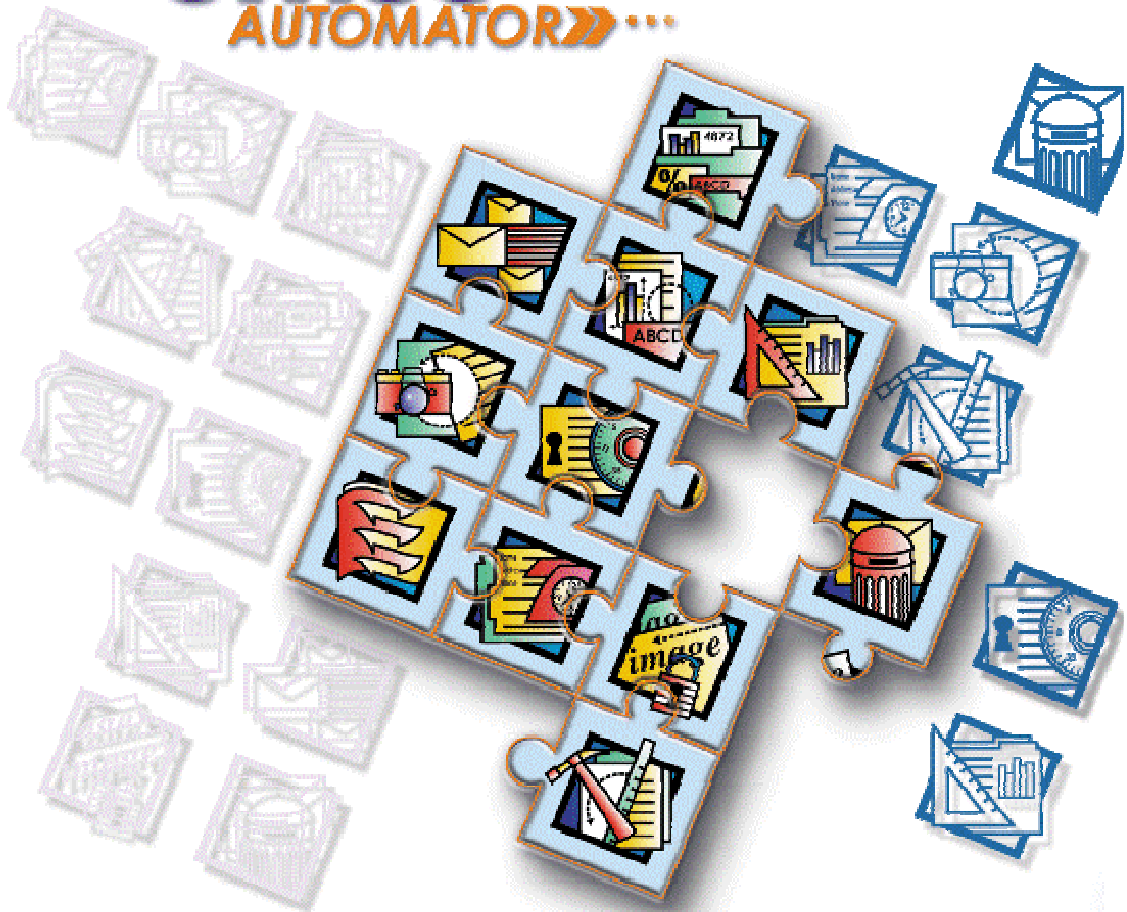


office AUTOMATOR»»...



the ultimate automator for Microsoft Office

OFFICE AUTOMATOR PRODUCT OVERVIEW



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Contents

OFFICE AUTOMATOR OVERVIEW	3
BUSINESS PROCESS AUTOMATION	3
Modelling the business	3
Automating Tasks	4
Security	5
Auditing	5
Integration With Third Party Products	6
Operating Environment	6
BUSINESS PRODUCTIVITY TOOLS	6
SYSTEM ADMINISTRATION TOOLS	7
Security Manager	7
Licence and User Management	7
OTHER CAPABILITIES	7
Remote Access	7
Multiple Business Environments	7
Operating System Support	7

Office Automation Pty Ltd – A History Of Innovation

When business first moved out of the “Cottage”, the idea of the Office was born. Huge productivity gains came with technology resulting in Microsoft Office re-inventing personal productivity.

Office Automation’s Founder Philip Boswell had a bigger dream...to automate work flow and document management while allowing staff to keep using the productivity tools they were used to and businesses to work the way they want to, not being dictated to by technology.

Today, Office Automation Pty Ltd is proud to offer its ground breaking **Office Automator** that will manage a single Project or a Division or every aspect of a Business while integrating directly with Microsoft Office.

CEO, Mark Stevens brings global technology business experience to the Company and is taking the business and its products to the world stage. Clients already include some big names like Rio Tinto and the Bateman Group. To discuss your needs, **call Barry Hatton on 1300 858 764.**

OFFICE AUTOMATOR OVERVIEW

Office Automator is a business process management suite which consists of three components, Business Productivity Tools, System Administration Tools and System Builder (Business Modelling) Tools. It can be used to automate an entire business, or any individual functional area of a business in order to:

- **Reduce costs and improve efficiency:** Daily business tasks get done with less people in less time
- **Increase visibility:** Reports and Executive Dashboards allow monitoring of any aspect of the business, such as billing ratios, project progress, where employee time is spent etc.
- **Improve process discipline:** Makes it easy for users to follow processes and gives visibility if processes are not completed
- **Track Everything:** Never lose a document, drawing, or email again. Office Automator stores all transactions and communications in an auditable and searchable database.

Unlike most other tools, with Office Automator, workflow doesn't have to change to suit the software - it automates existing workflows, minimising staff retraining and dramatically reducing resistance to change.

At the core of Office Automator is a OA-FS, a secure structured (hidden) file system which stores all business documents and a centralized database which is broken into three parts:

1. Transaction Database – tracks all the information relevant to registered documents thus providing all the capabilities of a full document management system.
2. Contacts Database – provides a central repository of contact information for employees, clients, prospects and suppliers.
3. Communications Database - tracks and records all email threads in an auditable fashion.

Users don't need to know how the file system is structured to find their data, they simply work with their data using the Business Productivity Tools and Office Automator automatically tracks everything and files it in the correct locations.

BUSINESS PROCESS AUTOMATION

Modelling the business

The Office Automator System Builder Tools are used to build a model of your business as it functions today. Although each business is organized differently, there are common organizational elements which are used to build the model of the business.

At the highest level are Groups or Departments, such as HR, Legal, and Finance. Depending on the nature of the business, these functions may be organized differently (for instance sales and marketing may be separate departments, or one department) or there may be certain functions added or deleted. A legal firm for instance probably does not have a purchasing department, whereas a construction company does.

Each Department will have Units within it, and each Unit will have Duties or tasks associated with its responsibilities, such as billing, expediting or recruitment. These Duties are typically made up of a collection of individual actions or transactions such as letter writing, memo creation or invoicing.

Project based organizations have additional elements to their business models, namely

- Projects which represent an entire body of work, such as building a mining camp.

- Packages (of work) which are groups of tasks executed in a particular order to produce a desired outcome.

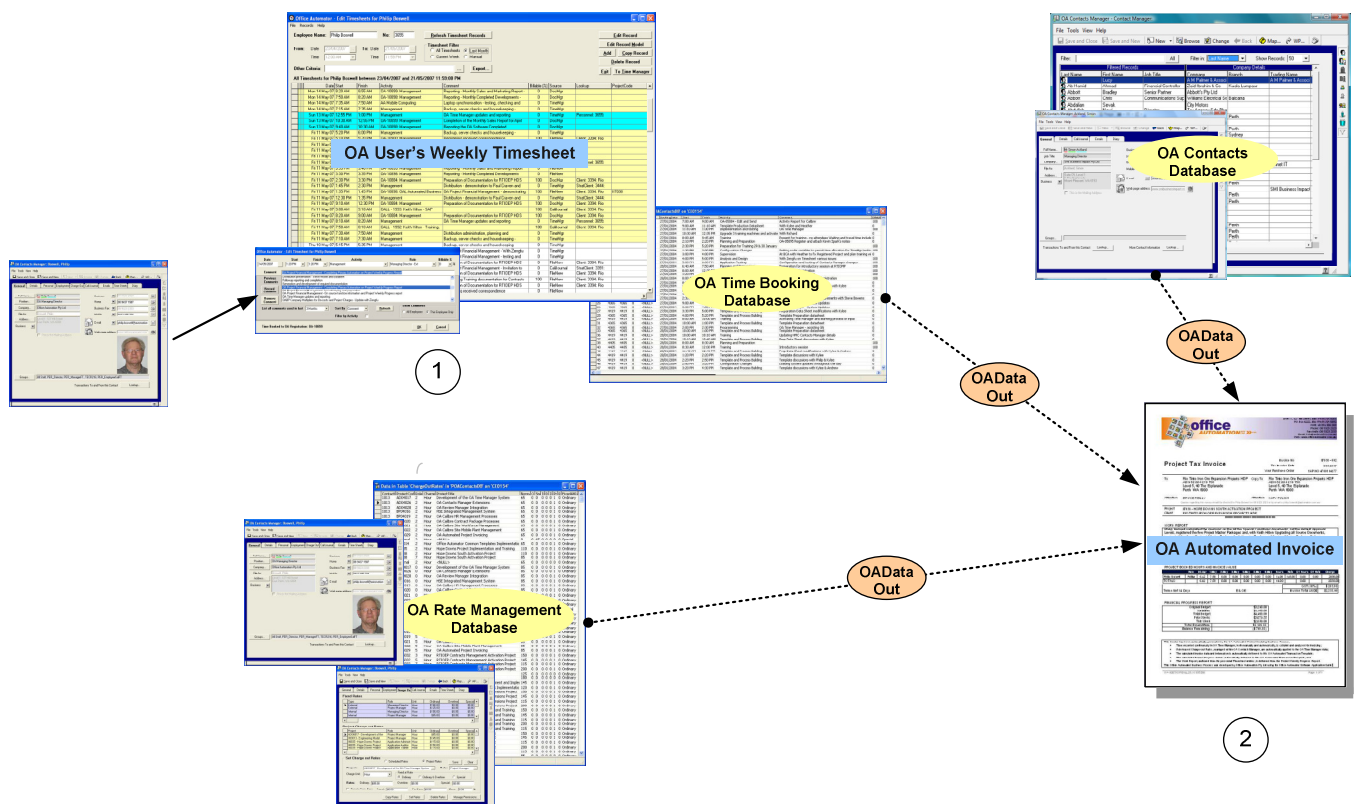
Once the model of the business is built, the next step is to automate the transactions, tasks, packages and projects which are the day to day work of the business, so users who work within a particular department, have available to them all the (automated) tasks they need to do their job. Projects and Packages can be dynamically added and removed from the business model by the client once the model is implemented.

Automating Tasks

The fundamental building block for automating a business is the Automated Transaction Template (ATT). Automated Transaction Templates are a combination of a program and a document template which can

- Accept data entered manually – either through forms or directly typed in.
- Search the OA-FS for content and insert it into the document.
- Search the central database for information and insert it into the document.
- Perform operations and/or calculations on any of the data and insert the result into the document

A task can be a single ATT or an automated process involving several ATT's and potentially other tasks. Let's look at an example of an ATT: Automatic Invoice Generation



In this example:

1. The employee fills in his time sheet either directly in OA Time Manager, or simply using the Time Manager entry dialogs which are integrated into his normal working tools (Word, Outlook etc) This information is then automatically stored in the OA Time Booking database.
2. The Automated Invoice is created using an OA Automated Transaction Template (ATT). To create an invoice, we simply open the ATT and specify which customer we want to create the invoice for. The ATT will then run its internal program to go out and get the required data:

- (a) The employee's time booked against that customer from the OA Time Booking database.
- (b) The employees charge out rates, from the OA Rate Management Database. Charge out rates may be different for the same employee in different parts of the customers job – i.e. He may book some time as a project manager when he is performing that function, and as a systems analyst when he is performing that function.
- (c) The logos, headers and footers etc for the employees company which OA stores in one central location for all ATT's to use.
- (d) The address and contact details for the customer from OA Contacts Manager.

In this way an invoice can be created in less than a minute, a process which would take much longer if done by hand. ATT's can automate practically any function, for example:

- Purchase orders.
- Conformal Contracts (pulling information from ITT's etc).
- Invoices.
- Billing Ratio Reports (through the Time Booking database).
- Project progress reports (gathering data from all aspects of a project in real time).
- Formal Letters.
- Meeting Agendas (automatically including minutes from the last meeting).

In this example, most of the work is performed by built-in Office Automator functions, the only customization is the creation of the Automated Invoice ATT. Office Automator ships with a comprehensive set of standard ATT's for most business functions. A large library of specialized ATT's has also been developed to speed up customization.

In a project based organization, tasks can be grouped together in sequences to form packages of work and packages grouped together to encompass an entire project.

Office Automator also has pre-built automation modules for:

- Engineering Project and Package Management.
- Compliance Auditing.
- Human Resource Management.

Security

A key part of developing the business model is designing the security model, in other words, which employees will be entitled to see which parts of the company's data and operations. Office Automator supports full role based administration based on Active Directory Groups. Through 187 individually controllable items, Office Automator System Administration Tools provide fine grained control over all aspects of the business. These tools are also used on an ongoing basis to manage the security of your business.

Auditing

Office Automator allows you to track the who, what, when, where, why and how of changes to any document or transaction within the system. Automated reports can then be produced to be able to determine the history of any document and if desired, "please explain" memos can be sent to any users who edit critical documents . Edits can be managed individually, by author, or on a global basis.

Integration With Third Party Products

Office Automator data storage uses a standard (hidden) Microsoft file system as well as a database. The standard database implementation is SQL but Office Automator can also use Oracle or other databases. Office Automator can be interfaced with any product which supports standard import/export functionality or which supports a BUS connection. Some software such as Livelink has additional capabilities which allow tighter integration including shared data storage. Office Automator has already been interfaced with the following products for data exchange:

- Tenision Technologies SOX telephone systems for phone call activation from OA contacts Manager with integrated phone call journaling. SOX uses a TAPI interface;
- I-Manage document management application. (now Interwoven)

Office Automator has also been integrated with the following products:

- Micro Station drawing software suite.
- Livelink Knowledge Management software.
- Share Point Server system.

Operating Environment

At the end of the modelling process a complete environment is produced. This environment incorporates has the complete model of the business (or business division) and all the projects, packages, tasks and Automated Transaction Templates as well as the common content of that business such as headers, footers, standard legal disclaimers etc. The environment is broken up into three parts

- a development workspace where changes to the model can be tested as the business evolves.
- a training and test workspace for model changes to be evaluated and users trained.
- The production workspace.

BUSINESS PRODUCTIVITY TOOLS

In addition to modelling your business and automating your business processes as described above, Office Automator provides a set of Business Productivity Tools which give true integration between all facets of your business including Communications (email, phone etc), Document management, Billing, HR, Project Management and tracking.. Many of these functions are performed using tight integration into Microsoft Office programs such as Word and Outlook. The use of these tools is role based, so employees only see the content and ATT's relevant to their position within the company. The Business Productivity Tools include:

- Document Generator – allows users to do their work using the ATT's and is integrated with Microsoft Word.
- Document Revision Manager – provides many common revision control schemas, or can be customised as required.
- Transaction Manager – Allows users to find, organize, report on, and track their work, including any type of electronic files and physical documents.
- Communication Tracker – tracks emails, phone calls and diary entries to allow users to organize, report on, and manage all forms of communication.
- Outlook Email Manager – integrates into Microsoft Outlook and allows users to make use of all the Office Automator capabilities, such as centralized contacts, email tracking and (optional) time management.

- Contact Manager – the centralized contact database. From this tool users can send emails, make phone calls (when integrated with a compatible phone system) and many other functions. It also forms the basis for Office Automator to deliver an HR or CRM capability to your business.
- Diary Manager – used by employees as their work diary, it also allows them to track their own email correspondence, phone calls and view their HR details.
- Time and Activity Manager (optional) provides integration into Microsoft Office to book time against document creation/editing, email and other tasks. Time sheets can also be edited directly.
- Utilities
 - Email Send – is an email distribution and routing manager for that greatly simplifies distribution lists.
 - Query Builder – is a comprehensive and powerful system-wide search tool which can be used to find any type of information within the system.
 - Fast Open – is a shortcut function to directly access commonly used documents via their reference number
 - Electronic Bulletin – allows authorised users to quickly notify others in their department or workgroup of events (can be scheduled).
 - Quick Reference Guide – is a comprehensive help system which is customised to your business model

SYSTEM ADMINISTRATION TOOLS

Security Manager

The security manager controls the user access, visibility and functionality permissions within the automated company model, according to position and organisational requirements. This applies to all aspects of the company business processes, including Automated Transaction Templates and Business Productivity Tools.

Licence and User Management

The system administrator is able to monitor and manage the licence usage by user and month in accordance with the business requirements and OA licence agreement.

OTHER CAPABILITIES

Remote Access

Staff who work in the field can use Office Automator over the internet with either Citrix XenApp (presentation server) or Microsoft Terminal Services. Office Automator Workstation is also available in a mobile (standalone) configuration which can operate without internet connectivity and supports full file locking (check out / check in) and synchronisation with the Office Automator Server.

Multiple Business Environments

Office Automator's environment model means that a single server installation can run multiple business environments simultaneously.

Operating System Support

Office Automator supports Windows Small Business Server, Server 2003 and Server 2008 on the server side and Windows XP and Vista on the client side. Office 2003 and 2007 are supported.

At Last...! A Business Process Management Suite That Manages From A Single Project, To A Division Or To EVERY Aspect Of Your Business And Integrates Directly With Microsoft Office

office
AUTOMATOR >>>...

Improve all areas of your business including:

- Accountability
- Compliance
- Performance
- Audit Trails
- Consistency

Sales Enquiries:

Contact SMI Business Impact

Phone +61 1300 858 764

Email info@smibusinessimpact.com.au

Web www.smibusinessimpact.com.au/office-automator.aspx

Automate processes for Company, Project and Contract management:

- Fits to your workflow to minimize staff resistance
- Document creation, management and revision control
- Tracking of email and "snail" mail communications
- Compliance enforced with document style & corporate standards
- Contact database integrates with email & phone systems for complete CRM
- Time management and invoicing automated
- Capture, store, search & retrieve data & all file types



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