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# 1 Introduction

Office Automator is a business process management suite which consists of three components, System Builder (Business Modelling) Tools, System Administration Tools and Business Productivity Tools. It can be used to automate an entire business, or any individual functional area of a business. Office Automator is a Client Server application. At the core of Office Automator is 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. The architecture is shown in Figure 1.

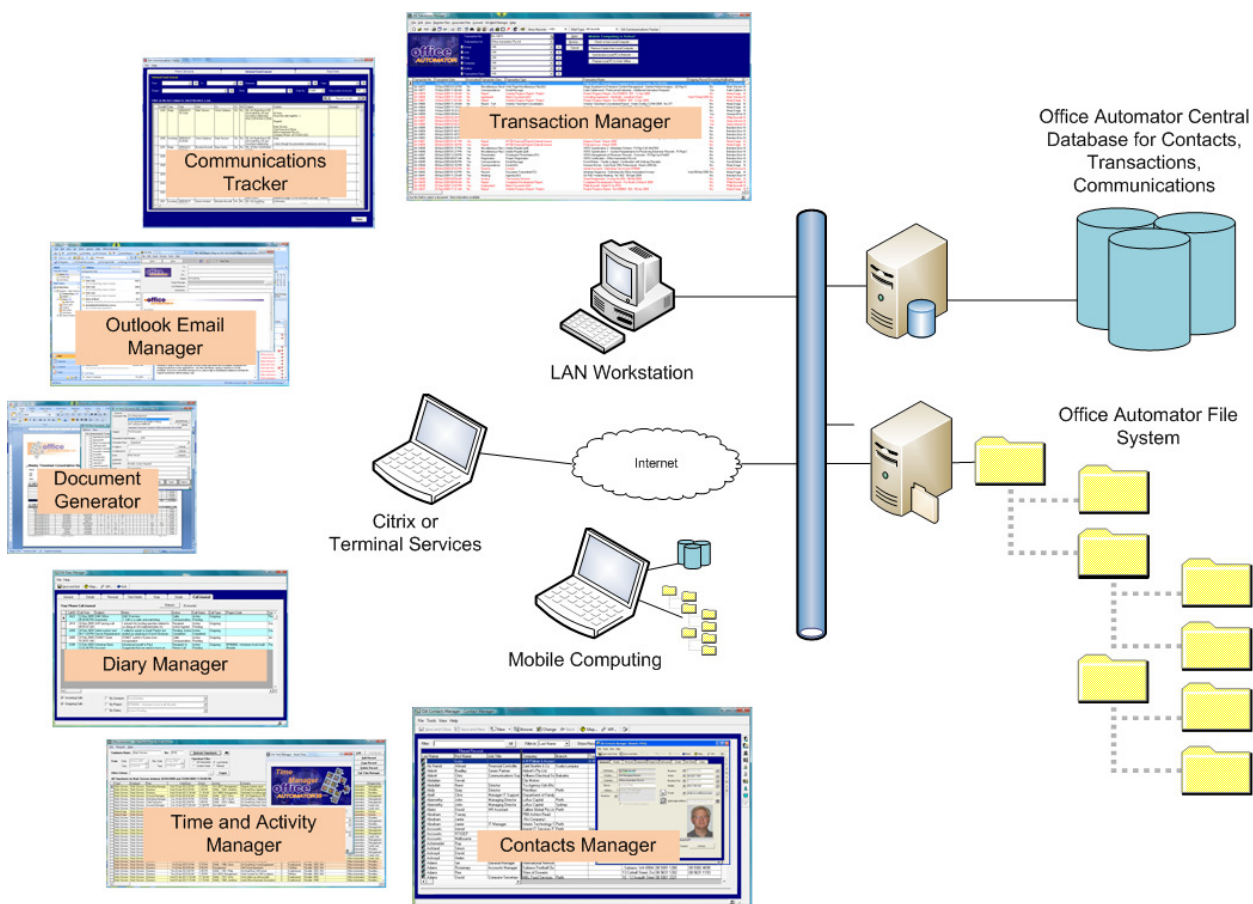


Figure 1. Office Automator Architecture.

## 2 System Builder Tools

### 2.1 Model Manager

Model Manager is used to build a model of the business which mirrors its existing structure. 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.

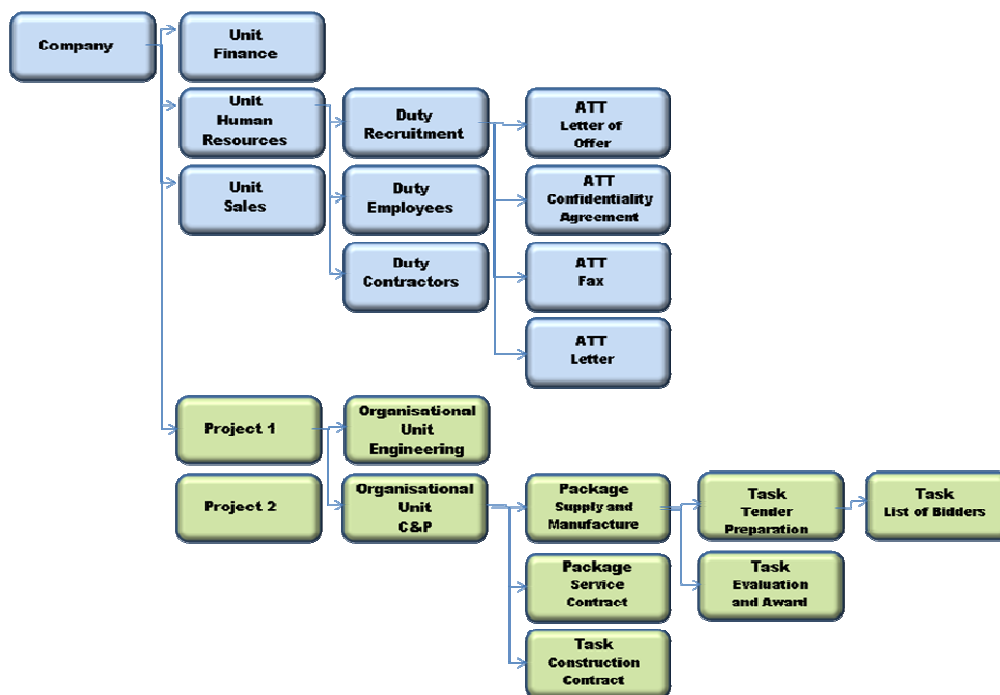


Figure 2 Company Structure With Projects

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. For instance all electrical systems within construction project

Model Manager also has several other key functions, it:

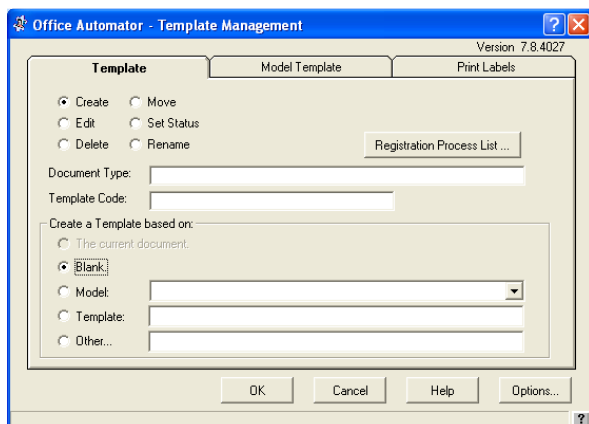
- Builds the file system for all the transactions which will be created by the operational business. This file system can be set to automatically mirror the model, or can be created to the customer requirement and mapped to the business model.
- Creates libraries of projects and packages which accompany the model as well as libraries for the Automated Transaction Templates (see next section).
- Assigns branding and sets branding rules – i.e. what logos addresses and other company information is used and in what context.

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. This is performed by a specialized Automated Transaction Template.

## 2.2 Template Manager

Template manager is the tool which is used to build Automated Transaction Templates (ATT's). ATT's are the fundamental building block for automating a business. They are a combination of a parameter driven 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.
- Use stored procedures to perform operations and/or calculations on any of the data and insert the result into the document.
- Initiate other external actions (such as send an alert) by means of Functions which are called from the ATT. Office Automator has an extensive library of built in Functions.



ATT's can automate practically any process, 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).

Accompanying the Office Automator software suite is a set of common Automated Transaction Templates (ATT's) automated with business style, registration, coding and revision processes, available within each Duty in each Department, according what is defined by the business model. These Automated Transaction Templates may appear at many points within the model, for instance Agendas, Letters and Faxes could be used within the Sales as well as the Financial departments. The Common ATT's are:

Agenda  
Blank Document  
Call Report  
Document Transmittal  
Email Formal  
Email Informal  
Facsimile  
File Note

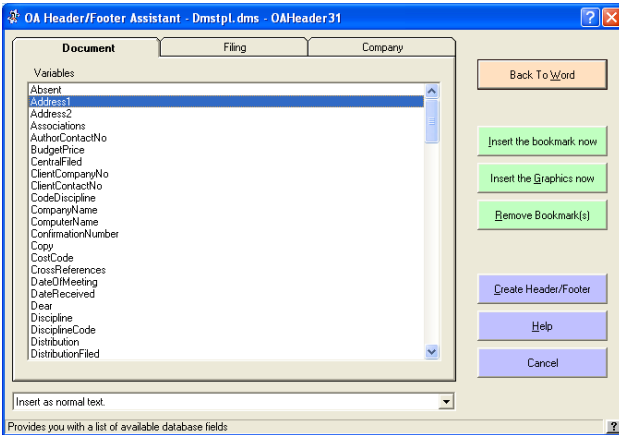
Letter  
Letter Printed Stationery  
Memorandum  
Minutes of Meeting  
Registered Document  
Report  
Transmittal of Non-registered items

A large library of specialized ATT's has also been developed to speed up customization, including complete systems for: Engineering Project and Package Management, Compliance Auditing and Human Resource Management.

In a project based organization, specialized ATT's are used to modify the business model in order to add the structures necessary for the projects and packages.



## 2.3 Header and Footer Manager



Header and Footer Manager creates and edits automated headers and footers which are code driven. Custom headers and footers, along with a standard set which ship with Office Automator are stored in a library and are referenced by ATT's whenever a header or footer is required.

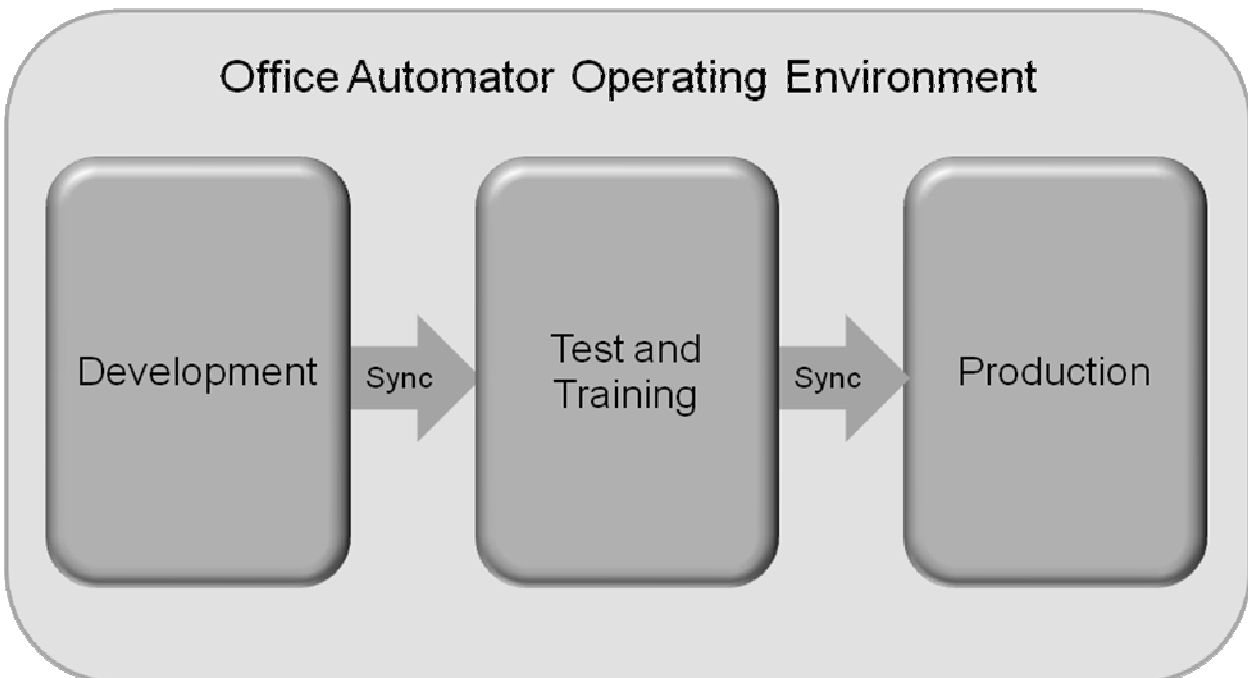
The automated headers and footers can get information from the central database or from files. Calculations can also be embedded in the headers and footers.

## 2.4 Template Editor

Template Editor is used to modify static content, such as embedded text, within an ATT without giving access to the programming behind the ATT. This allows authorised users to add or modify text in ATT's without needing to be fully trained in creating the ATT programs.

## 2.5 Synchroniser

An Office Automator installation is a complete environment. This environment incorporates the 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 style sheets, headers, footers, standard legal disclaimers, flags, logos, help files, quick reference guides etc.



The environment is broken up into three parts

- The development workspace where changes to the model, new ATT's, or new workflow automation can be developed as the business evolves.
- The training and test workspace where model changes can be evaluated and users trained.
- The production workspace.

Model changes can be synchronised between the three parts and data can be imported from the production workspace for test and training purposes.

## 2.6 Query Generator

Query Generator is used to build advanced queries which can then be stored in the Library for use within ATT's. Several other tools including Template Manager have simplified versions of Query Generator built into them.

## 2.7 Run File Log Generator

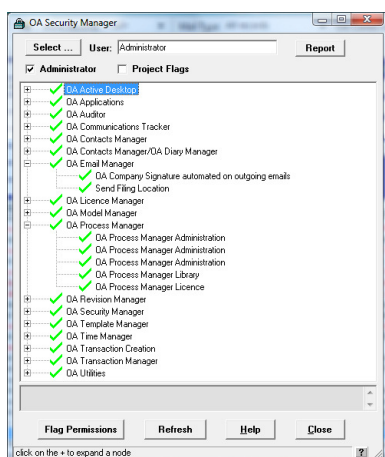
In Office Automator, Run File Logs are tables in the central database which track all relevant information about transactions as they are created and used. Run File Log Generator is a tool to automatically generate a new run file log either for a business, or for a project which requires its own separate run file log.

# 3 System Administration tools

These are the tools by which the user interface, view, authorities and processes are managed.

## 3.1 Security and Audit Manager

The security manager controls the user access, visibility and functionality permissions within a automated company organisation according to position and organisational requirements.



User's visibility and accessibility to transaction templates, transactions read and/or write accesses and functions are assigned accordingly encompassing all OA suite and system tools.

## 3.2 Licence and user management

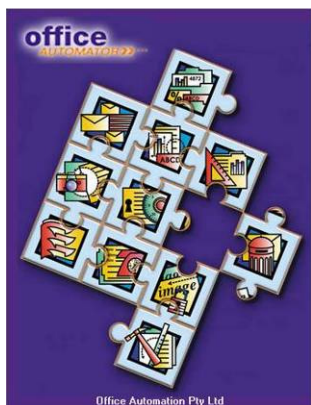
The system administrator is able to monitor / manage the licence usage according to user / month in accordance with the business requirements and OA licence parameters..

## 4 Business Productivity Tools

The Business Productivity Tools drive business efficiency through 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 relevant to their position within the company. The Business Productivity Tools provide:

- Complete document management and revision control
- Full correspondence tracking for electronic and physical communications
- Central Contacts database accessible to all users and integrated with email and telephone systems
- Time management, tracking and billing
- Style management to ensure all documents and correspondence meet the corporate standard.
- Powerful cross referencing and search capabilities for all company data

The eight major Business Productivity Tools are accessed through the Office Automator Active Desktop. They organize all corporate data and provide visibility and control over business information while helping your users perform their daily tasks using automated processes and consist of:



- Transaction Manager
- Document Generator / Revision Manager
- Outlook Email Manager
- Communications Tracker
- Contacts Manager
- Diary Manager
- Mail Manager
- Time & Activity Manager (Optional)

### 4.1 Transaction Manager

Transaction Manager is the control centre for the built-in content management system. It allows users to access and manage all formal transaction documents and information about those transactions within the system to which each user has permissions.

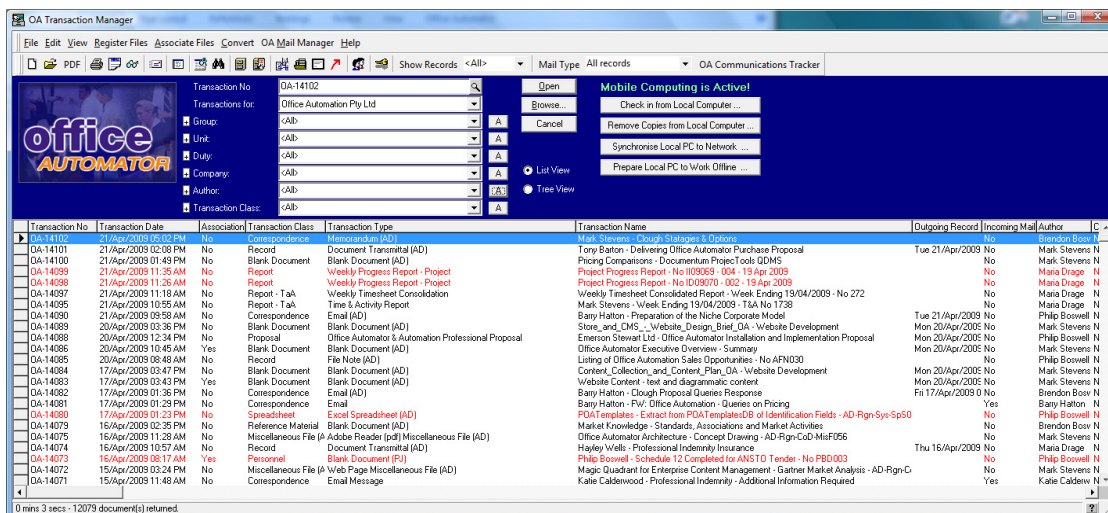


Figure 2: Transaction Manager



Transaction manager includes a large number of capabilities as described below:

#### **4.1.1 Functions for Existing Transactions**

- Quick view or full view
- Email, print, PDF, resend transactions
- Transfer via web sites
- Evolution auditing
- Transactions history register
- Printing history register
- Create, review or remove cross references
- Create, review or remove associations (files grouped together under one transaction – for instance a PDF version of a word document or a drawing and its cover sheet)
- Revise documents for new transaction
- Set or amend security permissions for individual transaction documents
- Refile transaction documents according to modified Project / task or Department / unit / duty
- Remove transaction documents from the register ( Remove Manager utility)
- Filter and search to find a transaction

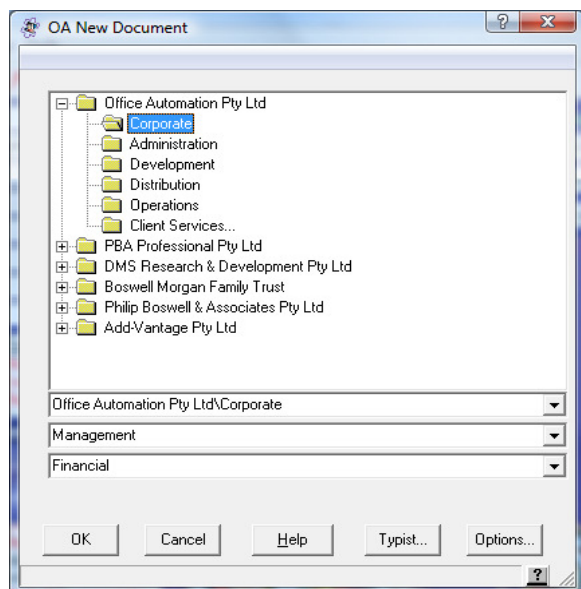
#### **4.1.2 General Functions**

- Registration of any electronic file type not created by the Office Automator suite, for example:
  - Database
  - Microsoft Project
  - Multimedia Item
  - Power Point presentation
  - Drawing (Microstation, Autocad, Visio)
  - Spread sheet
  - Incoming and reply email
  - Incoming mail
- Add any transaction document to the database, both incoming and outgoing
- Modify views and colour code systems
- Launch Document generator application
- Launch Communication tracker application
- Distribute or route a transaction with applied rules via the email system
- Query Builder Utility (report extraction)
- Electronic Bulletin Utility
- OA Help menu
- Administration Tools
  - Transaction remove manager
  - Security manager
  - Template editor
  - User Management utility
- Mobile Computing
  - History file and database audit
  - Transaction check out to local computer
  - Transaction copy to local computer

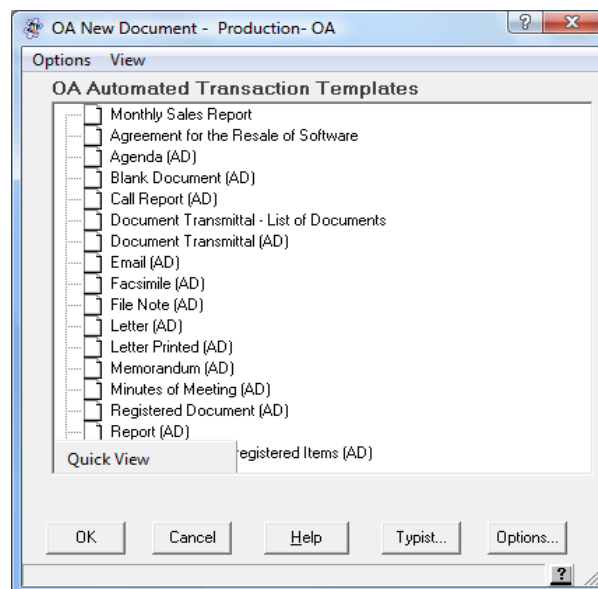
## 4.2 Document Generator

Document Generator uses Automated Transaction Templates<sup>1</sup> to create predefined reports, invoices, letters or any other predefined documents used within your business which are automated with your business style, registration, coding and revision processes.

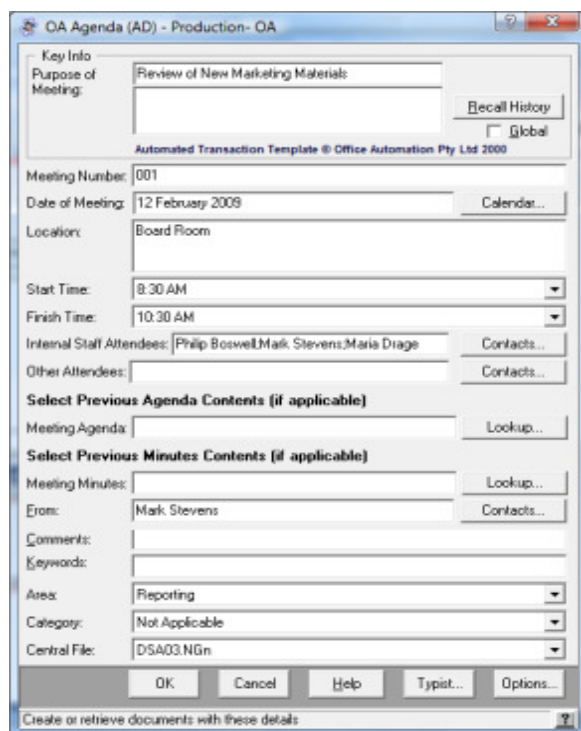
Document Generator uses a wizard to build the document and to find out where to file the created documents according to the filing structure defined within your business model, for instance a contract may be filed under YourBusinessName/Legal/Contracts.



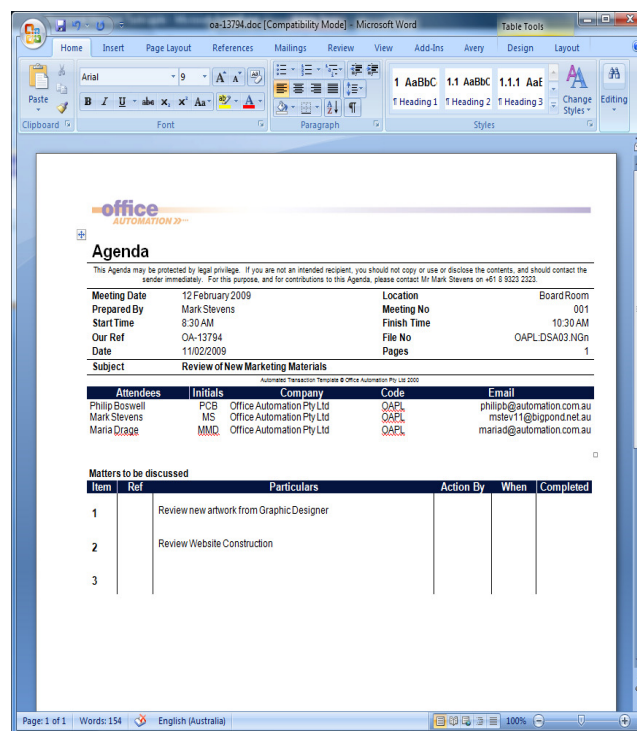
Step 1: Select your Company/Department



Step 2: Select your Duty/Task



Step 3: Fill in the Document Details



Step 4: Start working on the document

When the user fills in the document details, the dialog, which is specific to the type of document being created, also allows the user to:

- Include the Document title and subject

<sup>1</sup> For an explanation of Automated Transaction Templates, see Document OA-13831 Product Overview  
OA-13776:OPI03b.NGN

- Add recipients from OA contacts
- Add cross references to other existing transactions
- Add associations to other existing transactions or communications

Once created, the document will automatically be given a transaction number and filed. If the user sets recipients, then it will also be emailed to them automatically.

## 4.2.1 Document Revision Manager

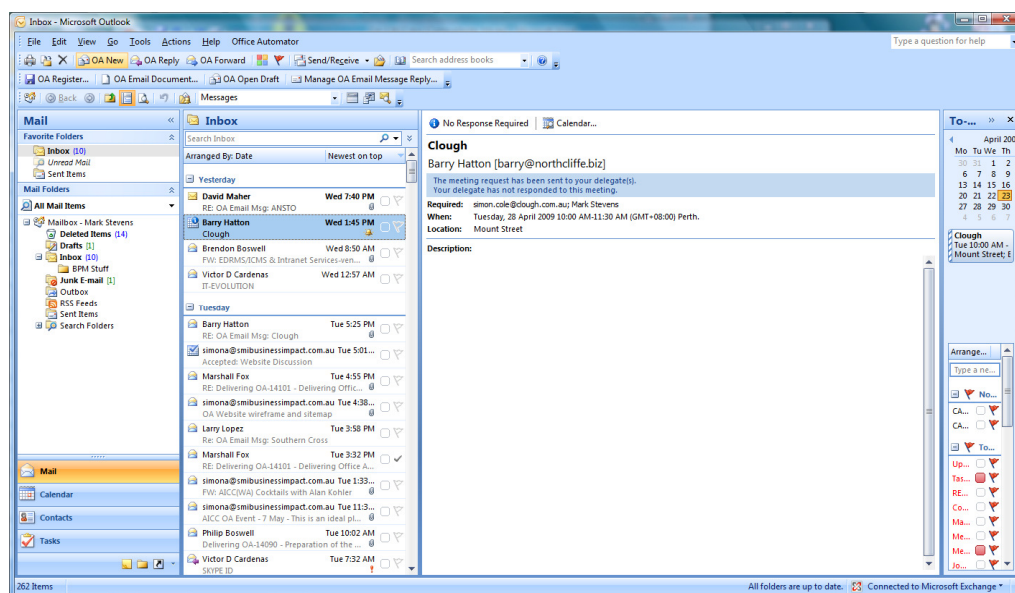
When a new document is created, the Automated Transaction Template used may have as one of its properties a revision schema. There are 26 standard schemas built into the system and custom ones can be added as desired. These schemas can be any combination of:

- Alpha / numeric
- Tiered approvals (up to 3 levels)
- Revisions with snap shot saved as associations
- Permissions and security
- Preparation for language translations

Document Revision Manager allows authorised users to revise documents and lock those documents when they reach a full revision level. The audit trail is recorded providing traceability of a transaction / document evolution.

## 4.3 Outlook Email Manager

Outlook Email Manager runs within Outlook to provide powerful communications management and tracking in an environment familiar to most users.



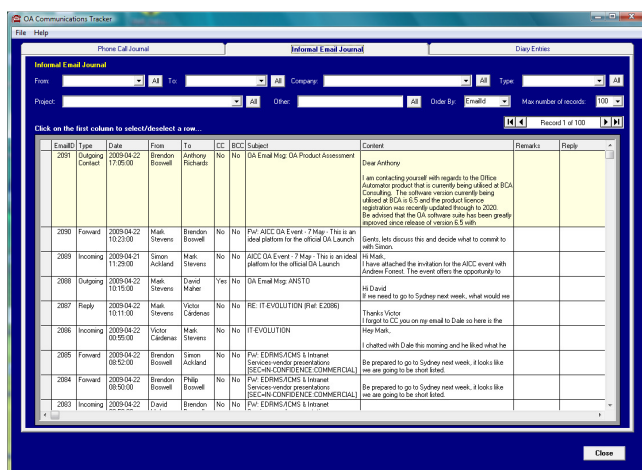
Email Manager enables users to:

- Create formal email transactions automated with your business style, registration, coding and revision processes, filed according to the applicable business function within the transaction database.
- Create informal email transactions registered within Communications database and accessible via Communications Tracker and Contacts Manager applications
- Register as formal transactions, inbound emails and attachments according to Group/Unit or Project/Package within OA Transaction, Communications and Contacts Manager
- Register as informal transactions, incoming emails and reply emails
- Automatically track email conversation threads
- Use the centralised contact database for all communications
- Minimise clutter by automatically removing emails from Inbox and Sent Items once they have been registered.

(Note: When Office Automator suite is not running, Outlook reverts to its standard capabilities)

#### 4.4 Communications Tracker

Communications Tracker provides a centralized view of the database of all informal communications including emails, phone call journals and diary entries with powerful filter and search capabilities, including the ability to view email conversation threads.



Communications Tracker is also integrated with Outlook Tasks and Calendar functions.

Office Automator stores email content much more efficiently than Microsoft Exchange as attachments, signature blocks and other common data are saved in one location in the system, not duplicated in every email attachment as would occur if Microsoft Exchange was used as the email repository.

#### 4.5 Contacts Manager

Contacts Manager is an extended centralised global contact repository for employees and external contacts. Contacts Manager:

- Provides telephone system integration, so contacts can be called directly from Contacts Manager (Call Journaling is automatically activated).
- Provides Call Journaling – while the user is on the phone they can make notes about the conversation, file those notes as an informal transaction and send a confirmation email to the person they are calling – this makes decision making over the phone with email confirmation incredibly simple.
- Allows the user to view any emails, call journals or diary entries related to a particular contact – a core function for any CRM implementation
- Integrated with Outlook Tasks and Calendar functions
- Provides powerful search capabilities via filter / grouping / category series
- Provides validity features built in via web connections to cross references



**Fixed Rates**

Type	Role	Unit	Ordinary	Overtime	Special
External	Managing Director	Hour	\$180.00	\$0.00	\$0.00
External	Project Manager	Hour	\$125.00	\$0.00	\$0.00
Internal	Managing Director	Hour	\$100.00	\$0.00	\$0.00
Internal	Project Manager	Hour	\$85.00	\$0.00	\$0.00

**Project Charge out Rates**

Project	Role	Unit	Ordinary	Overtime	Special
AD04017 - Development of the	Project Manager	Hour	\$85.00	\$0.00	\$0.00
II03013 - Engineering Model	Project Manager	Hour	\$145.00	\$0.00	\$0.00
II6035 - Hope Downs Project	Application Adminstr	Hour	\$115.00	\$0.00	\$0.00
II6035 - Hope Downs Project	Application Auditor	Hour	\$150.00	\$0.00	\$0.00
II6035 - Hope Downs Project	Application Trainer	Hour	\$115.00	\$0.00	\$0.00

**Set Charge out Rates**

☐ Scheduled Rates ☒ Project Rates

Projects: AD04017 - Development of the OA Time Manager System Roles: Project Manager

Charge Unit: Hour Fixed at Rate ☒ Ordinary ☐ Ordinary & Overtime ☐ Special

Rates: Ordinary: \$85.00 Overtime: \$0.00 Special: \$0.00

☐ Remote From Base Travel: \$0.00 Per Diem: \$0.00 Zone: 0.00 %

Contacts Manager is extensible so fields for any information about required by the business about individual contacts can be added. Contacts manager is company centric, so each contact is associated with a particular company and group, it tracks organization and structure for external contacts via job titles and "reporting to" information.

For Employee contacts, additional fields includes all required HR management details enabling OA time sheet and billing systems as well as maintenance of personal information including CV's, qualifications.

An optional HRM module extends and automates a number of additional capabilities. Adding and deleting contacts from Contacts Manager is a permission granted by the system administrator.

## 4.6 Mail Manager

Mail Manager provides multiple ways to collect all incoming and outgoing *physical* mail to form a part of your knowledge base by:

- Recording and tracking outgoing mail and documents, formal and informal
- Registering and tracking filing location of incoming mail and documents
- Integration with business information database
- 

**Key Info**

From: Abraham Nagavkar  
Accounts  
Accounts Alliance

Contacts...  
Recall History  
☐ Global

Automated Transaction Template © Office Automation Pty Ltd 2000

Mail Type:

Subject:

Their Reference:

**Internal**

Recipient(s):  Contacts...

Distribution List:  Contacts...

In reference to:  Lookup...

Typist: Philip Boswell Initials: PCB

Comments:

Keywords:

Area: Agreements

Category: Not Applicable

Central File: Please Click Here

This field contains explanatory notes about the document required for personal use



## 4.7 Diary Manager

Call ID	Call Time	Subject	Notes	Action	Call Status	Call Type	Project Code	Contact	Comp.
2422	12 Mar 2009 05:00:00 PM	G4H Office Automator	G4H Overview	Caller Correspondence	Action Pending	Outgoing		Peter Miller	G4H L
2414	10 Mar 2009 09:55:47 AM	ASP pricing call	I asked if his hosting question related to us doing an OA implementation for	Recipient Action Agreed	Action Pending	Outgoing		David Maher	Intrac Consu
2408	24 Feb 2009 04:11:24 PM	Initial contact and Server Requirements	I called to speak to Geoff Puttick but ended up speaking to David Silverman	Pending Action Completed	Action Completed	Outgoing		David Silverman	Pre-Pt Pty Ltd
2406	23 Feb 2009 10:38:51 AM	COMET Grant	COMET cutoff is 5 years from incorporation	Caller Correspondence	Action Pending	Outgoing		Jim Paulyshyn	KJW C
2395	12 Feb 2009 12:02:40 PM	Informiner Bank Account	Introduced myself to Paul Suggested that we need to have an	Recipient to Return Call	Action Pending	Outgoing	BP08066 - Informiner Asset Audit Module	Paul Craven	Informi

☒ Incoming Calls  
☒ Outgoing Calls  
☐ By Contacts: David Maher  
☐ By Project: BP08066 - Informiner Asset Audit Module  
☐ By Status: Action Pending

Diary Manager is a personal workspace, where users can maintain their own daily diary and access other tools such as timesheets, as well as view and search their personal:

- Email correspondences
- Phone call journaling
- HR details

## 4.8 Time and Activity Manager

Provides a powerful tool for capturing staff activity. It manages what tasks employees can book time to – both internal functions and customer jobs and can record time for any activity i.e. phone calls, emails, document authoring etc from within the Business Productivity Tools (Document Generator, Outlook Email Manager etc) as you do your job . This provides the basis for automatically generating Customer invoices, exception reports etc.

Role	Date	Start	Finish	Activity	Comment
Managing Director - Int	Mon 09 Feb 09	7:55 AM	8:00 AM	Management	OA Time Manager updates and reporting
Managing Director - Int	Mon 09 Feb 09	7:45 AM	7:55 AM	OA-13772: Management	Administration tasks - Correspondence from Fogarty Partner
Managing Director - Ext	Mon 09 Feb 09	7:40 AM	7:45 AM	OA-13771: Management	Registering correspondence - iWebGate - Charlie Gargett -
Managing Director - Int	Mon 09 Feb 09	7:20 AM	7:40 AM	Management	Backup, server checks and housekeeping - Memory check
Managing Director - Int	Fri 06 Feb 09	5:30 PM	5:50 PM	Management	Backup, server checks and housekeeping - Memory check
Project Manager - Int	Fri 06 Feb 09	5:00 PM	5:30 PM	Management	With Zengfu on designing the lookup and cross reference r
Managing Director - Ext	Fri 06 Feb 09	4:40 PM	5:00 PM	Management	SKYPE conversation with - SMI - Barry Hatton - update on
Managing Director - Int	Fri 06 Feb 09	3:05 PM	4:40 PM	OA-13707: Management	Trip to Fogarty Partners - signing documents and discussing
Managing Director - Ext	Fri 06 Feb 09	2:50 PM	3:05 PM	Management	SKYPE conversation with - SMI - Simon Ackland - update c
Managing Director - Int	Fri 06 Feb 09	2:25 PM	2:50 PM	Management	General communications and tidying up loose ends
Managing Director - Ext	Fri 06 Feb 09	2:20 PM	2:25 PM	EMAIL - 1786: Steve van	OA Reply Msg to Follow Up - Some Answers
Managing Director - Int	Fri 06 Feb 09	1:50 PM	2:20 PM	Management	General communications and tidying up loose ends
Managing Director - Int	Fri 06 Feb 09	11:50 AM	1:20 PM	Management	With Brendon B and Mark S on analysis of OA a- OA Cont
Managing Director - Ext	Fri 06 Feb 09	11:35 AM	11:50 AM	CALL - 2392: David Maher	Contact for Recommendation - update on progress and pla
Managing Director - Int	Fri 06 Feb 09	7:45 AM	11:35 AM	Management	With Brendon B and Mark S on analysis of OA a- OA Cont
Managing Director - Int	Fri 06 Feb 09	7:40 AM	7:45 AM	Management	OA Time Manager updates and reporting

Time and Activity Manager provides a dashboard for measuring company performance in terms of:

- Measuring activity against profitability (billing ratios etc)
- Measuring success/rework, estimation rates against actuals

## **4.9 Utilities**

### **4.9.1.1 Project and Package Registration Process**

Many companies do not have Projects, however those who do, run their Projects in one of two ways, either they are a semi independent entity within the Company umbrella, or they are run by a particular department within the company. Businesses who do not have Projects mainly use static business models which are hierarchically organised as Groups (or Departments) each of which has Units (functional areas within the department) and Duties (tasks performed within the unit).

Companies which do have Projects will still have the above structure, but also need to dynamically add and remove Project structures into their business model where the automated processes used to execute and manage the project are organised. Similarly they need to be able to dynamically add and remove Packages of work within the Projects. Projects are organised as Organizational Units (equivalent to Units), Packages and Tasks (similar to Duties)

The project / package registration process adds and activates a project / package structure within the business model.

### **4.9.1.2 Fast Open**

The Fast Open function allows a user to access a transaction directly via the run file log number.

### **4.9.1.3 Electronic Bulletins**

Accessible via the Transaction Manager Edit list, this utility allows a user send internal organisational notifications according to the rules assigned within the application. For instance the bulletin could be set to be displayed at a certain time, or when a user next logs on or performs a certain action.

### **4.9.1.4 Quick Reference Guide**

This application is an adaptable help menu that can be utilised as a reference point for a user to access information on how the company / project conduct its business or the process of any given task. The guide is modified as part of the modelling and automation of a business so that it matches the process of that business exactly. Quick Reference Guides are easy to update as they are simply a collection of word documents stored in a particular location, add, or modify a document and the Guide is updated.

### **4.9.1.5 Query Builder**

Is a powerful search tool which allows the user to search the database on any logical combination of parameters. It is accessible from Transaction Manager / Browse / Query Builder

### **4.9.1.6 Remove Manager**

Remove Manager allows users to remove transactions from the Transaction Manager view. The transaction is not actually deleted, it simply stops being viewable. This is so that unwanted documents can be cleaned out of the view but remain auditable and trackable.

### **4.9.1.7 System defaults**

Allows the user to select the environment in which the computer is operating, mobile or networked. When the Office Automator suite is licensed for multiple companies the user can select the company in which they are working

## 5 Glossary of Terms

### **Automated Transaction Template**

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

### **Company**

Is the highest level in the Business Model. A single Office Automator implementation can contain several Companies.

### **Duty**

Duties exist within Units and are a collection of Automated Transaction Templates to perform a particular job, for instance within the Management Unit of an HR Department (Group) the Duties might be Recruitment, Procedures, Payroll, Reporting and Training. It is functionally equivalent to a Task in the Project Structure.

### **Environment**

A total business solution which includes Projects, Packages and Tasks which make up the entire functioning business. An Environment has Development, Training (test) and Production workspaces.

### **Group**

A Group is a department within a Company, for instance Sales, Marketing, Finance and Legal.

### **Library**

A collection of differently laid out Packages and Projects (and Tasks) which can be used to implement a new Project or Environment.

### **Model**

A documented business structure (Departments Units, Duties etc) and business processes from which an Environment is built.

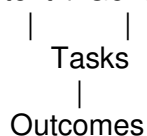
### **Organizational Unit**

Is a functional group within a Project – for instance Engineering, Project Services, Contracts and Purchasing or Site Construction. An Organizational unit will have Tasks and possibly Packages associated with it. The view in Transaction Manager of Organizational Units is referred to as the "Task View". It is functionally equivalent of a Unit in a normal business structure.

### **Package**

Packages exist only within Projects. A Package is a business process where a group of tasks is executed in a particular sequence to produce desired outcomes, for instance, all electrical work on a minesite.

Specific Content + General Content



**Package Registration**

Is the process of modifying a company Model to add in a new Package within a Project. The Package structure is not copied into the company Model from the Library, rather the model uses pointers to the Package structure stored in the Library.

**Project**

Many companies do not have Projects, however those who do, run their Projects in one of two ways, either they are a semi independent entity within the Company umbrella, or they are run by a particular department within the company. In either case a Project is a group of Organizational Units, Packages and Tasks. The Packages produce the desired outcomes (i.e. building a mining camp) while the Tasks are the "glue" (i.e. Scheduling, Expediting etc).

**Project Registration**

Is the process of modifying a company Model to add in a new Project. The Project structure is copied into the company Model from the Library.

**Task**

Task is used in the context of Projects and is a collection of Automated Transaction Templates and Tasks (Tasks can be nested). Tasks are a collection of Automated Transaction Templates and (potentially) Packages. It is functionally equivalent of a Duty in a normal company structure.

**Unit**

A Unit is a logical function within a Department (Group) for instance in the Human Resources Department, the logical functions could be Management, Employees, Contractors . It is the equivalent of an Organizational Unit in a Project structure.