

# Success Story – Accelerated Digital Transformation

<Key Word>

Biz. Analysis

Automation

Paperless

RPA

The customer, a famous Japanese bank, operating by manual and paper-based. However, there were facing some challenges such as for rolling out Business Continuity Plan (BCP) from the situation in Hong Kong over the past few years and Work From Home (WFH) when out breaking of COVID-19. In the matter of fact, it is crucial to handle huge workload without normal number of staffs supporting during the kind of situation. ISiD has plenty of experience of business system implementation projects and conducts business analysis, which enables us to deliver "issue sorting", "appropriate solution", and "expected effects" to customer.

## --- Past Operation ---

### Manual Paperwork

Transaction data from front department was handed over to the back office by paper. In addition, information that is not available on the system was added by handwriting separately.

### Hand-over in Approval Process

Approval process for the deal information in the paper ticket was conducted by signing a paper ticket and the ticket was handed over by manual.

### Manual Input

All data was inputted to the core banking system by manually. The process of confirmation was also carried out under visual inspection by human.

## --- Delivered Solution ---

### Digitalize Paper Ticket

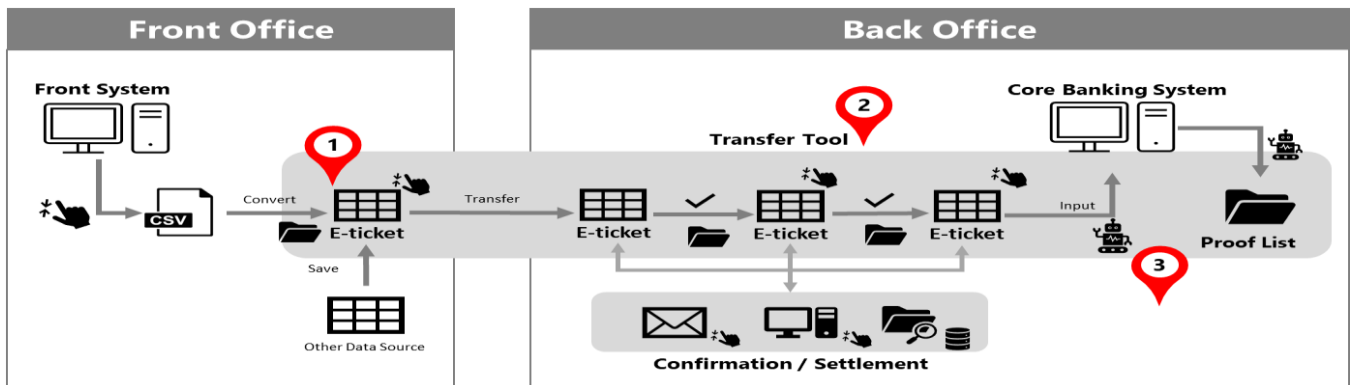
Paper tickets are digitized by enhancing the existing VBA tools with newly developed tools. This new developed tools help to update data with logic into the E-ticket.

### Implement Approval Process Tool

With paper ticket digitized, the approval flow was also digitized. Additionally, the status of ticket delivery between the departments, the approvals and the data entry to the core banking system can all be checked here.

### Auto Input to Core Banking System

After approved, E-ticket data is automatically input into the core banking system by RPA. The Proof List after the input is also automatically saved in the specified folder.



## Expected Effect

### Enhance Information Security

Prevention of paper ticket loss accidents after digitizing tickets. In addition, the approval flow tool "visualizes" the approval status of each transaction, that is not available before.

### Avoid Human Error

Human error is reduced dramatically by data input automatically with the new tool and RPA being worked to the core banking system.

### Business efficiency & save operational cost

Reduced operation time by more than **3,300 hours a year**. Also, by automatically inputting to the core banking system, the number of business steps can be reduced.

### Efficiency to Handle Huge Transaction

RPA solves the bottleneck even when the transaction volume increased, without adding human resources.

### Work From Home

In case, staffs can't go to office, they have continued business operation under secured access from home, and reinforce to minimize the usage of papers.

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# Digital Transformation and Paperless Simplicity

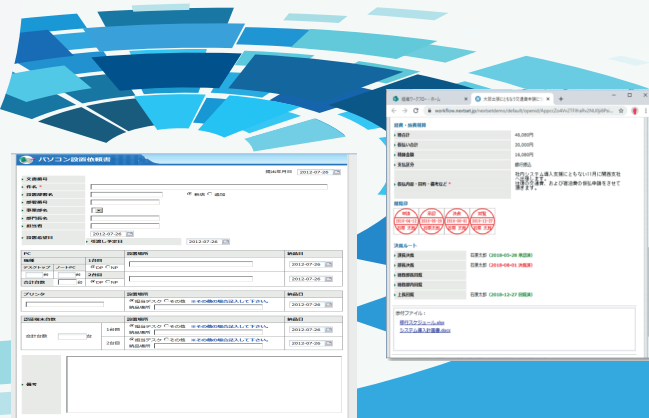
ISID provides workflow solution is an in-house workflow operation integrated with Microsoft 365. This is cloud-based service with supporting leave application, transportation expense claims, approval forms...etc.

- Support Single-Sign-On (SSO)
- Support mobile devices (Andriod/ IPhone/Ipad)
- Easy to create business e-forms and work ow
- Over 60 work ow templates built-in
- Support Multilingual (English/Japanese/Chinese)
- Works seamlessly with Office 365 (Teams, SharePoint & Outlook)
- API ready for integration with other systems
- CSV export/import automation
- Operation log management (View, New creation, Deletion, Download log)

Optimized business workflow on  
Microsoft 365



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