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Workplace Automation Solutions Playbook

Digitize • Automate • Manage

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What is RPA?

Robotic process automation (RPA) is the use of specialized computer programs, known as software "robots," to automate and standardize repeatable business processes across multiple systems.

RPA is… ✔

- **Computer-coded software**
- **Programs that replace humans performing repetitiverules-based tasks**
- **Cross-functional and cross-application macros**

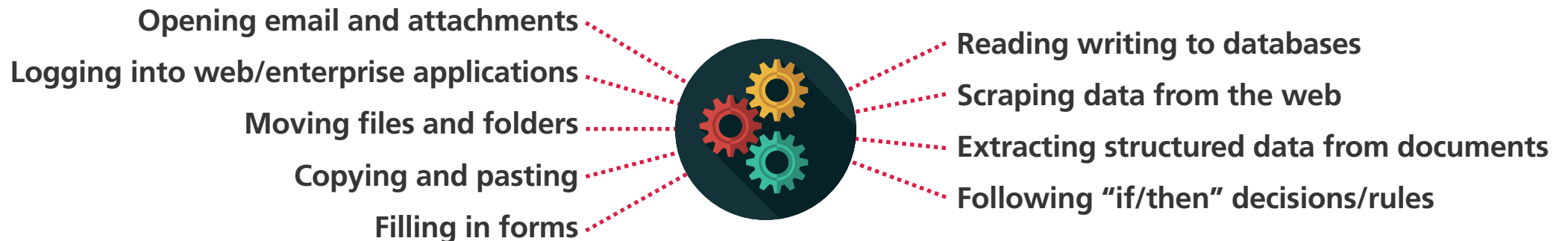## RPA is NOT… ✖

- **Walking, talking auto-bots**
- **Physical machines processing paper**
- **AI or voice recognition and reply software**

What RPA can do….

- Opening email and attachments
- Logging into web/enterprise applications
- Moving files and folders
- Copying and pasting
- Filling in forms

- Reading writing to databases
- Scraping data from the web
- Extracting structured data from documents
- Following "if/then" decisions/rules

Source: Deloitte Global RPA Survey 2018

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Market Adoption of RPA

By 2020, **72%** of organizations will have embarked upon their RPA journey. If this continues, RPA will have achieved **full adoption** within the **next 4 years**
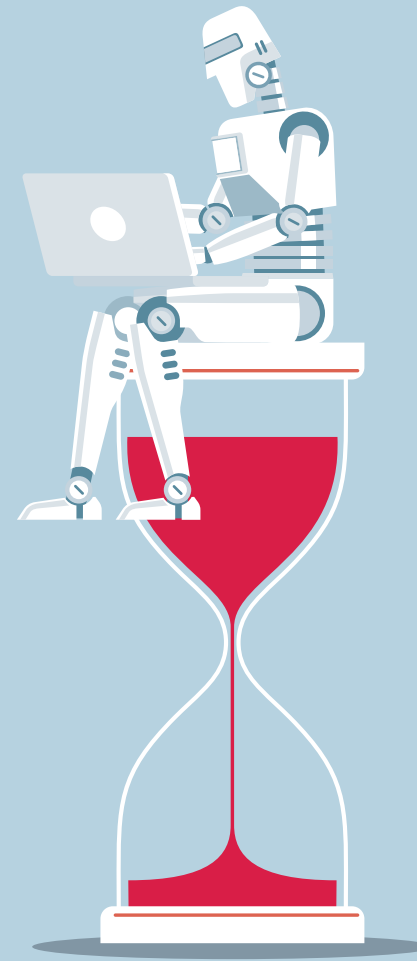
The Benefits of RPA

Payback period in

12 months

Improved compliance

92%

Improved accuracy

90%

Improved productivity

86%

Cost reduction

59%

Source: Deloitte Global RPA Survey 2018

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The Top 3 Processes Targeted for RPA

Supply Chain (logistics)

Inventory management

Order scheduling and shipment tracking

Quote, invoice and contracts management

Human Resources
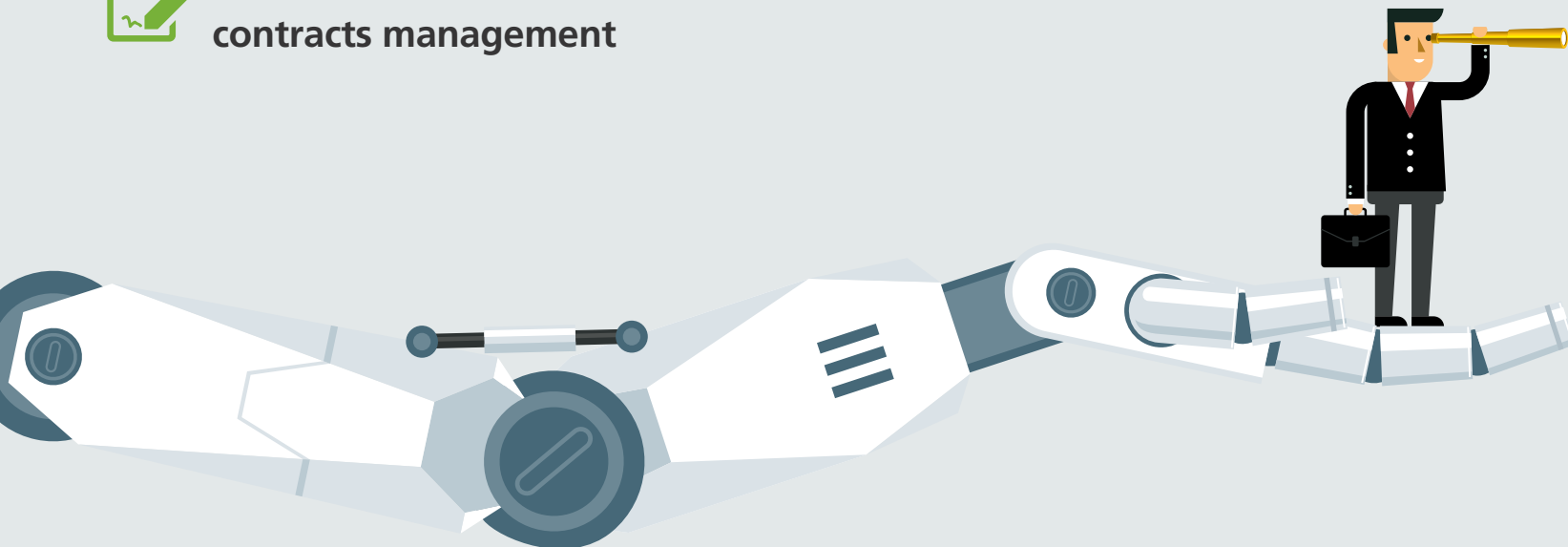
Payroll

Benefits administration

HR records processing

Finance and Accounting

Sales order management

Order to cash

Procure to pay and Record to report

03

Workplace Automation Solutions Playbook

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Let's Start the BPM Journey!

Human Resources Management Solution

Simplify time-consuming processes for your HR operations

Traditional method

- **Keep records of benefits, MPF / payroll calculation, leave roster and attendance in excel files**

- **Store employee records in box files or in shared drive**

- **Paper-based requests and approvals**

- **Report preparation is time-consuming**

New method

- **Single web portal or mobile access**

- **Single system for handling many HR operations**

- **Paperless requests & approvals**

- **Generate comprehensive reports**

- **Simplify HR administrative tasks to focus on high-value activities**

Human Resources Management Features

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Employee Self Service

Recruitment

Leave, Attendance & Roster

Employee Data Management

Compensation & Benefits

Performance Appraisal

Training & Development

Tasks & Dashboard

Recruitment Process Management Solution

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Simplify, standardize and speed up your recruitment process

Traditional method

- Keeping records in hardcopies or scanning e-copies at shared folders / drives

- Difficult to retrieve or search

- No versioning control

- Lack of efficient communications with line managers

New method

- Simplify the workflow between HR Dept and Line Managers

- Accelerate candidate selection process

- Easier to manage employment records
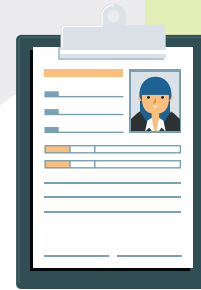
eRecruitment Workflow

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1 Writing Job Description

Post your job advertisements on online platform

2 Building Your Talent Pipeline

Applicants submit online application form and upload their CVs

3 Conducting Interviews

Select right candidates to enter the interview process

4 Identifying viable Candidates

Exchange information between HR and Line Manager based on online Interview Assessment Form

5 Offering of Employment

Confirm the offer by emailing the employment letter (e-signature enabled)

6 Hiring of the Candidate

Create an electronic P-file at system

7 Onboarding of the New Hires

Send confidentiality agreements, waivers and other forms to new hires

8 Probation Review

Complete online probation review & upload necessary documents

Leave Application Management Solution

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Smart online preview and leave application submission
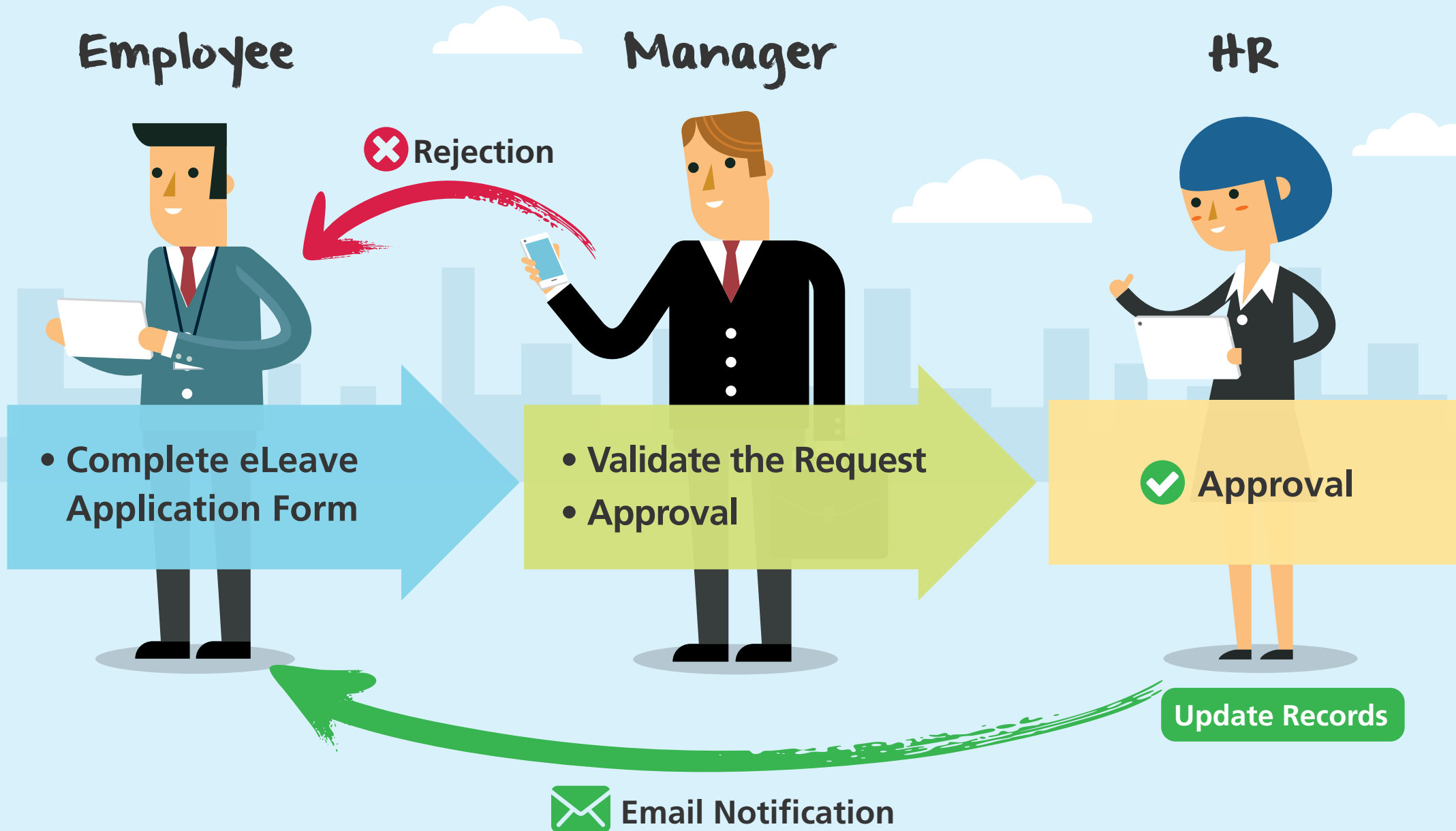
Traditional method

- **Paper-based submission or leave application via web portal**

- **Report preparation is time-consuming**

New method

- **Apply and approve leaves anytime and anywhere**

- **Generate comprehensive reports**

- **Cut down on unnecessary administrative resources**

eLeave Application Workflow

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Employee

Manager

HR

❌ Rejection

• Complete eLeave Application Form

• Validate the Request
• Approval

✅ Approval

Update Records

✉ Email Notification

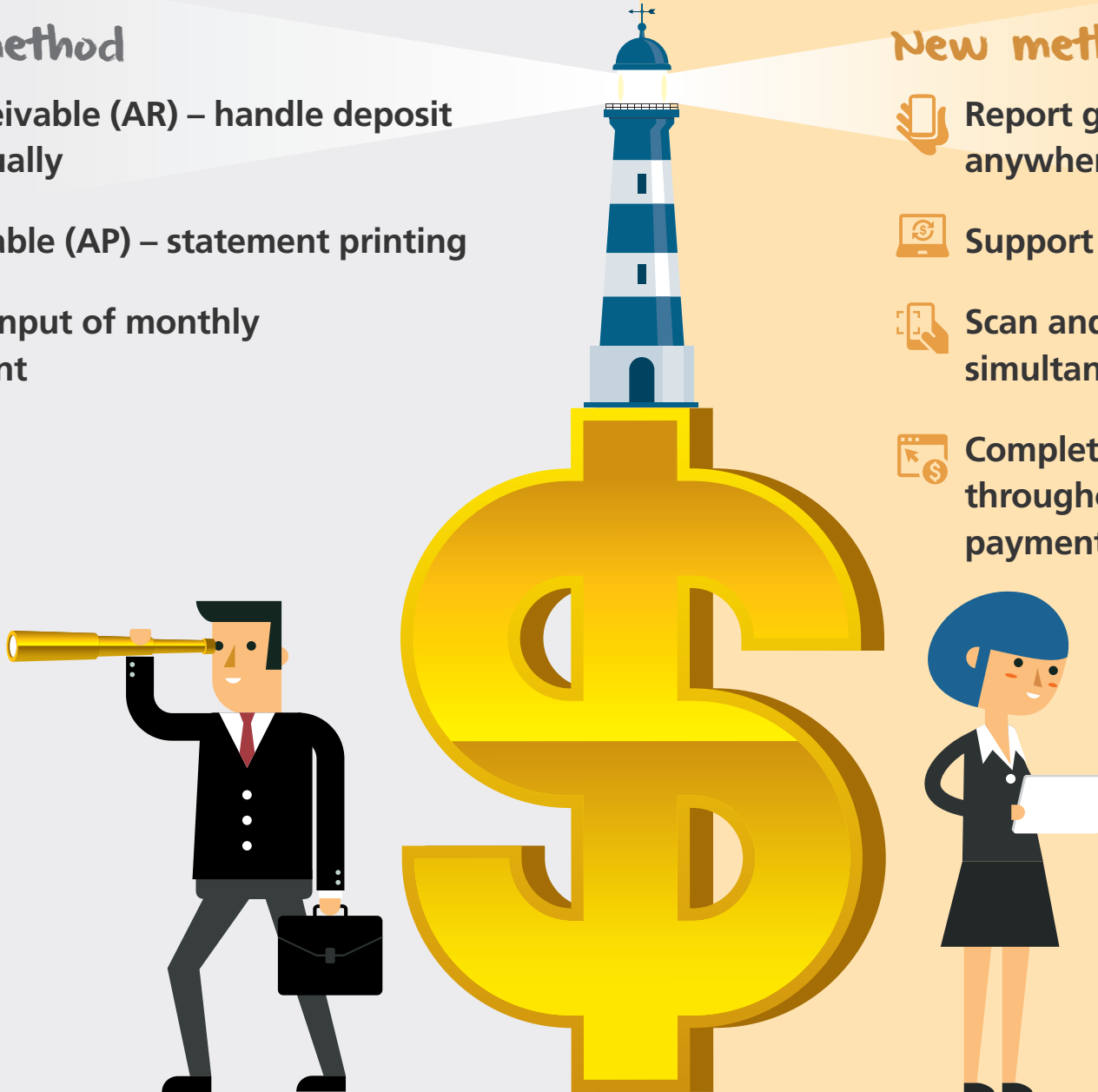# ERP Finance — AR & AP Process Management Solution

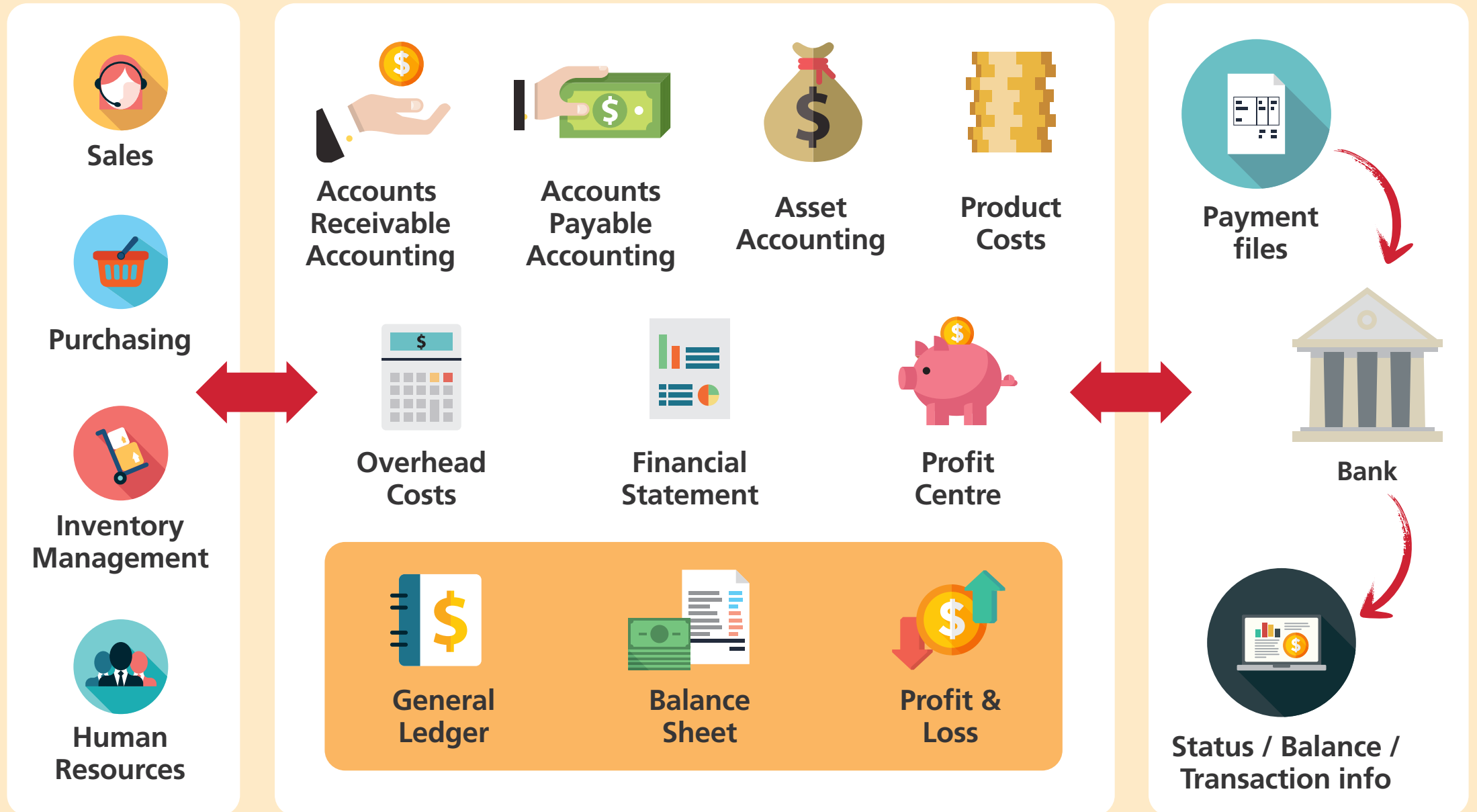**Handle massive amount of invoices timely and accurately**

Traditional method

- Accounts Receivable (AR) – handle deposit cheques manually

- Accounts Payable (AP) – statement printing

- Manual data input of monthly bank statement

New method

- Report generation at anytime and anywhere with PC or mobile devices

- Support eBanking integration

- Scan and capture multiple invoices simultaneously

- Complete control and visibility throughout invoice submission and payment approval process

AR & AP Workflow

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Sales

Purchasing

Inventory Management

Human Resources

Accounts Receivable Accounting

Accounts Payable Accounting

Asset Accounting

Product Costs

Overhead Costs

Financial Statement

Profit Centre

General Ledger

Balance Sheet

Profit & Loss

Payment files

Bank

Status / Balance / Transaction info

Expense Reimbursement Management Solution

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Accelerate your claim handling process to enhance customer experience
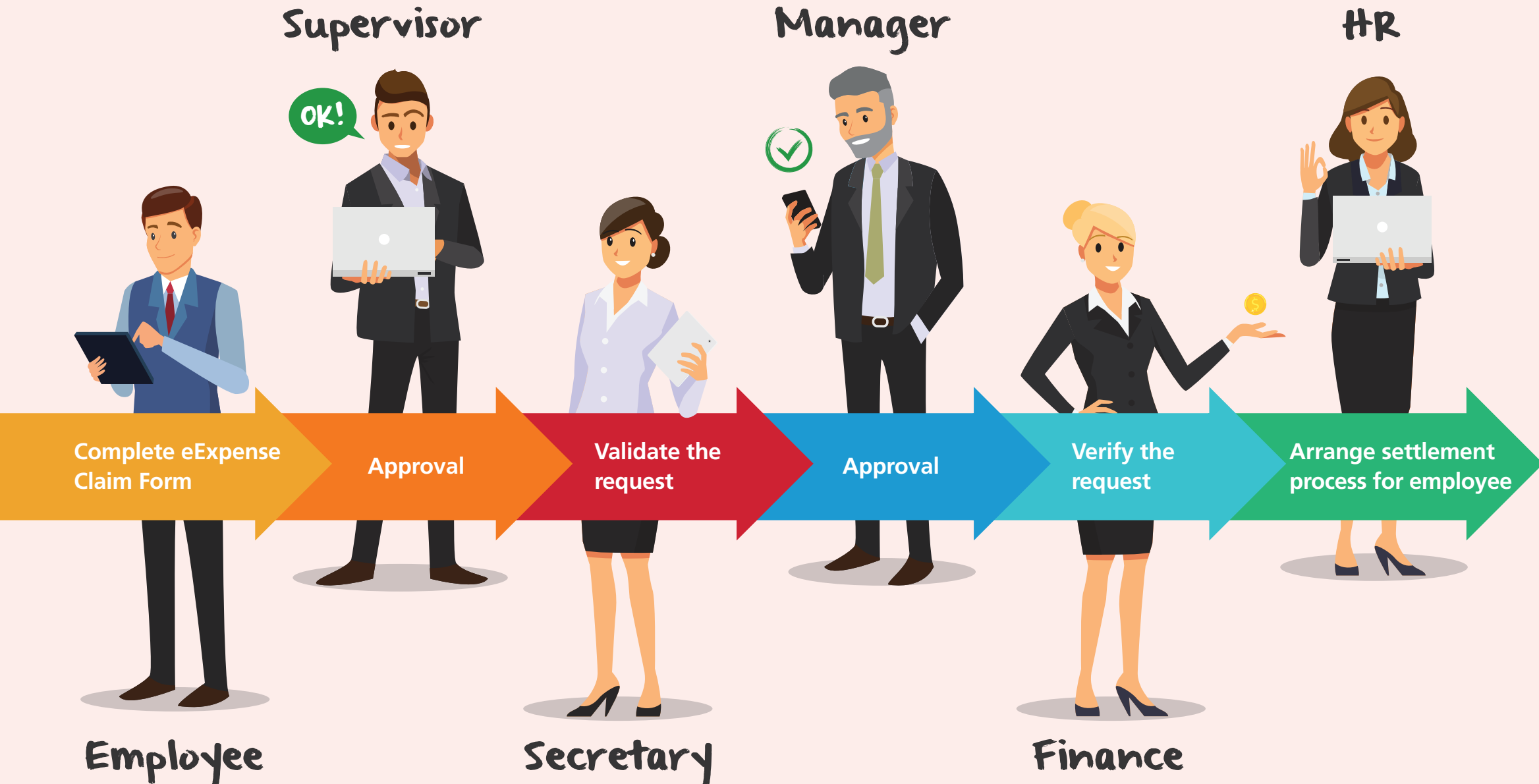
Traditional method

- Paper-based process
- Heavy manual workload
- Loss of document
- Difficult to trace & retrieve
- Report preparation is time-consuming

New method

- Capture receipts with camera on phone or tablet
- Complete automation of expense submission, approval and processing
- Approvers receive email notification for review / approval of claims

$515

Reciept

TICKET

PASSPORT
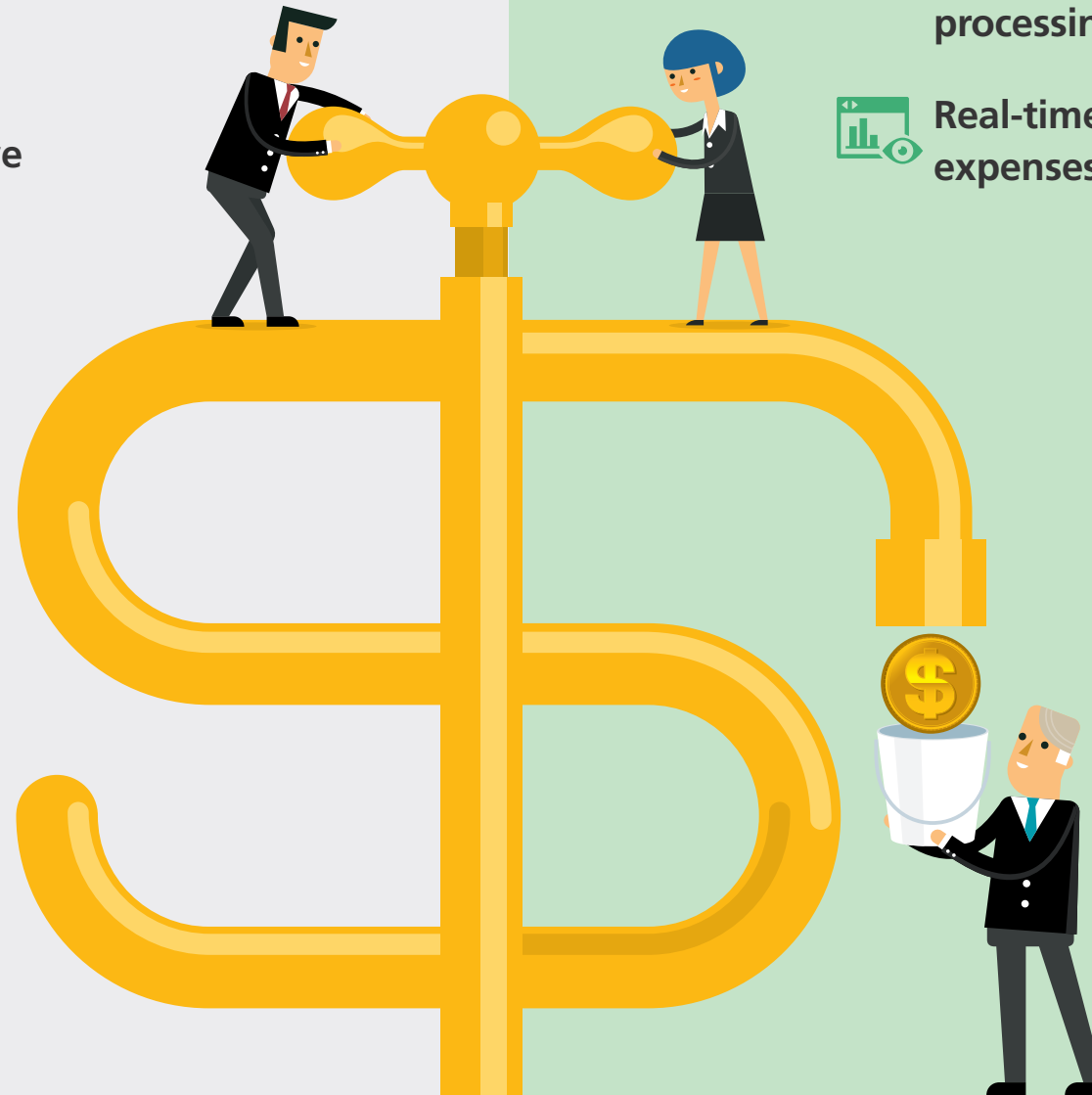
HOTEL
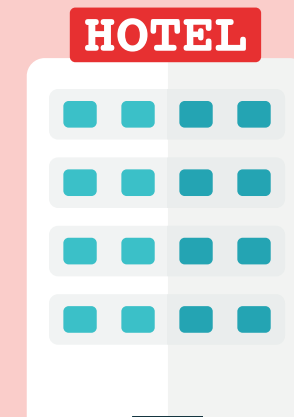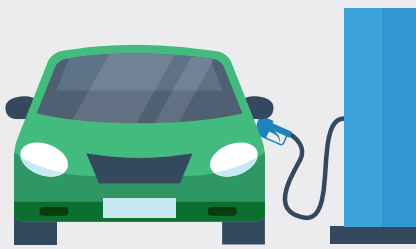
Budget Management Solution

Keep your spending on track

Traditional method

- Paper-based process
- Manual checking for budget utilization
- Difficult to trace & retrieve
- No versioning control

New method

- $ Complete automation of budget submission, approval and processing
- Real-time reports of the actual expenses with approved budget

Budget Management Workflow

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Activity Planner

Activity Plan Submission
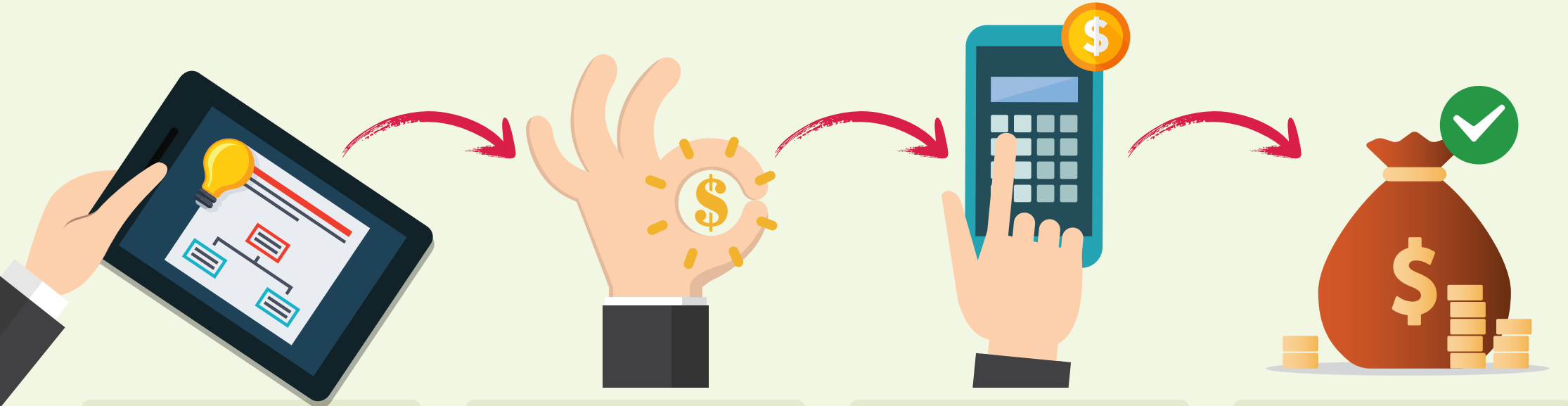
- Fill in & submit budget plan
- Submit Marketing Activities Request

Supervisor

Approval

- Approval

Marketing Manager

Execution

- Follow up the request
- Input the exact amount

Budget Approver

Accountability

- Verification & approval

Sales Order Management Solution

Ensure your order fulfillment runs smoothly

Traditional method

- Paper-based process
- Manual checking for order status
- Loss of document
- Difficult to trace & retrieve
- No versioning control
- Report preparation is time-consuming

New method

- Ensure goods or services delivered to customers
- Send email notification to responsible parties across the ordering process
- On-time billing to customers

eOrder Workflow

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Service Delivery

Service Order Confirmation

Timely Billing

Request Quote

Receipt of payment

Timeline

Contract Renewal/Cancellation

Billing info

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Service Order Process
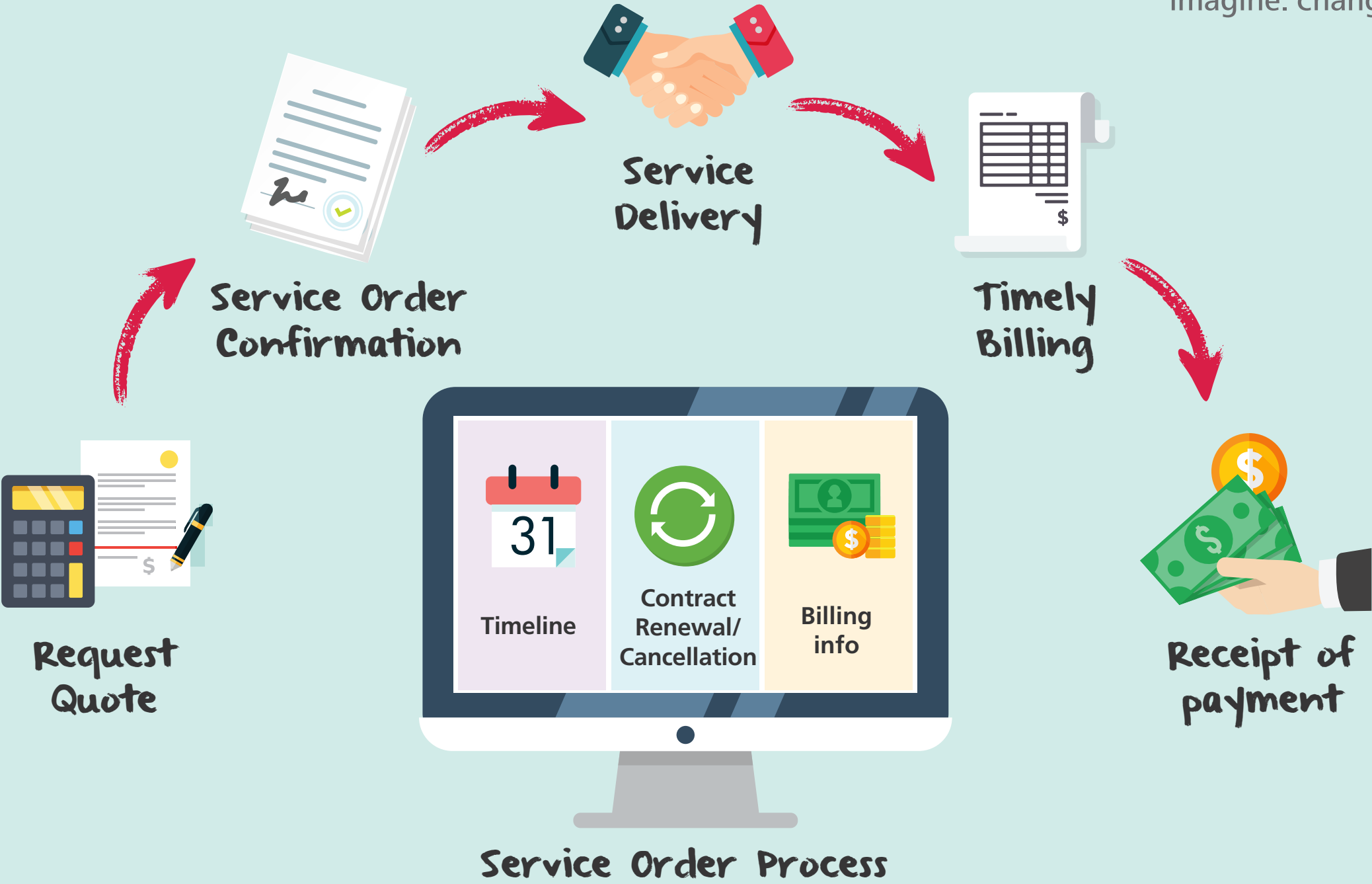
Stock Replenishment Management Solution

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Manage inventory and control stock efficiently

Traditional method

- **Manual checking on the stock level**
- **Difficult to trace & retrieve**
- **Report preparation is time-consuming**
- **Difficult to keep track of obsolete inventory**

New method

- **Tracking stock level in real-time**
- **Email alert when stock level reached the minimum order quantity**

Stock Replenishment Workflow

Real-time Stock Checking

Email Alert Once Hit Minimum Order Quantity

Setting of Minimum Order Quantity

Placement of Purchase Order

Stock Replenishment

Order Delivery

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Incident Management Solution

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Prompt error resolution, high level visibility for incident prevention and issues management

Traditional method

- **Paper-based process**
- **Manual case assignment**
- **Difficult to keep track of Service Level Agreement (SLA)**
- **Report preparation is time-consuming**

New method

- **Multi-channel submission of incidents**
- **Speedy internal process and tickets allocation**
- **SLA can be closely monitored**
- **Improved response time**
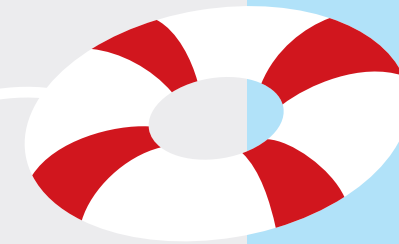
Incident Management Workflow

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Ongoing COmmunication and Monitoring

1. Incident Identification via Web Portal / Phone / Email
2. Incident Logging
3. Initial Investigation & Diagnosis
4. Assignment or Escalation
5. Resolution
6. Closure
7. Customer Satisfaction Survey

Maintenance Support Management Solution

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Guaranteed response to all inquiries in a timely manner

Traditional method

- **Paper-based process**

- **Manual case assignment**

- **Difficult to keep track of Service Level Agreement**

- **Report preparation is time-consuming**

New method

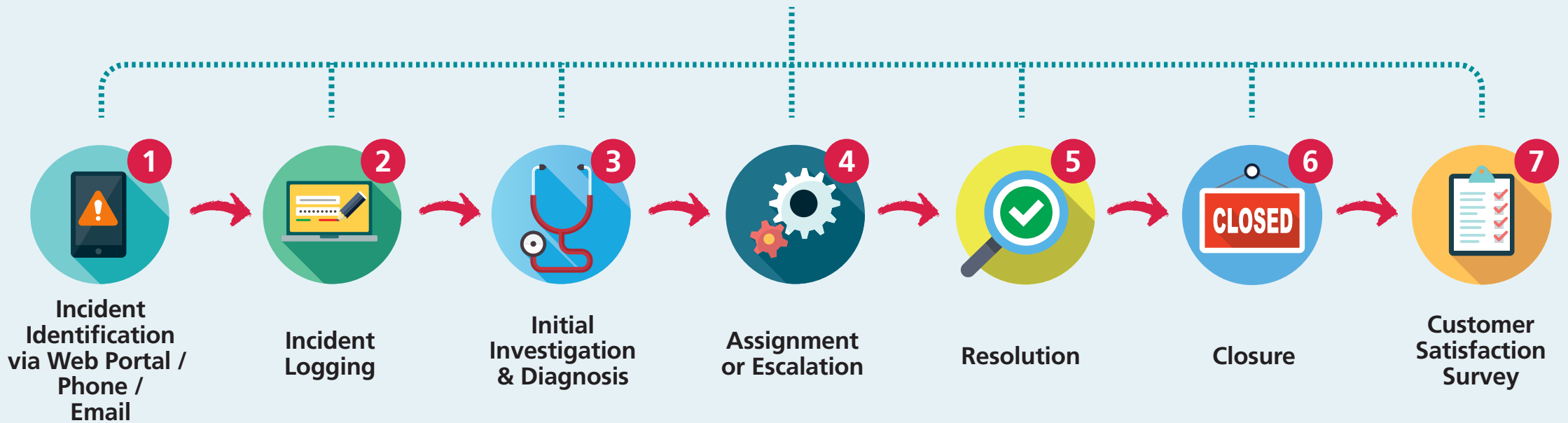- **Mobile support application**

- **Quicker tasks assignment**

- **Acknowledgement of client via e-signature**

- **The entire process can be traced and tracked electronically**
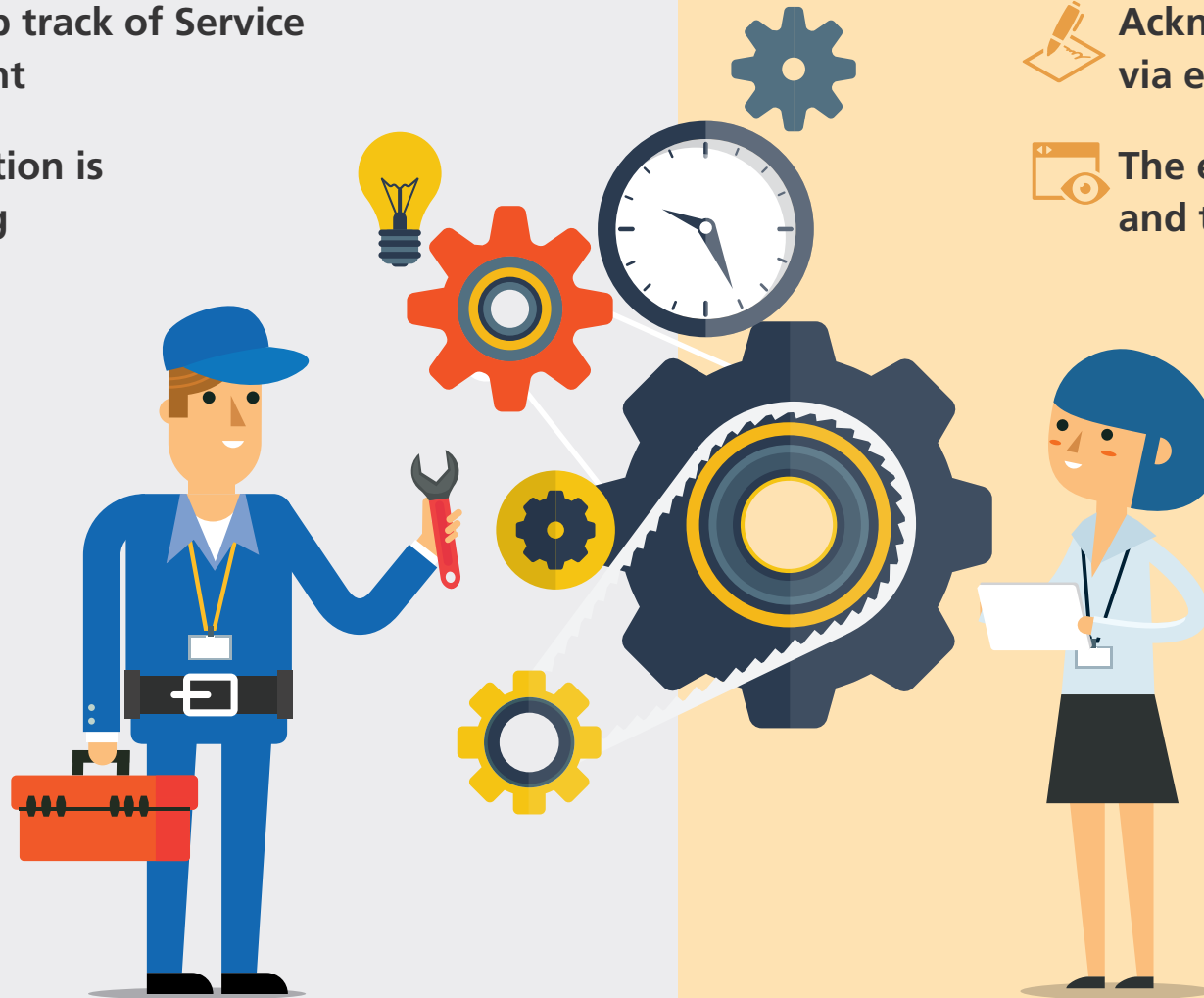
Maintenance Support Workflow

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1 CS Team
Order Request

2 SMS Team
(Service Management Support)
Job Allocation

3 Technician
Receive Job Order, Schedule
On-site Support

4 Client
On-site Appointment,
Acknowledgement of Job
Completion via e-Signature

5 SMS Team
Review and
Approval

6 CS Team
Record Update
and Job Closure
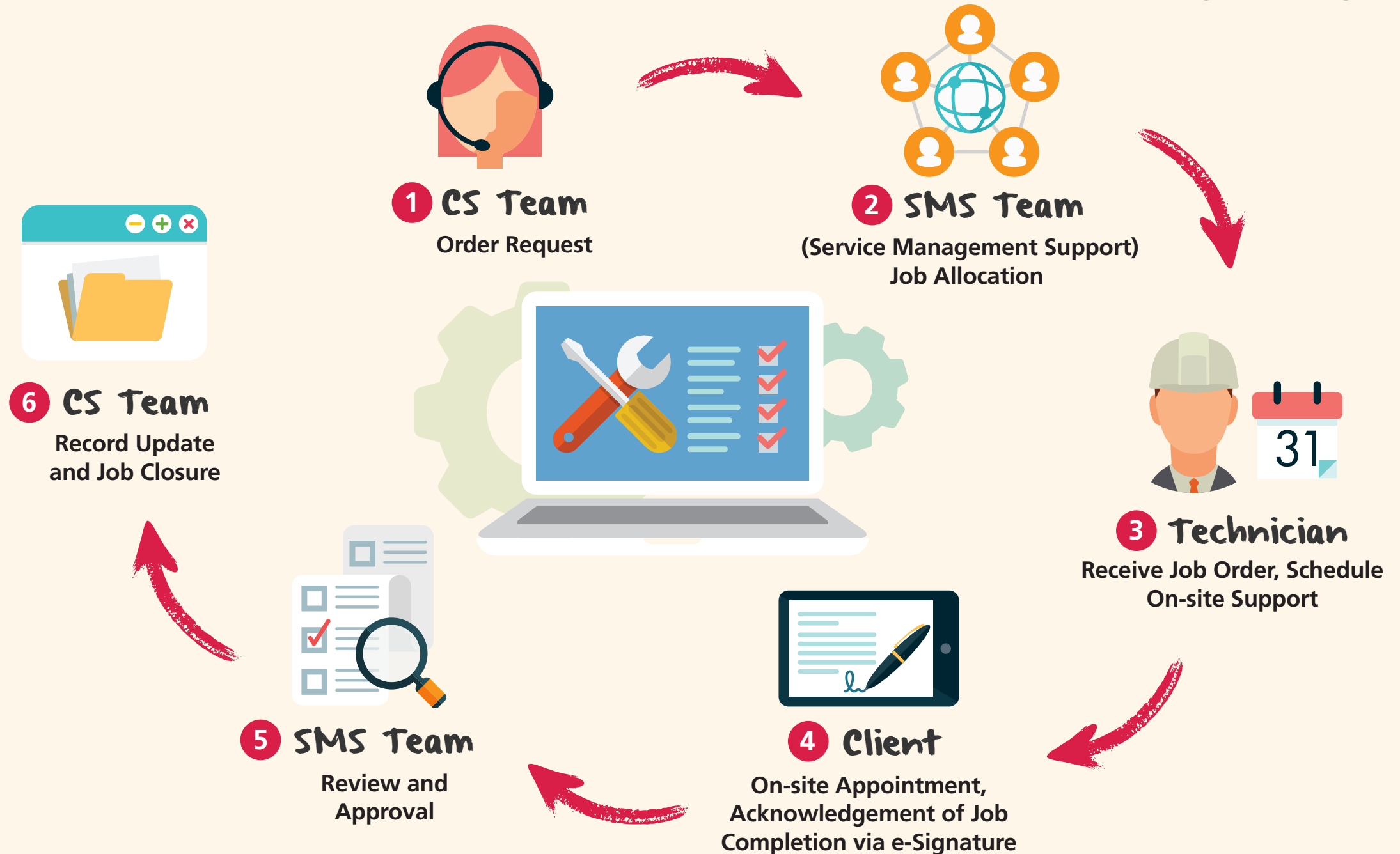
Contract Management Solution

Closely monitor all contracts renewal date

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Traditional method

- Paper-based process
- Manual checking for contract status
- Hard to trace & retrieve
- Unable to keep track of contract renewal
- Report preparation is time-consuming

New method

- Better risk management and cost control
- Auto-email alerts / reminders
- On-time contract renewal
- Real-time reporting & analysis

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Contract Management Workflow

1 Contract Request

2 Contract Data Input

3 Review

4 e-signature Approval

5 Contract Records

6 Contract Renewal and Amendment

Visitor Management Solution

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Enhnace security and regulatory compliance at your office

Traditional method

- **Paper-based process**
- **No control of visitors' access**
- **Loss of documents**
- **Difficult to trace & retrieve**
- **Report preparation is time-consuming**

New method

- **Paperless sign-in / sign-out**
- **Improve control of visitor access**
- **Real-time visitor report generation**

Welcome!

Visitor Management Workflow

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1 Visitor Check-in

2 Input Personal Details

3 Badge Creation with Unique QR Code

4 Access Granted

5 Visitor Check-out by Scanning that QR Code

Real-Time Analytics / Dashboard of Visitors in / out flow

Facility Management Solution

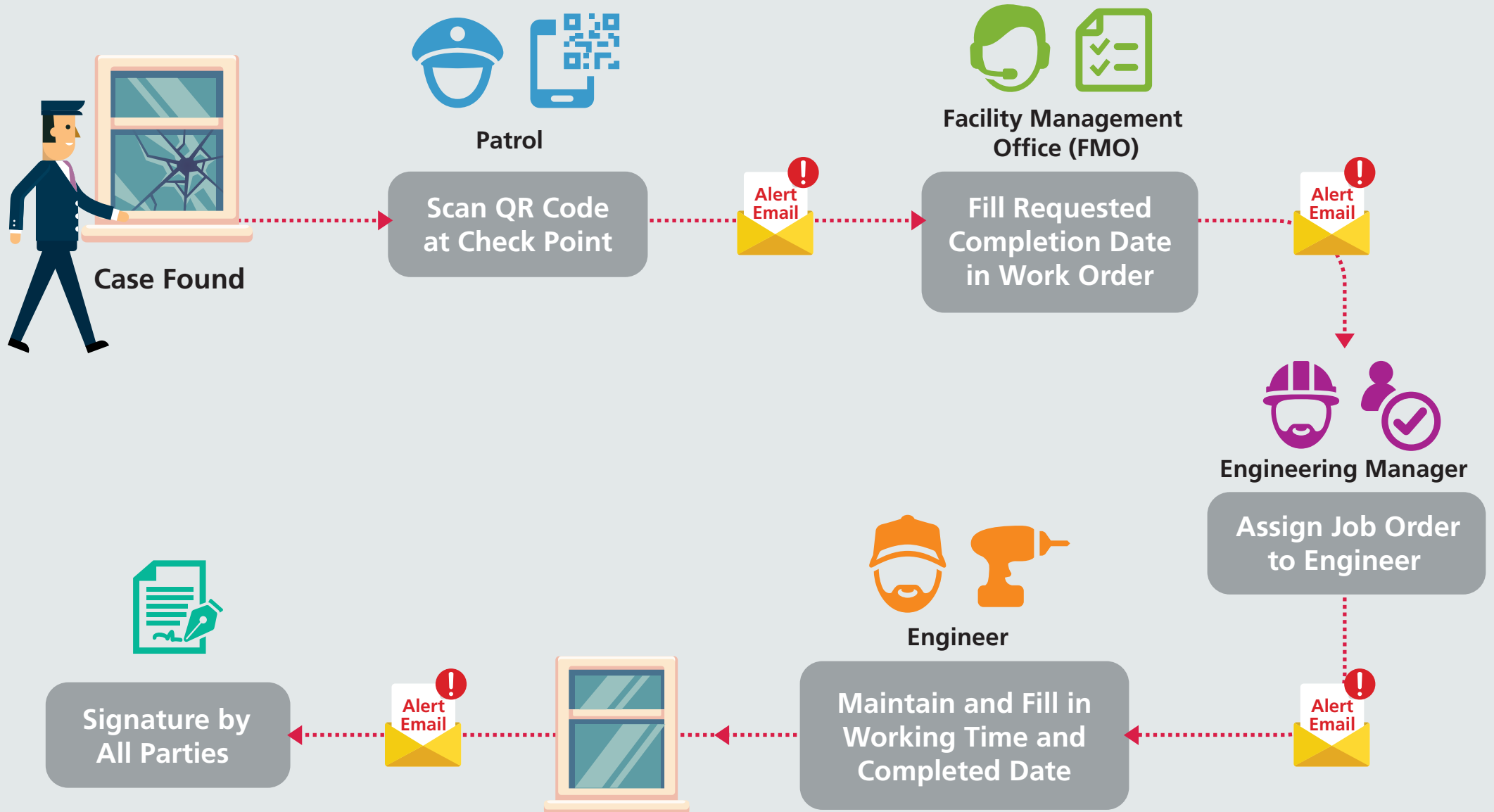|	Traditional method	New method
Office Supplies Management	• Rely on paper records • Unable to track the status in real time	• Real – time tracking of office supply status • Maintain a complete record of supply items • Purchase approval made easy via PC or mobile app
Incident Reporting	• Inspection in person • Verbal reporting without proper records • Manual assignment to the right handler	• Inspection photos and reports can be shared through mobile app for instant review and escalation • The entire escalation process can be traced and tracked electronically
Security Patrol	• Paper-based logbooks can be misplaced or lost • Staff activity such as attendance cannot be monitored accurately	• Patrol check-in/out can be reported or reviewed via mobile phone or computer • Speed up patrol scheduling and staff allocation
Report Review (audit)	• Paper-based records • Time-consuming report preparation • Report accuracy cannot be assured	• Customized report can be generated in real-time based on given attributes for analytics • Centralized report for ease of management

Facility Management Solution Work Flow

Case Found

Patrol

Scan QR Code at Check Point

Alert Email

Facility Management Office (FMO)

Fill Requested Completion Date in Work Order

Alert Email

Engineering Manager

Assign Job Order to Engineer

Alert Email

Engineer

Maintain and Fill in Working Time and Completed Date

Alert Email

Signature by All Parties

Rentokil

Rentokil Pest Control Hong Kong

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Challanges

- Heavy manual workload
- Difficult to trace and retrieve
- Slow customer response
- The rapid growth of business operations
- Improve cash flow management

Solutions

Laserfiche Content Services Platforms: includes native scanning, document classification, records management, collaboration, eform and workflow.

Benefits

- Reduce invoice processing time from **13 days** to **3.5 days**
- Increase correctness up to **98%**
- Shorten receivables collection period from **65 days** to **14-51 days** to strengthen financial status
- **Match documents automatically** to increase the productivity and correctness.

https://vimeo.com/198935817

Leading Insurance Company

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Challanges

Repetitive, manual, back office process, involving structured information with pre-defined rules

Solutions

Designed an integrated solution where Unattended Robots perform data collection and monitor for any errors

Unattended robots ran ~22hrs / day and constantly checked the work request location for new request

The Benefits

~75% of effort automated

Reduced backlog from 4000 to 0 in 1 month

First pass yield: 94%

Increase in customer satisfaction

Who We Are?

Ricoh Hong Kong is known for its copiers, printers and other office equipment. But we're more than that — we're a total services and solutions provider that can help customers to perform digital transformation as well as migrating paper-based processes to digital workflows, by offering:

- **Workplace Design & Build Services**

- **Business Process Services e.g. Enterprise Content Management & Workflow Solutions**

- **Business Applications Services, e.g. ERP & HRMS**

- **Business Process Outsourcing Services**

- **Unified Communication Services**

- **Cloud and IT Infrastructure Services**

- **Information Governance & Cyber Security Services**

- **Video Surveillance Solutions**

- **Production Printing Services**

Our solutions experts has a wide range of industry experiences and in-depth knowledge of your job's unique challenges — and how our services can help you overcome them.