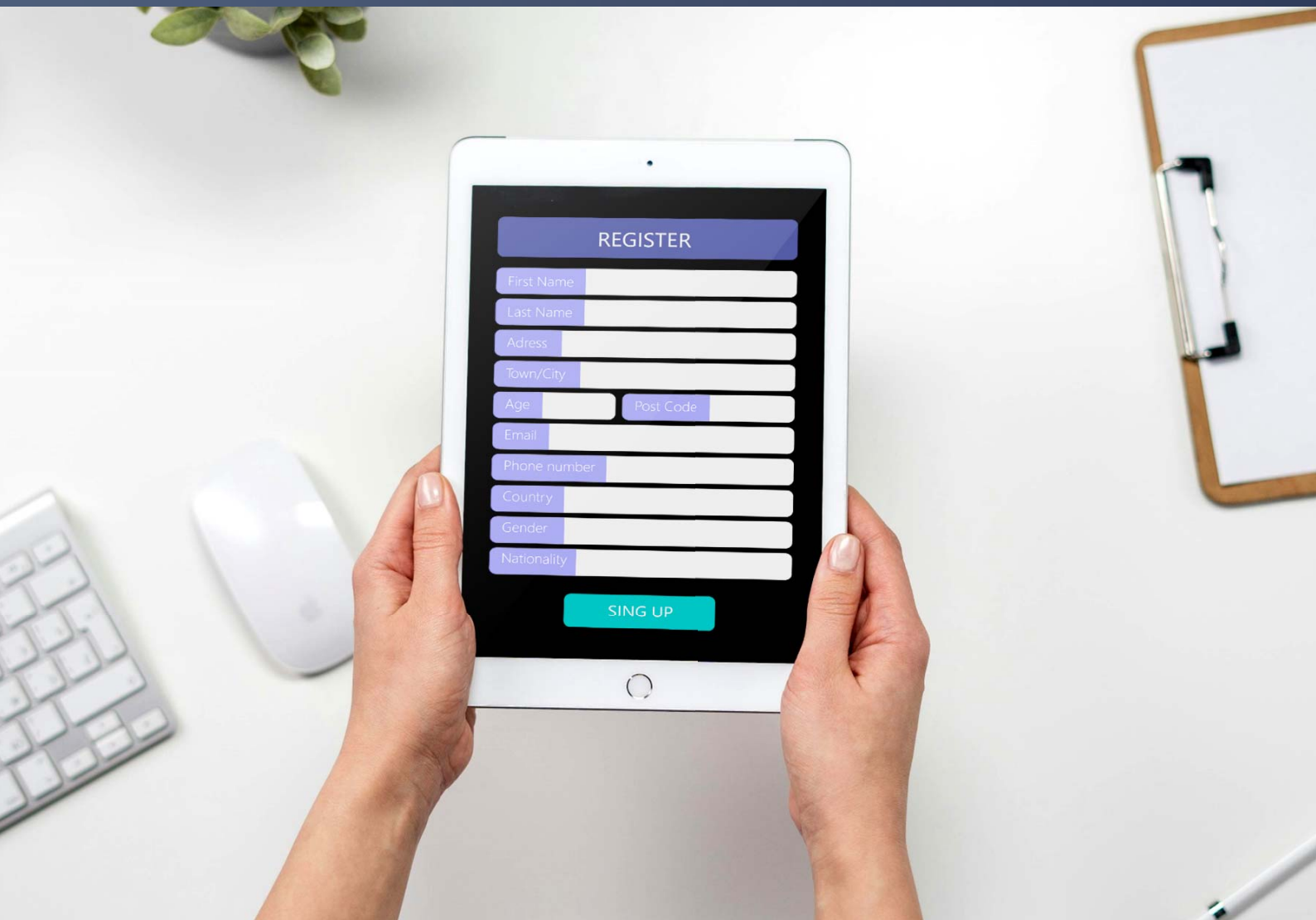# **8** Office Automation (OA)

An Integrated collaborative office platform

with automatic connection to actual business

Wisage Technology Limited (Hong Kong)

2702-6 Lucky Commercial Center 103-9 Des Voeux Road West   +852-6919-6665

8 OA allows the creation of any user-defined forms, workflows and reports. The high flexibility allows teams to easily manage the editing, approving and publishing of any type of information and obtain assessment and feedback in real-time.

8 OA forms an effective linkage between information publishers and receivers and helps teams to publish different types of information such announcements, meeting notices and minutes, requests and approvals etc. 8 OA allows everyone to deal with business communications effectively anytime, anywhere.

8 OA also has pre-built forms, workflows and reports for client management, supplier management, expense management and survey management.

Expense management

8 provides expense management features to allow managing trip requests, cash advances, expense reports and expense reimbursement processes as well as expense controls.

8 expense management features can also be easily integrated with other applications such as CRM, SRM and PPM for sales, procurement and project expense management.

Trip request & cash advance

TRIP REQUEST

500.00

ADVANCE

TAX

Expense report

PEPORT

$

Approval

500.00
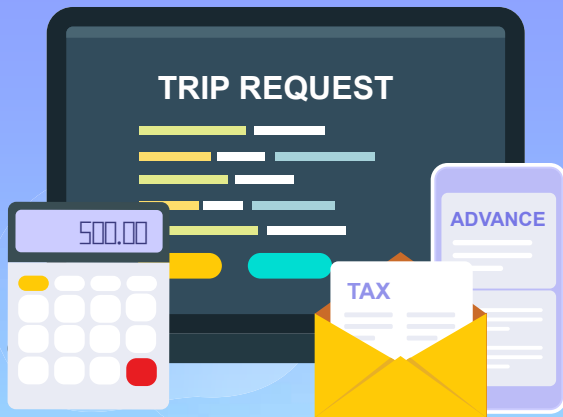
Reimbursement

REPORT

⑧ expense management includes:

- Trip request that allows your employees to request approval for business travel. It contains information about the trip, such as the purpose, dates, and estimated costs, that helps management decide whether to approve the trip.

- Cash advance allows your employees to get some cash (including cash in foreign currencies) in advance for the trip and the cash advance amount will be deducted from the expense reimbursement amount.

- Expense report that helps your organizations and finance teams track spending, ensure compliance with company policies, and allocate costs accurately.

- Expense reimbursement that allows your organization to pay back employees who have spent their own money for business-related expenses.

⑧ expense management provides your organization the following benefits:

- Automatically enforces organization's expense policies to ensure that all submitted expenses adhere to the guidelines

- Maintains an audit trail, and allows users to define spending limits, allowable expenses, and receipt requirements

- Automates expense categorization and approval processes to prevent expense fraud and improve productivity

- Expense control

No Code

Drag & drop
interface

Drag	and	Drop
for	Design	Systems

and

🗟 OA provides a no code mechanism to allow users to create applications without writing code. It uses a graphical interface with drag-and-drop elements and users can create workflows and design elements quickly and tailor them easily to their specific needs.

Automatic
dashboard & report generation

230   9.86% $25,690

230

Declarative
tools

e-Form, e-Flow and Enterprise Portal

8 OA provides the e-Form, e-Flow and enterprise portal mechanism to help businesses improve efficiency and accuracy, and reduce the need for paper. e-Forms can be used to collect and validate data and trigger e-Flows and the enterprise portal serves as a secure and unified platform for information, collaboration, and knowledge sharing for businesses.
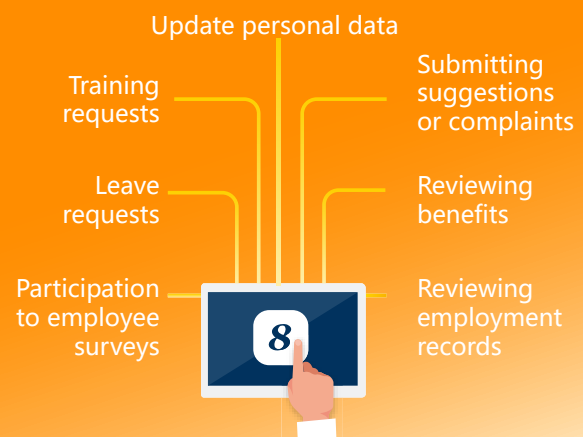
Define
forms & flows

Enterprise
portal

Control
flow & access

Update personal data

Training requests

Submitting suggestions or complaints

Leave requests

Reviewing benefits
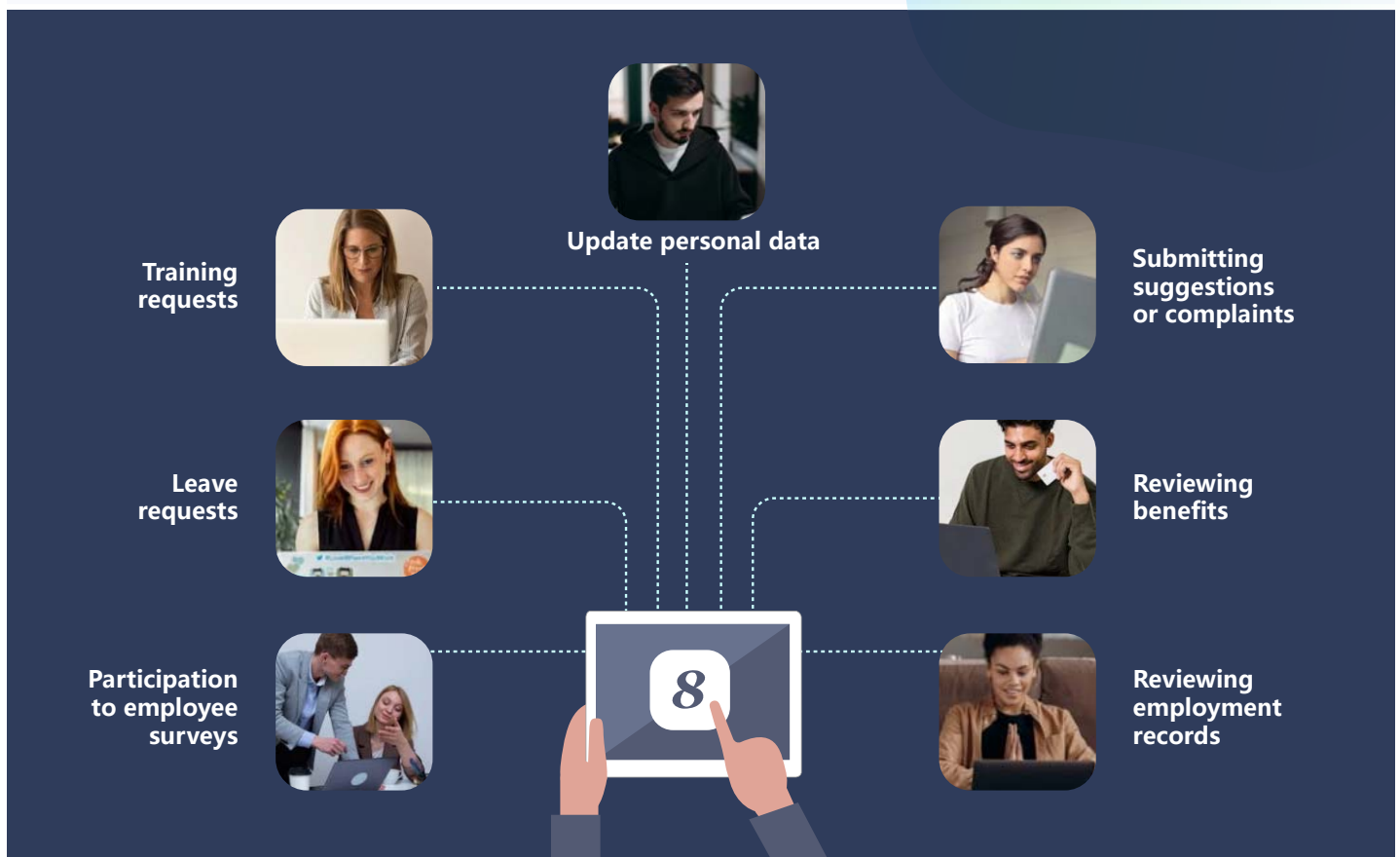
Participation to employee surveys

Reviewing employment records

e-Form & e-Flow Management

8 OA provides a user-defined e-Form and e-Flow facility to allow users to create different notification and request forms for reviews, comments and approvals. It also provides the employee portal for each user. In the Employee Portal, the user can access to different facilities such as:

- Office Equipment Request
- Material Request
- Service Request
- Off Hour Building Entry Request
- Parking Permit Request
- Transportation Request
- Facility Request
- Book Borrowing & Returning

- Award Nomination
- Internship Request
- Office Change Request
- Mail Stop Change Request
- Special Interest Group Registration
- Lost & Found Registration
- Visitor Registration
- Complaint & Suggestion

Update personal data

Training requests

Leave requests

Participation to employee surveys

Submitting suggestions or complaints

Reviewing benefits

Reviewing employment records

8 OA also can search and account the form by its type, requestor, and/or request time. *8* OA can also calculate the sum, average, max and min of the form values.

Sample e-Forms

The sample e-Forms for new employee registration and supplement income are shown as follows:

Basic   Attached Document   Flow & Timing   Approver Discussion   ⚙

New Staff Registration

Document No.:	10241200001
Requestor:	Cara
*Approver List:	New Staff Registration ⌄
*Owner Groups:	HR&Admin
Submit Approval:	Submit

Personal Information

*First Name:	Jamie
*Last Name:	Wong
*Marital Status:	Married ⌄
Date of Birth:	1985-06-20

Contact Information

Email:	jamiewong@123.com
Mobile Number:	89965662

Address

Street Address:	
City:	
State:	
ZIP Code:	
Country:	

Supplementary Income

*Name:	Lily
Document No.:	240900034
Requestor:	Albert
*Owner Groups:	HR&Admin
Required Finish Date:	2024-12-30

Not Yet Submited Stages:
- ☑ Applicant request
- ☑ Govt. official initial review
- ☑ Govt. official initial review
- ☑ Applicant notification

Applicant Information

Name:	Lily
ID:	-
Sex:	○ Male ● Female
Birthday:	1988-01-01
Marital Status:	Married
Address:	-

Dependent Information

1st Dependent

Name:	-
ID:	-
Sex:	○ Male ○ Female
Birthday:	-

2nd Dependent

Name:	-
ID:	-
Sex:	○ Male ○ Female
Birthday:	-

Intra-department approval flow

❽ OA allows the user to define multi-stage form approval flow and with multiple steps in each stage.

❽ OA also allows the user to specify what stages and steps will be executed in parallel and what stages and steps will be executed in serial.

The user can also define when an approver rejects the form, the re-approval will start from the beginning or the rejection point.

Interdepartment approval flow

Similar to the intra-department document approval flow, the user can define interdepartmental and inter-company document approval flow.

Users from different departments and companies can do approval via login, email or smart phone.

Legal Firm

Account Firm

Stage 3

Stage 3

Join Venture

Stage 2

Corporate A

Corporate B

Stage 1
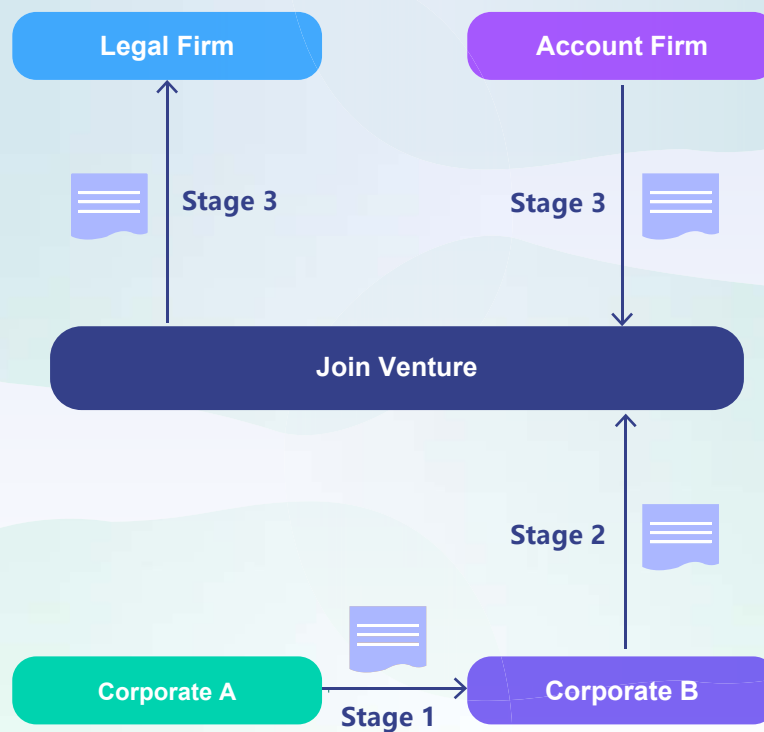
Online Survey

⌘ OA supports customized content and scope of online e-Survey, and to support the automatic analysis and query as well. ⌘ OA online e-Survey can be used for customer behavior surveys, to collect employee comments and the confidence of project members.

⌘ **OA online e-Survey may be used for the following tasks:**

- Investigation of customer behavior
- Investigation of customer satisfaction
- To collect feedback of clients on any market activities
- To collect feedback of clients on new products or services
- Collection of employees' views on the (new) management system
- Collection of the annual evaluation on other employees or departments
- Collection of the learning and training needs of employees
- Survey the evaluation of project members on plan completeness and operability
- Survey the confidence of project members on task schedule
- Survey the appraisal of project members on project management

Client's age distribution

10.53%
26.32%
63.16%

- Under 20
- 20-29
- 30-39

Top 5 products Favored by Clients

A
B
C
D
E

New customers Quantity

2026
2025
2024
2025

Product sales Volume

Unit: millions/set

Product A   Product B

January   February   March

⌘ OA also provides many other convenient features of online surveys, including the maintenance of enterprise survey databases, anonymous surveys, repeatability investigation, automatic investigation, investigation of reminder message and so on. These functions help users handle the e-Survey easier.
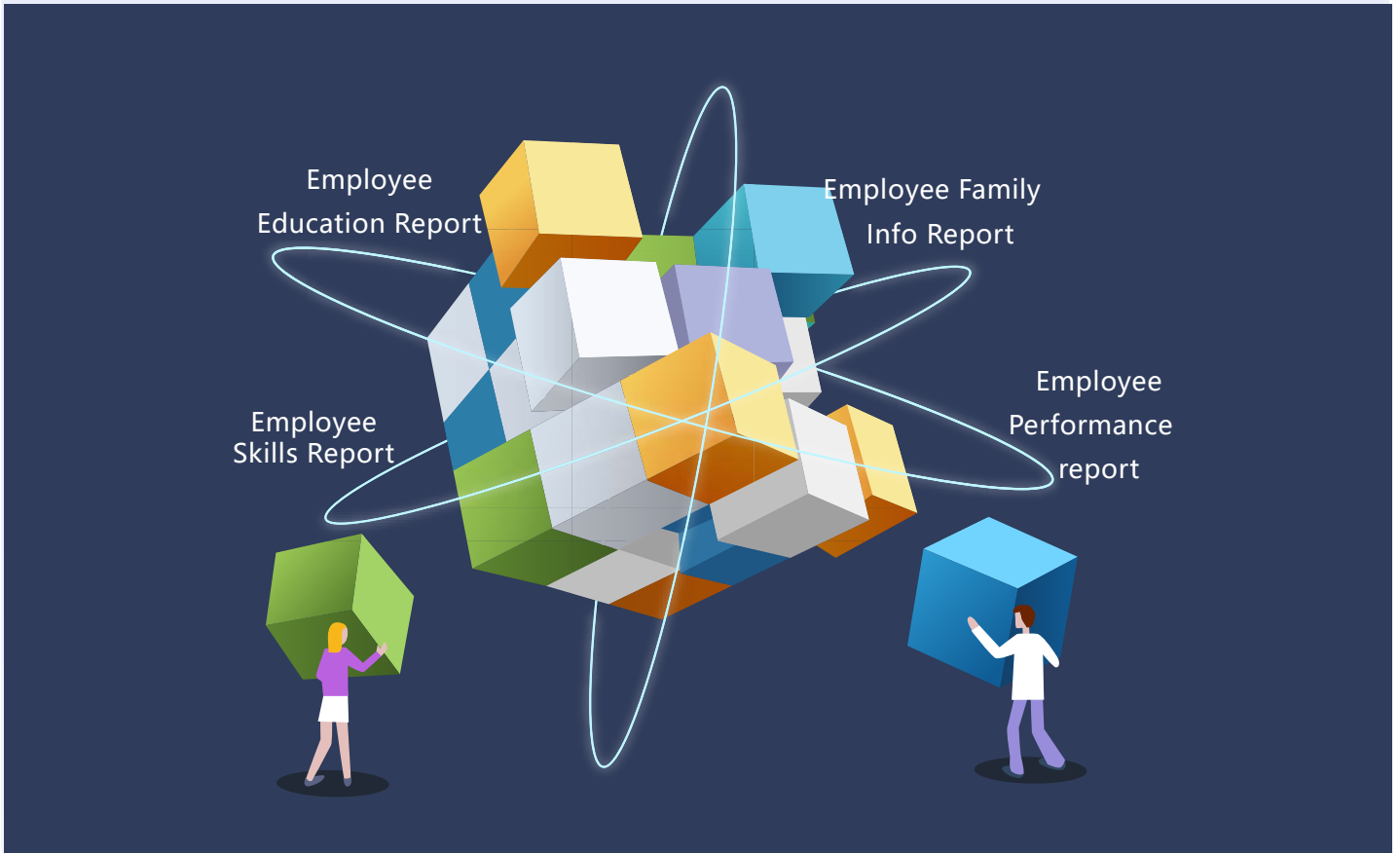
Mobile OA apps
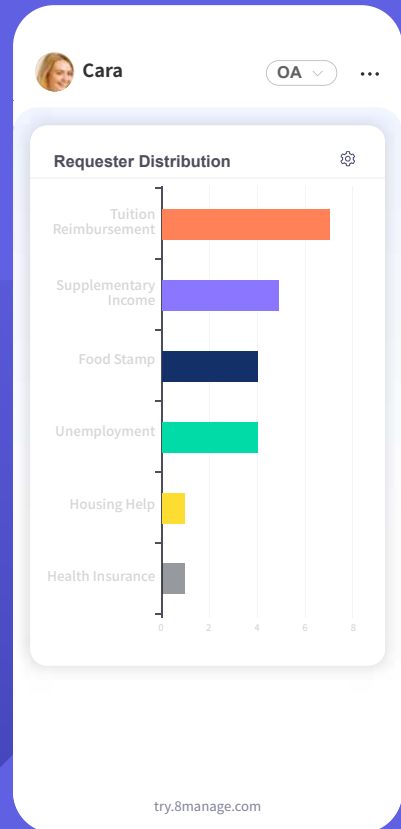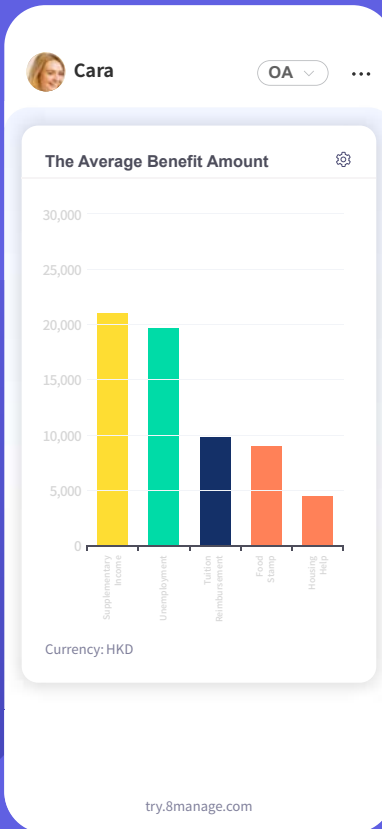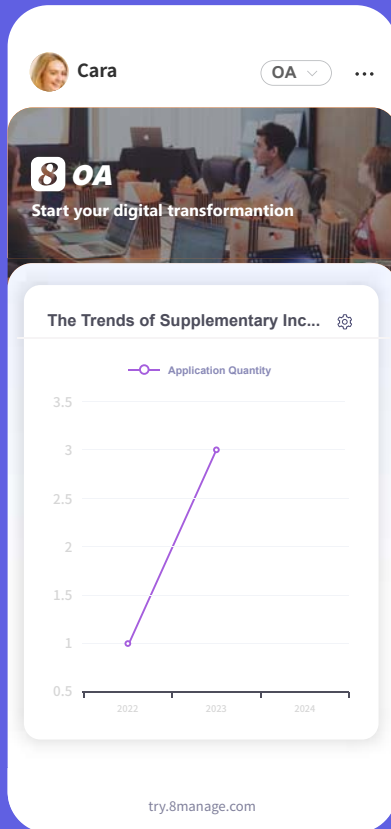
⑧ mobile OA apps offers a variety of benefits, from the cost savings to the convenience that can help your business succeed.

Point-and-click Report Generator

All user-defined data can be used in the 🎱 OA point-and-click report generator to generate 2D and 3D graphical reports or real-time dashboards.

Employee Education Report

Employee Family Info Report

Employee Skills Report

Employee Performance report

🎱 OA provides a **state-of-the-art point-and-click Report Generator** to allow business users to simply point to any field or fields that they want to search and generate a report. The system will perform accordingly.
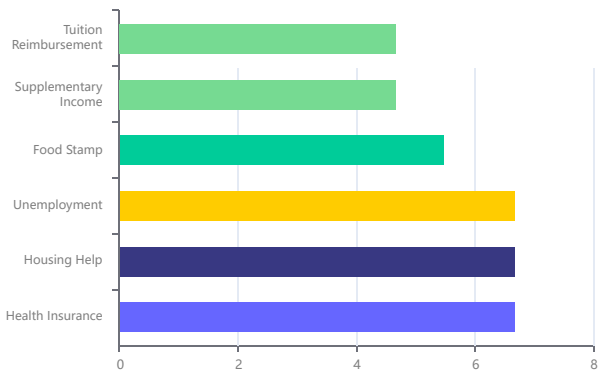
The simple-to-use but powerful mechanisms allow the business user to (a) select whatever combination of fields that he wants for search and report and (b) specify the layout or display order of the fields to be displayed in the report. It also allows the user to select different types of statistics (e.g., SUM, COUNT, AVERAGE, MIN, MAX) to be included in the summary line of the report.

With the 🎱 OA **point-and-click report generator** , business users no longer need to learn SQL or depend on the IT staff's assistance before they can do data mining and report generation.
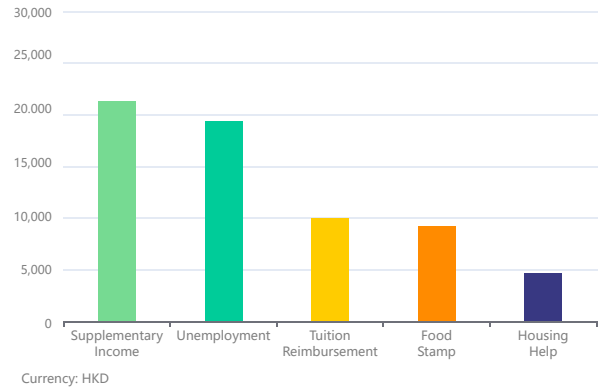
Analytical Reports
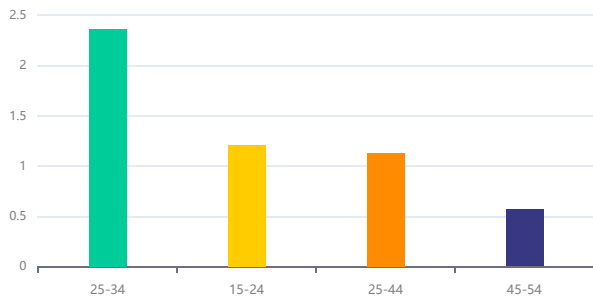
Generated by point-and-click report generator
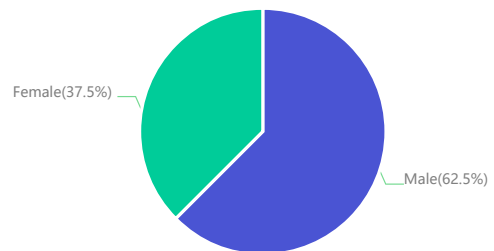
Requester Distribution

- Tuition Reimbursement
- Supplementary Income
- Food Stamp
- Unemployment
- Housing Help
- Health Insurance

0   2   4   6   8

The Average Benefit Amount

30,000
25,000
20,000
15,000
10,000
5,000
0

Supplementary Income | Unemployment | Tuition Reimbursement | Food Stamp | Housing Help

Currency: HKD

Tuition Reimbursement Obtained by Age Groups

2.5
2
1.5
1
0.5
0

25-34   15-24   25-44   45-54

Gender Proportion Receiving Unemployment Benefit

Female(37.5%)

Male(62.5%)

The Trends of Food Stamp Application

Application Quantity

2.2
2.1
1.8
1.5
1.2
0.9
0.8

2021 | 2022 | 2023

2021
Application Quantity   1
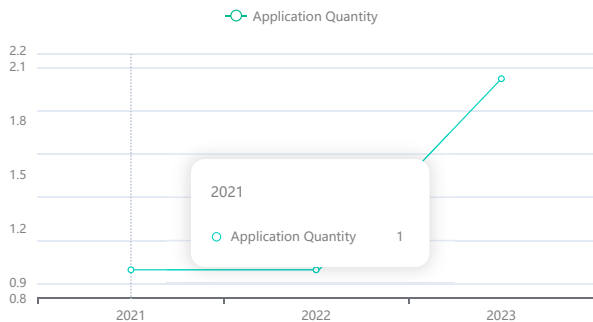
The Trends of Supplementary Incom Application

Application Quantity

3.5
3.0
2.5
2.0
1.5
1.0
0.5

2022 | 2023 | 2024

2022
Application Quantity   1

🎱 Office Automation (OA) Feature List

Feature	Description
Form & Flow	
Forms	Support to define common customized fields of all form types.
	Support to define customized fields and basic settings of specific form types.
	Support to create forms like request form, registration form, survey form, complaint & suggestion form etc. for data collection, enrollment, request and reply, review and approval purposes.
	Support different search criteria for different form types.
Workflows	Support to define different workflows based on form types and groups.
	Allow to define different response types for each approval step of multiple-stage workflows, such as for approval, comment and info only.
Expense Mgmt	
Expense Request	Support to add and submit expense requests for approval.
Expense Advance	Support to add and submit expense advances for approval.
Expense Report	Support to add and submit expense reports for approval.
Reimbursement	Support cashiers to handle expense payment and delivery after the expense items are approved.
Search	Support to search the expense records in the organization.
Approval	Support to define the approval workflows for expense request, expense advance and expense report.
Client Mgmt	
Client Info	Support to record client info, such as name, region, industry, type, contacts.
	Support self-defined fields on the client page.
Client Interaction	Support to record interactions with clients, including interaction time, participators and results.
Supplier Mgmt	
Supplier Info	Support to record supplier info, such as name, region, industry, supplier type, contacts.
	Support self-defined fields on the supplier page.
Supplier Interaction	Support to record interactions with suppliers including interaction time, participators and results.
Custom Settings	
My Attention	Support to handle outstanding work items on the self-defined dashboard.
Navigation View	Support user-defined graphical navigation flows that allow to proceed to the specific pages quickly by clicking the navigation icons.
Profile & Delegate	Support personalized settings such as personal password, delegation, my menu, etc.

Other Assisting Functions	
Communication	Support address book, announcement, chat and discuss forum.
Leave	Support to submit leave request and obtain approval, view leave balance and track the leave calendar.
Schedule	Allow to submit business trips and meetings for approval.
Timesheet	Allow to fill in, submit and track timesheets.
Facility & Equipment	Support to apply for facilities & equipment such as meeting rooms.
Working Calendar	Managers can view and assign tasks to subordinates from the working calendar.
Report	Support to view statistics reports for the entire organization.

8 can provide best combination of standard products & redevelopment services for enterprise management and over 500 corporations in Asia are using our following modules on-premises or SaaS:

CRM : Corporate Client CRM and Consumer CRM

Service : Service Management

SRM : Supplier Management, e-Procurement and e-Tender

PPM : Project and Portfolio Management

New Way : Visual Agile and Lean

Timesheet : Resource Time and Cost Management

EDMS : Electronic Document Management System

OA : Office Automation

HCM : Human Capital Management

All-in-one : Enterprise Full Automation