

EXCAPSULA

Introduction

Excapsula is a collaboration between Manx Business Solutions and Stonebridge Consultancy Services to provide an affordable approach to accelerating digitalisation of business processes using Laserfiche technologies.

Excapsula principles

Vision	Help businesses deliver a digital processing environment
Partnership	Work together to understand business requirements
People	Humans come first and make decisions. The machine does the boring stuff
Adaptability	Make processes adaptable to help future proofing
Data	Design processes that help make data accurate and complete
Reporting	Automate reporting to make it easier for management
Integration	Build everything with integration in mind
Affordability	Price to make the digital journey affordable

Excapsula outcomes



IMPROVED
EFFICIENCY



FASTER
PROCESSING



EVIDENCE OF
COMPLIANCE



MONITORING
AND CONTROL



INCREASED
CONSISTENCY



BETTER CLIENT
ENGAGEMENT



MORE
ENGAGED
STAFF



KNOWLEDGE
RETENTION



RISK
REDUCTION

Core capabilities

Digital procedures	The process becomes the procedure, so no need to update procedure manuals
Integration	The technology enables integration between systems
Adaptability	All processes can be made bespoke or adapted for new requirements
User friendly	Forms are designed with a 'user-first' approach
Control	Processes have built-in controls to ensure staff follow procedures
Monitoring	Every Excapsula process comes with full monitoring reports and dashboards
Reporting	Custom reporting can be built in Laserfiche or Power BI

The processes

Excapsula includes a suite of business processes for Trust and Company Service Providers (TCSPs). It has been developed by Stonebridge Consulting and Manx Business Solutions Limited (MBS) using Laserfiche, a market-leading Enterprise Content Management (ECM) system. Excapsula can be licensed for an annual fee. Stonebridge and MBS will provide support for Excapsula.

Excapsula processes are grouped into 8 business areas:

1. Client onboarding
2. Due diligence
3. CRS and FATCA
4. Administration
5. Compliance and Co-Sec
6. Client accounts and Internal Finance
7. HR and Staff
8. Operations

Scope

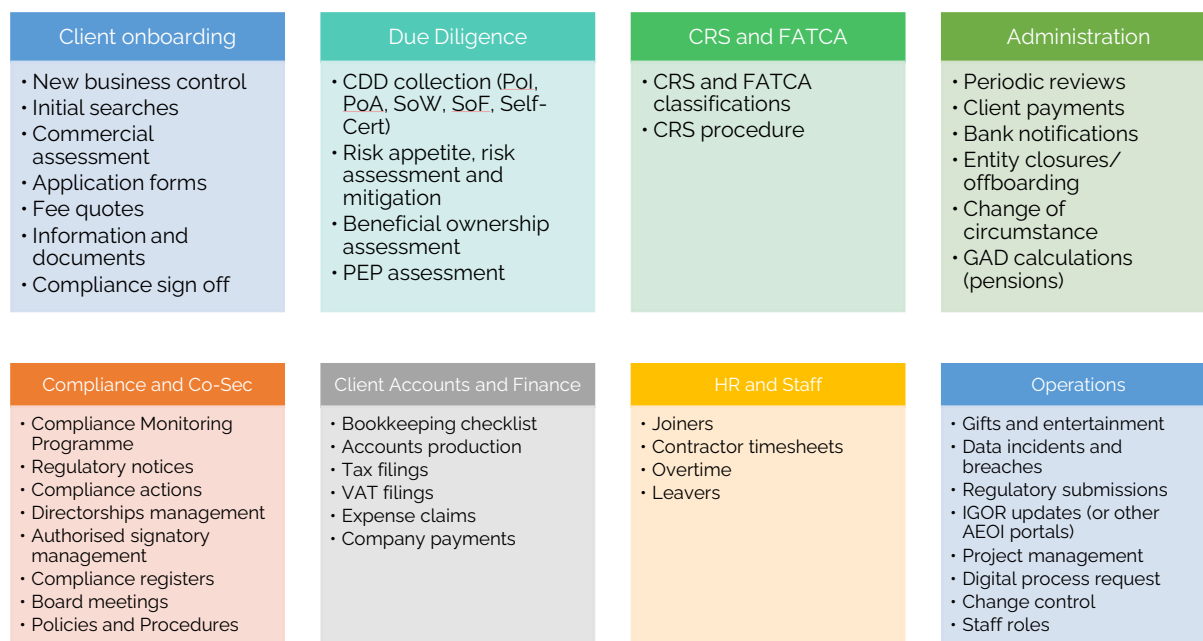
The processes set out below are a representation of what is available. This may be added to in time, on the basis that Excapsula only includes processes that fit within the principles, are economically viable and would be useful to more than one client.

For a complete and up-to-date view, please visit the Excapsula website:

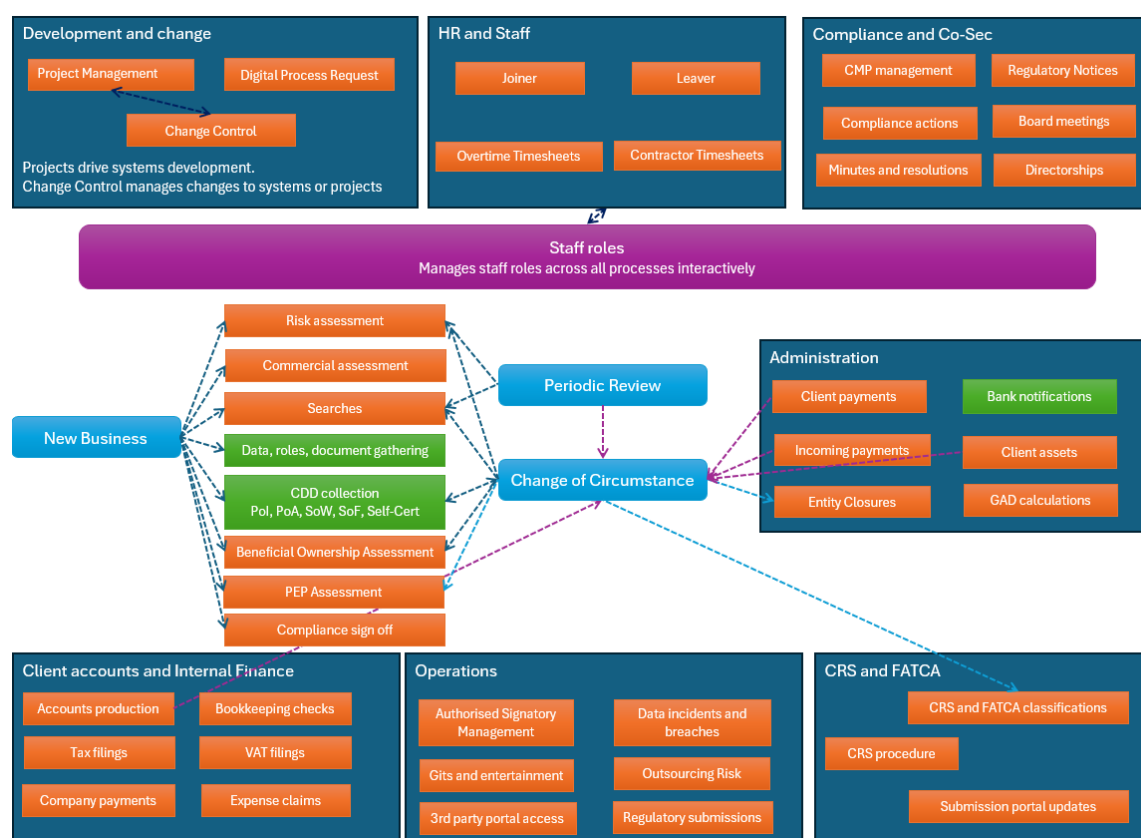
<https://excapsula.com/>



Summary



An indication of how the processes fit together



The diagram above includes just some of the connections between processes. In reality, it is far more complex.

Integration

All our process fully integrate with the Laserfiche Document Management System.

If we can give Laserfiche permission to read SQL data, we can fully integrate on a 'pull' or 'read' basis. We are working with other software providers to enable 'push' or 'write' basis.

These are some of the systems where we have data integrations, we are working with providers or believe integration will be possible:

Core systems	Tools	Other Systems
<ul style="list-style-type: none"> •NavOne •5Series •Plainsail •Acumen •vPoint 	<ul style="list-style-type: none"> •DocuSign •Search tools •eID solutions •Invoice processing •Banking and broker feeds 	<ul style="list-style-type: none"> •HR systems •CRMs •Microsoft 365

Notes on processes

1. All digital processes include:
 - a. Routing between different business functions/roles for processing and approvals. It is entirely adaptable and based on conditions within the process,
 - b. Integration with SQL to hold data.
2. Where the processes use data that usually reside in separate systems (such as Quantios NavOne), the processes can use:
 - a. Lookups to access that data,
 - b. Workflows to display the data,
 - c. Workflows to process the data through SQL so that the data can be pushed into the core system via APIs (we are working with Quantios on this).
3. All digital processes are accompanied by bespoke reports that can act as registers or monitoring tools.
4. The built-in dashboards allow management to view statistics, progress, and blockages etc.
5. All digital processes and attached documents can be saved down to Laserfiche DMS including full audit trail as a permanent record.
6. Any process that includes third parties will start externally and then flow internally, not back-and-forth without significant complexity (due to security constraints).
7. External processes can be initiated via URL links. These can be auto-generated using workflows.
8. All digital process can become the procedure and refer to, include wording from, and confirmation of compliance with, policies.
9. Processes can also include links to documents, websites, reports and other processes.

