

Workflow

SunFish embeds the sophisticated features of a professional workflow management system that provides users with a graphical, easy-to-use interface to flexibly configure and manage the automated routing of their documents, approvals and business processes.

Processes such as leave requests, or reimbursement approvals, employee request approvals, performance evaluations, bank transfers, score adjustments, feedbacks or task assignments and many more can be easily defined with simple and/or complex workflow rules to give companies the control over these processes they require to ensure that the processes are properly tracked and followed up.

For any request or form, users can create a workflow main level that catches any situation and then add as many lower levels of details and optional rules as needed. Each approval workflow is set up with the criteria that triggers the workflow rule execution, the immediate actions to be taken, in which order and by whom, and actions to be taken if approvals exceed a pre-defined duration of time.

The origin of a workflow can be defined as 'who is the requester' or 'who the request is for' and the system allows the combination of multiple filters such as position, organizational units, cost centers, job grades, etc. to specify that origin. For the approval flow the system supports sequential or parallel single, group or multi-tiered approval processes, whereas parallel processes can be merged back to a single sequence process after each individual process branch is completed. Approvers, cross-functional approval lines, and alternate approvers can be specified by position, employee ID, levels of supervisors, directors, managers, etc. using the matrix organization chart.

Auto-approvals for certain requests are as much accommodated as ordering the 'if' and 'else' conditions of an approval formula for the system to verify before sending a request. Email notification, status updates, and reminders accompany each record through its workflow cycle and alert people in charge to what action they need to take.

Additionally, dashboard indicators and alerts graphically display the performance of different approval flows, highlight problems, and let users drill down the data until the origin of a bottleneck is identified.

Approvals that exceed a defined time frame will be addressed by the system automatically depending on a company's policy. The following options are possible:

- Rerouting of the requests to a central position
- Voiding the requests with notification to employees to re-apply
- Auto approval of requests
- Auto rejection of requests

Ultimately, the workflow management system in SunFish reduces the complexity of configuring approval flows and easily maintains them. Users no longer need to remember to adjust workflow settings in case of partial or complete organizational restructuring, employee promotions or resignations as automatic and pre-defined adjustments ensure that requests do not become obsolete when sudden vacancies occur.

The screenshot displays the SunFish ERP interface. At the top, it shows the user 'James Smith' and the company 'PT Indodew Niaga Internet'. Below the navigation bar is a table of request approvals. The table has columns for No., Request Name, Request Code, Order, Approval Formula, Requestee, and Requestor. The 'Request Name' column lists various workflows such as 'Default Book Entry Requestion Workflow', 'Default Book Entry Declaration Workflow', etc. The 'Request Code' column contains codes like 'FINANCE.BOOKENTRYREQ', and the 'Approval Formula' column contains '*POS_FINSTAFF*'. The 'Requestee' and 'Requestor' columns are mostly empty or contain '[GENERAL]'. Below the table, a window titled 'Request Approval > Edit Request Approval' is open. This window shows the configuration for a 'Loan Request'. It includes fields for 'Request Code' (set to 'LOAN Request'), 'Request Order' (set to '--Select One--'), and 'Request Name' (set to 'Loan Request'). The 'Approved Formula' section shows a flowchart with icons for 'MGR' and 'SPV' connected by arrows. Below this, there are radio buttons for 'Dynamic Approver' and 'Fixed Approver'. Under 'Dynamic Approver', there are options for 'SPV', 'MGR', 'POS', and 'EMP', each with a dropdown menu and a search icon. The 'POS' option is selected, and the dropdown shows 'FINMGR'. Under 'Dynamic Approver', there are also radio buttons for 'Notification, Only need to Acknowledge', 'Required (*), Required to Approve', and 'Sequence (**), Required to Approved Before another Approver Approve'. The 'Required (*)' option is selected. At the bottom of the window are 'Cancel', 'Delete', and 'Submit' buttons.

No.	Request Name	Request Code	Order	Approval Formula	Requestee	Requestor
8	Default Book Entry Requestion Workflow	FINANCE.BOOKENTRYREQ	0	*POS_FINSTAFF*		[GENERAL]
9	Default Book Entry Declaration Workflow	FINANCE.BOOKENTRYREQDEC	0	*POS_FINSTAFF*		[GENERAL]
10	Default Book Entry Bank Workflow	FINANCE.BOOKENTRYTRANSB	0	*POS_FINSTAFF*		[GENERAL]
11	Default Book Entry Cash Workflow	FINANCE.BOOKENTRYTRANSC	0	*POS_FINSTAFF*		[GENERAL]
12	Default Deposit Settlement Workflow	FINANCE.DEPOSITSETTLEMEN	0	*POS_FINSTAFF*		[GENERAL]
13	Default Book Entry Settlement Workflow	FINANCE.TRANSFERMONEY	0	*POS_FINSTAFF*		[GENERAL]
14	Default Asset Capitalization Workflow	FIXEDASSET.ASSETCAPITALIZ	0	*POS_FINSTAFF*		[GENERAL]
15	Default Asset Depreciation Workflow	FIXEDASSET.ASSETDEPRECIAT	0	*POS_FINSTAFF*		[GENERAL]
16	Default Asset Revalue Workflow	FIXEDASSET.ASSETVALUE	0	*POS_FINSTAFF*		[GENERAL]
17	Default Asset Transfer Workflow	FIXEDASSET.ASSETTRANSFER	0	*POS_FINSTAFF*		[GENERAL]
18	Default Asset Disposal Workflow	FIXEDASSET.DISSPOSAL	0	*POS_FINSTAFF*		[GENERAL]
19	Default Asset Write Off Workflow	FIXEDASSET.WRITEPOFF	0	*POS_FINSTAFF*		[GENERAL]
20	Default Good Issue Workflow	ITEM.GOODISSUE	0	*POS_INVSTP*		[GENERAL]
21	Default Good Receipt Workflow					
22	Workflow Internal Requisition					
23	Default Inventory Adjustment					
24	Default Transfer Order Workflow					
25	Loan Request					