

# Efam Departement Settings

## Module Guide: EFAM Department Settings

### Module Location

Utilities > EFAM Department Settings

### Module Purpose

The EFAM Department Settings module is used to map or synchronize departments between the Sunfish system and the EFAM (Enterprise Financial & Asset Management) system or another relevant system. This module is essential for ensuring data integration across applications, particularly for reporting, approval workflows, or exporting data to external systems.

## 1. Main View (Sunfish to EFAM Department Mapping List)

### View Explanation

- **Main Tabs:** There are two tabs: "Set Department" for mapping and "Set Alias Account" for other purposes (this document only covers the Set Department tab).
- **Mapping Table:**
  - **ID:** A unique department code from the other system (e.g.,

- **Sunfish Dept.:** The department name or title in the Sunfish system (e.g., `MANAGING DIRECTOR`).
- **EFAM Dept.:** A dropdown or selection field allowing the user to choose and save the mapping from a Sunfish department to the corresponding department in the EFAM system.
- Users can select the relevant EFAM department for each row, and the system saves the mapping to support integration.

## 2. Steps for Mapping EFAM Departments

- Navigate to **Utilities > EFAM Department Settings**, and ensure you are on the "Set Department" tab.
- The table will display a list of all departments from Sunfish along with their IDs.
- For each row, open the dropdown menu in the **EFAM Dept.** column and select the corresponding EFAM department.
- Save each mapping that has been selected or entered.
- This process ensures that any transaction or document involving a department can be correctly passed or consolidated between both systems.

## 3. Integrated Workflow & Business Process

- **Data Integration:** The EFAM Department mapping is used when it is necessary to export or integrate data between the

Sunfish and EFAM systems, or with other external applications that require department references.

- **Approval Workflow:** In some scenarios, the system can use this department mapping to route documents between systems for approval schemes, consolidated reporting, and other functions.

## 4. Tips & Important Notes

- Ensure each mapping is performed with care to avoid inaccuracies in reporting or cross-application workflows.
- Review the mappings periodically, especially if there are changes to the organizational structure in either system.
- Access to this module should be granted only to system administrators or the IT division responsible for data integration and master data management.

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