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., `00000`).

- **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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