



**PS Financials**  
Powering Better Business Decisions

# Workflow Management



## Customise processes and achieve true efficiency using our Workflow Management tool

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The PS Financials Workflow Management engine, based on Windows Workflow Foundation, allows business processes to be modelled. Workflows can be initiated from a number of different places within the system on demand, on event trigger, on an accounting rule, or an action.

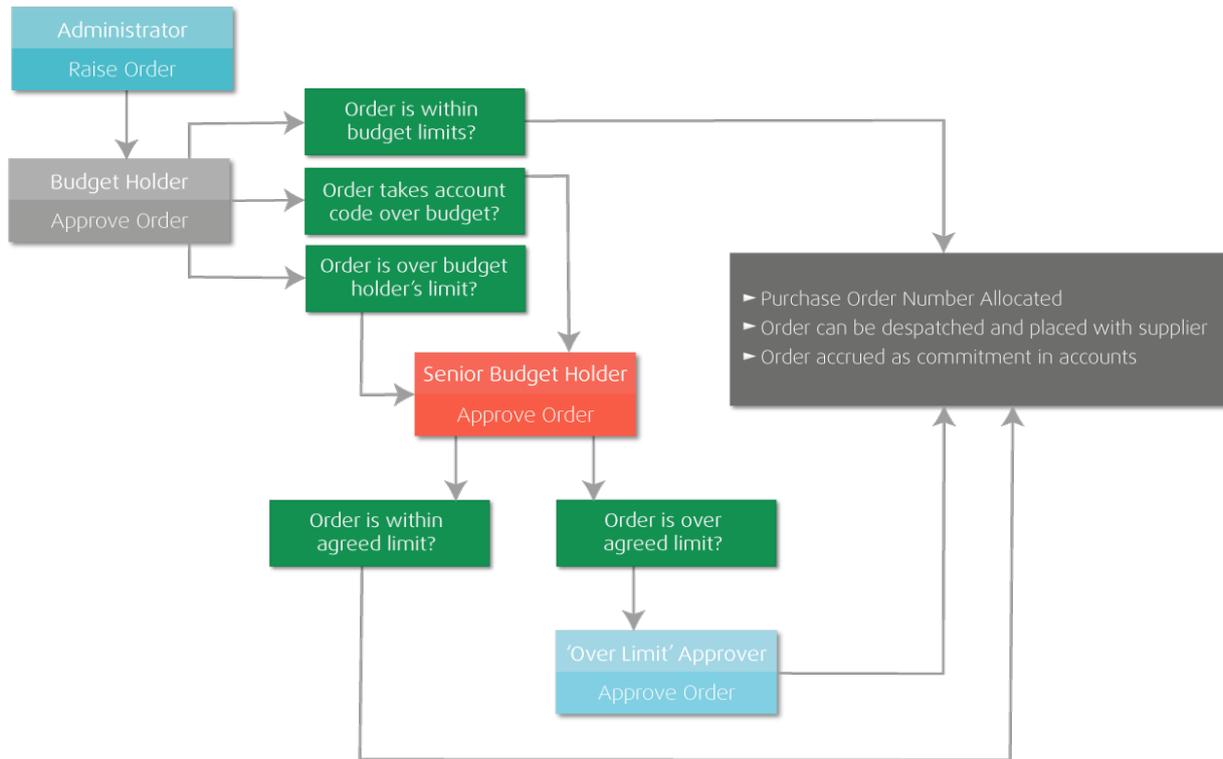
PS Financials Workflow enables the development of complex document approval scenarios. This workflow engine can make decisions and perform predetermined actions based on information from anywhere within the PS Financials database.



### Features of the Workflow Management

- ▶ Compatible with MS Sharepoint
- ▶ Create workflows for documents, document details, accounts, expenses/expensed e-mails, images
- ▶ Multiple levels of approval for a document based on value or other factors
- ▶ Approval hierarchy can be derived from any data & approval limits
- ▶ Approval limits can be set
- ▶ Delegated approval can be given for when approvers are absent
- ▶ Emails can be sent at any stage of the process
- ▶ If... Else scenarios can be implemented i.e. a document coded to the balance sheet could have a different approval process to that of a trading transaction
- ▶ Any action as a result of the workflow can be logged for auditing purposes
- ▶ Actions on timings on stages – i.e. delayed approvals
- ▶ Graphical interface

## Purchase Order Workflow Example:



Workflows are set to represent an organisation's business approval for many different scenarios. One of the main types of workflow configured in a majority of instances is the Purchase Ordering workflow.

## Benefits of PS Financials Workflow Management:

- ▶ Supplier creation requests
- ▶ Order approval
- ▶ Journal/transaction approval
- ▶ Purchase invoice approval
- ▶ Holiday approval
- ▶ Expenses approval
- ▶ Fixed asset movement approval
- ▶ Project approval
- ▶ Master record amends

"PS Financials, is an excellent fit for our requirements, the flexibility of analysis, workflow and reporting means we will be able to cater for our grants processing and accounting and be able to provide our fund holders with timely and accurate statements, which were big issues for us."

Moorfields Eye Charity

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For an in-depth look into PS Financials' solutions, visit our website:  
[www.psf Financials.com/our-solutions](http://www.psf Financials.com/our-solutions)

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To find out how PS Financials can help you make better business decisions:  
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