



## Overview of iCube eWorkflow™ 2.0

iCube eWorkflow is a workflow design and control system which allows you to tailor make workflows to fit your various company operating requirements, and controls the works to be processed from start to end to conform to the requirements.

Most companies have their unique operating procedures to perform works such as the data and supportive documents to track, the users and their roles, the process and the control etc. The varieties of procedures and revisions and the complex intra/inter department and company interactions make the processing very prone to error and inefficient.

iCube eWorkflow gives you a simple solution to custom build workflows to tailor your requirements, to streamline the processing and to control the works to be conducted the way you defined and to maximize the desired outcome.

You can design and define

- the workflow type and name and for what department
- the processes and operating sequence
- the tasks per process
- the electronic forms & fields to track
- the team and member's role

All works are tracked with a unique work number like the sales order number. Users are notified to process (request, approve & conduct) when their turn arrives. They enter the required data in the eform, attach supportive documents, along with communication and notes. This information, along with the time and user stamp and status will be logged in the work. The conforming tasks will be routed to next process and nonconforming tasks will be rejected for correction and reprocess. Emails will be sent to related members per outcome.

### What is workflow?

A workflow defines a set of requirements and rules (what, how, who and when) to perform a work and different types of works may require different workflows. Each work is tracked by a work number and the workflow leads the works to be processed from start to end accordingly to the rules and control the outcome to be consistent with the requirements.

A workflow consists of multiple processes operating in a fixed sequence. The route of a workflow

- *goes forward to next process if current process was done properly*
- *goes backward to a predefined process for correction & resubmit if the current process failed*
- *can be held if you need extra time to process, and be resumed for processing with your release*
- *ends when the last process is completed*

A workflow involves groups of users to perform with different roles such as to request, process, approve or notify. It tracks specific data in required formats and supportive documents.



### Examples of workflows

#### 1. Customer credit application

- Customers fill credit applications and attach financial documents. The application is forwarded to accounting department for credit approval.
- Credit manager approves, rejects or holds the application. Approved applications will be forwarded to process. Rejected applications will be returned to customers. Holding the application allows the administrator to have more time to investigate and he can unhold to resume the approval process.
- Accounting administrator processes the approved applications, update the customer credit term in record and in accounting system.

Application status will be emailed to customers, sales people and other people in the distribution list.

Processes are "Credit request", "Credit approve" and "Credit process".

#### 2. PTO (Personal Time Off)

- Employee fills PTO requisition and is forwarded to department manager/HR department for approval
- Department or HR department reviews the application. Approved requisition is forwarded to HR to process. Rejected requisition will be returned employee for correction and resubmit.
- HR administrator processes the approved applications, updates the employee records and in the HR management system.

Application status will be emailed to the employee, department manager and other people in the distribution list.

Processes are "PTO request", "PTO approve" and "PTO process".

#### 3. Financial reporting

- Accountant prepares financial statements to financial manager for Internal approval
- Internal approved financial statement is forwarded to auditor for approval
- Auditor approved financial statement is routed to finance department to release

Status will be emailed to the accountant, finance manager, auditor, management and other people in the distribution list.

Processes are "submit report", "internal approval", "auditor approval" and "financial release".



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### 4. Engineering Change Order (ECO)

- Engineer enters engineering changes for a product. The ECO is routed to the manager or a board to review
- The manager or board approves, rejects or holds the ECO
- Approved ECOs will be forwarded to an administrator to update the product BOM and document with the changes.

ECO status will be emailed to the engineer, manager, reviewing board and other people in the distribution list.

Processes are "ECO request", "ECO approve", "ECO process".

### **Benefits of iCube eWorkflow**

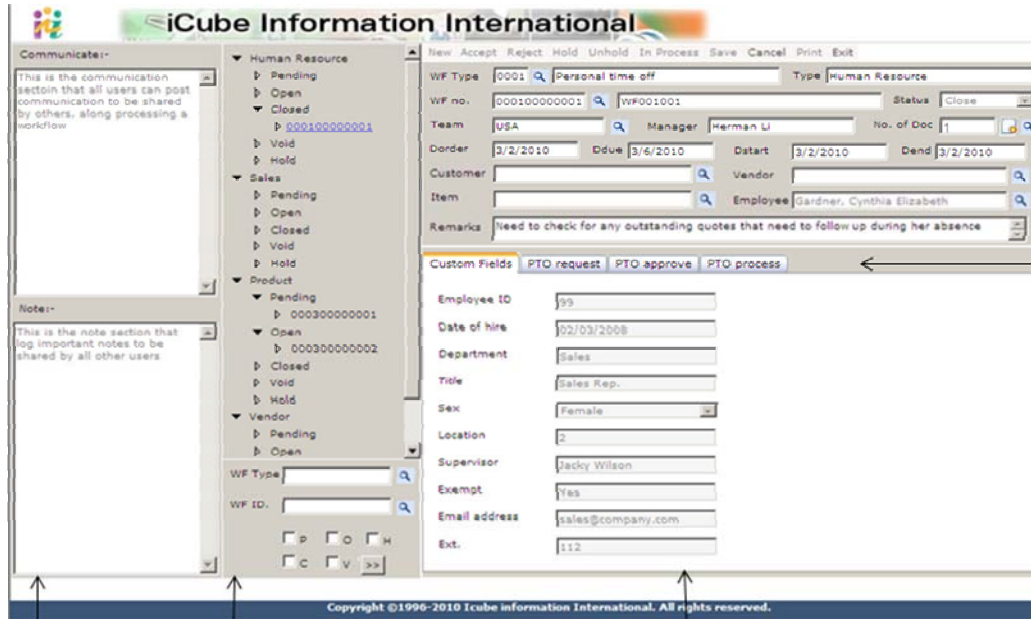
It defines what you want and controls to conform

- Easy customization to define what you want
- Smart control to conform what you define consistently
- Easy classification of works by department and type per your design
- Turns works to paperless
- Serves as eDocument center w/ non-stop and reliable self-services
- Link w/ ERP & validate of master data of employee, item, vendor & customer
- Intelligent analysis & reports for performance, audits and improvement



## How eWorkflow processes PTO

### Design the workflow "PTO"



Header & custom fields are shared by all team members

Each process in WF is defined in its tag organized in the processing sequence.

Only the process to be operated is enabled & to the authorized members to avoid wrong doing.

Tree view of WF by type & status

Custom fields of electronic form to define specific field to track

- Processes
  - "PTO request" for employee or HR to fill the form and submit for approval
  - "PTO approve" for manager to approve
  - "PTO process" for HR to record and maintain in the HR records
- Routing
  - "PTO request" -> "PTO Approve" -> "PTO Process" for normal case
  - "PTO request" -> "PTO Approve" -> "PTO Process" for correction
- Team
  - Who can perform at which processes
  - Who is the manager
  - The distribution list for notification



## Processing

### 1. Process "PTO Request"

**iCube Information International**

Communicate:-  
This is the communication section that all users can post communication to be shared by others, along processing a workflow

Note:-  
This is the note section that log important notes to be shared by all other users

Human Resource  
Pending  
Open  
Closed  
000100000001  
Void  
Hold  
Sales  
Pending  
Open  
Closed  
Void  
Hold  
Product  
Pending  
000300000001  
Open  
000300000002  
Closed  
Void  
Hold  
Vendor  
Pending  
Open

WF Type: [Personal time off]  
WF ID: [WF001001]

WF Type: 0001 Personal time off Type: Human Resource  
WF no.: 000100000001 WF001001 Status: Close  
Team: USA Manager: Herman Li No. of Doc: 1  
Dorder: 3/2/2010 Ddue: 3/6/2010 Dstart: 3/2/2010 Dend: 3/2/2010  
Customer: Vendor: Employee: Gardner, Cynthia Elizabeth  
Remarks: Need to check for any outstanding quotes that need to follow up during her absence

Custom Fields: PTO request PTO approve PTO process

Dateoff Start: 03/01/2010 Status: Approved  
Dateoff End: 03/12/2010 Owner: Gopi  
PTO Left: 69 Note:  
Last off date: 09/23/2009  
Remarks: Current account will be cov

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- Click new to create new work
  - Select the work type "PTO processing"
  - Fill out the form in the tag "Custom fields" and "PTO Request"
  - Attach any supportive document
  - Fill in an communication and note
  - Click Save to submit
- Email will be sent to notify approver to approve, and status update to predefined recipient.

### 2. Process "PTO approve"

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Communicate:-  
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Human Resource  
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Hold  
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Pending  
Open  
Closed  
Void  
Hold  
Product  
Pending  
000300000001  
Open  
000300000002  
Closed  
Void  
Hold  
Vendor  
Pending  
Open

WF Type: [Personal time off]  
WF ID: [WF001001]

WF Type: 0001 Personal time off Type: Human Resource  
WF no.: 000100000001 WF001001 Status: Close  
Team: USA Manager: Herman Li No. of Doc: 1  
Dorder: 3/2/2010 Ddue: 3/6/2010 Dstart: 3/2/2010 Dend: 3/2/2010  
Customer: Vendor: Employee: Gardner, Cynthia Elizabeth  
Remarks: Need to check for any outstanding quotes that need to follow up during her absence

Custom Fields: PTO request PTO approve PTO process

No of hours: 60 Status: Approved  
Date Start: 03/01/2010 Owner: Selvam  
Open issues: 9 Note:

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- Approver receives email to approve new work
- Select the WF no. from the pending stage to bring up the WF detail
- Review the data, communication, attached document
- Click on the "PTO approve" tag
- Click "Accept" to approve, "Reject" to reject and "Hold" to freeze the work
- The process will be routed according to the decision, and emails to recipients will be notified.

### 3. Process "PTO process"

The screenshot displays the iCube Information International software interface. The main window is titled "iCube Information International" and shows a workflow detail for "PTO process". The interface includes a navigation pane on the left with a tree view showing categories like Human Resource, Sales, and Product, with sub-items for Pending, Open, Closed, Void, and Hold. The main content area is divided into several sections: a "Communicate" section with a text area for communication, a "Note" section for logging important notes, and a "Custom Fields" section with tabs for "PTO request", "PTO approve", and "PTO process". The "PTO process" tab is active, showing fields for "Payroll Update" (Yes), "Status" (Approved), "Remarks" (All arranged, no open issue), and "Note" (Done processing). The top of the window has a menu bar with options: New, Accept, Reject, Hold, Unhold, In Process, Save, Cancel, Print, Exit. The bottom of the window has a copyright notice: "Copyright ©1996-2010 Icube information International. All rights reserved."

- HR administrator receives email to process an approved work
- Select the WF no. from the approval stage to bring up the WF detail
- Review the data, communication, attached document
- Fill in any notes, and the related custom fields
- Click "Save" to complete.  
Email will be sent to recipients for update.

The WF no. is now completed. This work along with the attachments and details will be stored in system as eDocument Center for you to review.