

# OCTO Biz

SysAdmin  
**Workflow Setup**  
Lite Package

TUTORIALOCTOBIZ2024

*Aksi dan  
Kolaborasi*





**SysAdmin**

# Workflow Setup

**SysAdmin - Workflow Setup** Untuk mengatur alur kerja yang sederhana dan *Advanced*.

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**03** Workflow  
Setup

PAGE  
**13** Approval  
Process

Role	Deskripsi
<b>Maker</b>	User yang bertugas sebagai pembuat Transaksi atau peng-Input data Transaksi
<b>Reviewer</b>	User yang berfungsi sebagai Reviewer untuk melakukan validasi data transaksi yang telah di submit oleh Maker( <b>Opsional</b> )
<b>Approver</b>	User yang bertugas untuk memberikan keputusan (Menolak atau menyetujui Transaksi) terhadap transaksi yang telah dikirim oleh Maker (Dapat diatur secara Berjenjang)
<b>Releaser</b>	User yang berfungsi untuk memberikan keputusan yang sudah disetujui oleh Approver ( <b>Opsional</b> )
<b>Viewer</b>	User yang berfungsi untuk melihat Laporan Keuangan saja (Tidak dapat melakukan Transaksi)

**CATATAN: Prasyarat** yang harus dimiliki sebelum mengatur **Pengaturan Alur Kerja** Dapat diatur melalui: **BBO Company Maintenance, BBO Onboarding, dan CFO Manage Company Menu**

**Company Maintenance > Details**

**Company Details**

Company Name	CIF No.	Enrolled Date
JLPTJTU JPYKULZS TJOYQYSYZL TWONJSW	11200000211190	02 Feb 2024 13:13:40 WIB
Last Effective Change On	Last Modified By	Last Approved By
19 Jun 2024 14:56:41 WIB	NGB9	NGBUAT18

Company Details Account Tagging Customized Service Package Account Accessibility File Format **Signature Type** User Group User

**2** Signature Type Listing - Total 4 item(s) in the batch

No.	Signature Type	Description	Users Assigned?	Sub-Action	Txn Status
1	<a href="#">CLERK</a>	the clerk	<a href="#">Yes</a>		-
2	<a href="#">MANAGER</a>	The manager	<a href="#">Yes</a>		-
3	<a href="#">STAFF A</a>	the staff a	<a href="#">Yes</a>		-
4	<a href="#">STAFF B</a>	the staff b	<a href="#">Yes</a>		-

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**1** Arahkan ke **Halaman Signature Type**

**2** Dibutuhkan **List** untuk **Signature Type**

## Company Maintenance &gt; Details

**Company Details**

Company Name	CIF No.	Enrolled Date
JLPTJTU JPYKULZS TJOYQYSZL TWONJSW	11200000211190	02 Feb 2024 13:13:40 WIB
Last Effective Change On	Last Modified By	Last Approved By
19 Jun 2024 14:56:41 WIB	NGB9	NGBUAT18

Company Details Account Tagging Customized Service Package Account Accessibility File Format Contact Info Signature Type **User**

**1**

**Search**

Search By

User ID User Name Enter

**Search**

User Listing - Total 12 item(s) in the batch

No.	User ID	User Full Name	Mobile No.	Email	Single Access User	Secure Token Type	Waive Secure Token Charges	Sub-Action	Txn Status
	<a href="#">ADMIN2</a>	ChangpreeAdmin	+621323244124	chanyei@gmail.com	No	Secure Token (Software)	No	Edit	-
		ChangpreeAdmin	+621323244124	chanyei@gmail.com	No	Secure Token (Software)	No	Edit	-
		EDIT TESTING	+62242424	emailtesting1@gmail.com	No	Secure Token (Software)	No	Edit	-
4	<a href="#">Fortesting</a>	Fortesting	+622424247272	emailtesting1@gmail.com	No	-	No	Edit	-
5	<a href="#">Fortestingg2</a>	Fortesting2	+622424247272	emailtesting1@gmail.com	Yes	-	Yes	-	-

< 1 of 3 >

**2**

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User Details

User ID	User Full Name	KTP / Passport
ADMIN1	ChangpreeAdmin	-
Mobile No.	Office No.	Email
+621323244124	-	chanyei@gmail.com
Authorized Person	Single Access User	Secure Token Type
No	No	Secure Token (Software)
Request New Secure Token	Waive Secure Token Charges	Dashboard
Yes	No	Default PortalGroup
Last Updated Date	Updated By	
19 Jun 2024	NGB9	

Belongs to User Group

No.	User Group	SynAdmin	Maker	Reviewer	Approver	Viewer	Releaser	Restricted Template Maker	View Sensitive Details	Sub-Action
1	<a href="#">UG ADMIN</a>	Yes	Yes	No	Yes	Yes	No	No	No	-

**Has this Signature Type**

No.	Company ID	Company Name	Signature Type	Description
1	CHANCORP	JLPTJTU JPYKULZS TJOYQYSZL TWONJSW	<a href="#">CHANCORP_v10_testing@ex-v10-18c0346-7971-4a2d-5afb-6c0481a8208e</a>	
2	CHANCORP	JLPTJTU JPYKULZS TJOYQYSZL TWONJSW	<a href="#">CHANCORP_v10_testing@ex-v10-28f1eafa-120-4b72-ba58-29663d925088</a>	
3	CHANCORP	JLPTJTU JPYKULZS TJOYQYSZL TWONJSW	<a href="#">CHANCORP_v10_testing@ex-v10-54666ac8-f96b-4fb-1-1a591-6b0924aa4e63</a>	

**3**

**1** Klik **Bagian User**

**2** Klik **Hyperlink** pada **User ID**

**3** Periksa **User** apakah sudah terhubung dengan **Signature Type**



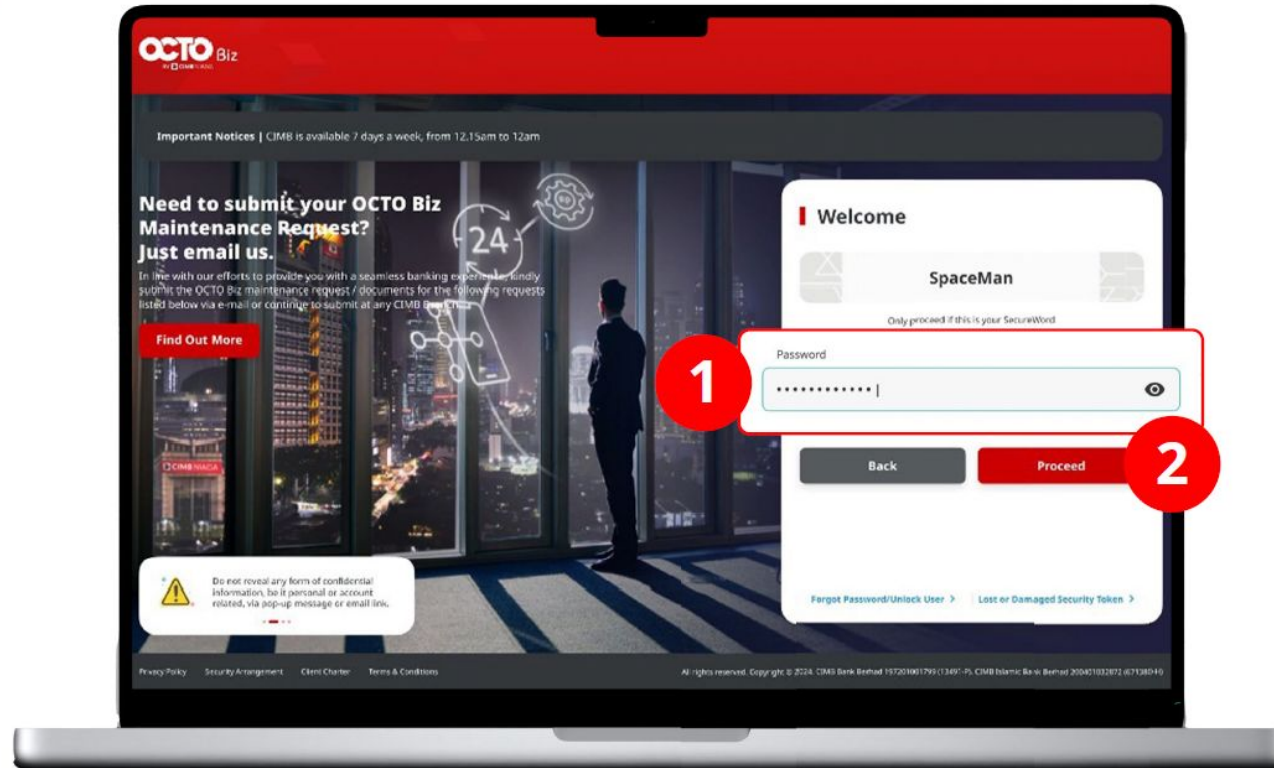
# SysAdmin Workflow Setup





1 Masuk menggunakan **CFO administrator**. Masuk dengan menggunakan **User & Company ID**

2 Klik **Next**

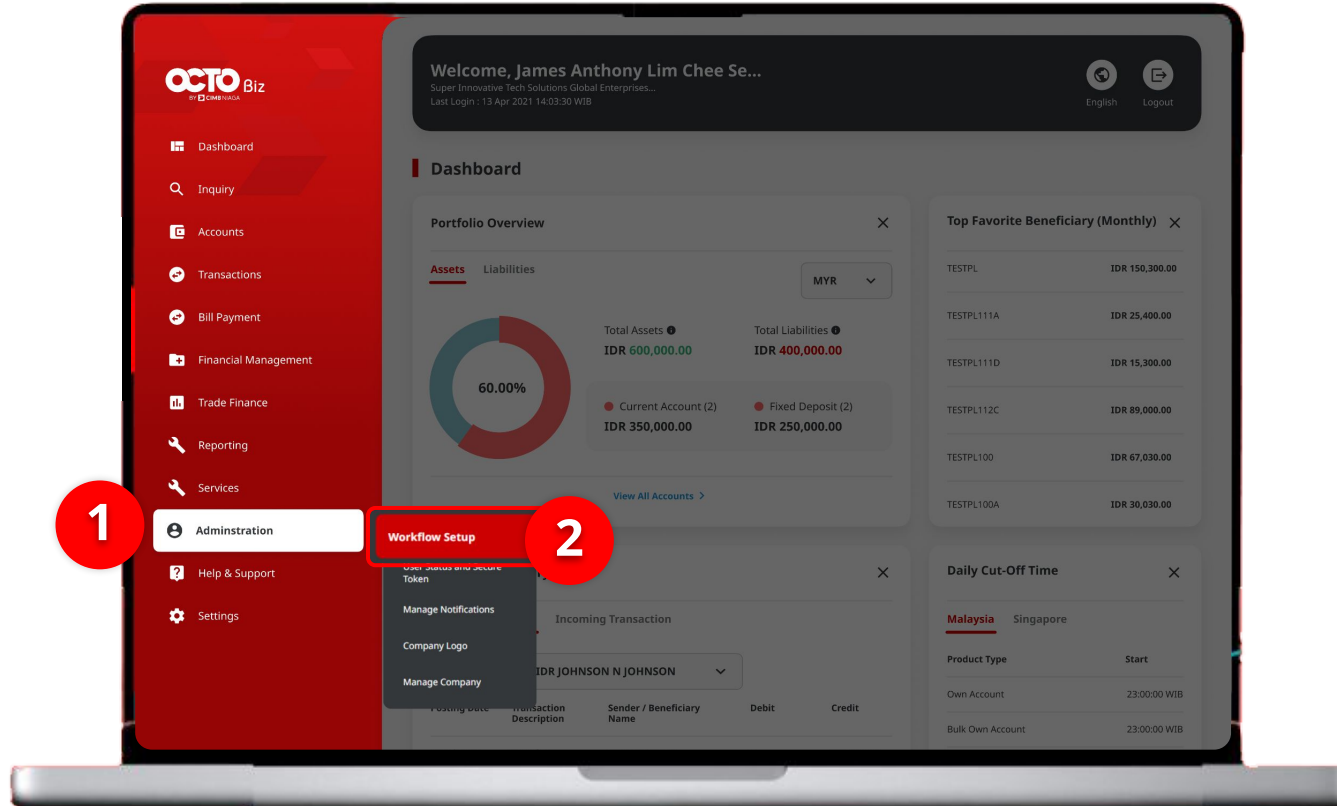


1 Isi *Password*

2 Klik *Proceed*



# LANGKAH 03



Sistem akan menampilkan halaman ***Dashboard***

- 1 Arahkan **Kursor ke Administration**
- 2 Klik **Workflow Setup**

## Workflow Setup &gt; Listing

Listing

Company ID  
CHANCORP

Company Name  
JLPTJTU JPYKULZS TJOYQYSZL TWONJSW

No.	Version	Workflow Name	Effective Date	Last Active Date	Status	Action
1	<a href="#">37</a>	WORKFLOW_1	20 Jun 2024	-	Active	<b>Duplicate</b>

History

No.	Version	Workflow Name	Effective Date	Last Active Date	Status
1	<a href="#">26</a>	WORKFLOW_1	20 Jun 2024	20 Jun 2024	Expired
2	<a href="#">23</a>	WORKFLOW_1	20 Jun 2024	20 Jun 2024	Expired
3	<a href="#">22</a>	WORKFLOW_1	20 Jun 2024	20 Jun 2024	Expired
4	<a href="#">21</a>	WORKFLOW_1	20 Jun 2024	20 Jun 2024	Expired
5	<a href="#">18</a>	WORKFLOW_1	20 Jun 2024	20 Jun 2024	Expired
6	<a href="#">10</a>	WORKFLOW_1	19 Jun 2024	20 Jun 2024	Expired
7	<a href="#">9</a>	WORKFLOW_1	19 Jun 2024	19 Jun 2024	Expired
8	<a href="#">5</a>	WORKFLOW_1	19 Jun 2024	19 Jun 2024	Expired
9	<a href="#">4</a>	WORKFLOW_1	19 Jun 2024	19 Jun 2024	Expired
10	<a href="#">1</a>	WORKFLOW_1	02 Feb 2024	19 Jun 2024	Expired

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Sistem akan menampilkan halaman **Workflow Setup > Listing**

**1** Klik **Duplicate**

Workflow Setup > Edit

Successful task saved

Reference No. : BBC224061900007232 Saved On : 19 Jun 2024 15:47:42

Transaction Status : Draft

Creation Date  
19 Jun 2024 15:47:39

Details

Company ID CHANCORP	Company Name JLPTJU JPYKULZS TJQYQSYZL TWDQNSW	Workflow Name WORKFLOW_1
Effective Date 19 Jun 2024	Last Active Date -	Status Inactive
Version 10	Clone From Version 9	

Workflow Setup Authorisation Policy

Note

- User is allowing to set up Reviewer and Approver workflow by selecting either by Simple Workflow Mode or Authorisation Policy (only for Approver) at one time.
- Simple Workflow Mode only required on how many number of user required to complete the workflow.
- Authorisation Policy value is Policy Rules tab to set on specific rules such as transaction amount, initiating account, etc and number of user required to complete the workflow.

Functions	Reviewer		Approver
	Simple Workflow Mode	Simple Workflow Mode	Authorisation Policy
Administration			
Manage Company	0	1	N/A
Manage Notifications	0	1	N/A
User Status and Secure Token	0	1	N/A
Workflow Setup	0	1	N/A

2

Administration			
Manage Company	0	1	N/A
Manage Notifications	0	1	N/A
User Status and Secure Token	0	1	N/A
Workflow Setup	0	1	N/A
BI-AS1 Alias Maintenance	0	1	N/A
BI-AS1 Alias Registration	0	1	N/A
Manage beneficiary	0	1	N/A
Manage Recurring	0	1	N/A
Manage Template	0	1	N/A
Stop Payment	0	1	N/A

3

Back Cancel Next

Sistem akan menampilkan halaman **Workflow Setup > Edit**

- 1 Klik **Workflow Setup**
- 2 Pilih **Data** yang ingin diubah
- 3 Klik **Next**

## Task List &gt; Review Details

**Details**

Company ID CHANCORP	Company Name JLPTJTU JPYKULZS TJQYQSYZL TWONJSW	Workflow Name WORKFLOW_1
Effective Date 19 Jun 2024	Last Active Date -	Status Inactive
Version 10	Clone From Version 9	

**Workflow Setup** Authorisation Policy

**Note**

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- Simple Workflow Mode only required on how many number of user required to complete the workflow.
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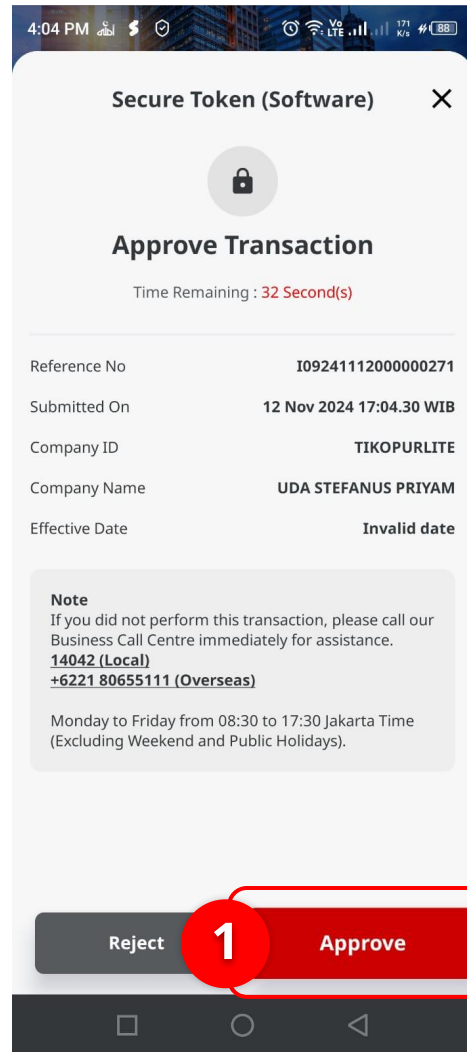
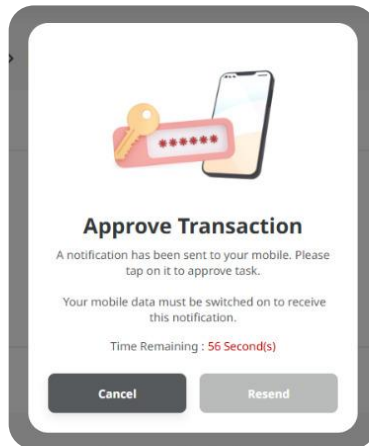
Functions	Reviewer		Approver
	Simple Workflow Mode	Simple Workflow Mode	Authorisation Policy
<b>Administration</b>			
Manage Company	0	1	N/A
Manage Notifications	0	1	N/A
User Status and Secure Token	0	1	N/A
Workflow Setup	0	1	N/A

<b>Payment</b>			
Bill Payment	0	1	Testing
Modul Penerimaan Negara	0	1	taskiler
Transfer to Other Banks	0	1	taskiler
Transfer within CIMB Niaga	0	1	taskiler
<b>Services</b>			
BI-FAST Alias Maintenance	0	1	N/A
BI-FAST Alias Registration	0	1	N/A
Manage beneficiary	0	1	N/A
Manage Recurring	0	1	N/A
Manage Template	0	1	N/A
Stop Payment	0	1	N/A

**1** **Submit**

Sistem akan menampilkan halaman **Review Details**

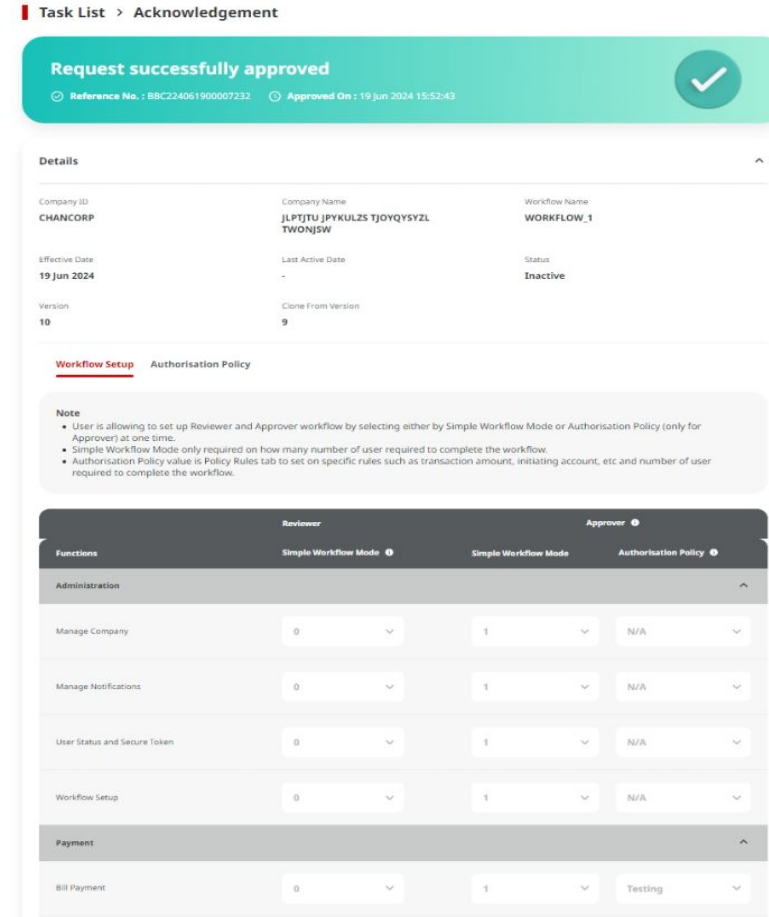
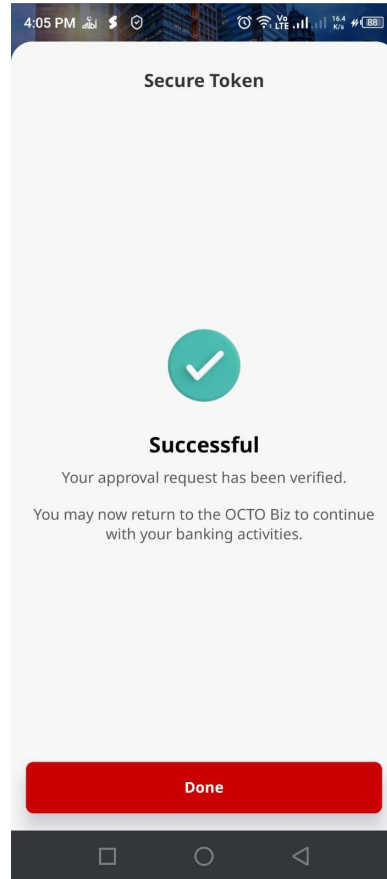
**1** Klik **Submit**



Sistem akan menampilkan halaman **Pop Up Approve Transaction**

- 1 Buka **aplikasi mobile**, dan klik **Approve Transaksi**





Jika transaksi Berhasil, sistem akan menampilkan **halaman Acknowledgement**



**OCTO** Biz  
BY  **CIMB NIAGA**

