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eFLOW Resolve Fiori App

User Guide

Version 5.2

Contents

eFLOW Resolve Fiori App

This guide explains how to use the eFLOW Resolve Fiori App.

About eFLOW Resolve

TIS eFLOW Control and eFLOW Resolve are SAP add-ons for automated invoice processing, integrated into SAP ERP. In combination, both components deliver a highly automated solution for vendor invoice processing, including requirements such as automatic posting, automatic line item matching and automatic workflow routing for exception handling and approval.

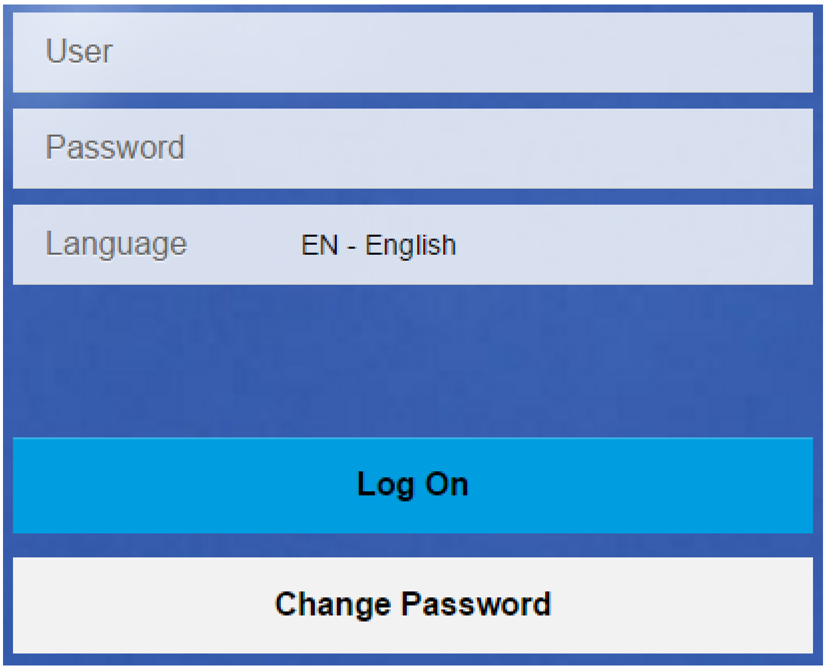
eFLOW Control users can manually process invoices with exceptions in an easy-to-use, familiar interface, which offers a wealth of features to help users find, organize, correct, complete, and post documents.

If eFLOW Control users cannot fully process documents themselves, they can send them to other users in a workflow to obtain information, clarification, or approval. Workflow processing takes place in eFLOW Resolve in the SAP GUI, the eFLOW Resolve Web Application, or the eFLOW Resolve Fiori App.

> **Note:** eFLOW Resolve Fiori App is customizable. Depending on your system configuration, some features described in this guide may not be available, or may be different than described.

Start the eFLOW Resolve App

1. Open your web browser and enter the eFLOW Resolve Fiori App URL in the address line.
2. Enter your user name and your password.



3. (Optional) Select the language for the user interface.
4. Click the **Log On** button.

5. On your Fiori homepage, click the **eFLOW Resolve** app.

   If the app is not available on your homepage, follow these steps to add it:

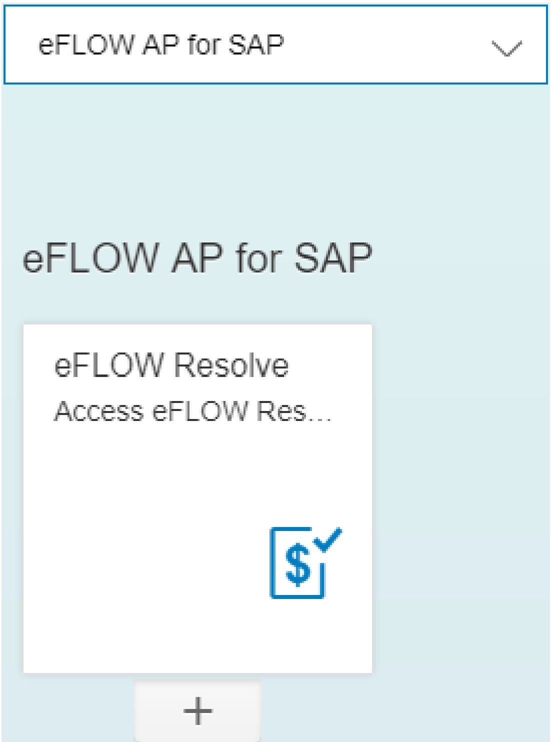
   a. Click the **Personalize Home Page** button at the bottom right of the screen:

   b. In the **My Home** group, click the **Open App Finder** tile:

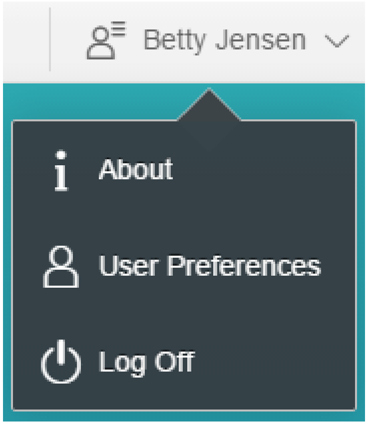
   

   c. Select the catalog **eFLOW AP for SAP**, then click the **Add tile** button  below the **eFLOW Resolve** app.

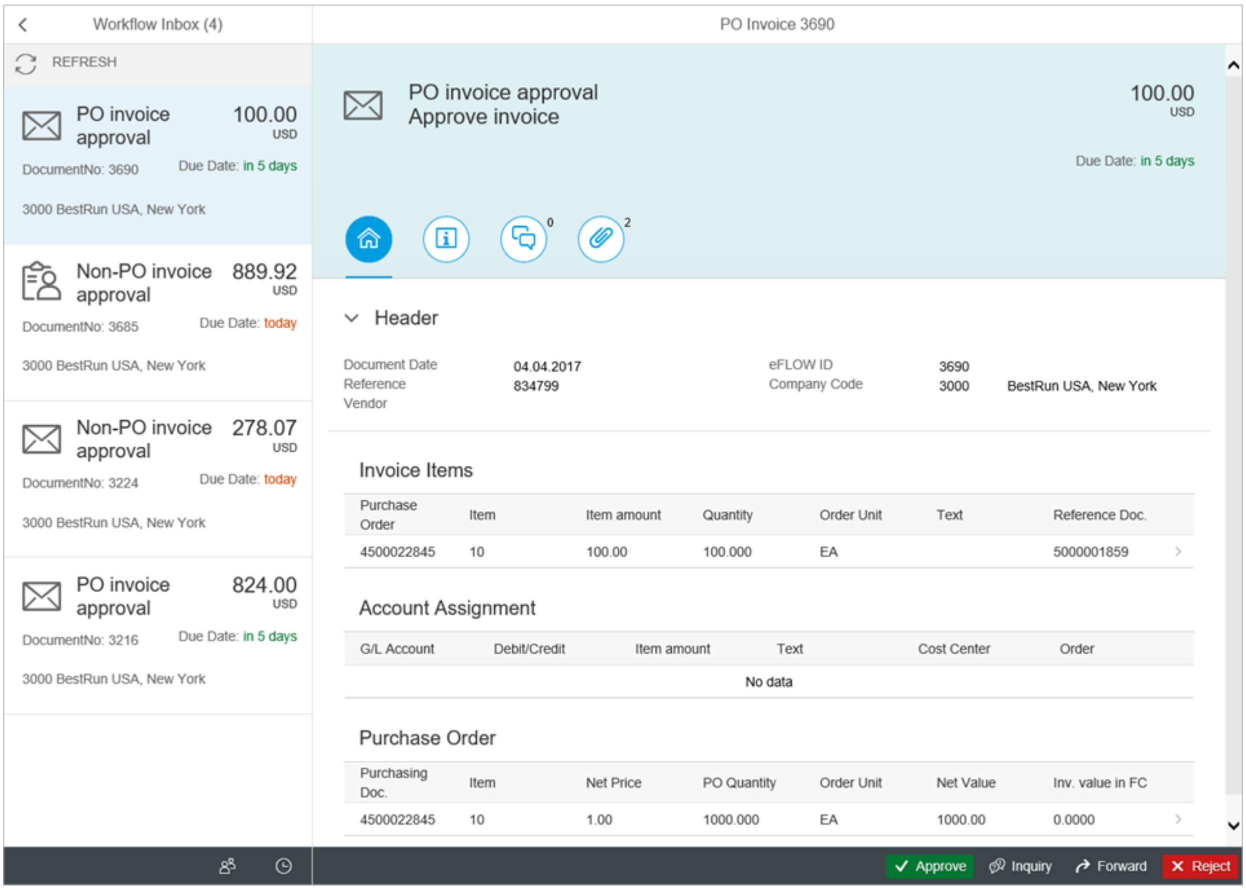
   See the SAP documentation for more information on personalizing your Fiori homepage.

To log out again, click the **Options** button at the top right of the screen and select **Log Off**.



Workflow Inbox

After you log on, the eFLOW Resolve App window displays your **Workflow Inbox**, which contains a list of documents that have been sent to you in a workflow. As you are working, new documents may arrive in your workflow inbox. To display the latest documents, click the **REFRESH** button.



To view a list of documents sent to users for whom you act as a substitute, click the **Substitution Documents** button below the **Workflow Inbox**.

> **Note:** This list displays documents of passive substitutes only. Documents of active substitutes are displayed in your **Workflow Inbox**. Active substitutes are intended for planned absences, such as vacation. Passive substitutes are intended for unplanned absences, such as sickness. See the SAP documentation for information on maintaining substitutes.

To view a list of workflows that you have already processed, click the **Workflow History** button .

To return to your inbox, click the **Workflow Inbox** button .

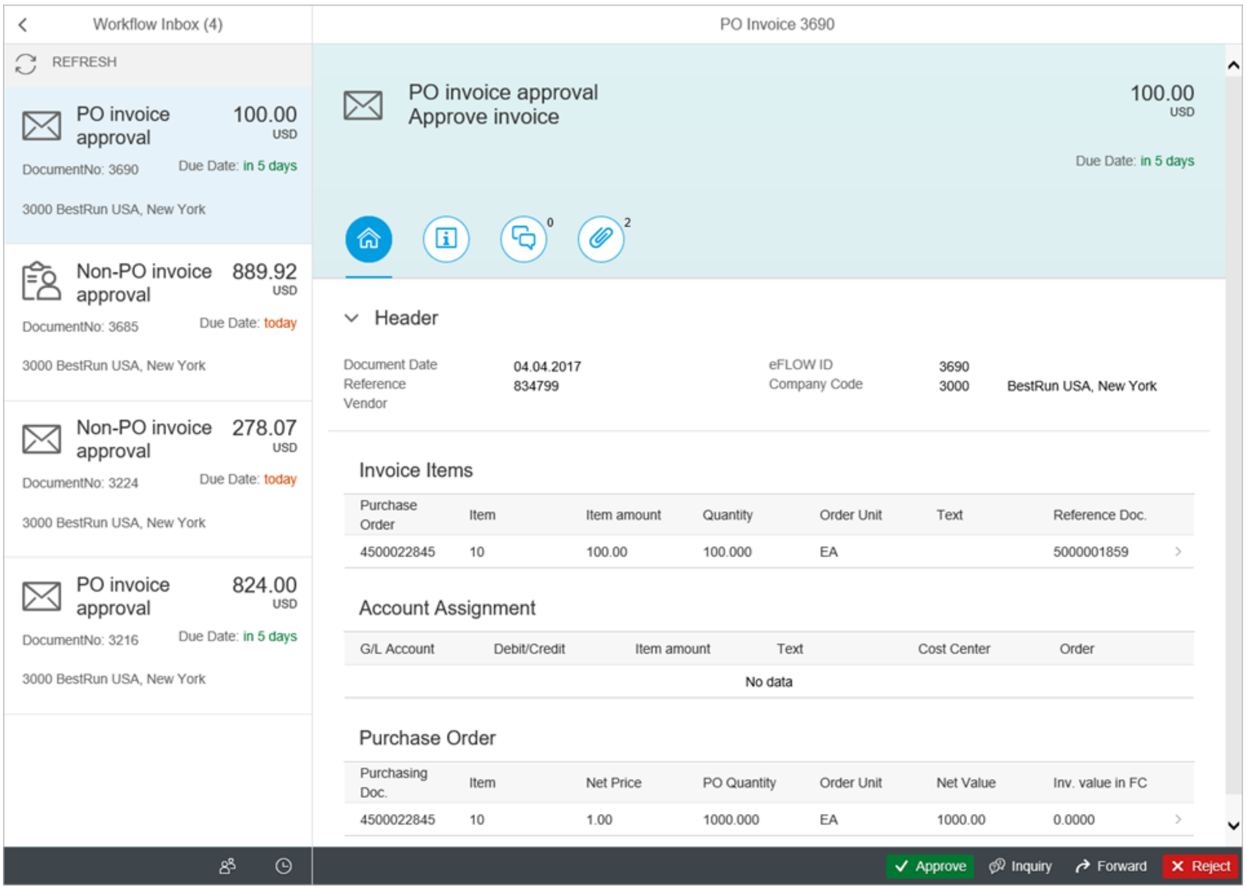
For each document, the following information is displayed:

- An icon indicating the workflow status. See Workflow icons for more information.
- Name of the workflow task

- Invoice amount and currency
- eFLOW document number
- Workflow due date. This is specified by the workflow sender and is displayed in orange if the task is due for completion today, and in red if the workflow task is overdue.
- Invoice receiver
- Invoice supplier

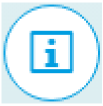
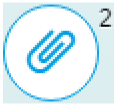
Document detail

To view details of an invoice, click on the invoice document in the **Workflow Inbox**.



Click the following buttons to display information:

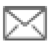
Button	Description
	Display the invoice details.

Button	Description
	Display the Workflow Audit Trail. See Workflow Audit Trail for more information.
	Display notes. The number next to the icon indicates how many notes are available. See Notes for more information.
	Display the invoice image and other attachments. The number next to the icon indicates how many attachments are available. See Attachments for more information.

Use the buttons below the invoice details to process the document.

Workflow icons

The following workflow status icons may be displayed in the **Workflow Inbox** and the document detail.

Icon	Description
	Not yet processed
	Sent to a user for whom you are an active substitute
	Forwarded to another user
	Escalated. The document has been forwarded to another user because the due date has passed and you have not processed the document.
	Inquiry from another user
	Inquiry answered
	Approved

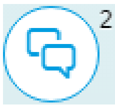
Icon	Description
	Rejected
	Called back from workflow

Notes

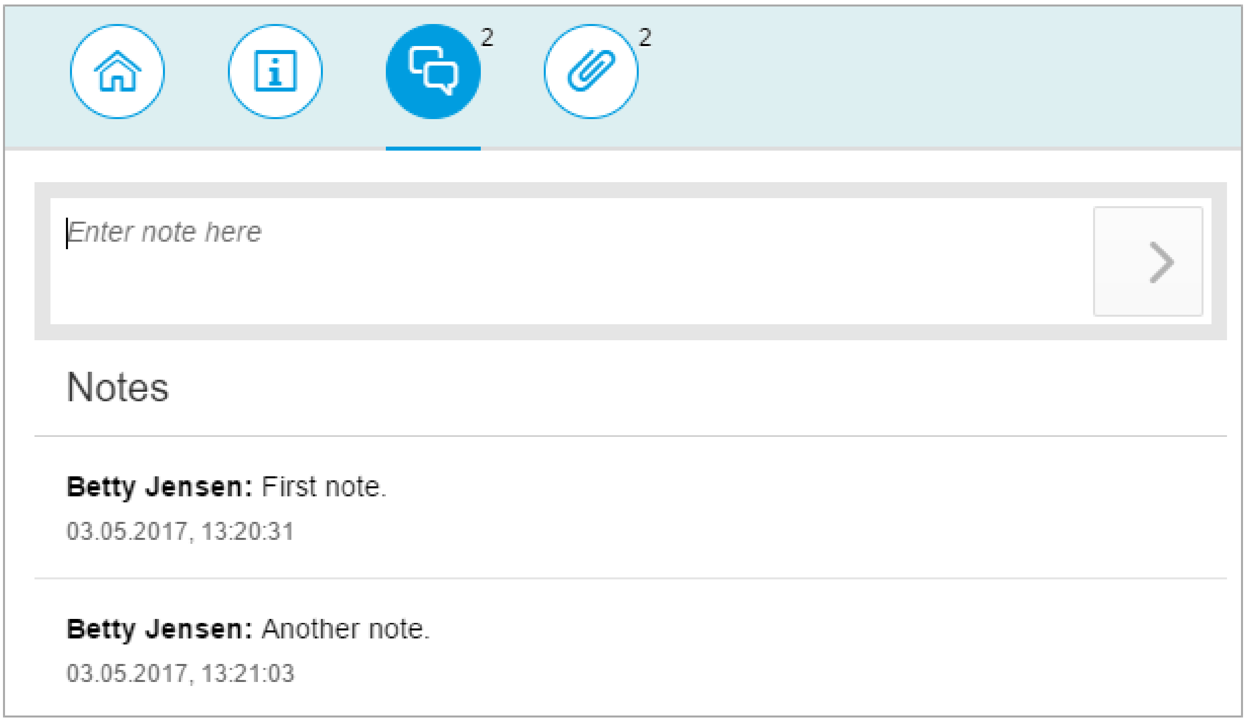
Notes enable you to communicate with other users within eFLOW Control and eFLOW Resolve. Notes are displayed when you click the **Notes** button in the document detail. They are saved with the document as an attachment and permanently archived. Notes are not passed to the SAP document.

Note: You cannot delete a note after saving it.

1. To view or hide notes, click the **Notes** button:



2. To add a note, click in the **Enter note here** box and type your text.

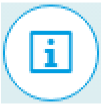


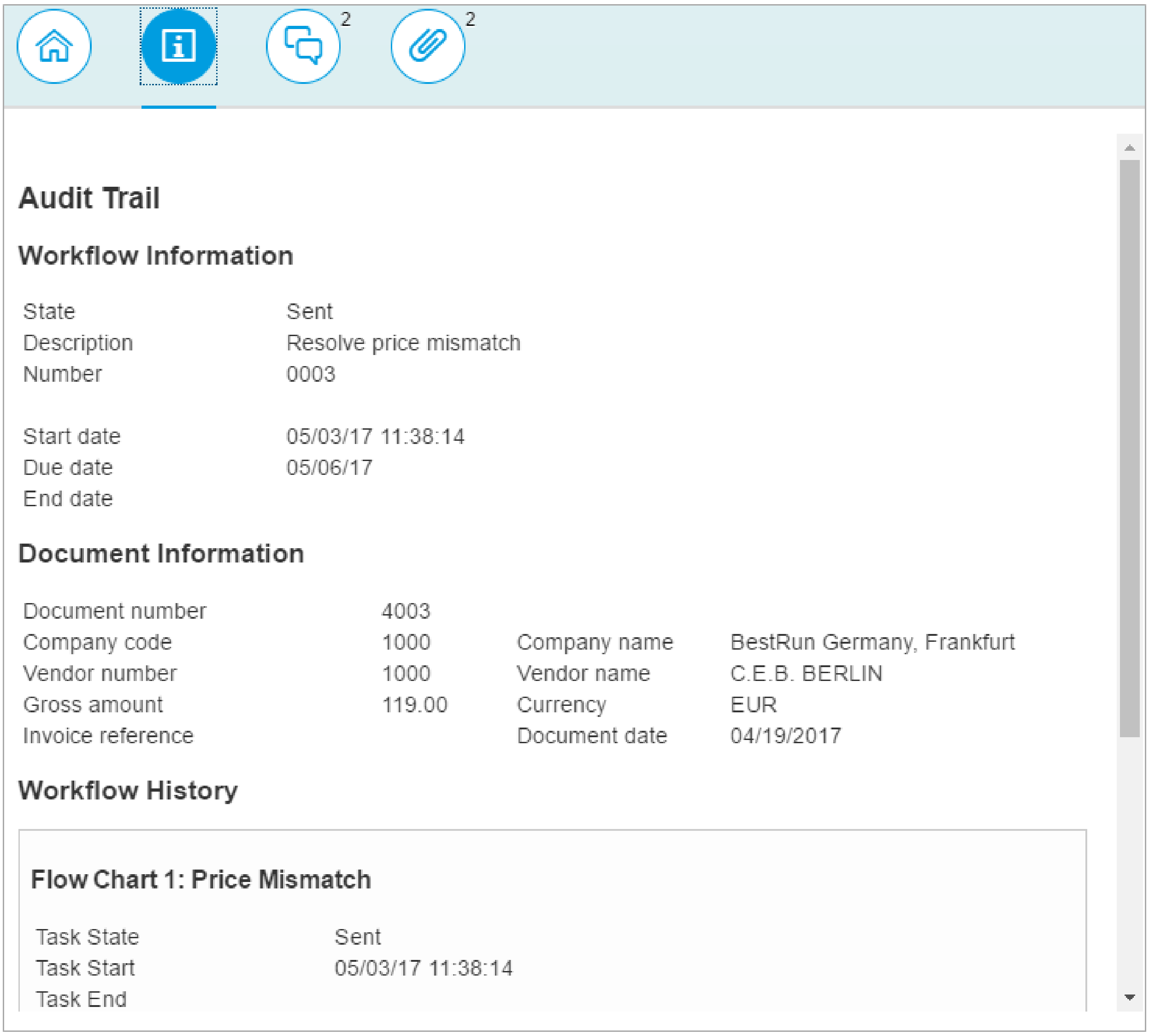
3. Click the **Submit** button:

Workflow audit trail

The Workflow Audit Trail provides information about all workflows a document was sent to.

To view or hide the Workflow Audit Trail, click the **Workflow Audit Trail** button:

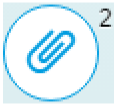




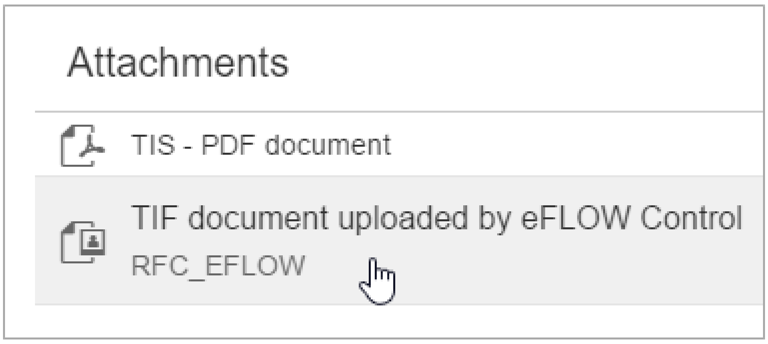
Attachments

To view the invoice image or other attachments:

1. Click the **Attachments** button:

2. Click on the attachment you want to view.

Depending on the file type, the document is displayed in a new browser tab or window, or is downloaded to your computer.

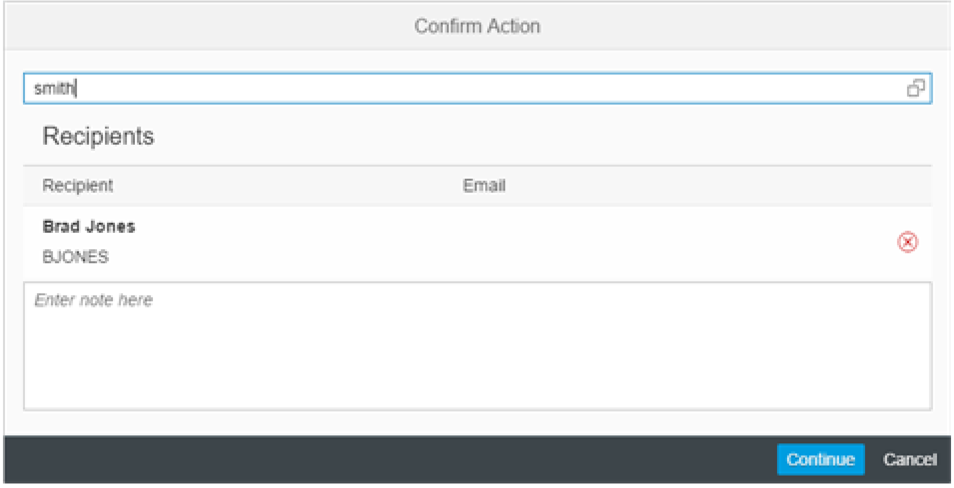
Approve a document

1. Open the document and click the  **Approve** button below the document details.

   If the workflow has a next step which is configured for manual assignment of recipients, you must add recipients.

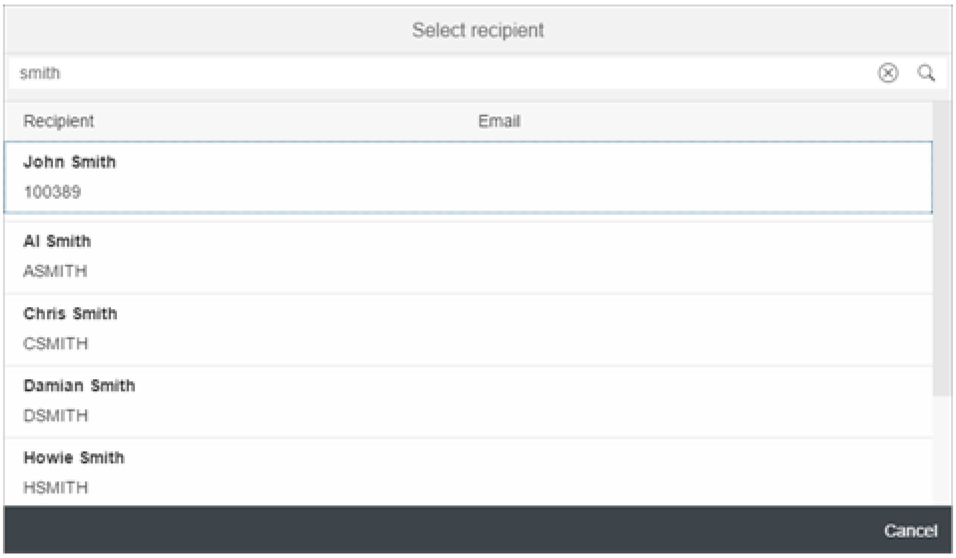
2. Search for recipients:

   a. Type the recipient name in the search box, then click the search button .



   You can also enter part of the name followed by an asterisk, for example, smi*.

   b. Select the recipient from the search results list.



   The recipient is added to the recipients list.

3. Type a note. This may be mandatory or optional, depending on the workflow configuration.
4. Click **Continue**.

Reject a document

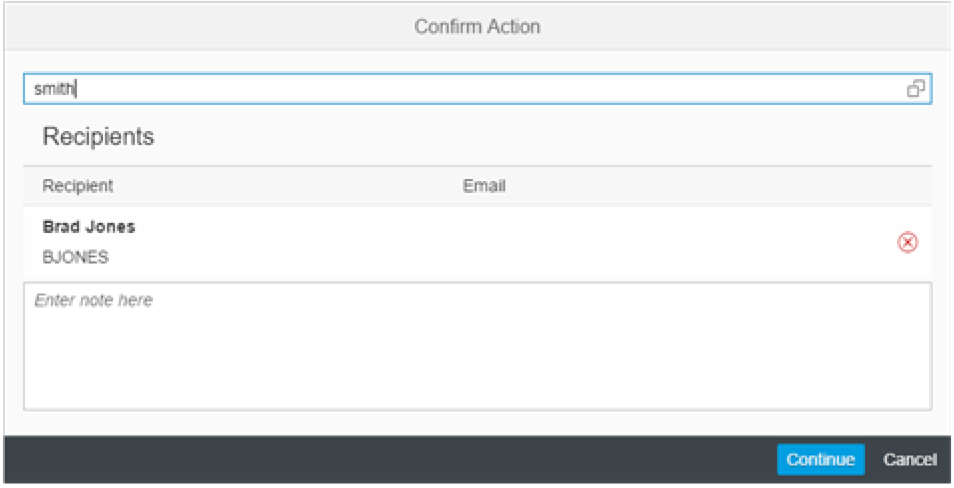
Open the document and click the **Reject** button below the document details.

Forward a document

You can forward documents to another user. Forwarding passes responsibility for the document to that user. The document is no longer displayed in your worklist.

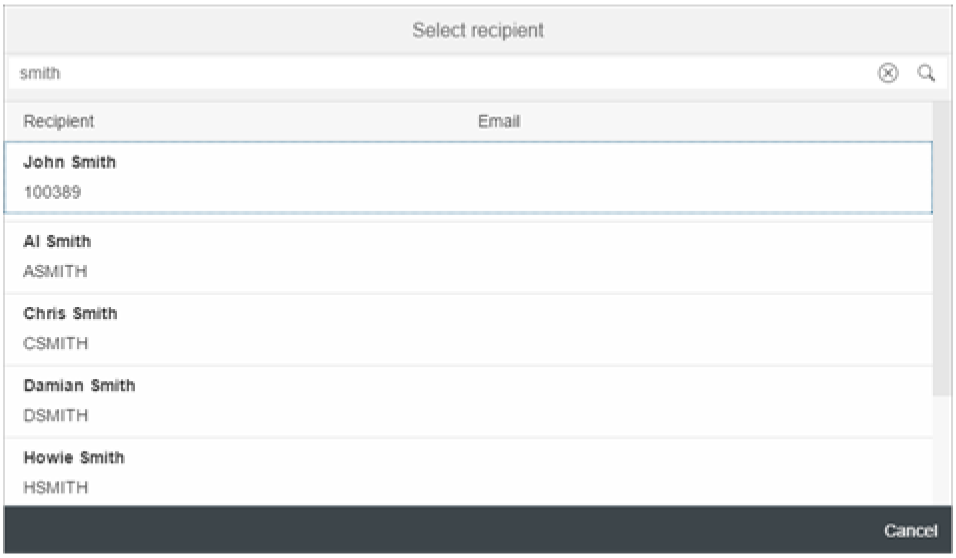
1. Open the document and click the **Forward** button below the document details.
2. Search for recipients:

   a. Type the recipient name in the search box, then click the search button .

   You can also enter part of the name followed by an asterisk, for example, smi*.

   b. Select the recipient from the search results list.

   The recipient is added to the recipients list.

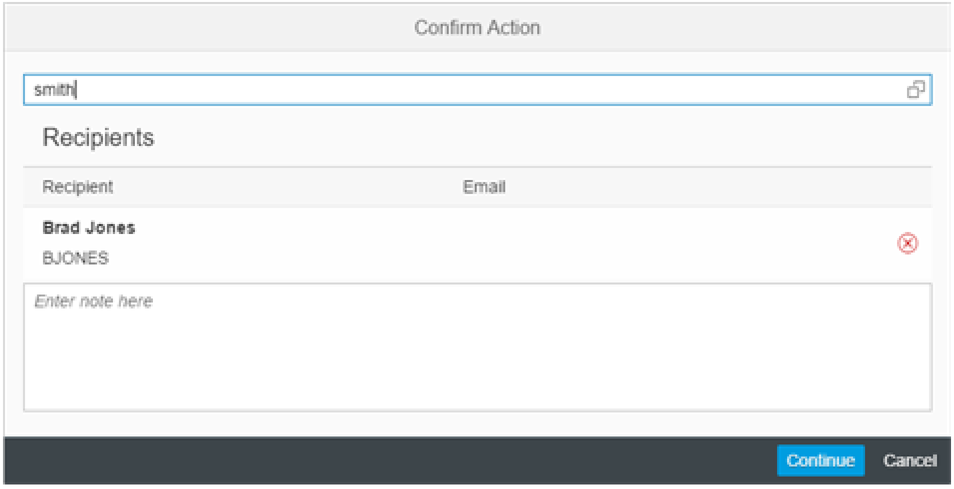
3. Type a note. This may be mandatory or optional, depending on the workflow configuration.
4. Click **Continue**.

Send an inquiry

You can send inquiries to obtain information from other users.

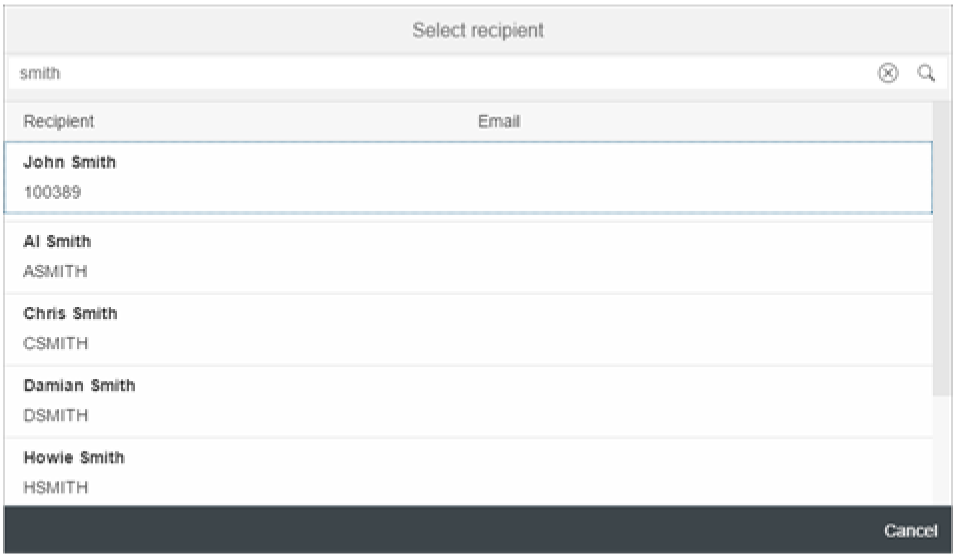
1. Open the document and click the **Inquiry** button below the document details.
2. Search for recipients:

   a. Type the recipient name in the search box, then click the search button .

   You can also enter part of the name followed by an asterisk, for example, smi*.

   b. Select the recipient from the search results list.

   The recipient is added to the recipients list.

3. Type your inquiry.
4. Click **Continue**.

The document appears in the inquiry recipient's **Workflow Inbox**. You can view your inquiry and the recipient's answer by clicking the **Notes** button in the document detail:

Answer an inquiry

When another workflow processor sends you an inquiry about a document, the document appears in your **Workflow Inbox** with the **Inquiry** icon .

To answer the inquiry:

1. Open the document and click the **Notes** button:

2. Enter some text, then click the **Submit** button:

3. Click the  **Answer** button below the document details.

The document is moved to your **Workflow History** document list.

Change your password

1. Open your web browser and enter the eFLOW Resolve Fiori App URL in the address line.
2. Enter your user name and your password.
3. Click **Change password**.
4. Enter your old password.
5. Enter your new password, then enter it again to confirm.
6. Click **Change**.