

eFLOW Resolve

SAP Quick Start Guide

Version 5.2

eFLOW Resolve quick start

This quick start guide explains how to log on to eFLOW Resolve in SAP and describes the main features. For more detailed information, see the *eFLOW Resolve SAP User Guide*.

Notification of a new workflow

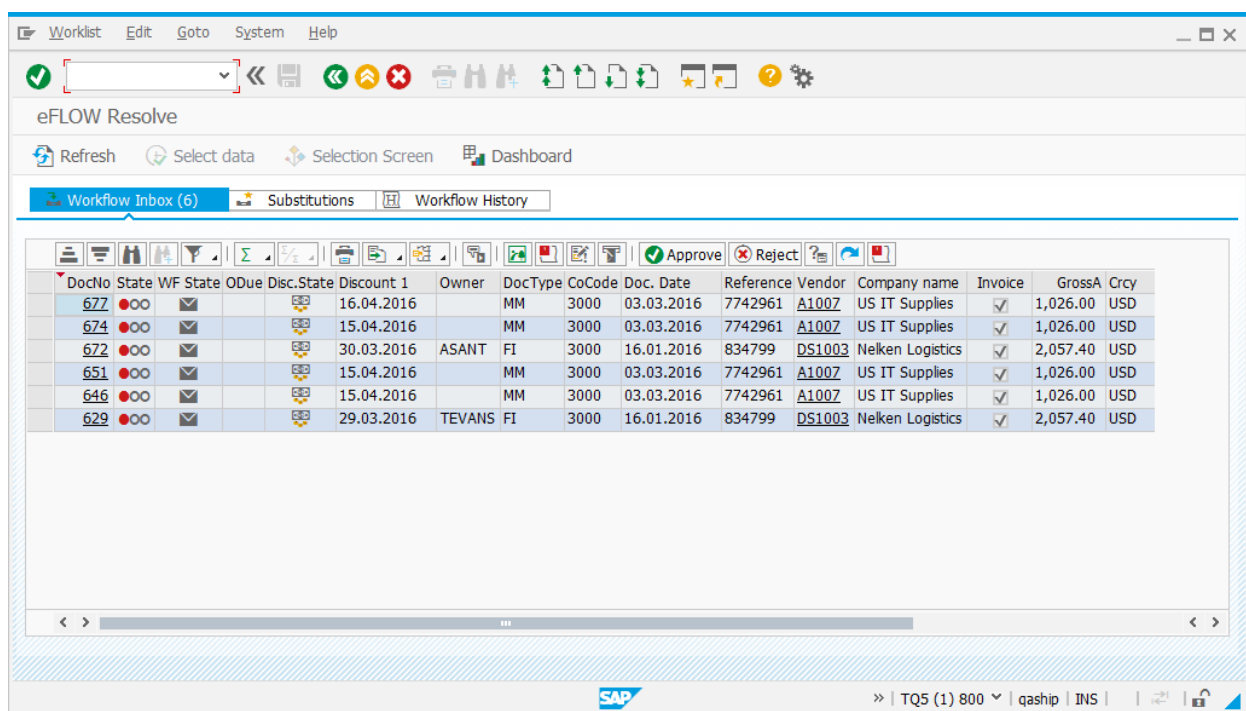
You receive an email notification for each document sent to you in workflow.

You process the workflow document in the eFLOW Resolve software inside SAP.

Start eFLOW Resolve

To start eFLOW Resolve, log on to SAP and enter transaction `/n/tisa/eflow_resolve`.

The eFLOW Resolve window displays the document list.



The screenshot shows the SAP eFLOW Resolve interface. At the top, there is a menu bar with 'Worklist', 'Edit', 'Goto', 'System', and 'Help'. Below the menu bar is a toolbar with various icons for navigation and actions. The main area is titled 'eFLOW Resolve' and contains a sub-menu with 'Refresh', 'Select data', 'Selection Screen', and 'Dashboard'. Below this, there are tabs for 'Workflow Inbox (6)', 'Substitutions', and 'Workflow History'. The 'Workflow Inbox (6)' tab is active, displaying a table of documents. The table has columns for DocNo, State, WF State, ODue, Disc.State, Discount 1, Owner, DocType, CoCode, Doc. Date, Reference, Vendor, Company name, Invoice, GrossA, and CrCy. The table contains six rows of data, each representing a document with its respective details.

DocNo	State	WF State	ODue	Disc.State	Discount 1	Owner	DocType	CoCode	Doc. Date	Reference	Vendor	Company name	Invoice	GrossA	CrCy
677	●○○	✉		📧	16.04.2016		MM	3000	03.03.2016	7742961	A1007	US IT Supplies	✓	1,026.00	USD
674	●○○	✉		📧	15.04.2016		MM	3000	03.03.2016	7742961	A1007	US IT Supplies	✓	1,026.00	USD
672	●○○	✉		📧	30.03.2016	ASANT	FI	3000	16.01.2016	834799	DS1003	Nelken Logistics	✓	2,057.40	USD
651	●○○	✉		📧	15.04.2016		MM	3000	03.03.2016	7742961	A1007	US IT Supplies	✓	1,026.00	USD
646	●○○	✉		📧	15.04.2016		MM	3000	03.03.2016	7742961	A1007	US IT Supplies	✓	1,026.00	USD
629	●○○	✉		📧	29.03.2016	TEVANS	FI	3000	16.01.2016	834799	DS1003	Nelken Logistics	✓	2,057.40	USD

Document list

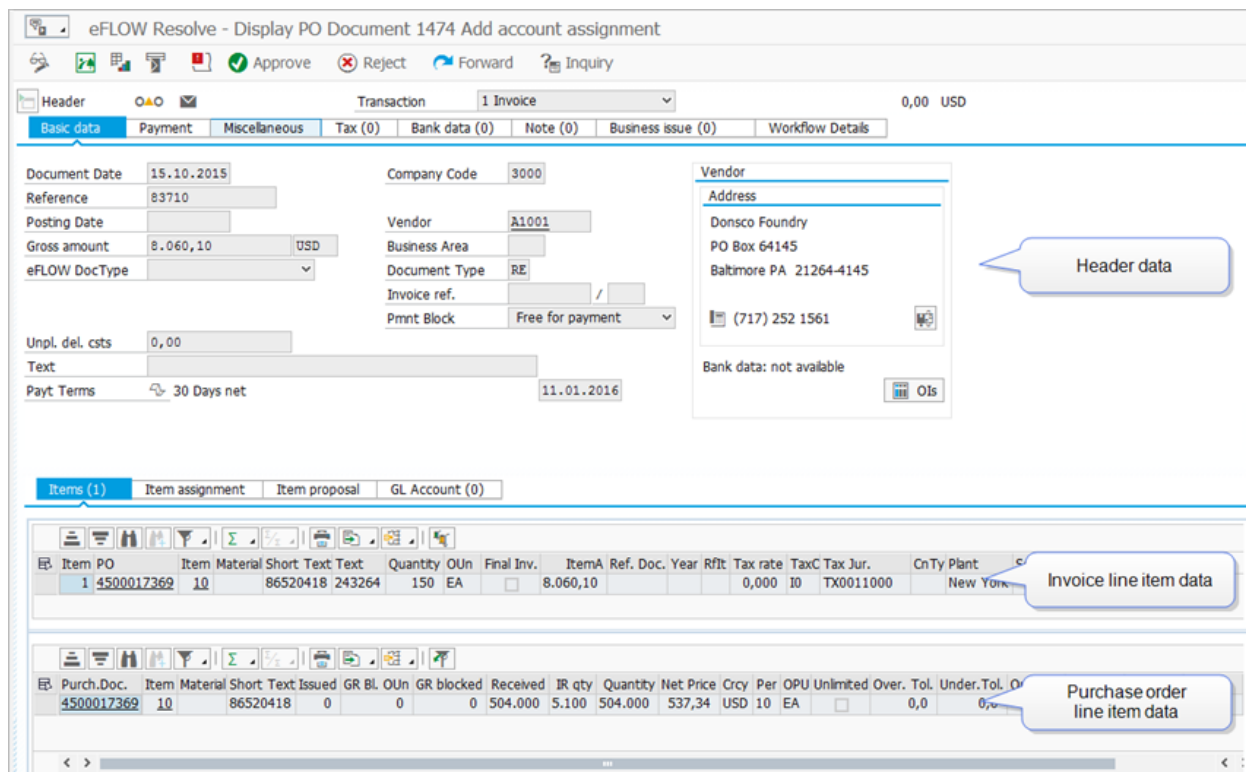
The document list displays documents in the following tabs.

Tab	Description
Workflow Inbox	All documents sent to you in workflow but not yet processed.
Substitutions	All documents sent to users for whom you act as a substitute.
Workflow History	All documents sent to you in workflow that you have processed, or for which the workflow was canceled.

Document detail

To open the document detail, in the document list **DocNo** column, click the document number.

PO invoice



The screenshot displays the SAP eFLOW Resolve interface for displaying a PO document (1474). The header section shows document details such as Date (15.10.2015), Reference (83710), and Gross amount (8.060,10 USD). A vendor popup window shows the address for Donsco Foundry in Baltimore, PA. Below the header, there are two tables: 'Invoice line item data' and 'Purchase order line item data'. The 'Purchase order line item data' table shows the original PO details, including Item 10, Material 86520418, and a quantity of 10.

Non-PO invoice

G/L ac.	G/L Account	Text	ItemA	D/C	Cost	Ctr	SD	Doc.	Item	Order	Tax rate	Tx	Tax Jur.	Network	OpAc	WBS Elem.	FA	Comt	Item	COAr	Prof	
451000	Building maintenance		1.905,00		4300						0,000	II	IL0000000									

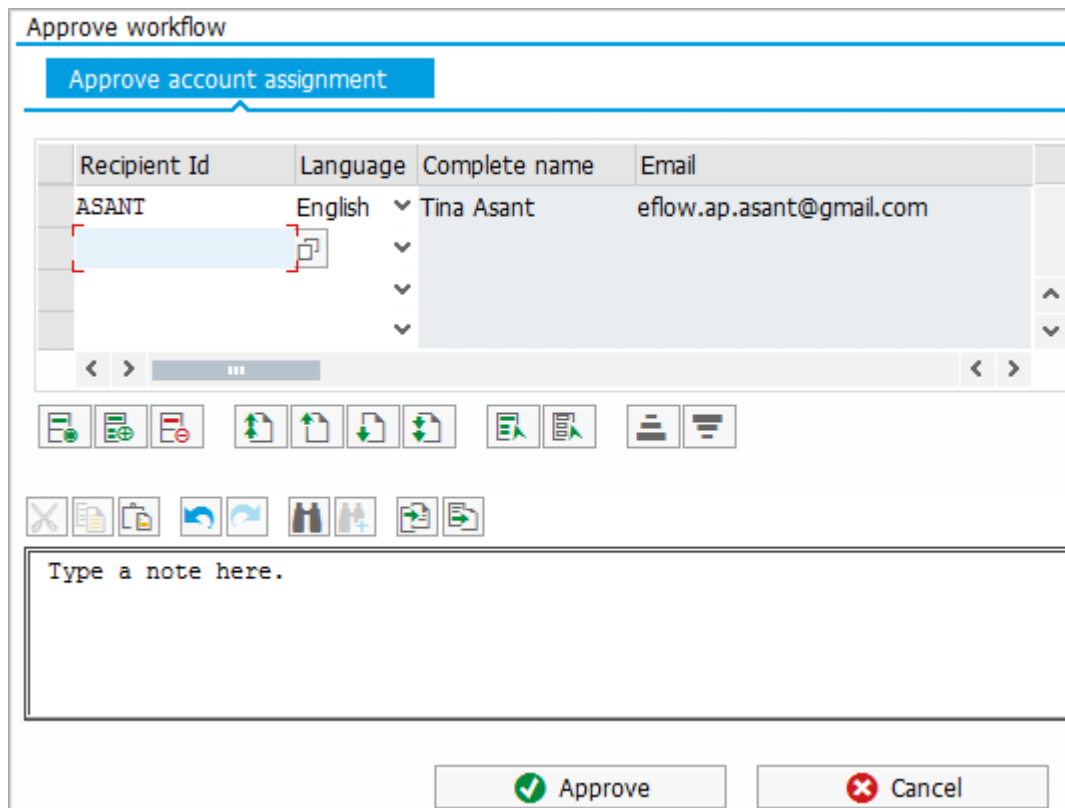
Workflow actions

This section describes the actions that you can perform when processing a document in workflow.

Approve a document

Click the **Approve workflow** button

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




Reject a document

To reject a document, click the **Reject workflow** button .


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. Click the **Forward workflow** button .
2. Enter a recipient and click the **Forward workflow** button.

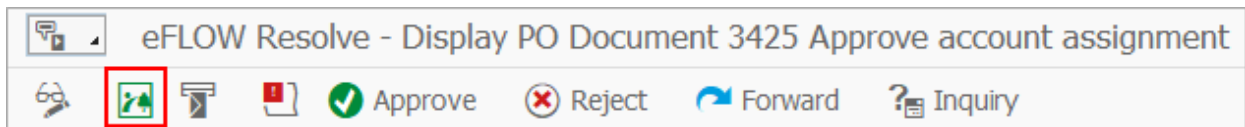
Send an inquiry


You can send inquiries to obtain information from other users.

1. Click the **Send inquiry** button .
2. Enter a recipient and type your inquiry in the text box.
3. Click the **Send inquiry** button.

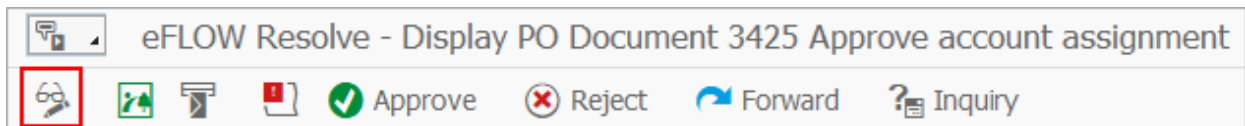
Other features

Document image



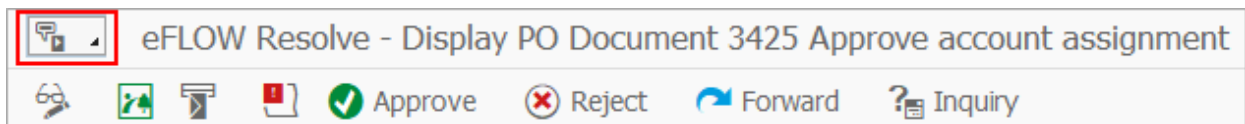
To display the document image, click the **Show image** button .

Change mode






To add account assignments to the invoice line items, open the document in change mode. You can only edit the document if the workflow allows changes. Most workflow configurations do not allow changes to the document.



Attachments



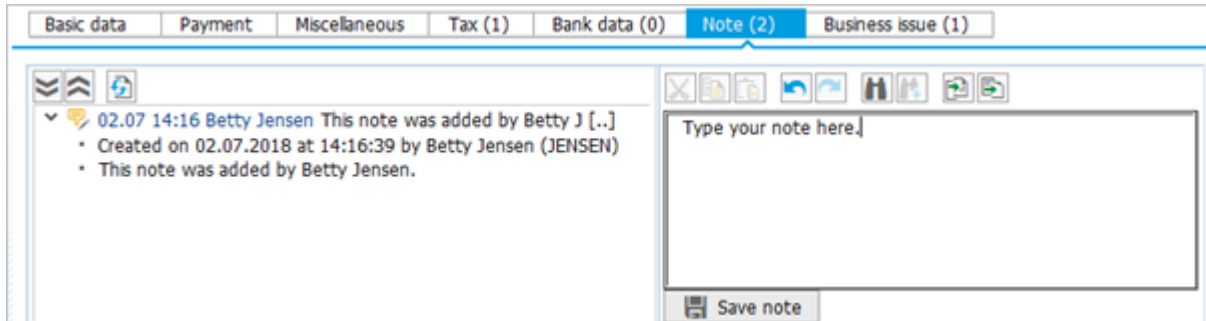
You can add files as attachments to eFLOW Control documents. Attachments are available in the eFLOW Control document and, after posting, in the corresponding SAP document.

To add an attachment:



1. Click the **Services for Object** button .
2. Click the **Create** button  and select **Store Business document**.
3. Select a **Document Type** and then drag and drop the file from your file system into the empty field.
4. Click the **Continue** button .

To view attachments, click the **Services for Object** button  and then click the **Attachment list** button . Double-click the attachment to open it.

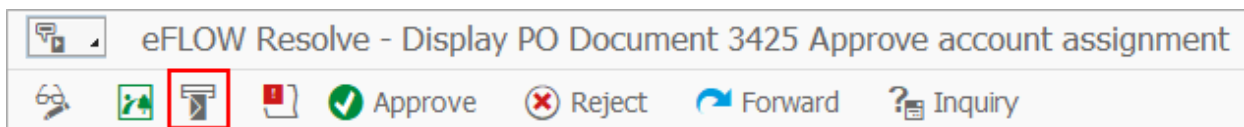
Notes






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

1. Click the **Note** tab.
2. To add a note, type in the text box on the right and click the **Save note** button.
3. Click the arrows >v to view or hide the entire note text, or the buttons   to view or hide all note texts.

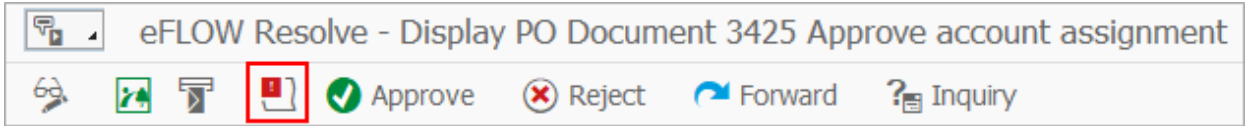
Messages



You can send email messages to any valid email address. eFLOW Resolve provides customizable, predefined message templates. The invoice image is attached to the message as a PDF file.

1. Click the **Send message** button .
2. Enter the email addresses to send the message to. The vendor email address is inserted by default.
3. Click the **Insert Row**  or **Delete Row**  button to add or remove recipient addresses.
4. Enter the message text:
 - To use a template, select the **Language** and then the **Template**. Depending on the system configuration, some templates may only be available for specific company codes.
 - To use your own text, type the text in the lower text box. If you select a template, the template text and your own text appear in the message. To use only your own text, select the blank entry in the **Template** list.
5. Click the **Send** button.

Workflow audit trail

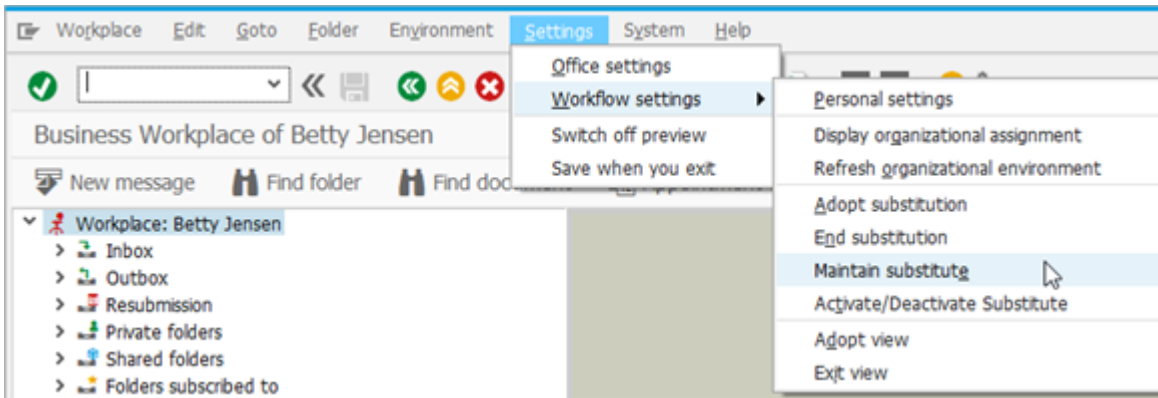



The workflow audit trail provides information about all workflows a document was sent to.

To view the workflow audit trail, click the **Workflow audit trail** button .

Substitutes

Substitutes are maintained in the SAP transaction **SBWP**.



Active substitutes can display and process your documents for a specified time period. They receive email notifications when a document is sent to you in workflow during that time period. Documents of active substitutes are indicated by the **Substituted active** icon  in the document list **Workflow Inbox** tab.

Passive substitutes are assigned for an unlimited time period. They receive no email notifications. Documents of passive substitutes are displayed in the document list **Substitutions** tab.