

eFLOW Resolve Web Application

Quick Start Guide

Version 5.2

eFLOW Resolve quick start

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

Start eFLOW Resolve

To start eFLOW Resolve, open your web browser and enter the eFLOW Resolve URL in the address line.

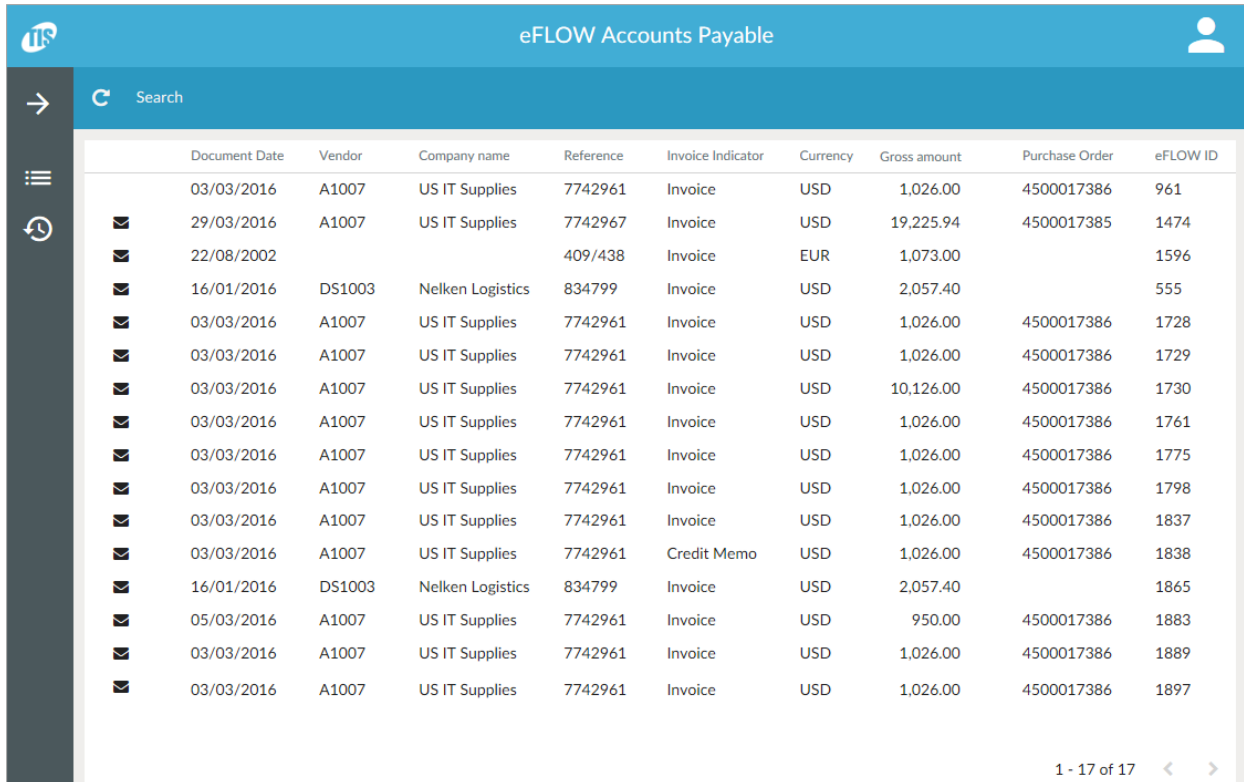
Enter your user name and your password, then click the **Login** button.



The image shows a login form with a dark blue background. It contains three main elements: a 'Username' label above a text input field containing the text 'asant'; a 'Password' label above a text input field filled with asterisks; and a blue 'Login' button at the bottom.

Document list


After you log on, the eFLOW Resolve window displays a list of documents that have been sent to you in a workflow.



	Document Date	Vendor	Company name	Reference	Invoice Indicator	Currency	Gross amount	Purchase Order	eFLOW ID
	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	961
✉	29/03/2016	A1007	US IT Supplies	7742967	Invoice	USD	19,225.94	4500017385	1474
✉	22/08/2002			409/438	Invoice	EUR	1,073.00		1596
✉	16/01/2016	DS1003	Nelken Logistics	834799	Invoice	USD	2,057.40		555
✉	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	1728
✉	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	1729
✉	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	10,126.00	4500017386	1730
✉	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	1761
✉	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	1775
✉	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	1798
✉	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	1837
✉	03/03/2016	A1007	US IT Supplies	7742961	Credit Memo	USD	1,026.00	4500017386	1838
✉	16/01/2016	DS1003	Nelken Logistics	834799	Invoice	USD	2,057.40		1865
✉	05/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	950.00	4500017386	1883
✉	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	1889
✉	03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	1897

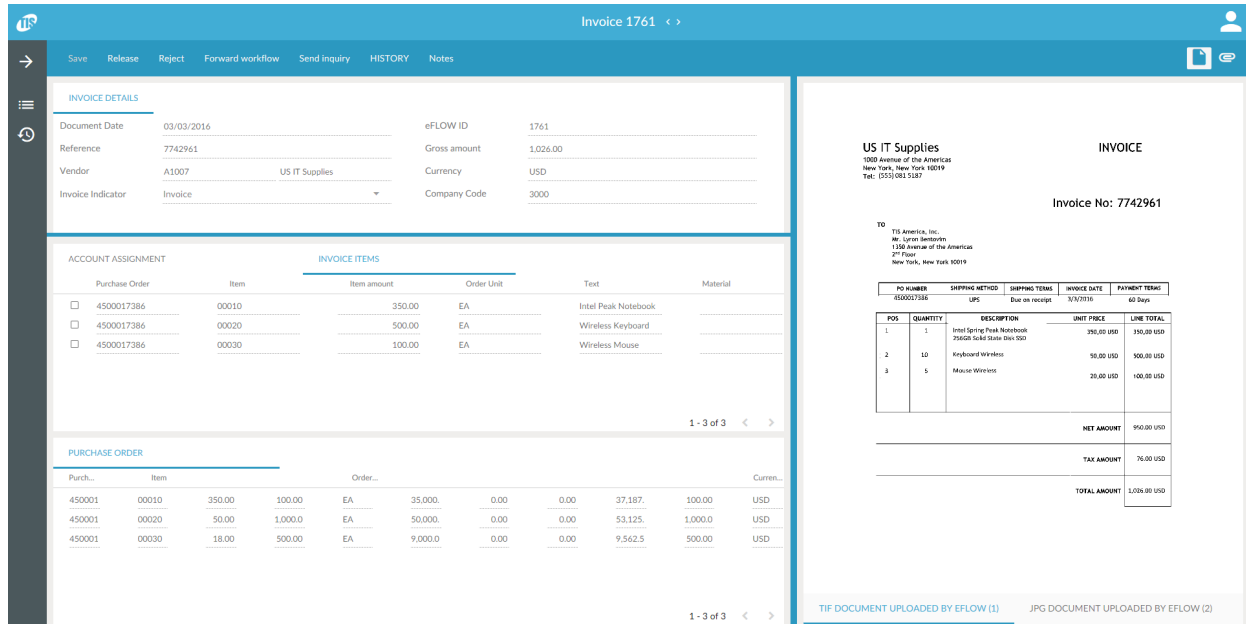
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To view a list of workflows that you have already processed, click the on **Previous workflows** button .

To return to the document list, click on the **My workflows** button .

Document detail

To view details of an invoice, click on the invoice document in the document list or the **Previous workflows** list.



INVOICE DETAILS

Document Date	03/03/2016	eFLOW ID	1761
Reference	7742961	Gross amount	1,026.00
Vendor	A1007 US IT Supplies	Currency	USD
Invoice Indicator	Invoice	Company Code	3000

ACCOUNT ASSIGNMENT

Purchase Order	Item	Item amount	Order Unit	Text	Material
<input type="checkbox"/> 4500017386	00010	350.00	EA	Intel Peak Notebook	
<input type="checkbox"/> 4500017386	00020	500.00	EA	Wireless Keyboard	
<input type="checkbox"/> 4500017386	00030	100.00	EA	Wireless Mouse	

INVOICE ITEMS

POS	QUANTITY	DESCRIPTION	UNIT PRICE	LINE TOTAL
1	1	Intel Spring Peak Notebook 256GB Solid State Drive 15.6"	350.00 USD	350.00 USD
2	10	Keyboard Wireless	50.00 USD	500.00 USD
3	5	Mouse Wireless	20.00 USD	100.00 USD

PURCHASE ORDER

Purch...	Item	Order...	Item amount	Order Unit	Text	Material	Current...
450001	00010	350.00	100.00	EA	35,000.00	0.00	37,187.00
450001	00020	50.00	1,000.00	EA	50,000.00	0.00	53,125.00
450001	00030	18.00	500.00	EA	9,000.00	0.00	9,562.50

US IT Supplies INVOICE
 Invoice No: 7742961

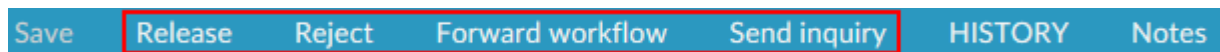
PO NUMBER	SHIPPING METHOD	SHIPPING TERMS	INVOICE DATE	PAYMENT TERMS
4500017386	UPS	Due on receipt	3/3/2016	60 Days

NET AMOUNT	TAX AMOUNT	TOTAL AMOUNT
960.00 USD	76.00 USD	1,026.00 USD

TIF DOCUMENT UPLOADED BY EFLOW (1) JPG DOCUMENT UPLOADED BY EFLOW (2)

Workflow actions


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



On small screens, these buttons are displayed as icons.



Approve a document

1. Open the document and click the **Approve** button .
2. If the workflow has a next step which is configured for manual assignment of recipients, you must add recipients. Click on **Search Term** and type the recipient name. Select the recipient from the search results list.




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

Reject a document

Open the document and click the **Reject** 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. Open the document and click the **Forward workflow** button .
2. Click on **Search Term** and type the recipient name. Select the recipient from the search results list.
3. Type a note. This may be mandatory or optional, depending on the workflow configuration.

Send an inquiry

You can send inquiries to obtain information from other users.

1. Open the document and click the **Send inquiry** button .
2. Click on **Search Term** and type the recipient name. Select the recipient from the search results list.
3. Type your inquiry.

Other features

Document image

The invoice image and other document attachments are displayed to the right of the document data in the document viewer.

Click the **Show image** button  to hide or display the document viewer.

Assign accounts


Depending on the workflow configuration, you may be able to assign accounts to invoice line items. You can only edit the document if the workflow allows changes. Most workflow configurations do not allow changes to the document.

In the line items area, click **Account Assignment**, then click the **Add** button and enter the details.

ACCOUNT ASSIGNMENT				
+ Add - Remove				
	G/L Account	Debit/Credit	Item amount	Cost Center
<input type="checkbox"/>	451000	Debit ▼	2,057.40	1000


Attachments

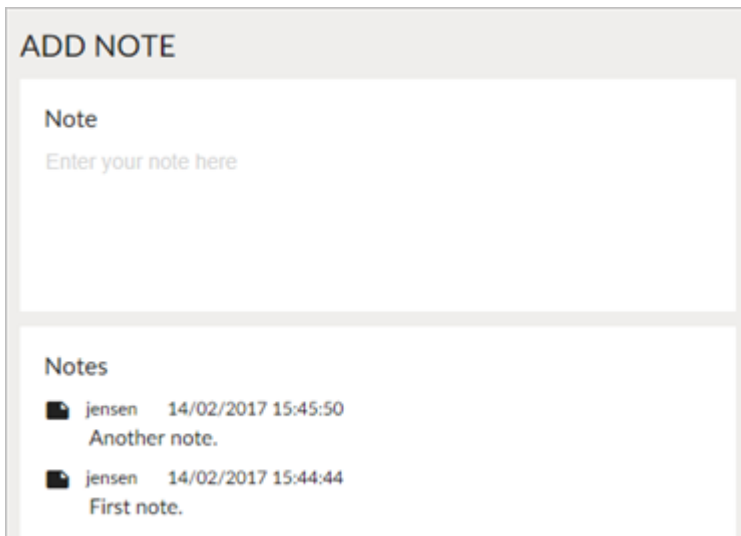
You can add files as attachments to eFLOW Control documents. Attachments are available in the eFLOW Control document and, after posting, in the corresponding SAP document. Attachments are displayed in the document viewer.

1. Click the **Download Attachments** button .
2. Drag the file from your file system into the upload area at the bottom of the screen, or click the **Add Attachment** button  to select and upload the file.

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.

1. To view or hide notes, click the **Notes** button .
2. To add a note, click in the **Note** box and type your text.



3. Click the **Save** button .


Workflow history

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

To view or hide the workflow history, click on the **History** button .

Substitutes

You can assign other users as substitutes to process your workflows during your absence.

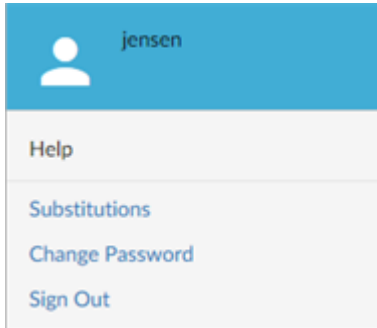
Active substitutes can display and process your documents for a specified time period. They receive email notifications when a document is sent to you in workflow during that time period. Documents of active substitutes are indicated by the **Substituted active** icon .

Passive substitutes are assigned for an unlimited time period. They receive no email notifications.

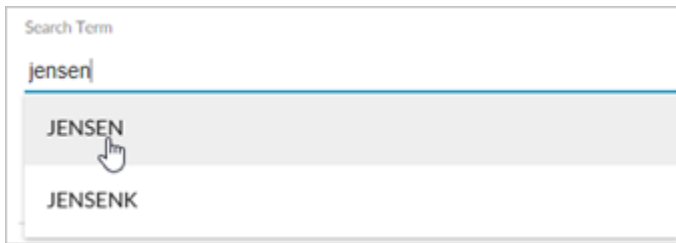
Documents of passive substitutes are indicated by the **Substituted passive** icon .

To assign a substitute:

1. Click the button at the top right of the screen and select **Substitutions**.



2. Click on **Search Term** and type the user name. Select the user from the search results list.



3. (Active substitutes only) Click the **Is Active** button and enter a **From Date** and **To Date**.

User Name	Name	From Date	To Date	Is Active
TEVANS	Blake Tevans	15/02/2017	22/02/2017	<input checked="" type="checkbox"/> X