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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

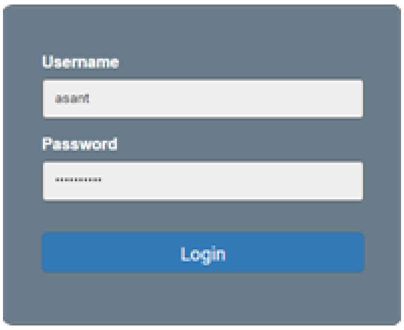
You receive an email notification for each document sent to you in workflow.

You process the workflow document in the eFLOW Resolve Web Application.

Start eFLOW Resolve

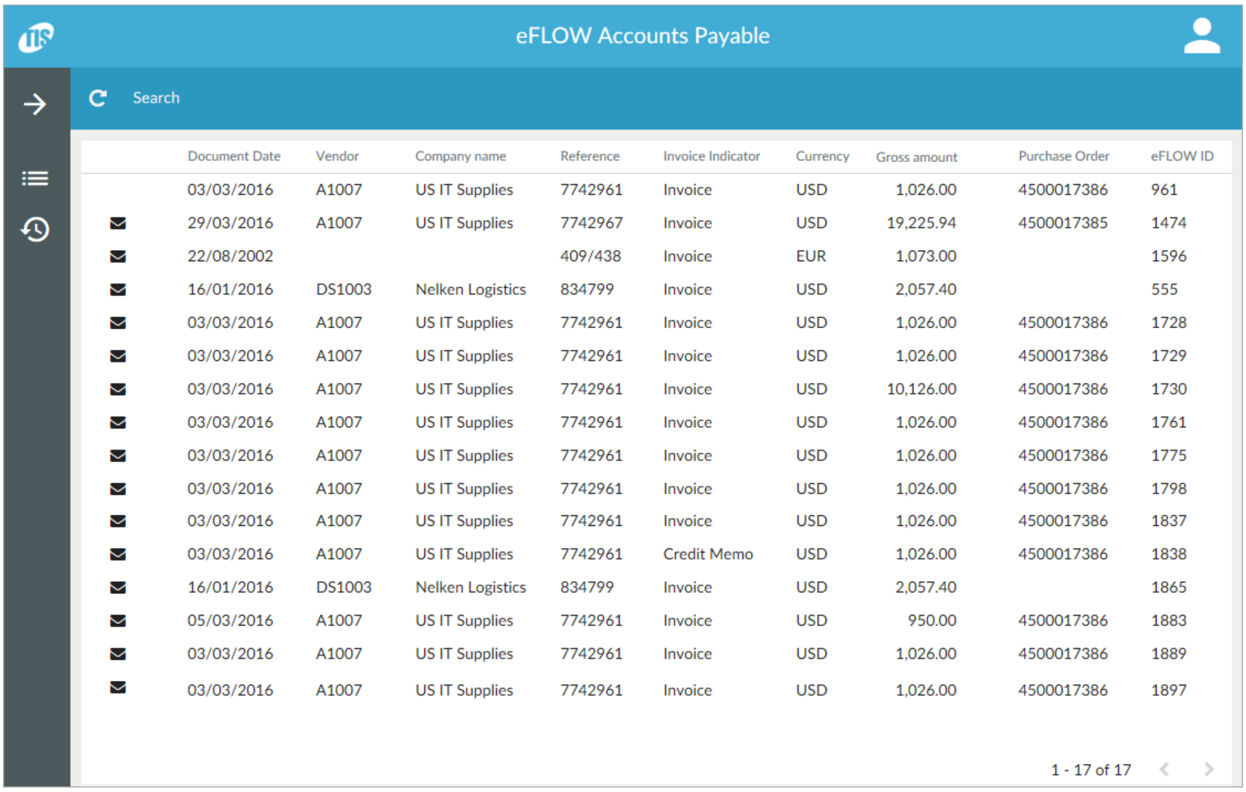
To start eFLOW Resolve, open your web browser and enter the eFLOW Resolve URL in the address line.

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



Document list

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



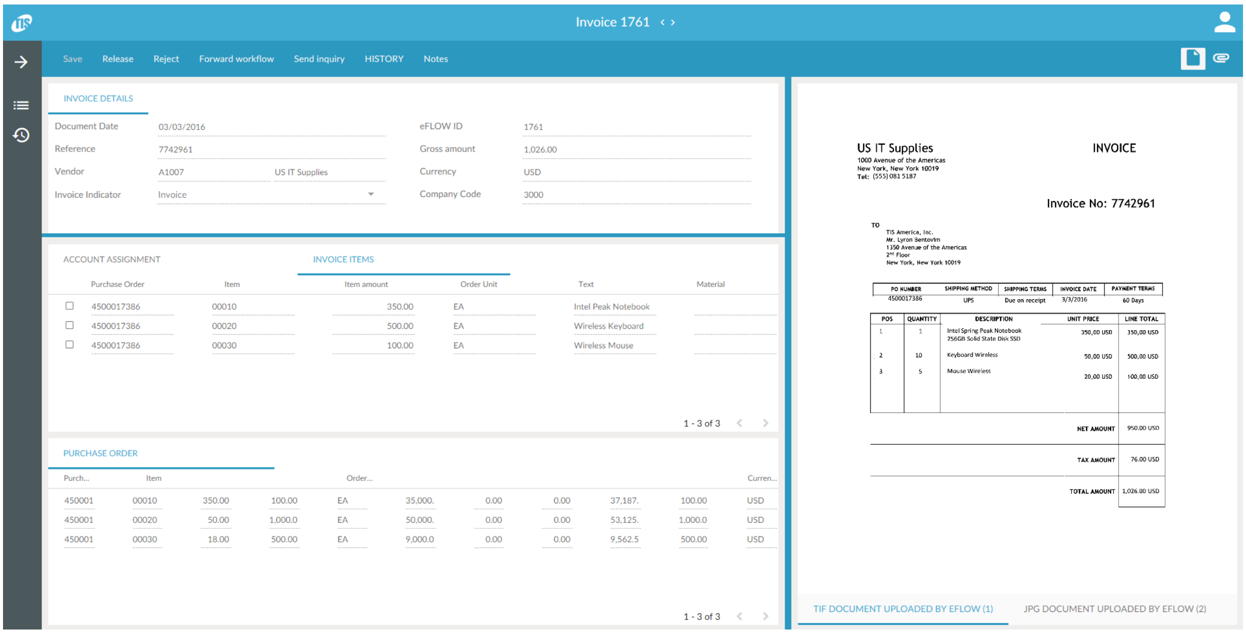
Document Date	Vendor	Company name	Reference	Invoice Indicator	Currency	Gross amount	Purchase Order	eFLOW ID
03/03/2016	A1007	US IT Supplies	7742961	Invoice	USD	1,026.00	4500017386	961
29/03/2016	A1007	US IT Supplies	7742967	Invoice	USD	19,225.94	4500017385	1474
22/08/2002			409/438	Invoice	EUR	1,073.00		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

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

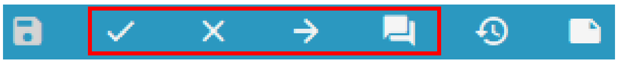
To view details of an invoice, click on the invoice document in the document list or the **Previous workflows** list.



Workflow actions

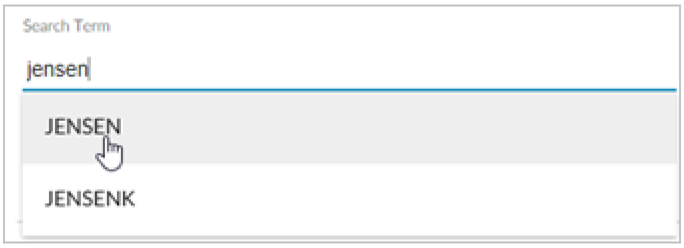
This section describes the actions that you can perform when processing a document in workflow.

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

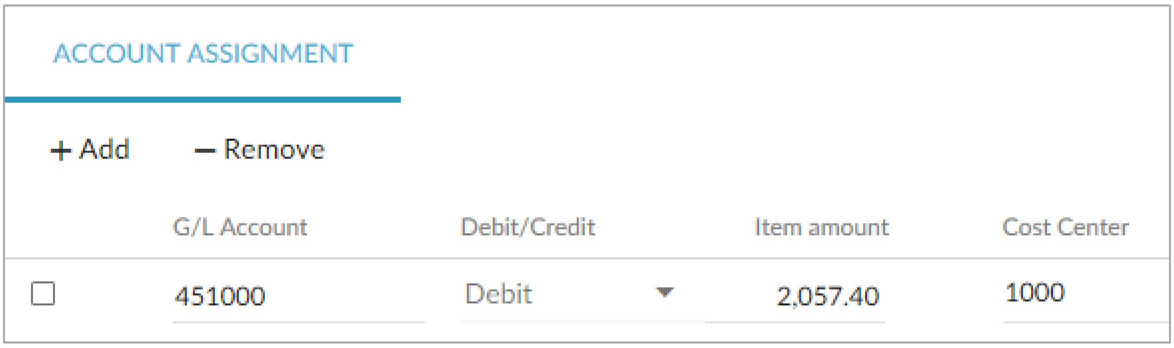
The invoice image and other document attachments are displayed to the right of the document data in the document viewer.

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.



Attachments

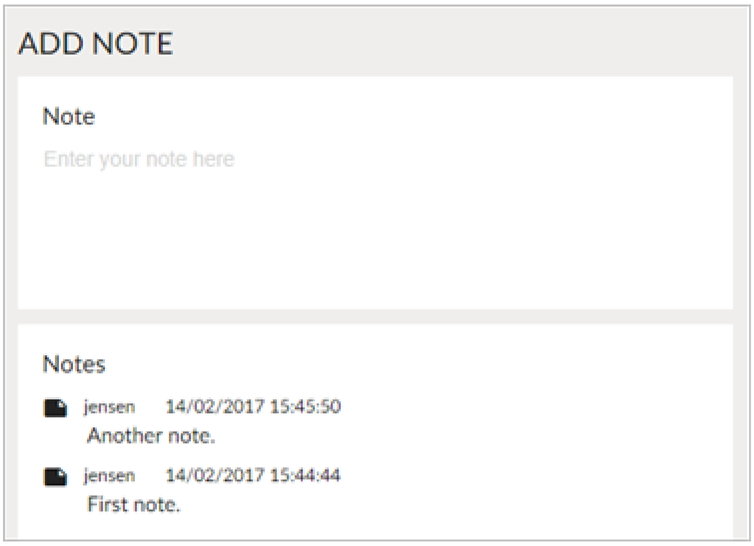
You can add files as attachments to eFLOW Control documents. Attachments are available in the eFLOW Control document and, after posting, in the corresponding SAP document. Attachments are displayed in the document viewer.

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

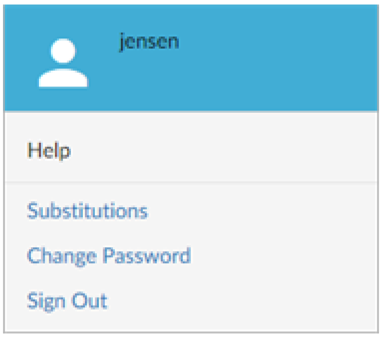
You can assign other users as substitutes to process your workflows during your absence.

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 .

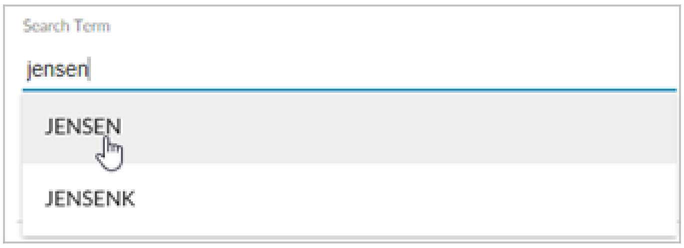
Passive substitutes are assigned for an unlimited time period. They receive no email notifications. Documents of passive substitutes are indicated by the **Substituted passive** icon .

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**.