Kofax eFLOW Resolve

SAP Quick Start Guide

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Table of Contents

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

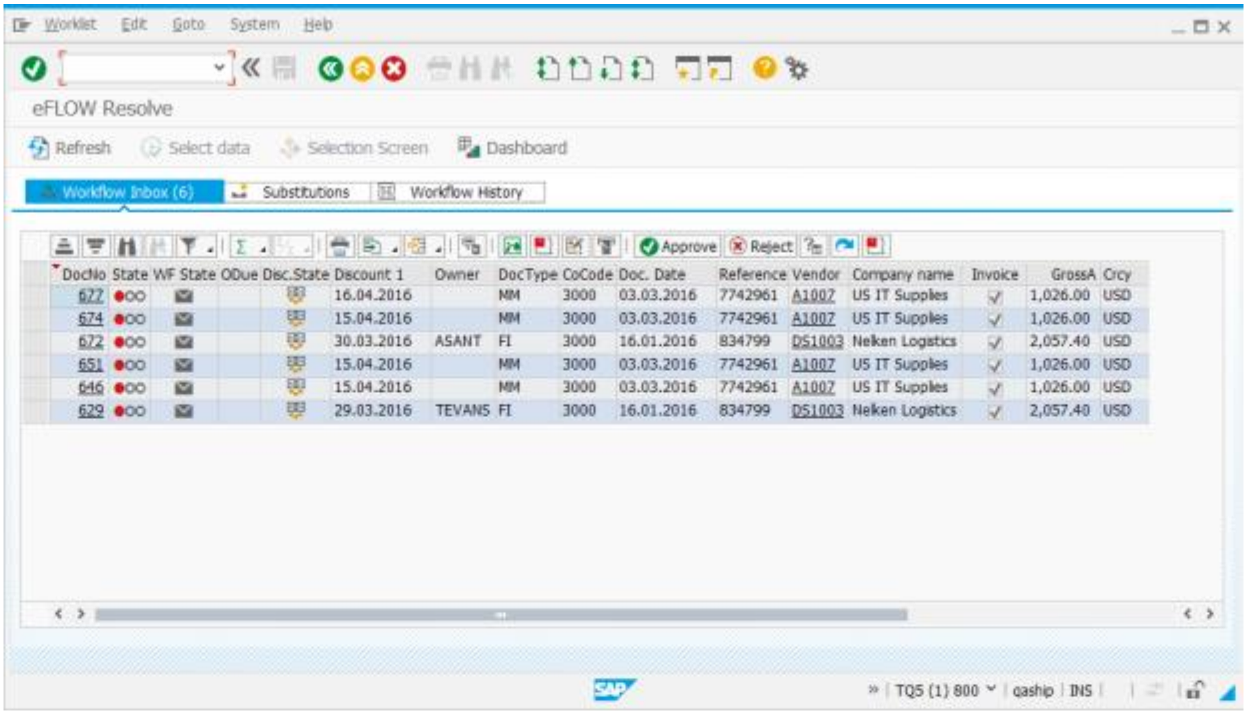
You receive an email notification for each document sent to you in workflow.

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.



Document list

The document list displays documents in the following tabs.

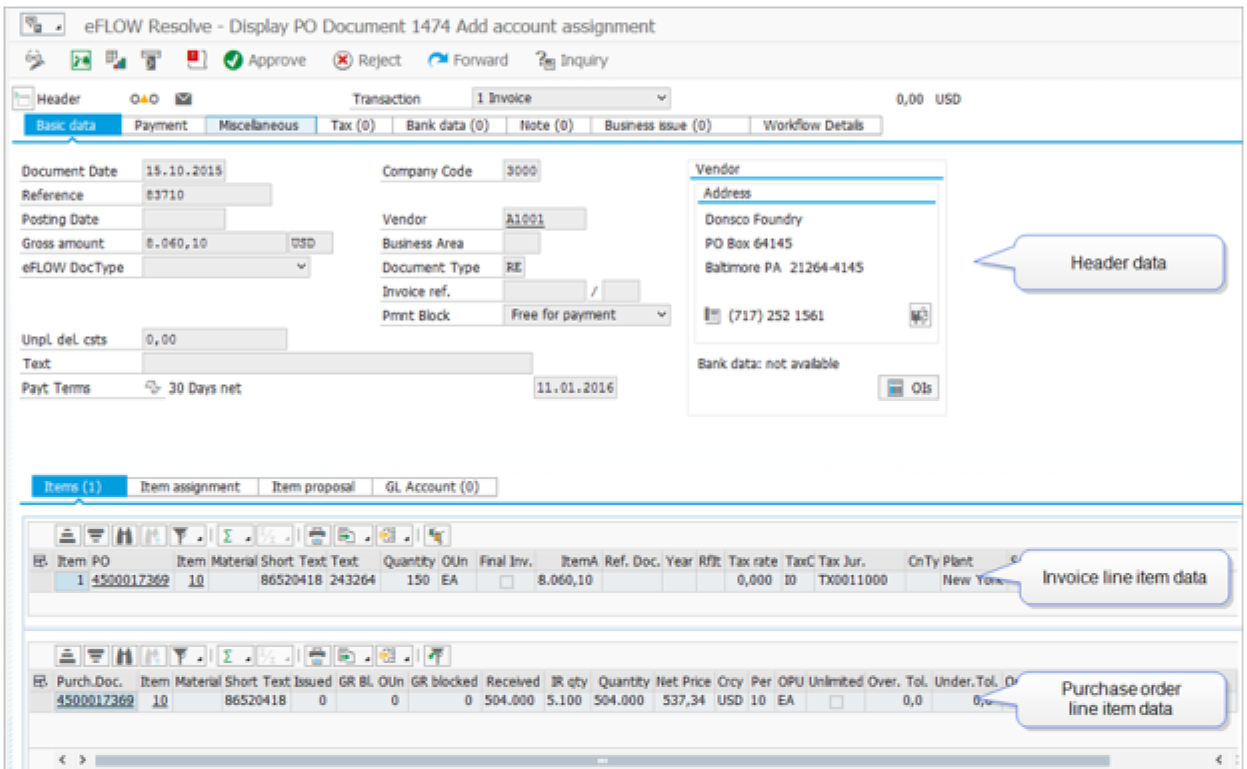
Tab	Description
Workflow Inbox	All documents sent to you in workflow but not yet processed.

Tab	Description
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.

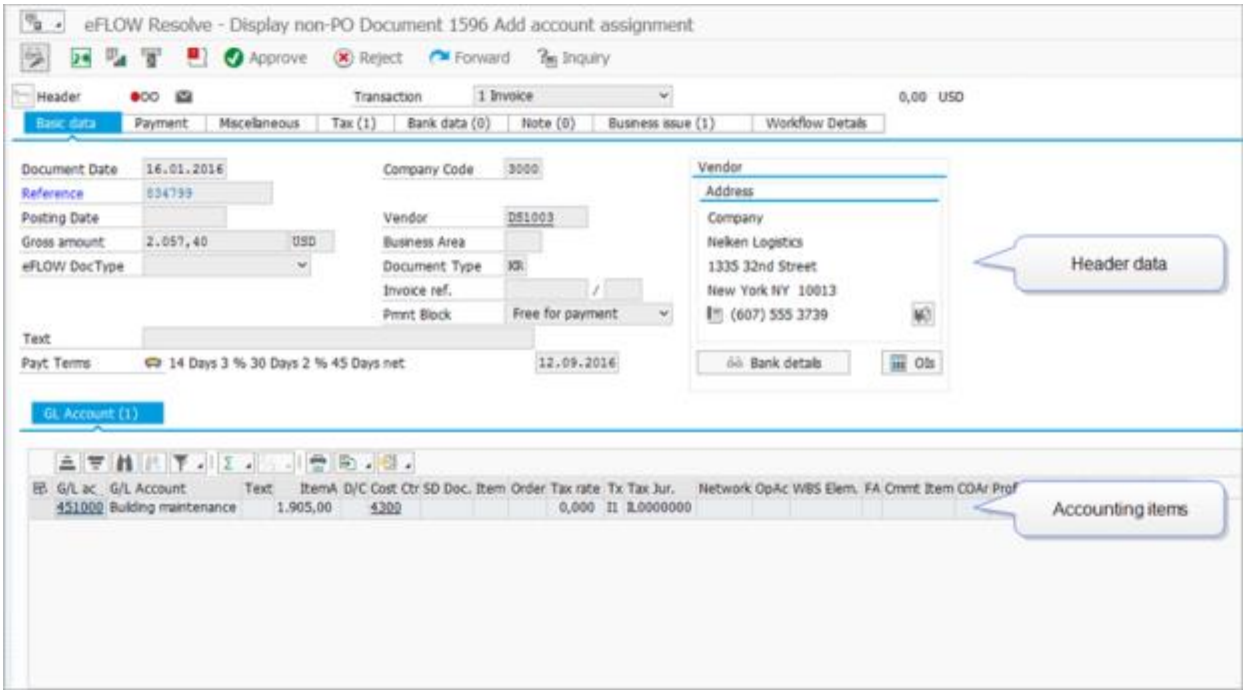
Document detail

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

PO invoice

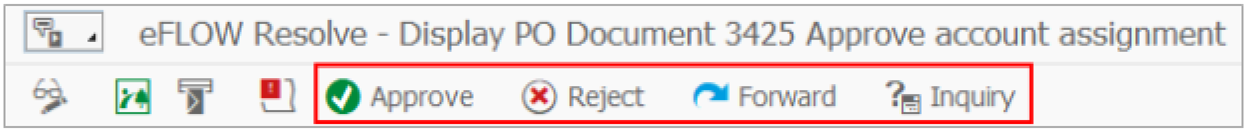


Non-PO invoice



Workflow actions

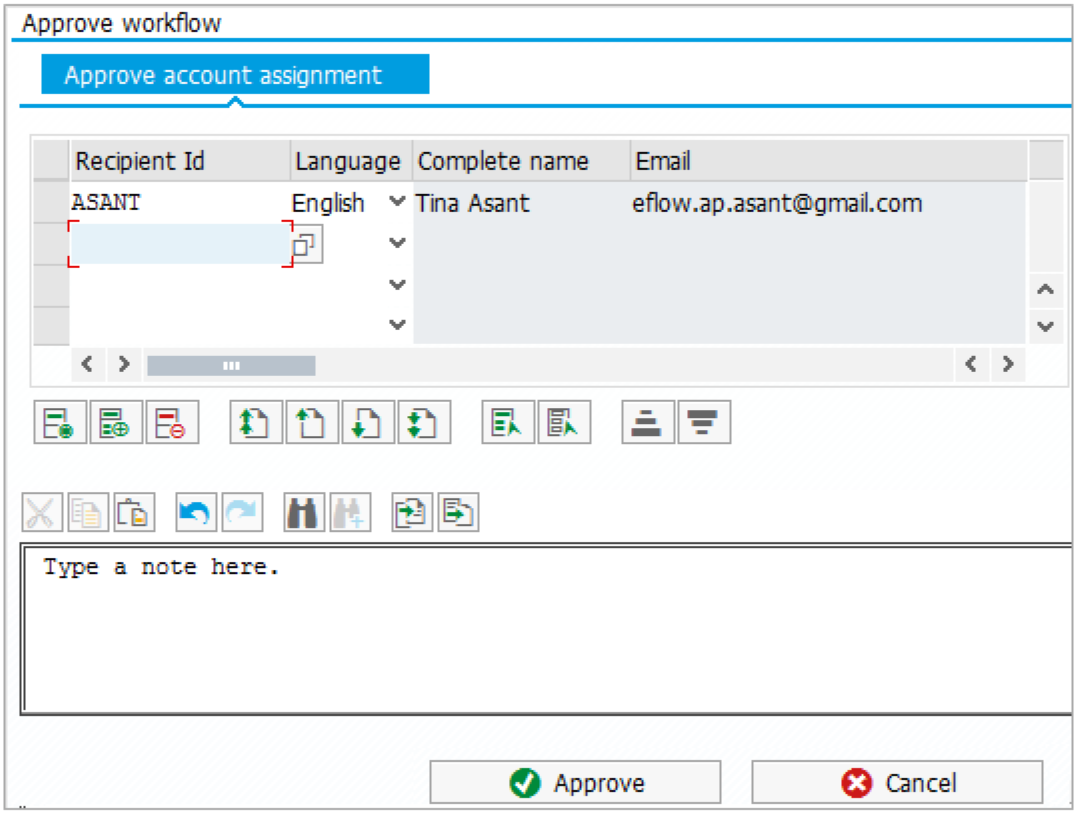
This section describes the actions that you can perform when processing a document in workflow.



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.

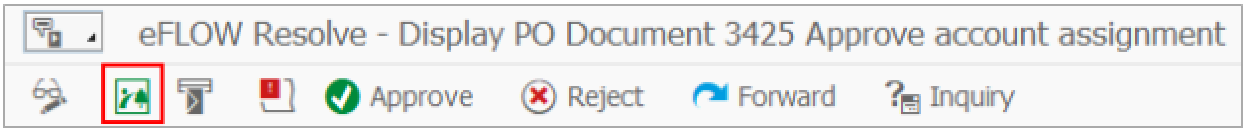
Send an inquiry

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.

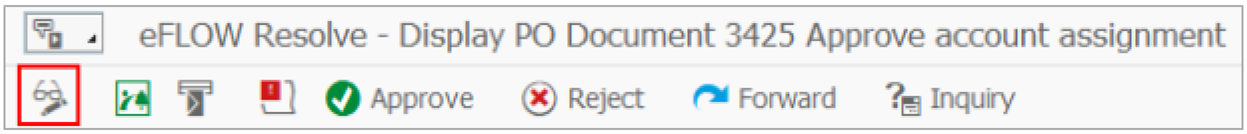
Other features

Document image



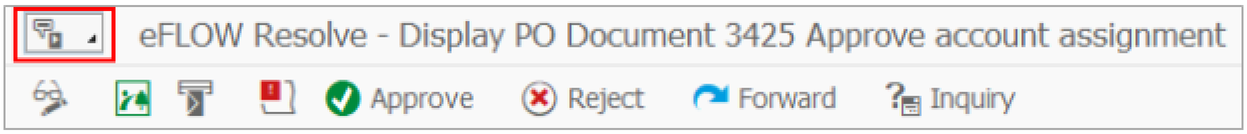
To display the document image, click the **Show image** button .

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



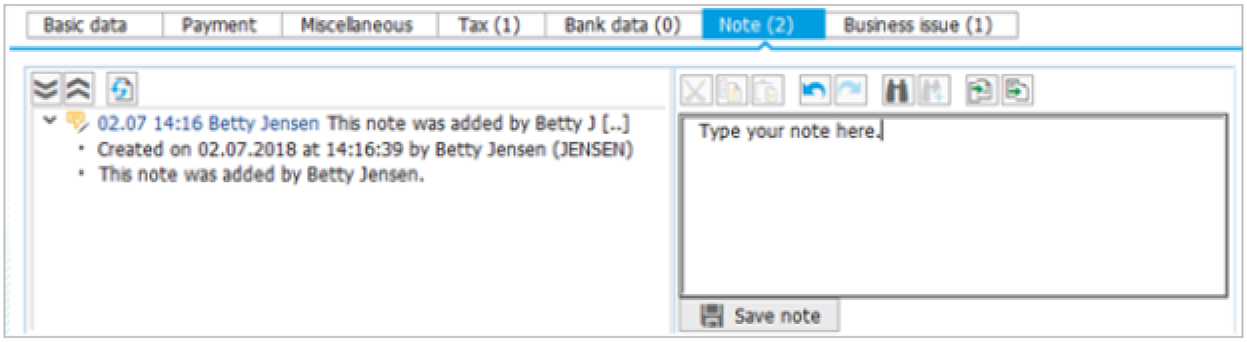
You can add files as attachments to eFLOW Control documents. Attachments are available in the eFLOW Control document and, after posting, in the corresponding SAP document.

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.

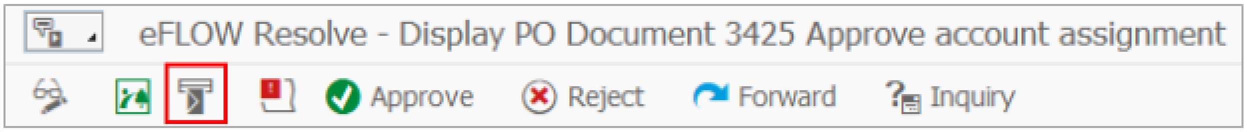
Notes



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 to view or hide the entire note text, or the buttons to view or hide all note texts.

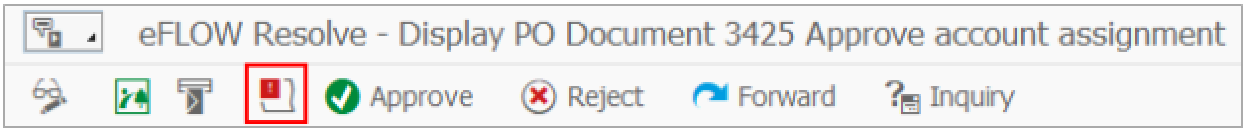
Messages



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.

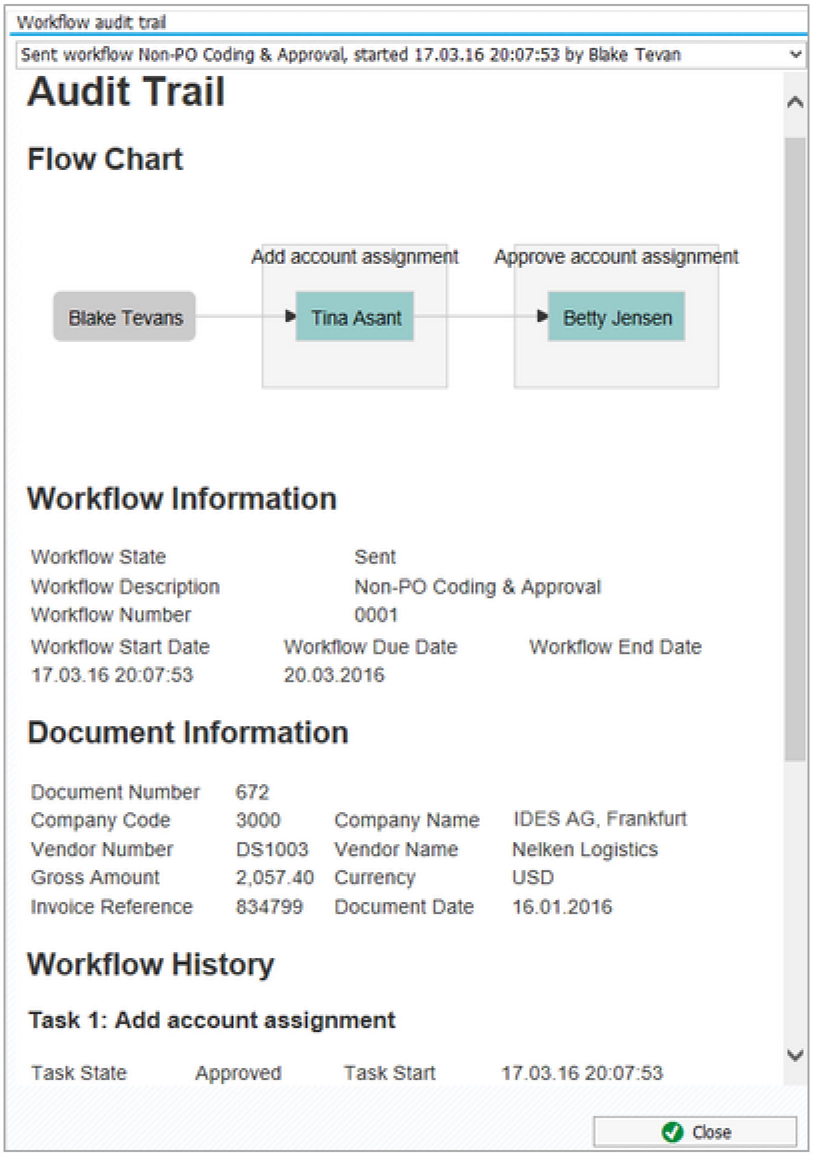
1. Click the **Send message** button .
2. Enter the email addresses to send the message to. The vendor email address is inserted by default.
3. Click the **Insert Row** or **Delete Row** button to add or remove recipient addresses.
4. Enter the message text:
   - To use a template, select the **Language** 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



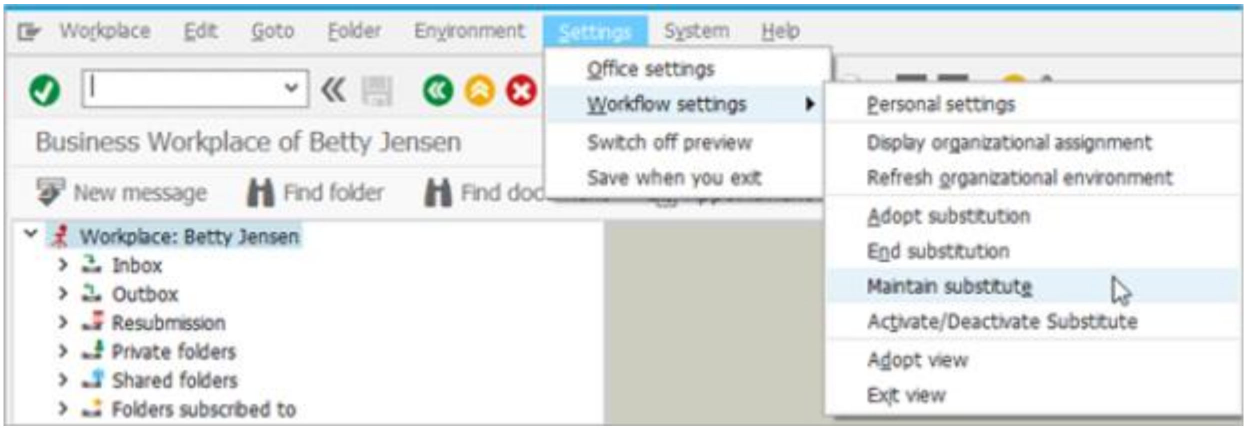
The workflow audit trail provides information about all workflows a document was sent to.

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.