

# Kofax eFLOW Resolve Web Application

## Quick Start Guide

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The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a slight shadow effect behind the text.

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# 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

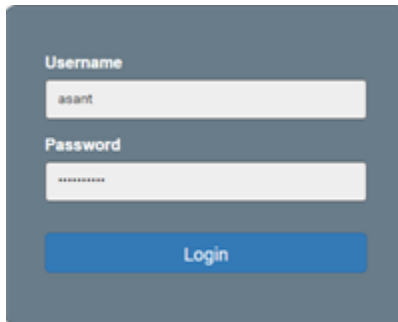
You receive an email notification for each document sent to you in workflow.

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.



A screenshot of the login form for eFLOW Resolve. The form is set against a dark blue background. It features two white input fields: the top one is labeled 'Username' and contains the text 'asant'; the bottom one is labeled 'Password' and contains a series of asterisks. Below these fields is a blue button with the text 'Login' in white.

## Document list

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




The screenshot shows the 'eFLOW Accounts Payable' interface. At the top, there is a search bar with a magnifying glass icon and the text 'Search'. Below the search bar is a table with the following columns: Document Date, Vendor, Company name, Reference, Invoice Indicator, Currency, Gross amount, Purchase Order, and eFLOW ID. The table contains 17 rows of data. A sidebar on the left contains several icons: a right-pointing arrow, a list icon, a refresh icon, and a user profile icon. At the bottom right of the table, there is a pagination indicator '1 - 17 of 17' with left and right arrow icons.

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.

**Invoice 1761**

Save Release Reject Forward workflow Select Inquiry HISTORY Notes

**INVOICE DETAILS**

Document Date: 03/03/2016 eFLOW ID: 1761  
 Reference: 7742961 Gross amount: 1,026.00  
 Vendor: A0007 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	00030	250.00	EA	Intel Peak Notebook	
<input type="checkbox"/> 4500017386	00030	308.00	EA	Wireless Keyboard	
<input type="checkbox"/> 4500017386	00030	308.00	EA	Wireless Mouse	

1 - 3 of 3 < >

**PURCHASE ORDER**

Purch...	Item	Date...	Curren...
450001	00030	250.00 300.00 EA 30.000 0.00 0.00 37.187	300.00 USD
450001	00030	30.00 1,000.0 EA 30.000 0.00 0.00 33.225	1,000.00 USD
450001	00030	18.00 500.00 EA 9,000.0 0.00 0.00 5,562.5	500.00 USD

1 - 3 of 3 < >

**US IT Supplies**  
 100 Avenue of the Americas  
 New York, New York 10019  
 Tel: (212) 512-1200

**INVOICE**  
 Invoice No: 7742961

Mr. Loren DeSantis  
 100 Avenue of the Americas  
 87th Floor  
 New York, New York 10019

QUANTITY	DESCRIPTION	UNIT PRICE	LINE TOTAL
1	Intel Peak Notebook	250.00 USD	250.00 USD
1	Wireless Keyboard	308.00 USD	308.00 USD
1	Wireless Mouse	308.00 USD	308.00 USD

**NET AMOUNT** 900.00 USD  
**TAX AMOUNT** 15.00 USD  
**TOTAL AMOUNT** 1,026.00 USD

PDF 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.

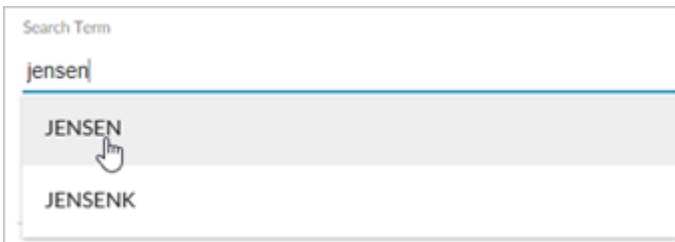


On small screens, these buttons are displayed as icons.




## 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.

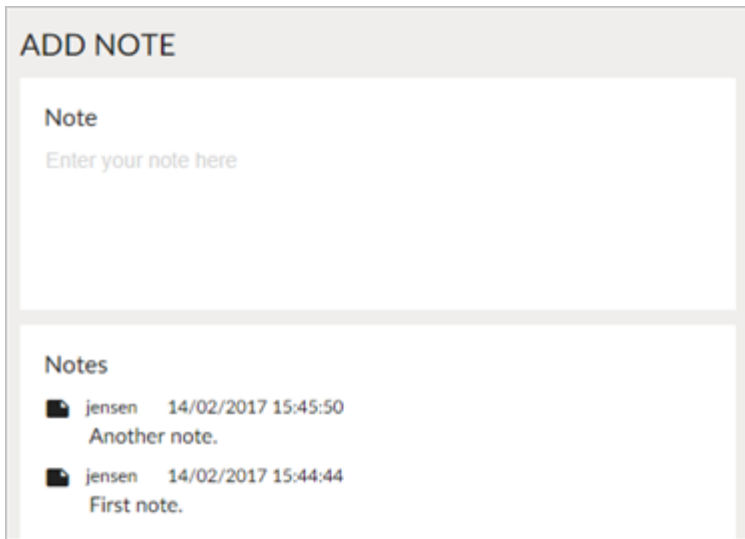
1. Click the **Download Attachments** button .
2. Drag the file from your file system into the upload area at the bottom of the screen, or click the **Add Attachment** button  to select and upload the file.

### 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

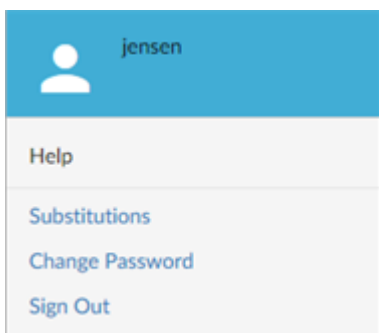
You can assign other users as substitutes to process your workflows during your absence.

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