Kofax eFLOW Resolve Web Application

User Guide

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eFLOW Resolve Web Application

This guide explains how to use the eFLOW Resolve Web Application.

About eFLOW Resolve

Kofax eFLOW Control™ and Kofax eFLOW Resolve™ are SAP add-ons for automated invoice processing, integrated into SAP ERP. In combination, both components deliver a highly automated solution for vendor invoice processing, including requirements such as automatic posting, automatic line item matching and automatic workflow routing for exception handling and approval.

eFLOW Control users can manually process invoices with exceptions in an easy-to-use, familiar interface, which offers a wealth of features to help users find, organize, correct, complete, and post documents.

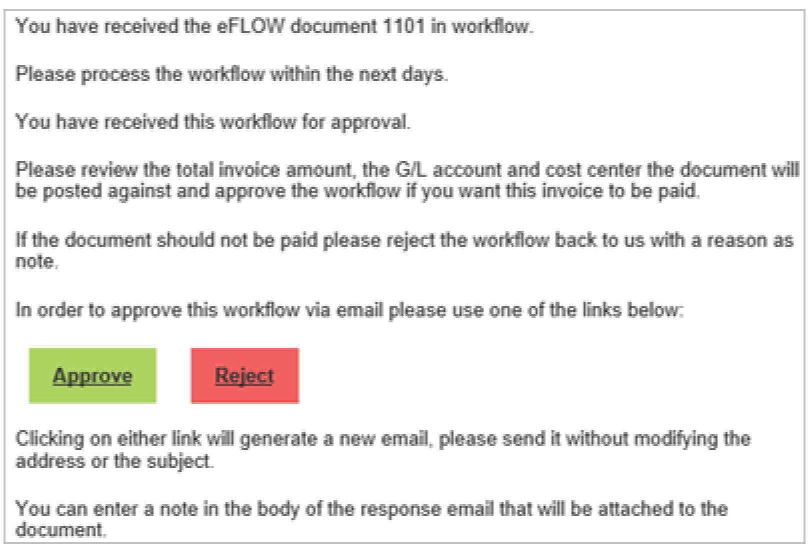
If eFLOW Control users cannot fully process documents themselves, they can send them to other users in a workflow to obtain information, clarification, or approval. Workflow processing takes place in eFLOW Resolve in the SAP GUI, the eFLOW Resolve Web Application, or the eFLOW Resolve Fiori App.

Note eFLOW Resolve is customizable. Depending on your system configuration, some features described in this guide may not be available, or may be different than described.

Email notifications

eFLOW Resolve can send email notifications to workflow processors, for example, to inform them that they have received a document in workflow, or that a workflow task is overdue. The eFLOW Resolve configuration determines whether, and under what circumstances, email notifications are sent. Depending on the configuration, you may receive individual notifications (for example, an email for each workflow document) or multiple notifications in a single email (for example, an email listing all workflow documents sent to you today).

If the workflow has been configured for approval by email, the email notification contains links that enable you to approve or reject the workflow task directly from the email.


You have received the eFLOW document 1101 in workflow.

Please process the workflow within the next days.

You have received this workflow for approval.

Please review the total invoice amount, the G/L account and cost center the document will be posted against and approve the workflow if you want this invoice to be paid.

If the document should not be paid please reject the workflow back to us with a reason as note.

In order to approve this workflow via email please use one of the links below:

Approve Reject

Clicking on either link will generate a new email, please send it without modifying the address or the subject.

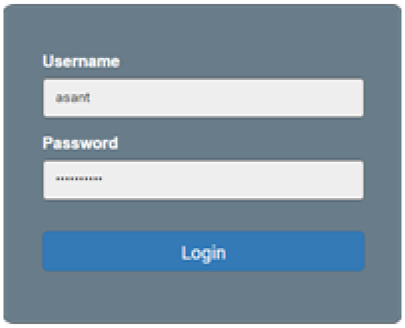
You can enter a note in the body of the response email that will be attached to the document.

Start eFLOW Resolve

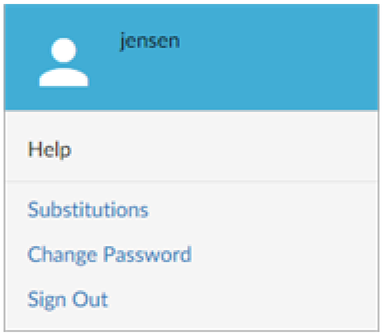
You can open eFLOW Resolve in Internet Explorer 11 or the current version of Google Chrome. We recommend using Google Chrome. Other browsers are currently not supported. The application uses the language that is set in your browser.

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.



To log out again, click the button at the top right of the screen and select **Sign out**. For security reasons, the system automatically logs you out after a certain time period if you do not perform any actions in the application.



Document list

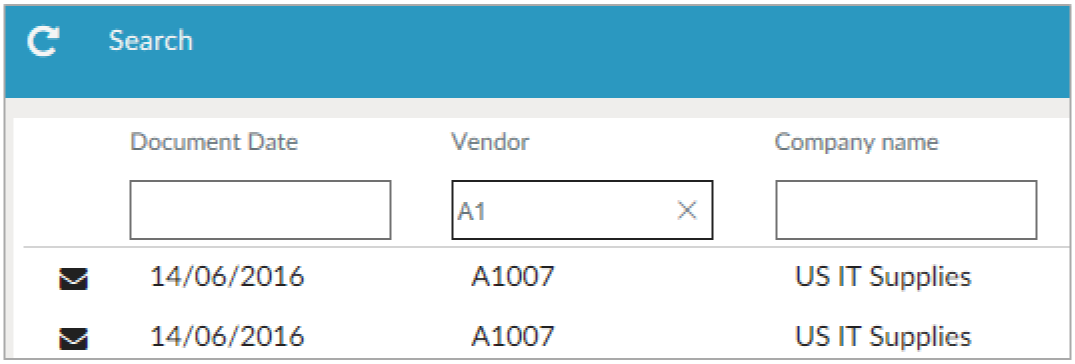
After you log on, the eFLOW Resolve window displays a list of documents that have been sent to you in a workflow. As you are working, new documents may arrive in your workflow inbox. To display the latest documents, click the **Refresh** button .

If you have a lot of documents, the document list may consist of multiple pages. Use the buttons at the bottom right of the screen to browse through the document list.

Button	Description
>	Go to the next page.
<	Go to the previous page.

To search for documents, click the **Search** button and enter search criteria. Click the **Search** button again to close the search. On small screens, the **Search** button is displayed as an icon .

Click the cross  in a search field to remove that search criterion.



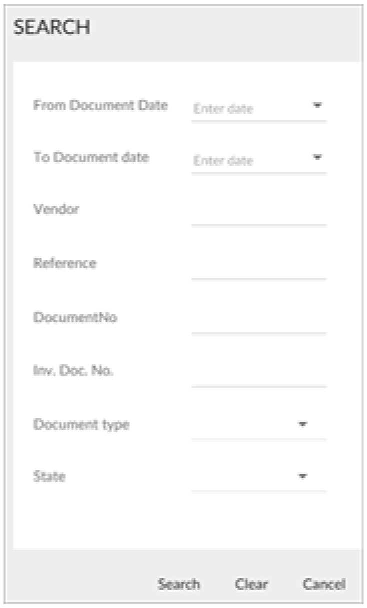
To sort the list on a specific column, click the column heading once to sort in ascending order, and again to sort in descending order. An arrow next to the column heading indicates that the list is sorted on this column.

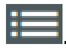
To view a list of workflows that you have already processed, click the on **Previous workflows** button .

Note This list displays a maximum of 50 documents. Use the search to display further documents.

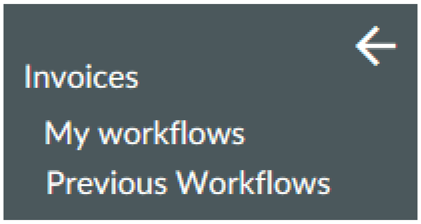
To search for documents in the **Previous Workflows** list, click the **Search** button. Enter your search criteria and click the **Search** button below the criteria.

Click the **Clear** button to view all documents again.



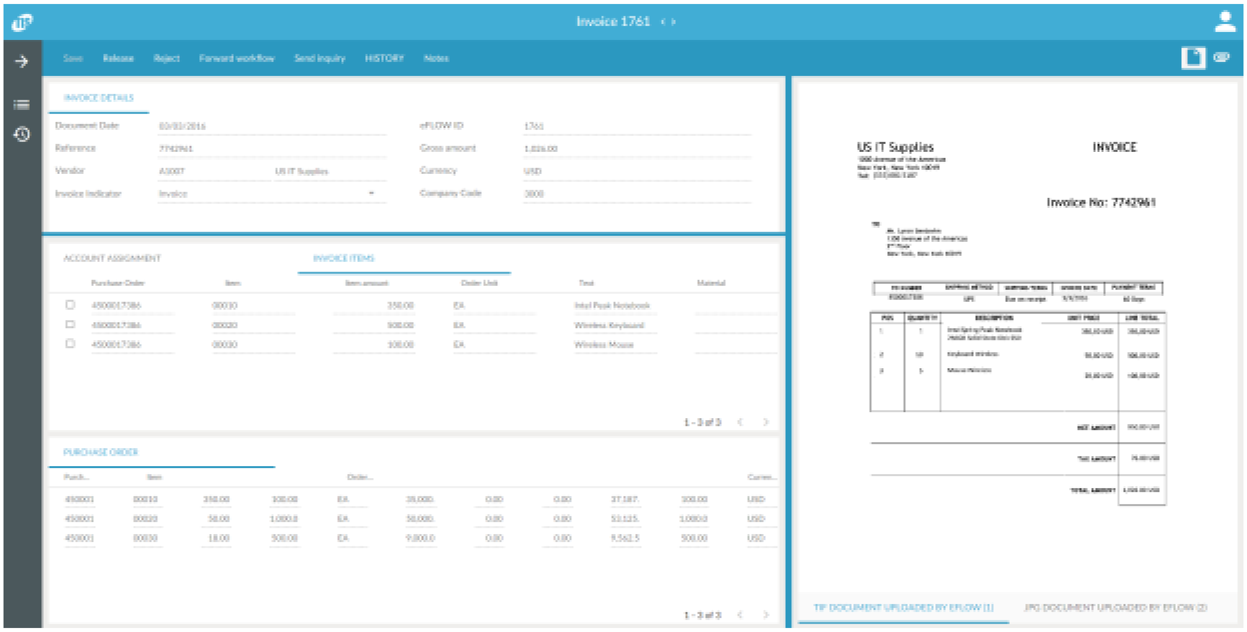
To return to the document list, click on the **My workflows** button .

You can also click on the arrow button  to navigate to these lists.



Document detail

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



The invoice image and other document attachments are displayed to the right of the document data. See [Document viewer](#) for more information.

Use the buttons above the invoice details to process the document, view and add [notes](#), or view the [workflow history](#).

On small screens, these buttons are displayed as icons.

Which actions you can perform on a document depends on the configuration of the workflow. For example, you may be able to edit the document, as well as approve it.

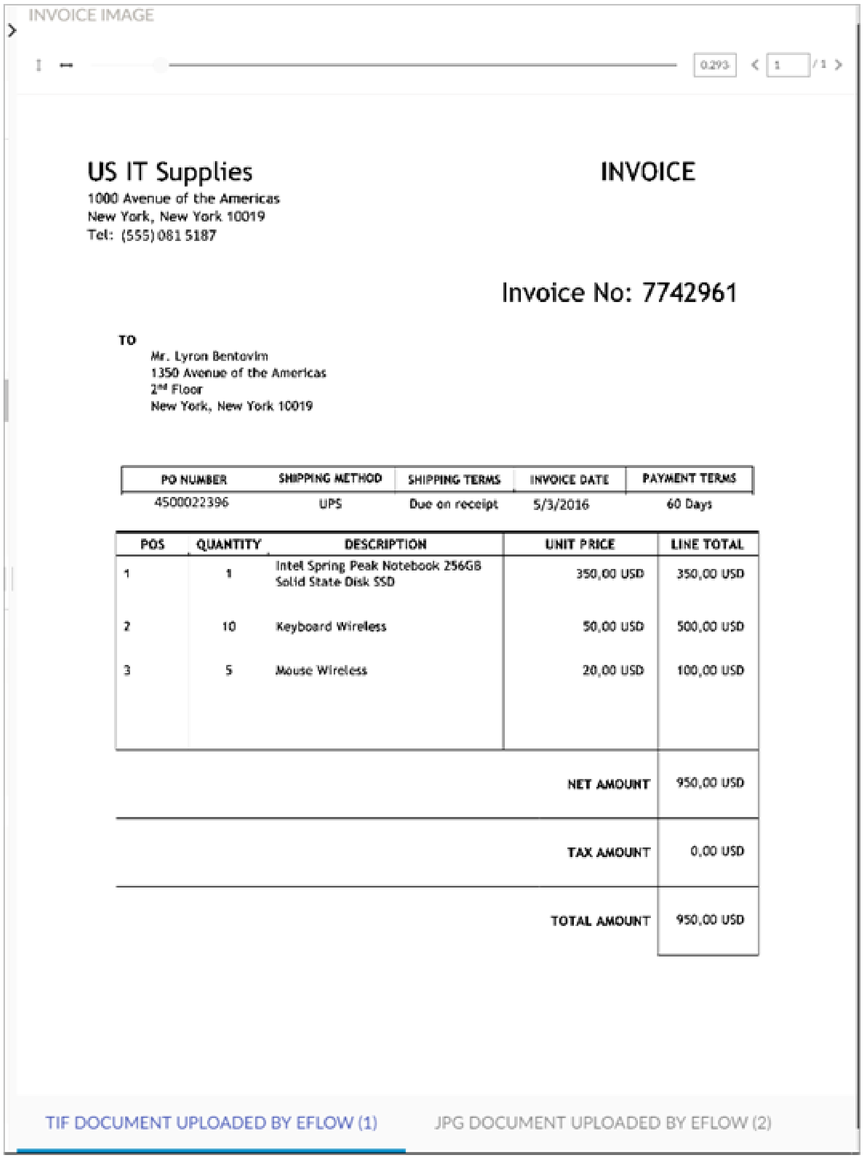
Use the arrows at the top of the document detail to display the next or previous document.

To return to the document list, click the **My Workflows** button at the top left of the screen.

Document viewer

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.



US IT Supplies
1000 Avenue of the Americas
New York, New York 10019
Tel: (555) 081 5187

INVOICE

Invoice No: 7742961

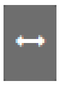
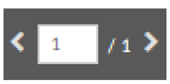
TO
Mr. Lyron Bentovim
1350 Avenue of the Americas
2nd Floor
New York, New York 10019

PO NUMBER	SHIPPING METHOD	SHIPPING TERMS	INVOICE DATE	PAYMENT TERMS
4500022396	UPS	Due on receipt	5/3/2016	60 Days

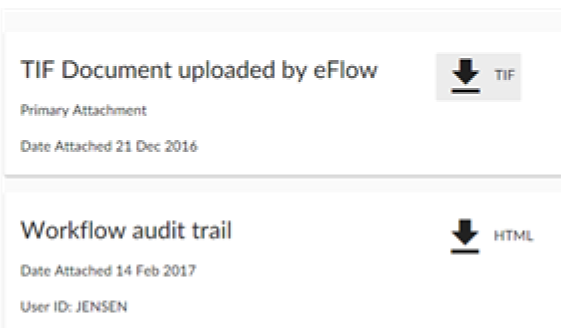
POS	QUANTITY	DESCRIPTION	UNIT PRICE	LINE TOTAL
1	1	Intel Spring Peak Notebook 256GB Solid State Disk SSD	350,00 USD	350,00 USD
2	10	Keyboard Wireless	50,00 USD	500,00 USD
3	5	Mouse Wireless	20,00 USD	100,00 USD
			NET AMOUNT	950,00 USD
			TAX AMOUNT	0,00 USD
			TOTAL AMOUNT	950,00 USD

To view a specific document, click on the document description at the bottom of the document viewer. The currently displayed document is highlighted.

Use the following buttons to work with the image viewer. These buttons appear when you move the mouse cursor to the top of the document viewer.

Button	Description
	Display the entire page.
	Display the full page width.
	Increase or decrease the image size. Use the slider bar, or type a value in the box.
	For multi-page images or attachments, go to the next or previous page.

To download the image or other attachments, click the **Download attachments** button .

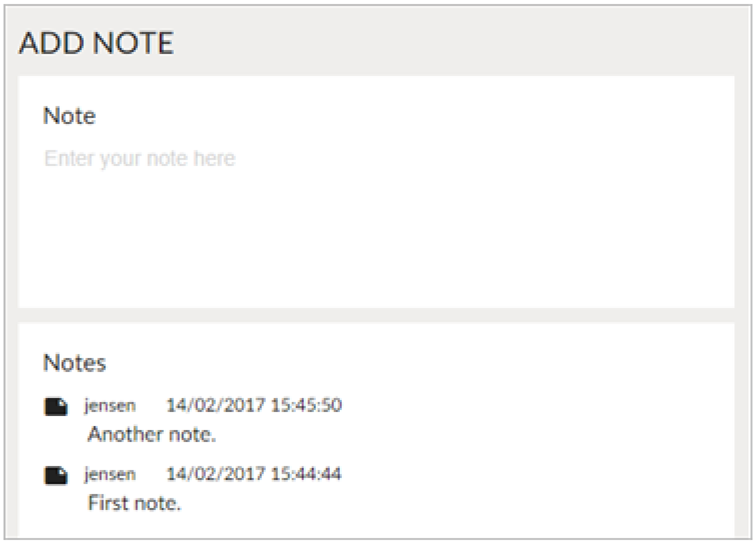


Notes

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.

Note You cannot delete a note after saving it.

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 .

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.

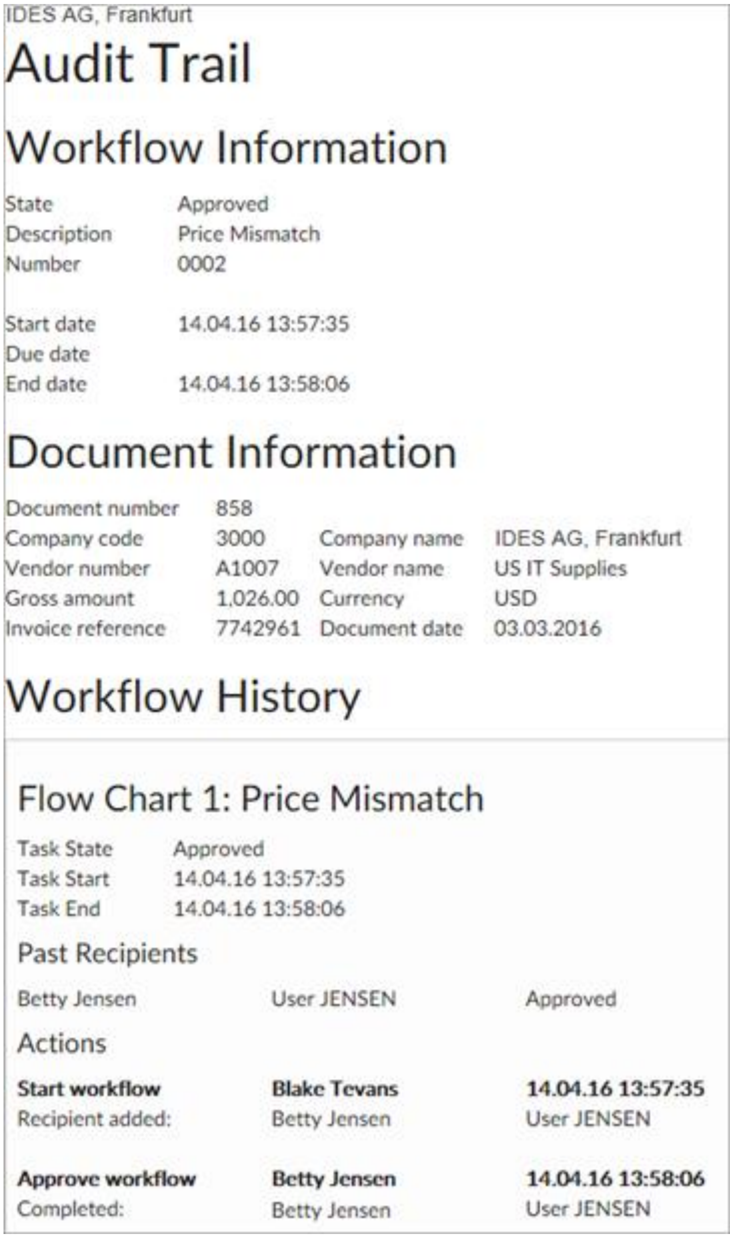
To add an attachment:

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.

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 .


IDES AG, Frankfurt

Audit Trail

Workflow Information

State	Approved
Description	Price Mismatch
Number	0002
Start date	14.04.16 13:57:35
Due date	
End date	14.04.16 13:58:06

Document Information

Document number	858		
Company code	3000	Company name	IDES AG, Frankfurt
Vendor number	A1007	Vendor name	US IT Supplies
Gross amount	1,026.00	Currency	USD
Invoice reference	7742961	Document date	03.03.2016

Workflow History

Flow Chart 1: Price Mismatch

Task State	Approved
Task Start	14.04.16 13:57:35
Task End	14.04.16 13:58:06

Past Recipients

Betty Jensen	User JENSEN	Approved

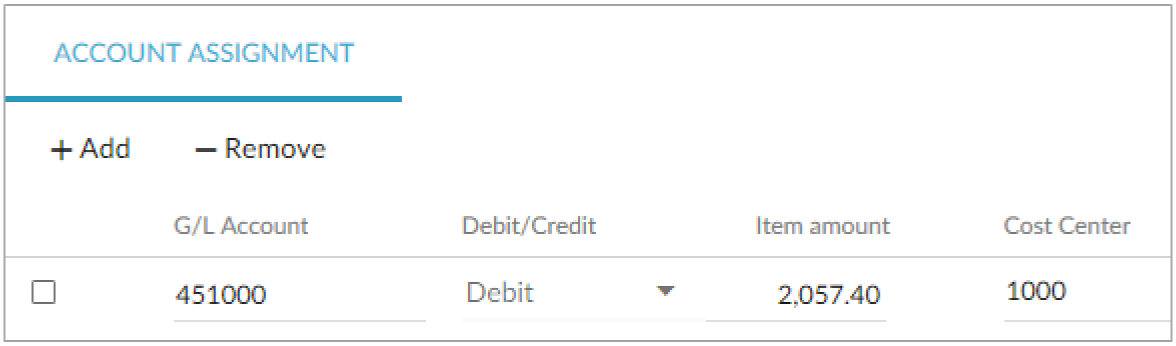
Actions

Start workflow	**Blake Tevans**	**14.04.16 13:57:35**
Recipient added:	Betty Jensen	User JENSEN
Approve workflow	**Betty Jensen**	**14.04.16 13:58:06**
Completed:	Betty Jensen	User JENSEN

Assign accounts

Depending on the workflow configuration, you may be able to assign accounts to invoice line items.

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



To remove an accounting line, click in the check box and then click the **Remove** button.

2. Click the **Save** button .

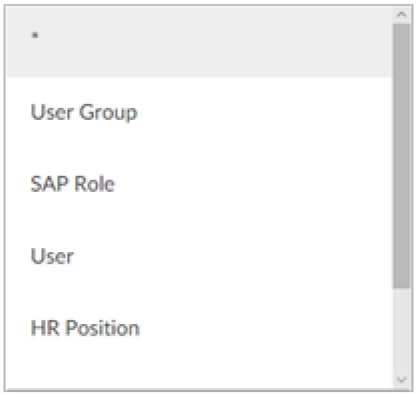
Approve a document

1. Open the document and click the **Approve** button .

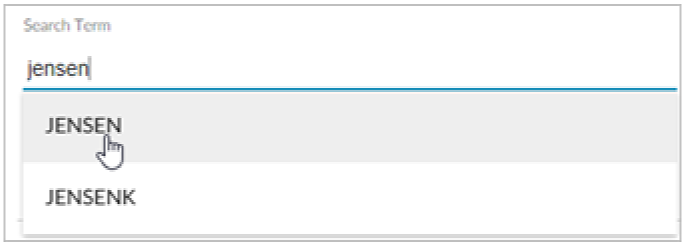
   If the workflow has a next step which is configured for manual assignment of recipients, you must add recipients.

2. Search for recipients:

   a. To limit the search, for example, to a specific user or SAP role, click **Search By**, then select an entry.

   b. Click on **Search Term** and type the recipient name. Select the recipient from the search results list.



The recipient is added to the recipients list.

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

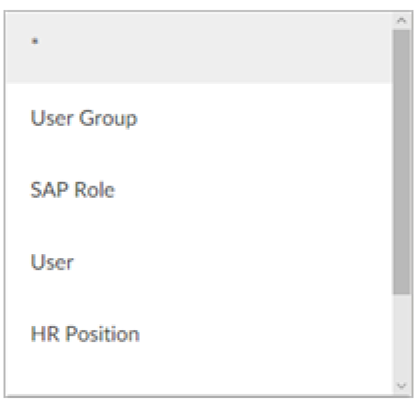
Reject a document

Open the document and click the **Reject** button.

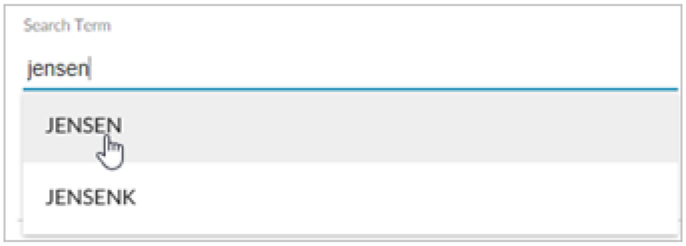
Forward a document

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. Search for recipients:
   a. To limit the search, for example, to a specific user or SAP role, click **Search By**, then select an entry.



   b. Click on **Search Term** and type the recipient name. Select the recipient from the search results list.



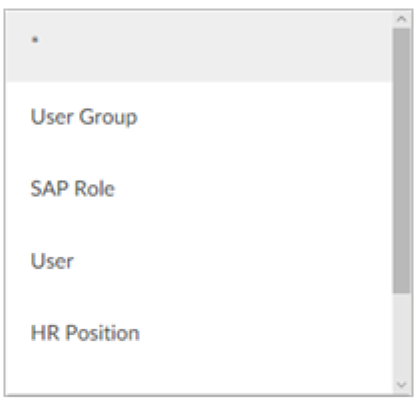
The recipient is added to the recipients list.

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

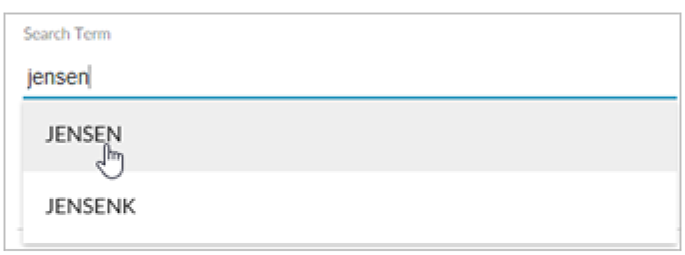
Send an inquiry

You can send inquiries to obtain information from other users.

1. Open the document and click the **Send inquiry** button .
2. Search for recipients:
   a. To limit the search, for example, to a specific user or SAP role, click **Search By**, then select an entry.

   b. Click on **Search Term** and type the recipient name. Select the recipient from the search results list.

   The recipient is added to the recipients list.
3. Type your inquiry.
4. Click on **SEND**.

The document appears in the inquiry recipient's document list. You can view your inquiry and the recipient's answer by clicking the **Notes** button in the document detail.

Answer an inquiry

When another workflow processor sends you an inquiry about a document, the document appears in your document list.

To answer the inquiry, open the document and click the **Notes** button. Enter some text and then click the **Answer Inquiry** button.

The document is removed from your document list.

Assign substitutes

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

Your documents are displayed in both your document list and the document list of the substitute. If the substitute processes a document (for example, approves it), the document is no longer displayed in your document list.

Active substitutes

Active substitutes are intended for planned absences, such as vacation.

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

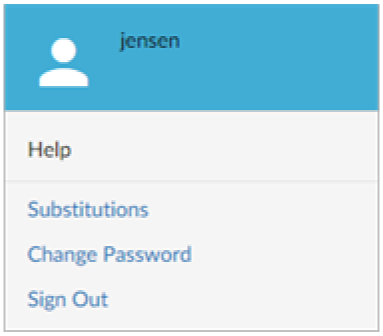
Passive substitutes are intended for unplanned absences, such as sickness.

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.

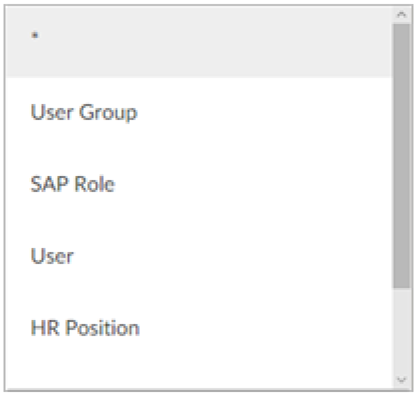
Assign a substitute

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

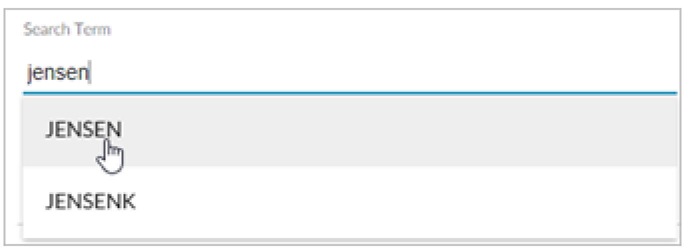


2. Search for users:

   a. To limit the search, for example, to a specific user or SAP role, click **Search By**, then select an entry.

   b. 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. The button color changes to green.
4. (Active substitutes only) Enter a **From Date** and **To Date** to define the duration of the substitution, or click the arrow to choose a date from the calendar.

User Name	Name	From Date	To Date	Is Active
TEVANS	Blake Tevans	15/02/2017	22/02/2017	

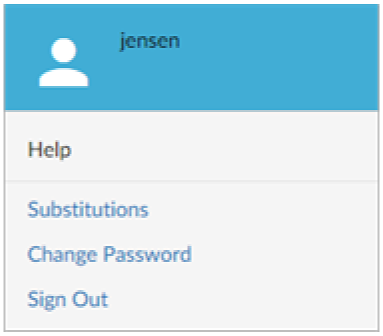
5. Click the **Save** button.

To make an active substitute passive, click the **Is Active** button. The button color changes to gray.

To delete a substitute, click the **Remove** button.

Change your password

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



2. Enter your old password.
3. Enter your new password, then enter it again to confirm.
4. Click **Update**.