



Forms Lifecycle Manager [FLM] Administrator's Guide

Release 290

Version History

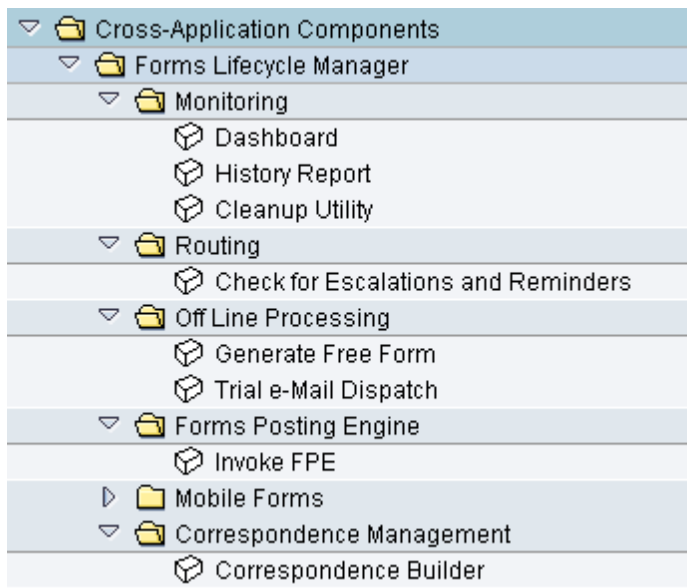
Version	Date	Reason for update
1	17/10/2007	Initial version
2	02/06/2008	271 Updates
3	07/07/2008	272-4 Updates
4	14/08/2008	Email setup moved to install guide
5	05/09/2008	290 update; setup functions moved to developer guide.

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1 Introduction

This document explains the functions of the FLM application menu, as shown below. To access this menu go through Cross-Application Components> Forms Lifecycle Manager.

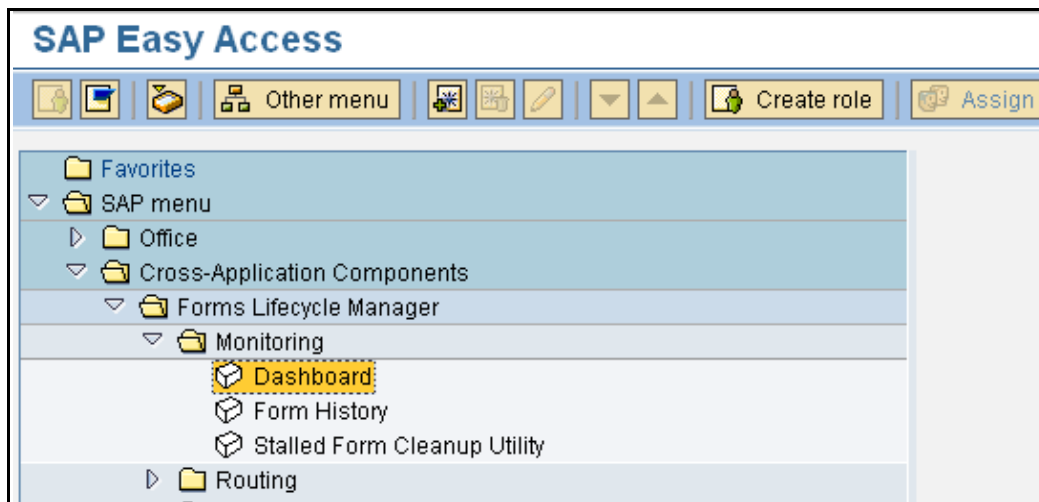


2 Forms Dashboard

The FLM Forms Dashboard allows you to:

- view all forms contained in the system
- change the status of a form or group of forms
- change the owner of a form or group of forms

2.1 To access the Form Dashboard




From the SAP menu select the menu path Cross-Application Components->Forms Lifecycle Manager->Monitoring->Dashboard.


FLM: Form Dashboard


Instructions
Please make your selections from the form or group boxes, and then choose a processing option.


Reset Dashboard
Reset Selections


Form Selections

Status to 

Owner to 


Initiator to 

Creation to 


ID to 


Include Terminated Forms
 Force Update of Locked Forms

Processing Options

Traffic
 View Current Traffic

Update

New Owner
  Change Form Owner

New Status
  Change Form Status

Group Selections

Form Types

Form Type	Description
BSCF	School Claims Form
CGS5	Multi-row test
CGS6	test6
CGS7	Purchase Order
CGS8	Inbound Delivery
CGS9	Customer Invoice
DET2	AG Test
DETS	German Locale
E567	SAP Cert Test
FRED	Simons Test Form
SAPC	SAP Canada demo
SCEN	Scottish Enterprise
SCF1	Schools Form
SIT2	SITA Demo 2
WF01	Workflow test 1

Versions

Versions
00

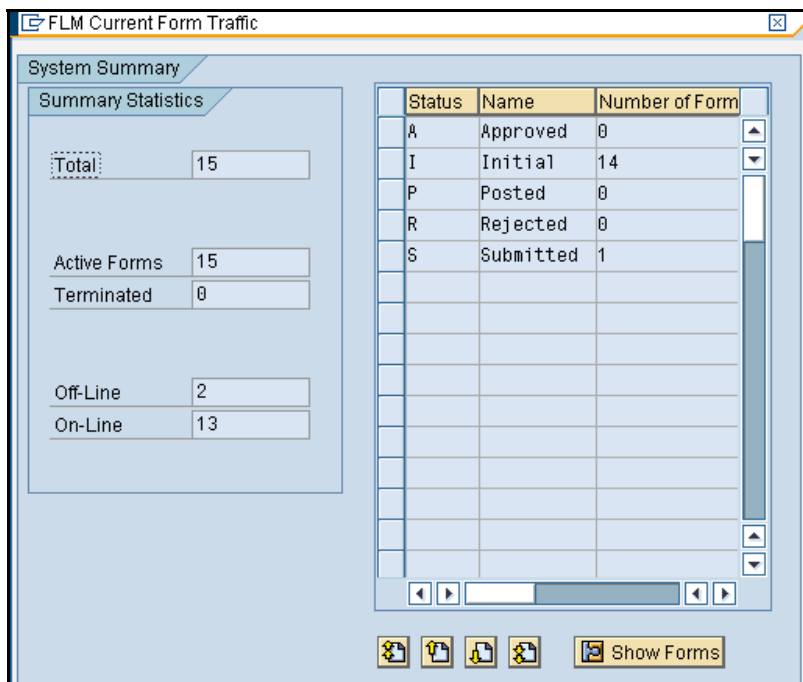
Languages

Lang	Name
E	English

2.2 Viewing Current Forms Traffic

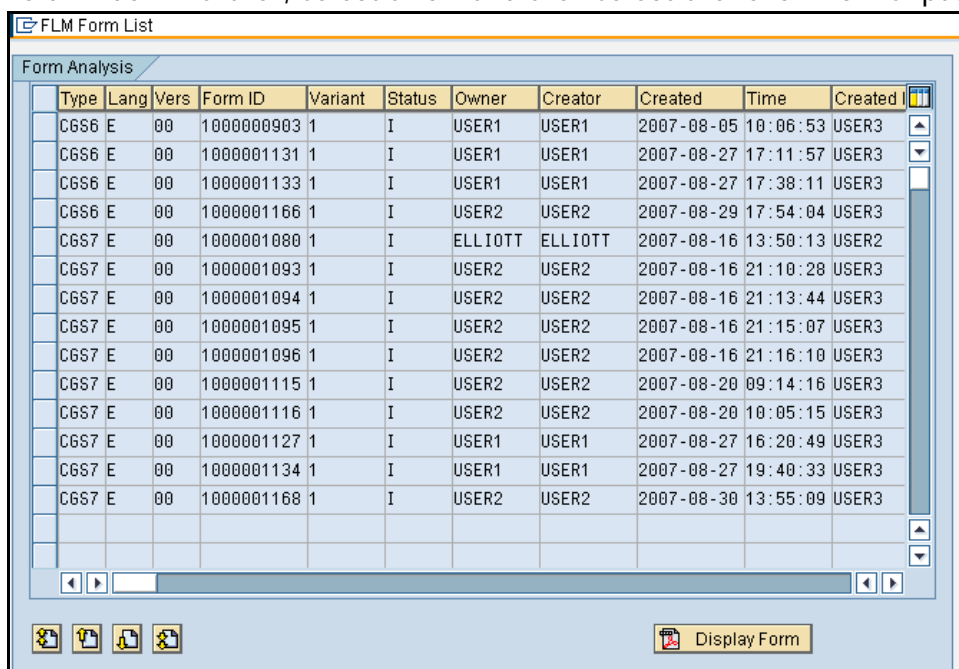
Select the Form Types under review and select the pushbutton 'View Current Traffic'. Alternatively, use the 'Form Selections' section for a free selection based on form type, owner, initiator, creation date or form ID.

Use the 'Include Terminated Forms' checkbox to include forms at the end of their lifecycle in the returned selection.



The returned pop-up report shows the number of forms by status, broken down by active forms and terminated forms, and broken down by on-line forms and off-line forms.

To drill-down further, select a row and then select the 'Show Forms' pushbutton.



The screenshot shows the 'FLM Form List' window. It contains a table with columns: Type, Lang, Vers, Form ID, Variant, Status, Owner, Creator, Created, Time, and Created by. The table lists 15 rows of form data:

Type	Lang	Vers	Form ID	Variant	Status	Owner	Creator	Created	Time	Created by
C6S6	E	00	1000000903	1	I	USER1	USER1	2007-08-05	10:06:53	USER3
C6S6	E	00	1000001131	1	I	USER1	USER1	2007-08-27	17:11:57	USER3
C6S6	E	00	1000001133	1	I	USER1	USER1	2007-08-27	17:38:11	USER3
C6S6	E	00	1000001166	1	I	USER2	USER2	2007-08-29	17:54:04	USER3
C6S7	E	00	1000001080	1	I	ELLIOTT	ELLIOTT	2007-08-16	13:50:13	USER2
C6S7	E	00	1000001093	1	I	USER2	USER2	2007-08-16	21:10:28	USER3
C6S7	E	00	1000001094	1	I	USER2	USER2	2007-08-16	21:13:44	USER3
C6S7	E	00	1000001095	1	I	USER2	USER2	2007-08-16	21:15:07	USER3
C6S7	E	00	1000001096	1	I	USER2	USER2	2007-08-16	21:16:10	USER3
C6S7	E	00	1000001115	1	I	USER2	USER2	2007-08-20	09:14:16	USER3
C6S7	E	00	1000001116	1	I	USER2	USER2	2007-08-20	10:05:15	USER3
C6S7	E	00	1000001127	1	I	USER1	USER1	2007-08-27	16:20:49	USER3
C6S7	E	00	1000001134	1	I	USER1	USER1	2007-08-27	19:40:33	USER3
C6S7	E	00	1000001168	1	I	USER2	USER2	2007-08-30	13:55:09	USER3

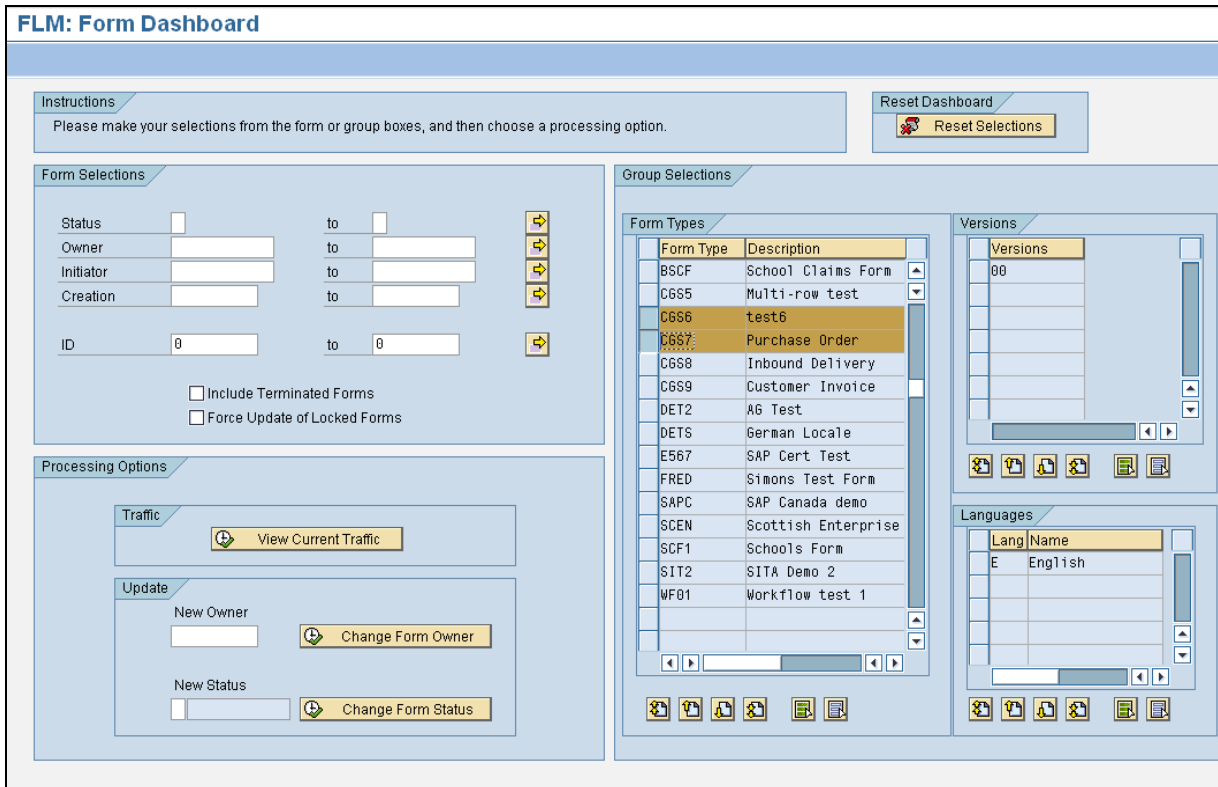
At the bottom of the window, there are several icons and a 'Display Form' pushbutton.

The FLM Form List shows the detailed list of the forms selected, showing the Form ID and Form Variant.

To drill-down to see the details of the particular form, select a row and then select the 'Display Form' pushbutton.

2.3 Form status re-assignment

From the SAP menu select the menu path Cross-Application Components->Forms Lifecycle Manager->Monitoring->Dashboard.



FLM: Form Dashboard

Instructions
Please make your selections from the form or group boxes, and then choose a processing option.

Form Selections

Status to

Owner to

Initiator to

Creation to

ID to

Include Terminated Forms
 Force Update of Locked Forms

Group Selections

Form Type	Description
BSCF	School Claims Form
C655	Multi-row test
C656	test6
C657	Purchase Order
C658	Inbound Delivery
C659	Customer Invoice
DET2	AG Test
DETS	German Locale
E567	SAP Cert Test
FRED	Simons Test Form
SAPC	SAP Canada demo
SCEN	Scottish Enterprise
SCF1	School's Form
SIT2	SITA Demo 2
WF01	Workflow test 1

Processing Options

Traffic

Update

New Owner

New Status

Enter selections using the 'Form Selections' or 'Group Selections' section boxes.

Enter the current status in the 'Status' field within the 'Form selections' selection box. Enter the target status in the 'New Status' field within the 'Update' section of the 'Processing Options' selection box.

If any forms to be updated are locked then the 'Force Update of Locked Forms' checkbox must be selected.

Execute using the 'Change Form Status' pushbutton. Several pop-up windows now appear:

- 1) A warning pop-up window is displayed
- 2) A confirmation pop-up window is displayed to confirm the change status action
- 3) A pop-up window is displayed for each locked form, explaining that the form will be unlocked.
- 4) The following final confirmation window is displayed:

Code	Form ID	Run Date	Run Time	Old User	New User	Old Status	New Status	Text
0	1000001222	24.09.2007		USER1	USER1	I	P	Status can be changed
0	1000001168	24.09.2007		USER2	USER2	I	P	Status can be changed
0	1000001134	24.09.2007		USER1	USER1	I	P	Status can be changed
0	1000001127	24.09.2007		USER1	USER1	I	P	Status can be changed
0	1000001116	24.09.2007		USER2	USER2	I	P	Status can be changed
0	1000001115	24.09.2007		USER2	USER2	I	P	Status can be changed
0	1000001096	24.09.2007		USER2	USER2	I	P	Status can be changed
0	1000001095	24.09.2007		USER2	USER2	I	P	Status can be changed
0	1000001094	24.09.2007		USER2	USER2	I	P	Status can be changed
0	1000001093	24.09.2007		USER2	USER2	I	P	Status can be changed
0	1000001080	24.09.2007		ELLIOTT	ELLIOTT	I	P	Status can be changed

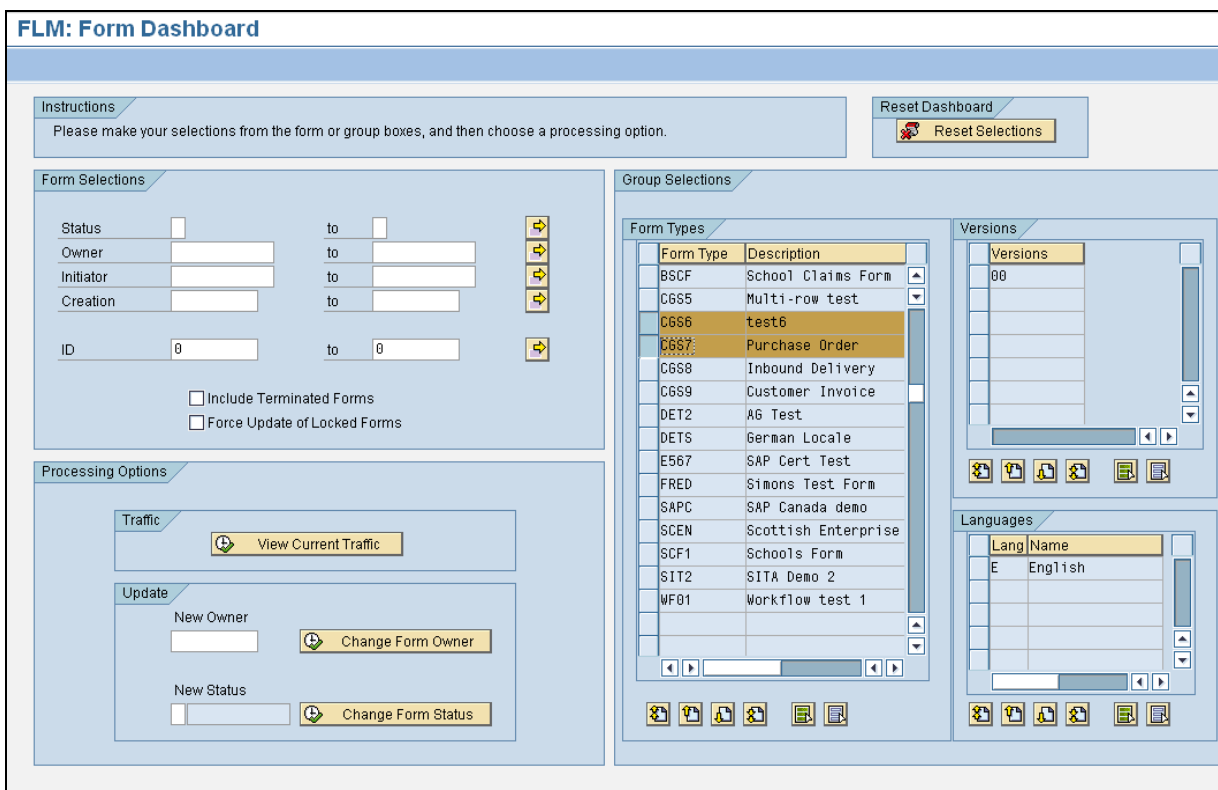
Accept Changes Reject Changes

Select 'Accept Changes' to continue.

5) A final confirmation window is displayed when the changes have been posted.

2.4 Form owner re-assignment

From the SAP menu select the menu path Cross-Application Components->Forms Lifecycle Manager->Monitoring->Dashboard.



FLM: Form Dashboard

Instructions: Please make your selections from the form or group boxes, and then choose a processing option.

Reset Dashboard: Reset Selections

Form Selections

Status: [] to []

Owner: [] to []

Initiator: [] to []

Creation: [] to []

ID: 0 to 0

Include Terminated Forms

Force Update of Locked Forms

Processing Options

Traffic: View Current Traffic

Update: New Owner: [] Change Form Owner

New Status: [] Change Form Status

Group Selections

Form Type	Description
BSCF	School Claims Form
C655	Multi-row test
C656	test6
C657	Purchase Order
C658	Inbound Delivery
C659	Customer Invoice
DET2	AG Test
DETS	German Locale
E567	SAP Cert Test
FRED	Simons Test Form
SAPC	SAP Canada demo
SCEN	Scottish Enterprise
SCF1	Schools Form
SIT2	SITA Demo 2
WF01	Workflow test 1

Versions

Versions
00

Languages

Lang Name
E English

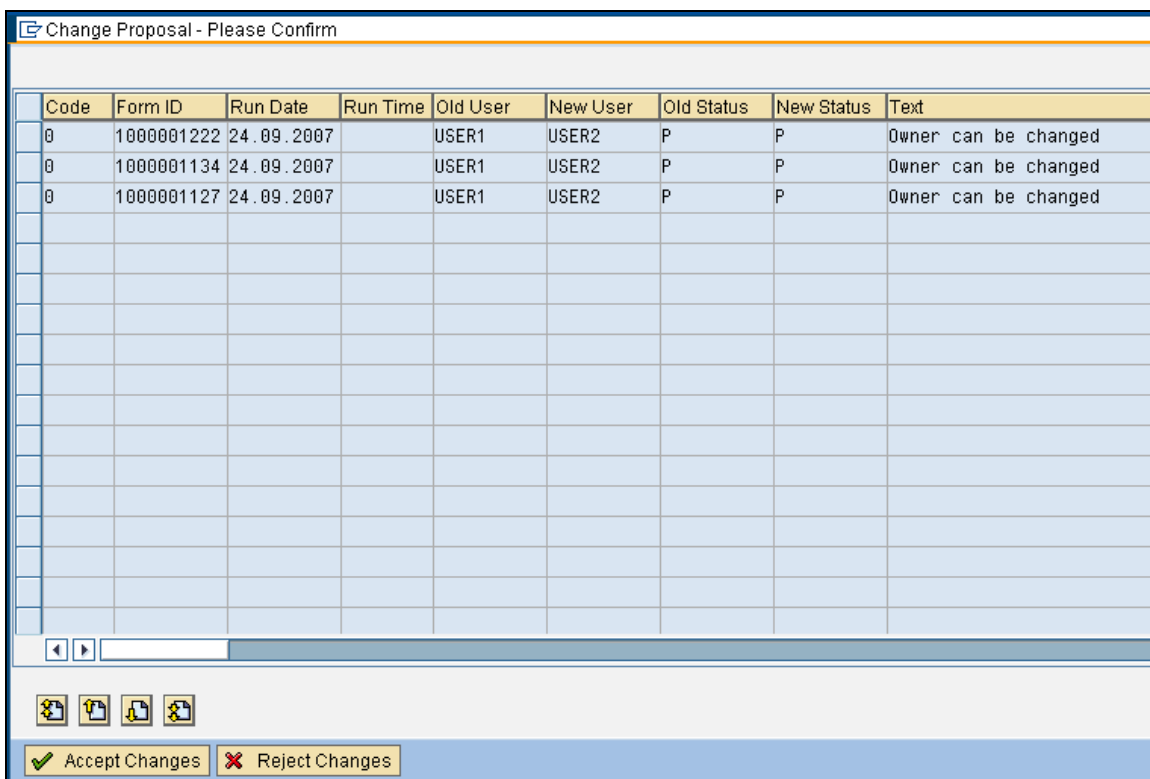
Enter selections using the 'Form Selections' or 'Group Selections' section boxes.

Enter the current owner in the 'Owner' field within the 'Form selections' selection box. Enter the target owner in the 'New Owner' field within the 'Update' section of the 'Processing Options' selection box.

If any forms to be updated are locked then the 'Force Update of Locked Forms' checkbox must be selected.

Execute using the 'Change Form Owner' pushbutton. Several pop-up windows now appear:

- 1) A confirmation pop-up window is displayed to confirm the change owner action
- 2) A pop-up window is displayed for each locked form, explaining that the form will be unlocked.
- 3) The following final confirmation window is displayed:



Code	Form ID	Run Date	Run Time	Old User	New User	Old Status	New Status	Text
0	1000001222	24.09.2007		USER1	USER2	P	P	Owner can be changed
0	1000001134	24.09.2007		USER1	USER2	P	P	Owner can be changed
0	1000001127	24.09.2007		USER1	USER2	P	P	Owner can be changed

Select 'Accept Changes' to continue.

- 4) A final confirmation window is displayed when the changes have been posted.

3 Execution Tools

3.1 FLM System Log

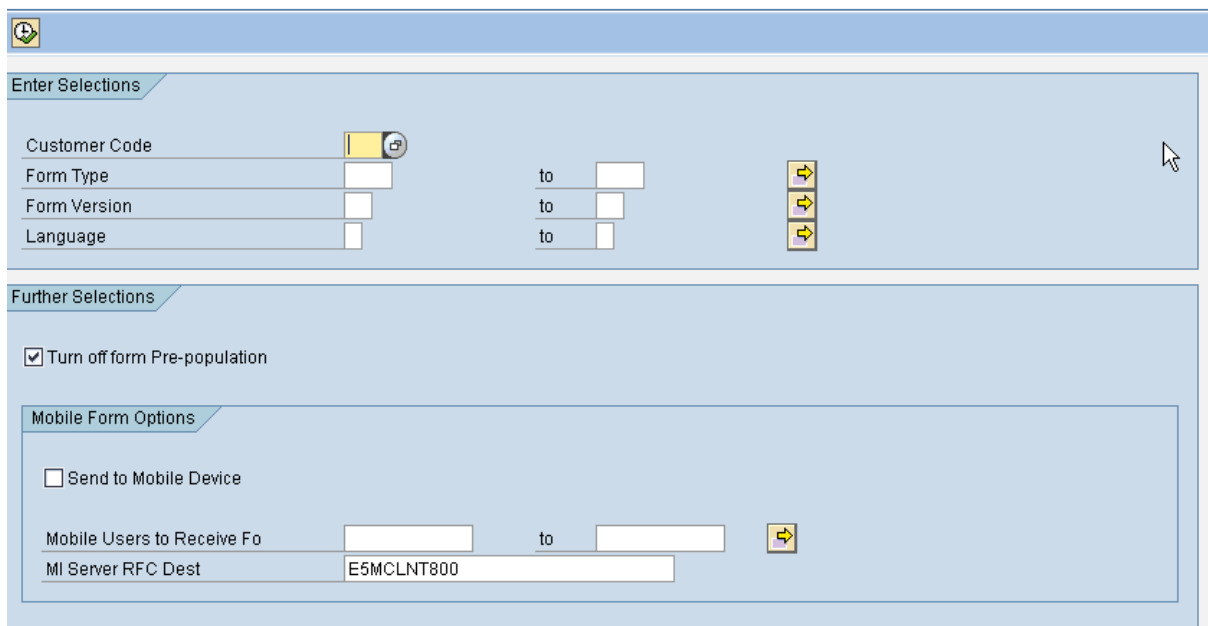
FLM-specific events are recorded in the FLM Application Log. Go into transaction SPRO then Cross-Application Components> General Application Functions Forms Lifecycle Manager> Execution Tools> System Log

Old log entries can be removed by using transaction SLG2 and object /FLM/LOG

3.2 Free Form Generation

You can generate an offline form independent of any routing scenario using the 'free form generation' facility. Select the form type and version you wish to dispatch, and whether you would like to disenable prepopulation, then click execute. Note that Mobile is not functioning in FLM version 290.

FLM: Free offline form creation



The screenshot shows the 'FLM: Free offline form creation' interface. It is divided into two main sections: 'Enter Selections' and 'Further Selections'.

Enter Selections: This section contains four rows of input fields. The first row is 'Customer Code' with a dropdown menu and a search icon. The second row is 'Form Type' with a dropdown menu and a 'to' field. The third row is 'Form Version' with a dropdown menu and a 'to' field. The fourth row is 'Language' with a dropdown menu and a 'to' field. There are three yellow arrow icons on the right side of this section.

Further Selections: This section contains a checkbox labeled 'Turn off form Pre-population' which is checked. Below this is a sub-section titled 'Mobile Form Options' which contains a checkbox labeled 'Send to Mobile Device' which is unchecked. Below this are two rows of input fields: 'Mobile Users to Receive Fo' with a dropdown menu and a 'to' field, and 'MI Server RFC Dest' with a text input field containing 'E5MCLNT800'. There is one yellow arrow icon on the right side of this section.

4 Form Monitoring and Processing

4.1 Form History Report

From the SAP menu select the menu path Cross-Application Components->Forms Lifecycle Manager->Monitoring->Form History.

Form History Report

Form selections

Customer	<input type="text"/>	to	<input type="text"/>	
Form Type	<input type="text"/>	to	<input type="text"/>	↕
Form Version	<input type="text"/>	to	<input type="text"/>	↕
Language Key	<input type="text"/>	to	<input type="text"/>	↕
ID	<input type="text" value="0"/>	to	<input type="text" value="0"/>	↕

Status selections

Status	<input type="text"/>	to	<input type="text"/>	
Form Owner	<input type="text"/>	to	<input type="text"/>	↕
Form Creation Date	<input type="text"/>	to	<input type="text"/>	↕
Form Initiator	<input type="text"/>	to	<input type="text"/>	↕

Enter selections as normal for any selection screen.

The report performs a simple selection on table /FLM/FPE_H and displays the form history for one or many forms.

Form History Report												
Form ID	Variant	Event	Old Owner	New Owner	Old Status	New Status	Created on	Created at	Initiator	Description	Action	Posting Status
1000001078	0001	001		USER2		Initial	15.08.2007	17:41:13	USER3	New form instance		Initial
1000001078	0002	002	USER2	USER2	Initial	Initial	15.08.2007	17:42:30	USER3	New Variant Generated	6	Initial
	0002	003	USER2	USER2	Initial	D	15.08.2007	17:42:30	USER3	Status Change	0	Initial
1000001078	0003	004	USER2	USER2	D	D	15.08.2007	17:43:14	USER3	New Variant Generated	6	Initial
	0003	005	USER2	USER2	D	Posted	15.08.2007	17:43:14	USER3	Status Change	Submit	Initial
	0003	006	USER2	USER2	Posted	Posted	15.08.2007	17:43:56	USER2	FPE: Posted to SAP. Document:- 0180000126		Posted

4.2 Manually posting forms using the FPE

From the SAP menu select the menu path Cross-Application Components->Forms Lifecycle Manager->Monitoring->Dashboard.

FPE: Form Posting Engine

Processing Mode

Foreground
 Background

Forms Selection

Customer to

Form Type to

Language Key to

Form Version to

Forms Status

Initial Transfer
 Reprocess Forms in Error
 Locked Forms

Record Selection

Forms ID to

Leave the Form Type selection empty and select the option 'Reprocess Forms in Error'. Execute in the Foreground as shown.

FPE: Form Posting Engine

Background Refresh Foreground Lock / Unlock Show Errors Display Form as PDF

FPE: Form Posting Engine

Process Status	Customer	FType	Language	Version	ID	Variant	Status	User	Task	Recr EMail	User	Form Block	Date	Date
Rejected	ACL	TRN3	EN	00	100	2	S	USER1			USER1			00

Any failed forms are displayed. The following options are available:

- 1) 'Show Errors': Display any errors returned by the posting adapter.
- 2) 'Background': Try to post the failed form in the background. This is suitable for posting adapters that use BAPIs to update SAP.
- 3) 'Foreground': Try to post the failed form in the foreground. This is suitable for posting adapters that use 'call transaction' (like a BDC session) to update SAP.
- 4) 'Lock/Unlock': Lock a form so that FPE stops trying to post it. The form can be fixed later or removed using the clean-up utility as necessary.
- 5) 'Display Form as PDF': Show the form data to help understand why the posting failed.

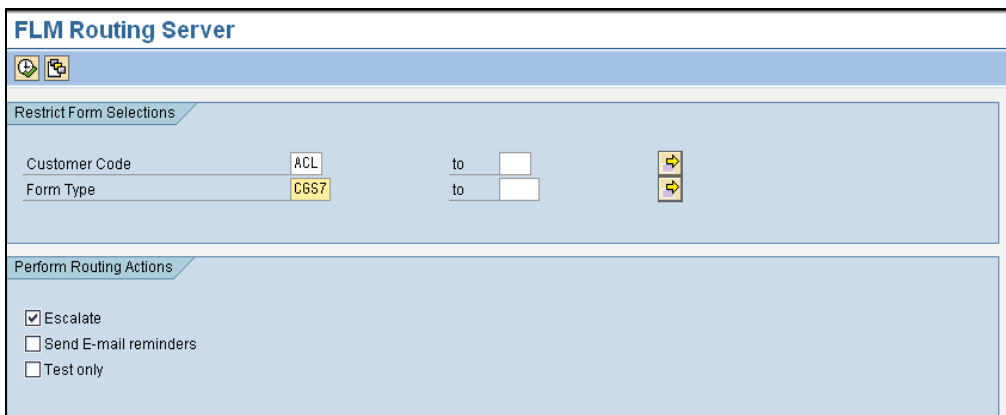
Select the option as desired to further process the form.

5 Background Jobs

Typically the following jobs should run daily, depending on the business process requirements:

5.1 Form Escalation

Program: /FLM/WF_ENGINE



FLM Routing Server

Restrict Form Selections

Customer Code: to

Form Type: to

Perform Routing Actions

Escalate

Send E-mail reminders

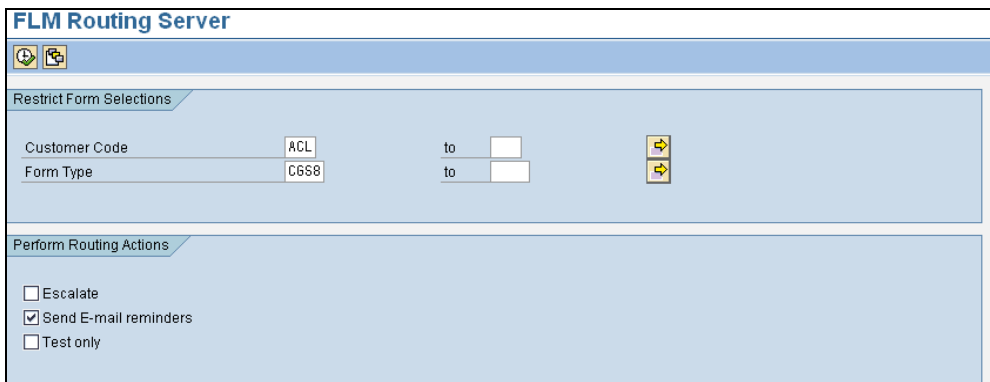
Test only

The form routing server should be run with the 'escalate' option for all form types. The program can be run in this mode multiple times per day; for example it could be run hourly depending on the business requirements.

The output written to the spool shows all forms selected for escalation.

5.2 Form Reminder E-mails

Program: /FLM/WF_ENGINE



FLM Routing Server

Restrict Form Selections

Customer Code: to

Form Type: to

Perform Routing Actions

Escalate

Send E-mail reminders

Test only

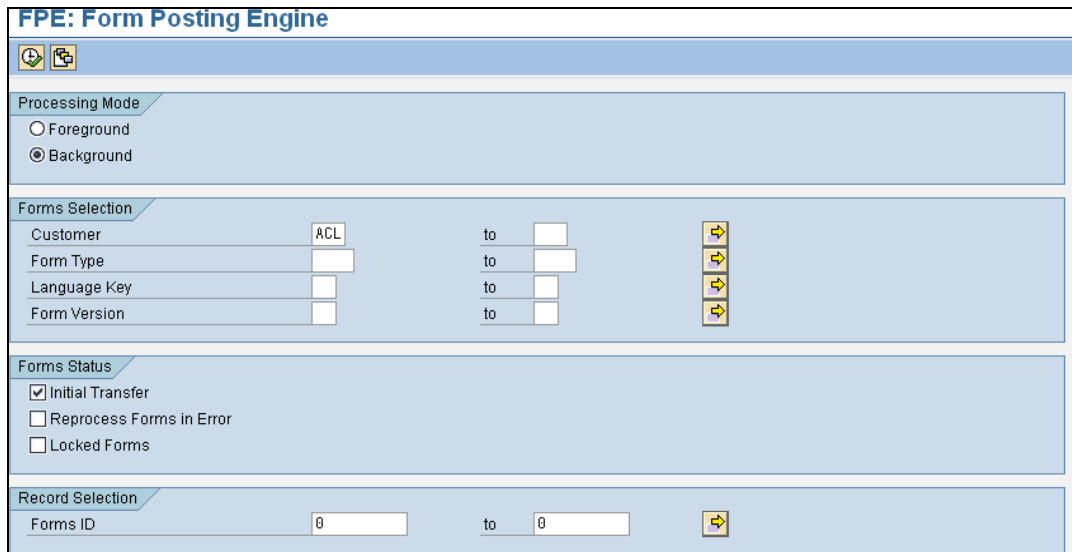
The form routing server should be run with the 'Send e-mail reminders' option for all form types.

The program must only be run in this mode once per day.

The output written to the spool shows all forms selected for e-mail reminders.

5.3 Form Posting

Program: /FLM/FPE_INVOKE



FPE: Form Posting Engine

Processing Mode
 Foreground
 Background

Forms Selection
 Customer to
 Form Type to
 Language Key to
 Form Version to

Forms Status
 Initial Transfer
 Reprocess Forms in Error
 Locked Forms

Record Selection
 Forms ID to

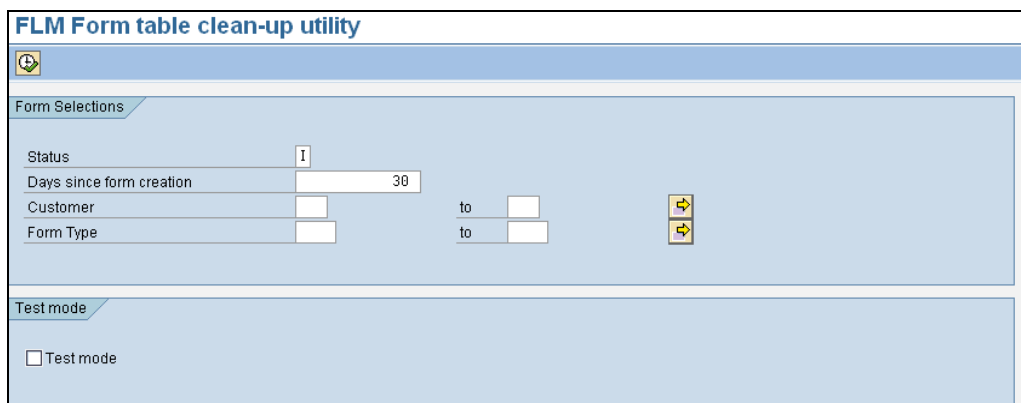
The Form Posting Engine should be run as a background job multiple times per day; for example it could be run once every hour depending on the business requirements.

The option 'Initial Transfer' should be selected for background processing. The options 'Reprocess Forms in Error' and 'Locked Forms' should not be selected.

The output written to the spool shows all forms posted.

5.4 Form Clean-up

Program: /FLM/FORM_CLEANUP



FLM Form table clean-up utility

Form Selections
 Status
 Days since form creation
 Customer to
 Form Type to

Test mode
 Test mode

It is recommended that the clean-up utility is run daily to remove unwanted forms. These forms have been rendered but not submitted, so remain in their initial status.

For offline forms the deletion window (shown above as 30 days) should be set at the point in time after which no submissions are accepted for the form type.

For on-line forms the deletion window should be set to 1 day.

Typically there would be one variant for on-line forms and one variant for off-line forms for the clean up utility background job. Alternatively a separate variant could be used for each form type.

The output written to the spool shows all forms removed. The form history table is not deleted and records that the form has been removed.

6 Correspondence Generation

To create a letter using FLM, go to 'correspondence generation' in the FLM application menu.

Your system administrator will already have defined various standard 'Correspondence Types' in the system. Subject to your user authorisation profile, you will be able to choose some or all of these from this transaction.

Begin by selecting the type of partner with which you wish to correspond in the tree below. Expand this folder and you will then see a list of all of the possible types of correspondence you can make with that object.

Select a Correspondence Type and you can then select the actual partner you wish to correspond with.

Finally you will be presented with the finalisation screen where on the left tab you will be able to edit the correspondence [if allowed] and on the right tab preview the correspondence. The buttons across the top of this screen allow you to choose different options for actually sending the correspondence once you are happy with it. All correspondences generated through this transaction can be attached to an SAP object, for example an employee's HR record, if required.

Select whether you would like to email or print the correspondence. This final step will generate the correspondence and its associated records.