



Forms Lifecycle Manager [FLM] Implementation Guide

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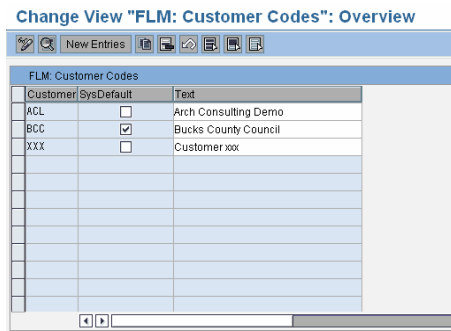
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1 Interactive Forms

1.1 Initialise Customer

This section explains how to customize the actions associated with the form routing according to the desired workflow and customer

1.1.1 Set Customer Code



Each implementation of FLM is defined by at 3-digit customer code. Use this activity to set the default customer code for this implementation of FLM by ticking the box next to the required code.

Customer Code

Lists the customer codes already assigned to the system

System Default

Shows which of the available customer codes is currently set as default

Text

Description of each 3-digit code

Creating a new customer code

You can create a new customer code by clicking 'new entries' at the top of the screen.

New Entries: Details of Added Entries

Customer

FLM: Customer Codes

Text	<input type="text"/>
EncryptKey	<input type="text"/>
File Type	<input type="text"/>
Sender EMail	<input type="text"/>
Object	<input type="text"/>
User	<input type="text"/>
Rej Title Text	<input type="text"/>
Rej Body Text	<input type="text"/>

Customer

Enter the 3- digit code (letters or numbers) you want to define your new FLM implementation

Text

Enter text that describes the customer code.

Encrypt/Key

Enter the desired encryption key.

File Type

Forms can be sent as PDF format (entire form) or Data Only Format.

PDF format contains both the form and the data held within it so the file attachment size can be very large.

Data only format sends only the information contained within the form, which means that the size of the attachment can be minimized. Such information is encrypted according to the entered encryption key and

Sender Email

This field holds the name of the email address to which any incoming mail will be directed.

Enter the email address from which any prompts should be sent, and from which replies can be retrieved

Object

Element of the authorization system.

An authorization object combines up to 10 authorization fields, which are checked using the AND connective.

Authorizations are checked against objects in the system. Authorization objects enable complex checks (linked to several conditions) of an authorization. For the authorization

check to be successful, the user must pass the check for each field contained in the object.

User

User Name in User Master Record

Rej Title Text

FLM: Text Object for Body of e-mail Rejection

When an off-line e-mail is received back into the FLM system it may have certain fields validated before it is received fully into the system. If the form fails validation, an e-mail may also be sent back to the sender to explain why it could not be received.

This field holds the name of the text object that is used to store the title of that e-mail.

Rej Body Text

FLM: Text Object for Body of e-mail Rejection

When an off-line e-mail is received back into the FLM system it may have certain fields validated before it is received fully into the system. If the form fails validation, an e-mail may also be sent back to the sender to explain why it could not be received.

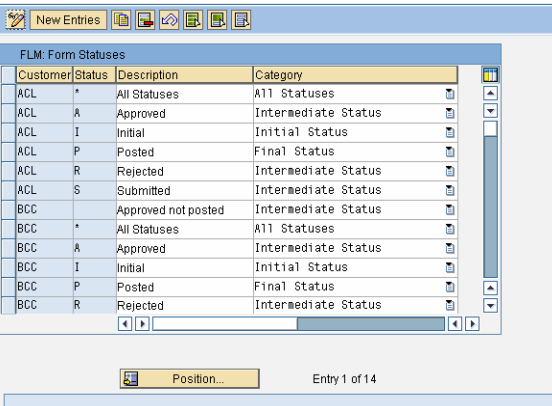
This field holds the name of the text object that is used to store the body of that e-mail.

1.1.2 Define Form Statuses

This section displays all the available statuses that can be assigned to each form. A separate status is available according to customer code, description and category.

Form statuses refer to the stage of the workflow, or **routing**, that the form is in at any one time.

Change View "FLM: Form Statuses": Overview



Customer	Status	Description	Category
ACL	*	All Statuses	All Statuses
ACL	A	Approved	Intermediate Status
ACL	I	Initial	Initial Status
ACL	P	Posted	Final Status
ACL	R	Rejected	Intermediate Status
ACL	S	Submitted	Intermediate Status
BCC		Approved not posted	Intermediate Status
BCC	*	All Statuses	All Statuses
BCC	A	Approved	Intermediate Status
BCC	I	Initial	Initial Status
BCC	P	Posted	Final Status
BCC	R	Rejected	Intermediate Status

Position... Entry 1 of 14

An **initial** status defines a form at the first stage of a routing, i.e. **initial**.

An **intermediate** status defines a form in the middle stages of a routing, e.g. **approved**, **rejected**, **submitted**, or **approved not posted**.

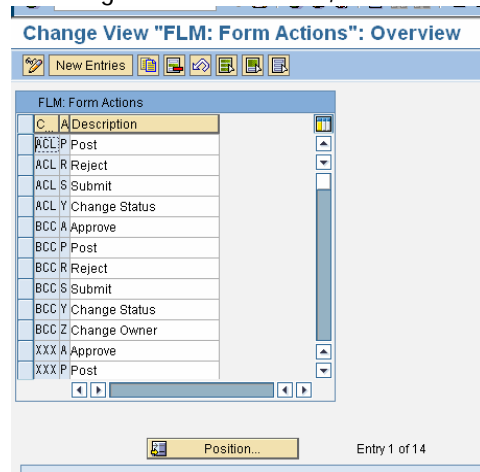
A final status defines the form at the end of a routing, e.g. posted.

All statuses displays all available statuses

You can create a new form status tag by going to the 'new entries' menu and entering new criteria for customer code, status code, description, and category

1.1.3 Define Form Actions

Form Actions list the options available to select the next position in the form routing, e.g. submit, approve, post etc. You can enter a new action by going to 'new entries' and entering a customer code, action code and description for each new action.



1.2 Setup Content Server

1.2.1 Define Content Repositories

Use

In this IMG Activity you can define content repositories to which contents can be moved.

You must only carry out this activity if problems have occurred in automatic configuration with the SAP Kpro Web Configuration Tool (see below), if you want to change the settings created by this tool, or if you want to insert more content repositories.

In Knowledge Warehouse three different types of content repositories are used:

HTTP Content Server

Documents of different types are generally stored in an external Content Server with SAP HTTP Interface (SAP Content Server).

Structure Storage System

Structures are stored in the Structure Storage System of the SAP System.

Database

Document administration data, macro files and other utilities needed to use the Knowledge Warehouse are stored in the SAP System Database.

You can find further information on content repositories in the SAP Knowledge Warehouse Installation Guide and in the SAP Library under Basis - Basis Services - SAP Knowledge Provider - Content Management Service - Concepts.

Requirements

In order to define an HTTP content repository in the external SAP Content Server as well as in the SAP System, the repository must be installed and an RFC connection to it must exist.

Standard settings

If you have used the SAP Kpro Web Configuration Tool when installing the Knowledge Warehouse and have selected automatic configuration of the content server, HTTP content repositories have already been created for the document ranges delivered with Knowledge Warehouse, in the SAP System as well as in the SAP content server. The names of these repositories follow the convention <SYSID>_<DOCUMENT AREA>. In addition an HTTP content repository <SYSID>_CUSTCONT will have been created. You can use this to store documents you may wish to create within the document ranges you have created.

Repositories in the SAP System (repositories of the Structure Storage and SAP database types) are delivered with the system and therefore do not need to be created.

Activities

In order to create a content repository, go to the Change Mode in the Overview Screen of the available content repositories and select **Create**.

In the field *Content Rep.* enter the name of the content repository and in the field *Description* enter an explanation.

In the field *DocRange* select the document range whose content you wish to store in the content repository. However, as content from several document ranges can be stored in one content repository, you do not need to assign a specific document range.

In the field *Storage Type* select one of the three above mentioned storage types and make the required additional entries in the fields which appear.

HTTP-Content Server

In the field *Version Nr* enter value 0046 in order to select version 4.6 of the HTTP interface.

In the field *HTTP Server* enter the host name (including domain) and in the field *Portnumber* enter the port on which the SAP Content Server is installed. The standard value for the Content Server Port is 1090.

In the field *HTTP Script* enter the path and program names of the HTTPContent Server Interface: ContentServer/ContentServer.dll.

By clicking on **Send Certificate** you can send the SAP System certificate to the HTTP Content Server. You need to send this certificate in order to work with signed URLs. After the certificate has been sent to the Content Server

you need to activate it in the content server before you can work with the content server and store documents.

Structure Storage

If you need a repository of this type for one of your document ranges in which you also produce structures, use the repository CUSTSTRUCT in which all the documents of the storage category (content category) of the same name are stored.

Database

If you need a repository of this type for one of your document ranges use the repository CUSTCONTDB in which all documents of the storage category (content category) of the same name are stored.

Save your entries

1.2.2 Define and Assign Content Categories

Use

In this IMG activity you assign the storage categories of documents managed in the Knowledge Warehouse to content repositories (in the Knowledge Provider these are also called content categories).

You must only carry out these activities if problems have arisen during the automatic configuration of the content repository by the SAP KPro Web configuration tool (see below), or if you want to change the settings made by the tool or create further storage categories.

Storage categories are logical storage areas. In the Knowledge Warehouse, a storage category is preset for each document class. When a document is created, the corresponding category is assigned to it. This assignment of storage category to content repository defines where the document should be physically stored.

You can also use this activity to define new storage categories that you will need for a location-specific override of the preset storage categories (see [Distributed Storage](#)).

Standard settings

If when installing the Knowledge Warehouse you used the SAP KPro Web configuration tool and chose automatic content server configuration, not only will HTTP content repositories have been created for Knowledge Warehouse document spaces, but storage categories will also have been assigned to these repositories.

Activities

In order to assign an existing storage category to another content repository, select the storage category on the overview screen and choose Go To -> Detail. In the field *Content*

Rep. choose the content repository in which documents of this storage category should be stored from now on.

Please note that after this change has been made, you will no longer be able to access documents from this storage category that had already been stored.

In order to create a new storage category and assign it to a content repository, choose New Entries. Enter the name of the storage category and give a description. If necessary, choose the document space whose content this storage category is to be used for. In the field *Content Rep.* choose the content repository in which documents from this storage category should be stored.

1.2.3 Link Document Types

In this activity, you link your document types to the content categories as defined in the CMS in the previous step. The only meaningful entries here are:

XDP Form Templates

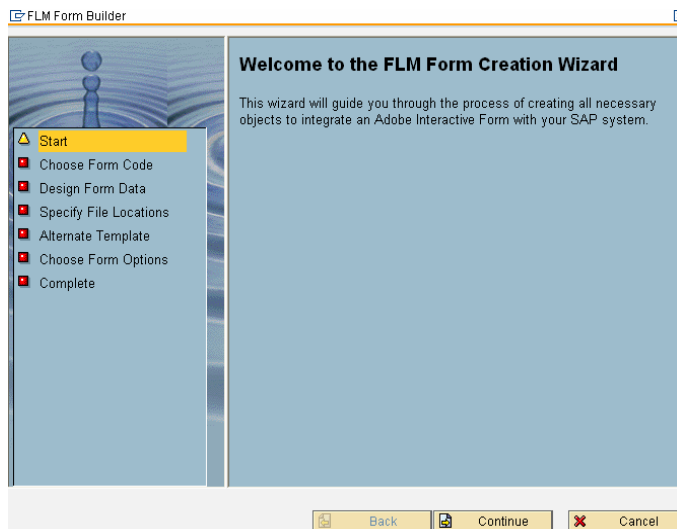
XML Form Data

PDF Documents

1.3 Setup Forms

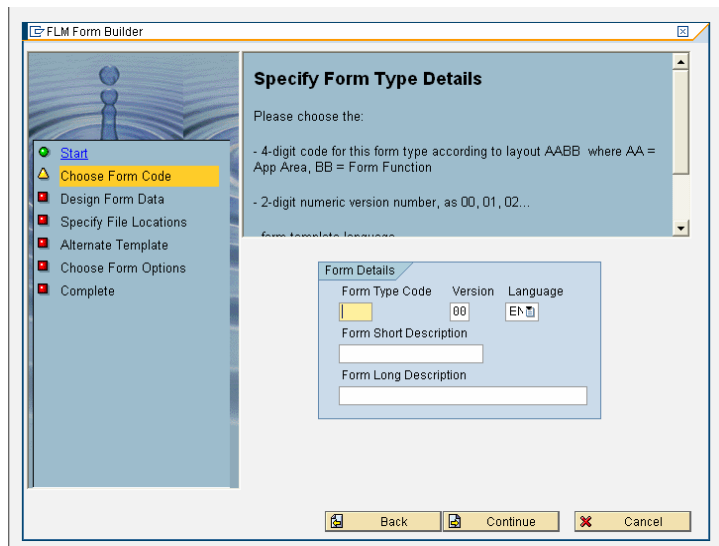
1.3.1 New Form Wizard

Create the logical definition of a new interactive form, including field names, field types and form templates. This section will take you through an example form creation to explain all the processes involved.



On the welcome page, click 'Continue' to begin creating your form.

Specify Form Type Details



This section of the form wizard defines how the form will be identified within SAP. Each form is defined by a four-character code, version number and language. You can enter a short description and long description of the form here.

1. Form type code.

Invent a form type code here: the first two letters define the application area while the second two denote the form's function. For example, a sales order form may have the code SAOR. It is a good idea to decide and agree on a universal form naming system so that each form code accurately describes the form's application area and function. This will be helpful, for example when managing form routings.

2. Version.

One of the features of FLM is the support of concurrent form versions. So it is possible to create a form with the same function and 4-character code, but with a different version number. This facilitates forms management, because the 4-digit character code can be fixed for a specified form type and application, and does not need to be altered with successive versions of the form.

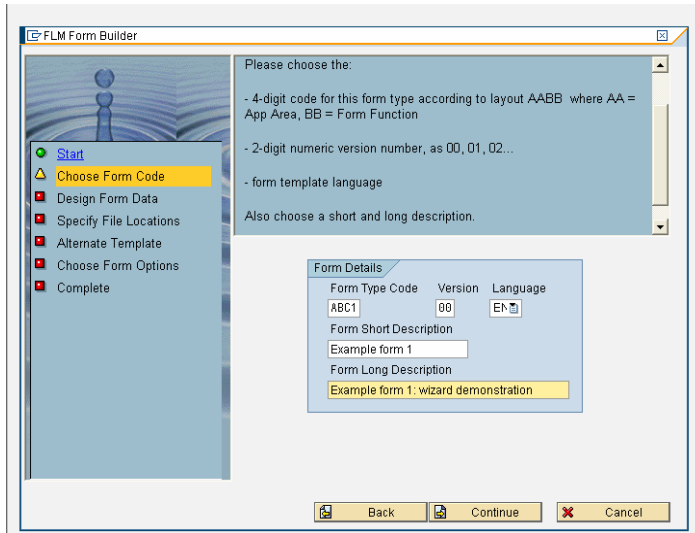
Use this field to enter the version number of the form.

3. Language.

Each form must be generated in English before a copy can be made in another language. Once a form has been designed in English though, any language can be selected for a successive version of the form.

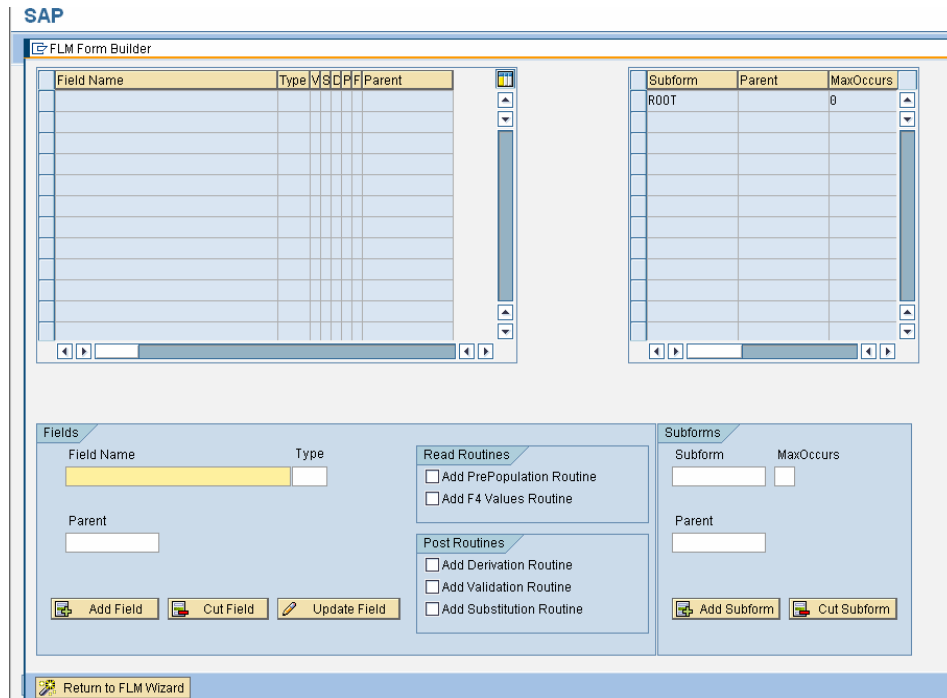
4. Form Description

Enter a short and long description of the form to easily identify it in the forms list.



Form Data Structure

Launch form data designer at this stage of the wizard to input the required fields and subforms.

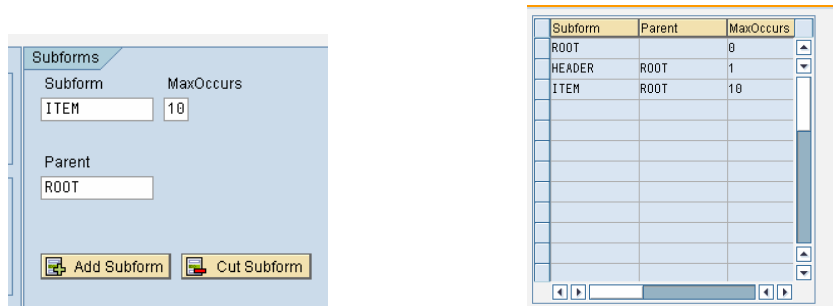


Subforms

Begin the new form creation by creating a Subform. This is a logical or physical grouping of fields that defines their characteristics on the form. It is a feature of Adobe interactive forms that some fields may be copied according to how many times it is required. For

example, on a sales order form, an item description/quantity field may be copied according to the number of discrete items to be ordered.

However it would be undesirable for some fields, for example 'name' and 'address' to be allowed to appear more than once on the form. MaxOccurs allows you to set the maximum number of times a subform field may occur on the form. Following the same example, it would be advisable to set Header fields as MaxOccurs: 1, and Item fields as MaxOccurs: 10. When these fields are eventually created, they can then be assigned to the relevant subform group to maximize the functionality of the fields according to requirements.



Fields

To create a field, begin by entering the field name in the 'Field' section of the page. The Field Type can be assigned as character, numeric, date etc. The field can then be assigned to one of the subforms you have created under 'Parent'. Please note that the field name must consist of alphanumeric characters only; underscores are allowed but spaces are not. Though the field names should resemble their content, they need not be the label of the field as it will appear on the form. This is done via form design at a later stage.

Read and Post routines can be assigned to each field:

Read Routines

Read Routines will apply to the field in any reading instance of the form.

A Prepopulation Routine will cause the field to be prepopulated and will not be amendable by the form user. This could be used, for example, for the Form ID field.

An F4 Values Routine limits the field input to options selected from a drop-down menu. This could be used in the case of there being a limited number of field options to select from, such as Country of Residence.

Post Routines

Post routines apply to the transfer of data back into SAP via the Posting Engine.

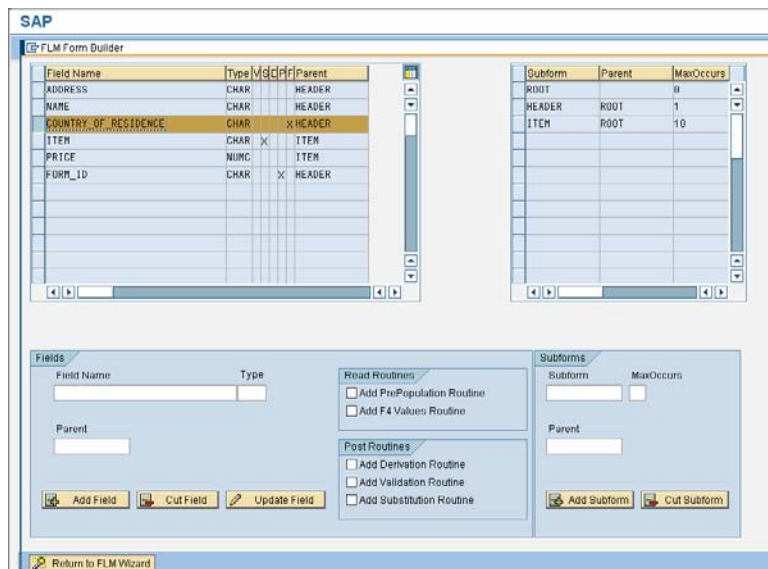
A Derivation Routine allows the data on the form to be used create a field?

A Validation Routine checks the data in the field for validity before the form can be submitted. For example, a postcode and address may be checked against a data bank of addresses and postcodes to confirm that the submitted data is valid.

A Substitution Routine substitutes the data input to the field for another value. For example, an item option featured as full text in the form might be substituted for an item code as the data is input to SAP.

Further details of the above processes are available in the Development Guide.

Field Editing



To edit or cut a field after it has been entered, select its row in the Field Name table by clicking on the blue square to the left of it. It can then be altered using Update Field, or deleted using Cut Field. Once all the fields have been entered, click on 'Return to FLM Form Wizard' and proceed to the next step.

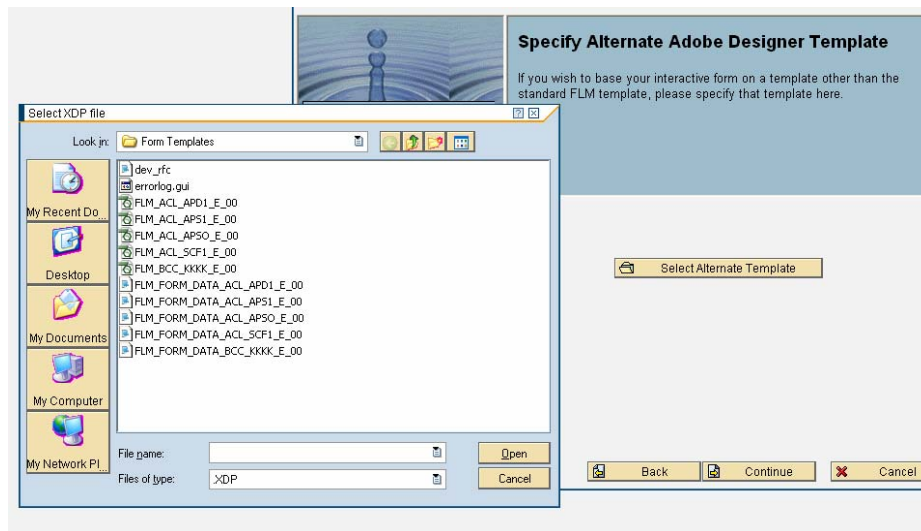
Specify Location for XML Data Definition File

The form data definitions you have just created will be stored as an XML file during the generation of the FLM interface. Here you can specify the location in which to store that XML file. You must store it to an accessible location such that it can be imported into the Adobe Lifecycle Designer Tool. Click 'Set Directory' and select a new location if the one displayed is not suitable.

Alternate Adobe Designer Templates

FLM uses a standard template on which to base its forms. To use this standard template, simply click 'continue' at the bottom of the page.

To choose an alternative Adobe Designer template (an .xdp or .pdf file only), click 'Select Alternate Template' and import a previously designed form template.



Form Options

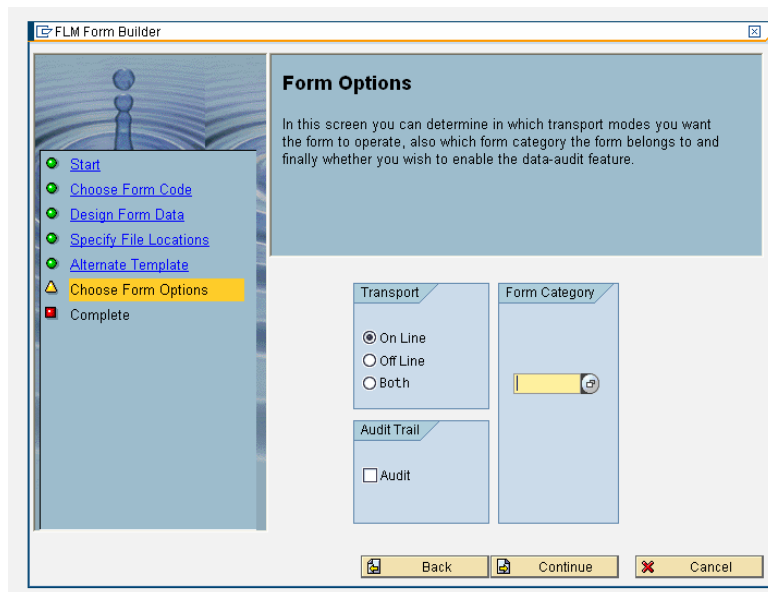
Under Form Options, you can specify the required form category, transport options, and whether an audit trail should be created.

With Offline Transport the form is sent via email as an attachment .

With Online Transport the form is only available via the online form portal.

Selecting 'Both' will allow both online and offline scenarios.

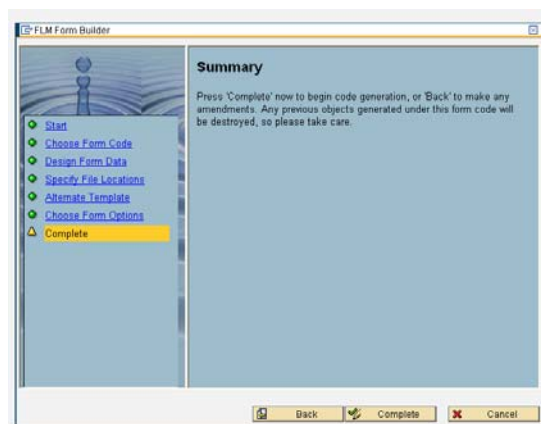
An Audit Trail (Variant Trail) can be created as the form is modified through its routing. Before selecting this option however, it is worth noting that an audit trail generates a significantly larger file size attached to each form, which may not be desirable if the form is to be transported offline.



Summary

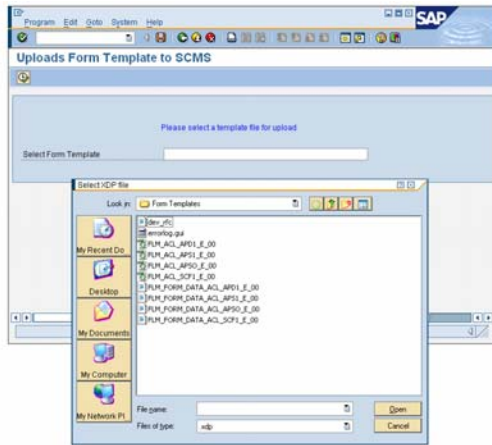
You can now click on 'complete' to generate your form, or 'back' to make any amendments. On clicking 'complete' the components of the form will automatically be saved in the system.

Once the wizard has been closed, you can still make amendments by initiating the form wizard for a form of the same code, and if necessary updating the version number of the form.



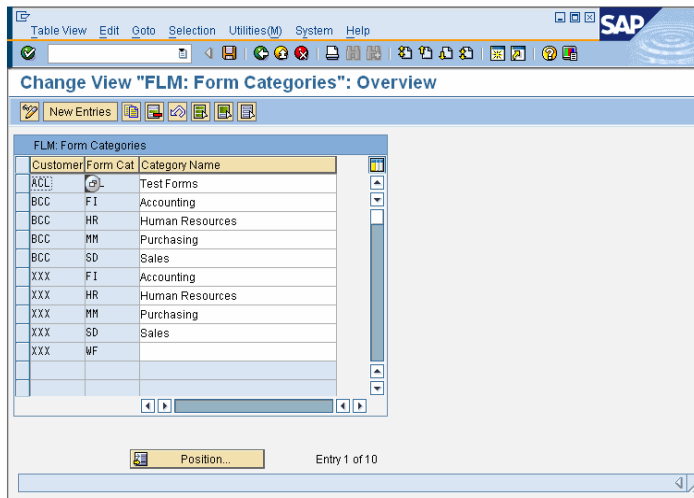
1.3.2 Upload Form Template

In this activity you can upload an .xdp file from your local machine into FLM. The system will ask you to confirm the form details and also if you wish to overwrite any existing form templates.



1.3.3 Define Form Categories

In this activity you define the set of available Form Categories in your system. A Form Category is a logical grouping of Form Types that is used as a part of the user authorisation concept in FLM.



1.3.4 Form Types Configuration

In this activity you can set up the various configurations for your form templates such as their number ranges.

Change View "FLM: Form Types": Overview

FLM: Form Types

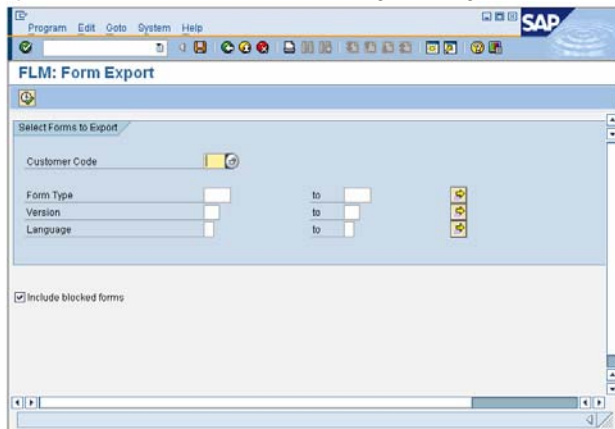
Customer	FType	Language	Version	Form Cat	Audit	Default	Form Name
BCC	C2	E	00	SD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Long ABC 2
BCC	ABC3	E	00	SD	<input type="checkbox"/>	<input type="checkbox"/>	Long ABC 3
BCC	ABC4	E	00	SD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Long ABC 4 V01
BCC	ABC4	E	01	MM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Long ABC 4 V01
BCC	ABC5	E	00	MM	<input type="checkbox"/>	<input type="checkbox"/>	alt template test
BCC	ABC6	E	00	SD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Long ABC 6
BCC	ABC7	E	00	SD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Long ABC 6
BCC	C6S1	E	00	FI	<input type="checkbox"/>	<input type="checkbox"/>	CGS Test Form
BCC	C6S1	E	01	FI	<input type="checkbox"/>	<input type="checkbox"/>	CGS Test Form
BCC	EX01	E	00	SD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Long EX01
BCC	EX02	E	00	SD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Long EX02
BCC	SD01	E	00	SD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Order

Position... Entry 1 of 25

1.3.5 Export/Import Form Package

Export Form Package

In this activity you can export form definitions to an external file. You can subsequently import these definitions into any FLM system which is of equal or later version.



FLM: Form Export

Select Forms to Export

Customer Code

Form Type to

Version to

Language to

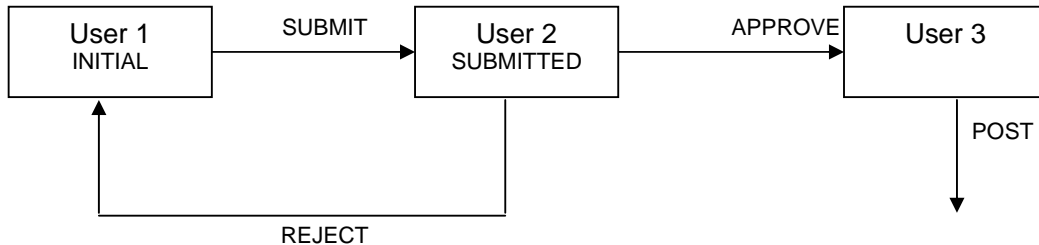
Include blocked forms

Import Form Package

In this activity you can import a form package into your system. A form package consists of one or more forms in a bundle. During the import you will be given chance to select which forms you wish to import, and also you are given the opportunity to allocate new form types, versions and languages as required.

1.4 Setup Form Routing

This section allows you to define all aspects of the form workflow, or routing. e.g:



1.4.1 Form Owner Determination

In this activity you determine which user will become the new form owner after an action by a specified user on a form of a specified status.

This activity is typically only relevant for workshops and rapid forms prototyping.

Change View "FLM: Form Routing Prototyping table": Overview

Customer	FType	User Name	Status	Action	User Name
BCC	ABC2	USER1	S	A	USER3
BCC	ABC2	USER1	S	R	USER2
BCC	ABC2	USER2	I	S	USER1
BCC	ABC2	USER2	R	S	USER1
BCC	ABC4	USER1	I	S	USER2
BCC	ABC4	USER1	R	S	USER2
BCC	ABC4	USER2	S	A	USER3
BCC	ABC4	USER2	S	R	USER1
BCC	SDS1	USER1	I	S	USER2
BCC	SDS1	USER1	R	S	USER2
BCC	SDS1	USER2	S	A	USER3
BCC	SDS1	USER2	S	R	USER1

Position... Entry 1 of 31

Stages in the form routing are listed as a function of customer code, form type, form status, action and user.

To add a stage in the form routing, go to 'new entries' and enter a new sequence of form ownership transfer.

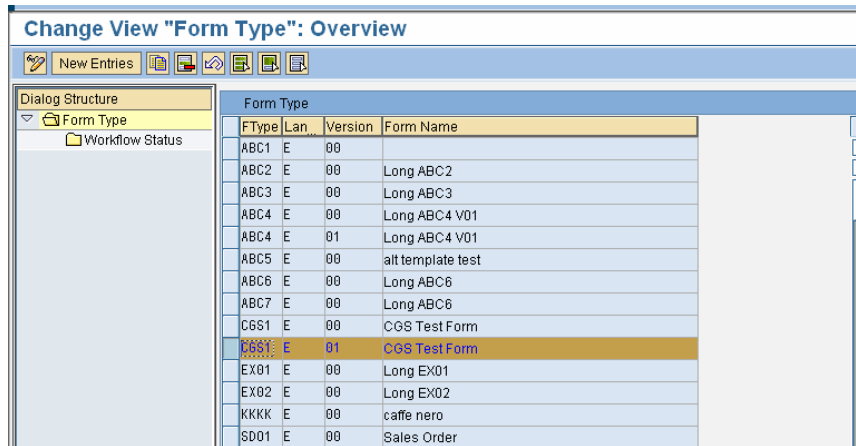
1. Enter the customer code
2. Enter the form type code
3. Enter the first form owner
4. Enter the form status code to which the action will be applied

5. Enter the desired action code
6. Enter the name of the user that will become the owner of the form once steps 1-5 have been applied.

1.4.2 Form Status Determination

This menu allows you to view Form Statuses and Actions for Form Routing.

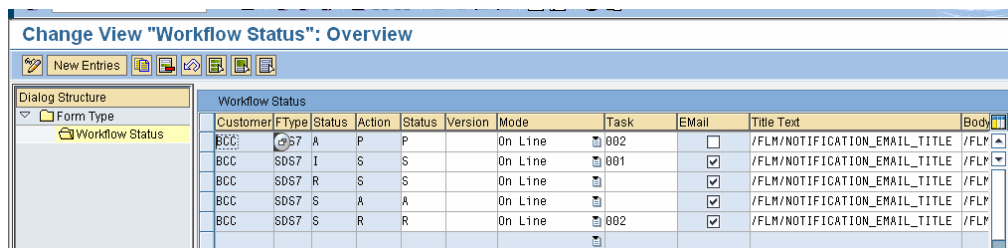
Change View "Form Type": Overview



FType	Lan	Version	Form Name
ABC1	E	00	
ABC2	E	00	Long ABC2
ABC3	E	00	Long ABC3
ABC4	E	00	Long ABC4 V01
ABC4	E	01	Long ABC4 V01
ABC5	E	00	alt template test
ABC6	E	00	Long ABC6
ABC7	E	00	Long ABC6
CGS1	E	00	CGS Test Form
CGS1	E	01	CGS Test Form
EX01	E	00	Long EX01
EX02	E	00	Long EX02
KKKK	E	00	caffe nero
SD01	E	00	Sales Order

To view the workflow status of a form, select its name from the list by clicking on the blue bar to the left of the relevant row, then double-click on 'Workflow Status' under Dialog Structure. This will bring up a screen detailing the workflow of that form, including whether that stage of the routing is to be conducted online or offline, email settings and links to any email title and body text.

Change View "Workflow Status": Overview



Customer	FType	Status	Action	Status	Version	Mode	Task	EMail	Title Text	Body
BCC	SDS7	A	P	P		On Line	002	<input type="checkbox"/>	/FLM/NOTIFICATION_EMAIL_TITLE	/FLP
BCC	SDS7	I	S	S		On Line	001	<input type="checkbox"/>	/FLM/NOTIFICATION_EMAIL_TITLE	/FLP
BCC	SDS7	R	S	S		On Line		<input checked="" type="checkbox"/>	/FLM/NOTIFICATION_EMAIL_TITLE	/FLP
BCC	SDS7	S	A	A		On Line		<input checked="" type="checkbox"/>	/FLM/NOTIFICATION_EMAIL_TITLE	/FLP
BCC	SDS7	S	R	R		On Line	002	<input checked="" type="checkbox"/>	/FLM/NOTIFICATION_EMAIL_TITLE	/FLP

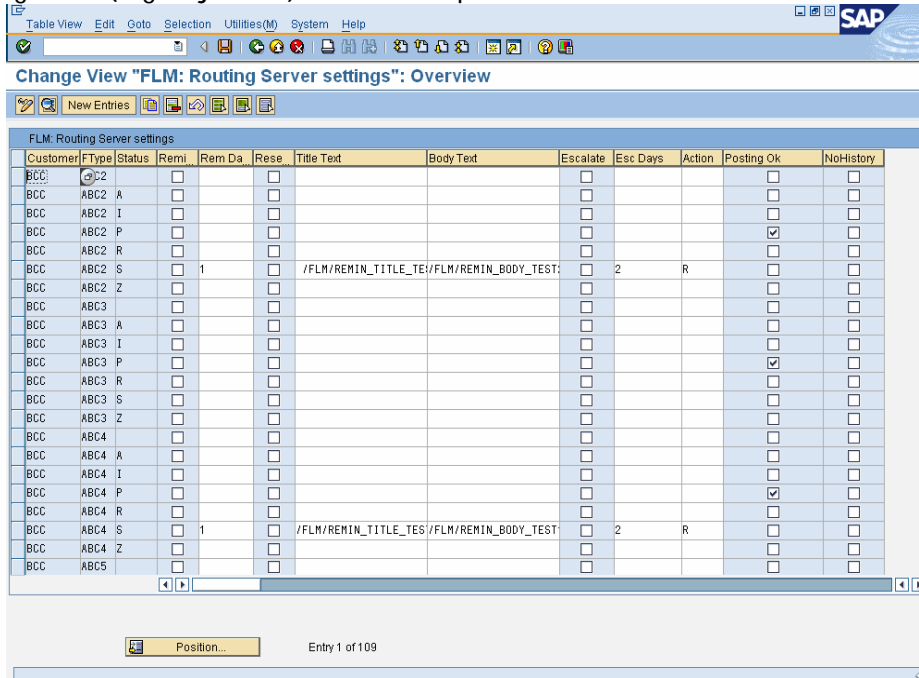
A new status routing can be created by selecting 'New Entries' and entering the Customer Code, Form Code, Version, Status, Action on Status, Status After Action and Online/Offline settings.

1.4.3 E-mail Reminder Settings

Email reminders can be automatically sent to the relevant user if the form spends too long at their stage in the form routing. You can set which form statuses have automatic reminders associated with them, the number of days that are allowed to pass before a reminder is sent and whether a reminder will be resent if no action is taken.

This option allows you to create and modify email reminder settings for every individual form in the system, identified by its customer code and form type. Reminders can be

configured according to form status; e.g. different reminder settings can be made depending on whether the form is in initial or rejected status. Links can be made to the desired email title text and body text, and an automatic action should reminders be ignored (e.g. rejection) can be set up.



The screenshot shows the SAP 'Change View FLM: Routing Server settings' table. The table has the following columns: Customer, F Type, Status, Remi., Rem Da., Rese., Title Text, Body Text, Escalate, Esc Days, Action, Posting Ok, and No-History. The data is organized into groups for Customer ABC2, ABC3, ABC4, and ABC5. Each group contains rows for different form types (A, I, P, R, S, Z) and statuses. The 'Remi.' column contains values 0 or 1, 'Esc Days' contains 0 or 2, and 'Action' contains 'R'. The 'Title Text' and 'Body Text' columns contain the path '/FLM/REMIN_TITLE_TEST/FLM/REMIN_BODY_TEST'. The 'Posting Ok' column has a checked box for some entries. The status 'S' is highlighted in blue.

Customer	F Type	Status	Remi.	Rem Da.	Rese.	Title Text	Body Text	Escalate	Esc Days	Action	Posting Ok	No-History
BCC: ABC2												
BCC: ABC2	A											
BCC: ABC2	I											
BCC: ABC2	P										<input checked="" type="checkbox"/>	
BCC: ABC2	R											
BCC: ABC2	S		1			/FLM/REMIN_TITLE_TEST/FLM/REMIN_BODY_TEST			2	R		
BCC: ABC2	Z											
BCC: ABC3												
BCC: ABC3	A											
BCC: ABC3	I											
BCC: ABC3	P										<input checked="" type="checkbox"/>	
BCC: ABC3	R											
BCC: ABC3	S											
BCC: ABC3	Z											
BCC: ABC4												
BCC: ABC4	A											
BCC: ABC4	I											
BCC: ABC4	P										<input checked="" type="checkbox"/>	
BCC: ABC4	R											
BCC: ABC4	S		1			/FLM/REMIN_TITLE_TEST/FLM/REMIN_BODY_TEST			2	R		
BCC: ABC4	Z											
BCC: ABC5												

To make a new email reminder entry, go to 'new entry' at the top of the screen. Here you can enter the 3-letter customer code, four-digit form type, and form status at the time the reminder should be sent.

Under 'FLM routing server settings' you can check options to:

Send reminder email. The 'reminder window' is the number of days allowed after the recipient has received the form for their completion or authorization before a reminder is sent.


Resend reminder: here enter the name of the text object used to store the title of the reminder e-mail, and the name of the text object used to store the email body text.

Escalate form. If the user has still not passed the form on after all reminders have been sent, the system can automatically take action on the form. You can enter the number of days that make the escalation window, and the required action code, e.g. R.

Posting OK

No History

New Entries: Details of Added Entries

Customer 

Form Type

Status

FLM: Routing Server settings

Send reminder email

Reminder Window

Resend reminder

Title Text

Body Text

Escalate Form

Esc Win [Days]

Action

Posting Ok


NoHistory


1.5 Offline Forms Setup

1.5.1 E-mail Settings

This facility allows you to view and create email sender and receiver settings. This defines the email addresses assigned to particular stages in an offline form routing. For example, a form with status I (initial) may be submitted to an approver at the first stage of the form routing. In the example below, an Initial form ABC3 will be routed to rg@arch.co.uk once submitted by the initiator.

Change View "FLM: Offline form settings": Overview

New Entries 

FLM: Offline form settings								
Customer	FType	Language	Version	Status	Receiver EMail	Title Text	Body Text	Attachment Name
BCC	 2	E	00	*				
BCC	ABC3	E	00	*				
BCC	ABC3	E	00	I	rg@arch.co.uk	/FLM/OFFLN_TITLE_TES	/FLM/OFFLN_BODY_TEST	/FLM/OFFLN_ATT
BCC	ABC4	E	00	*				

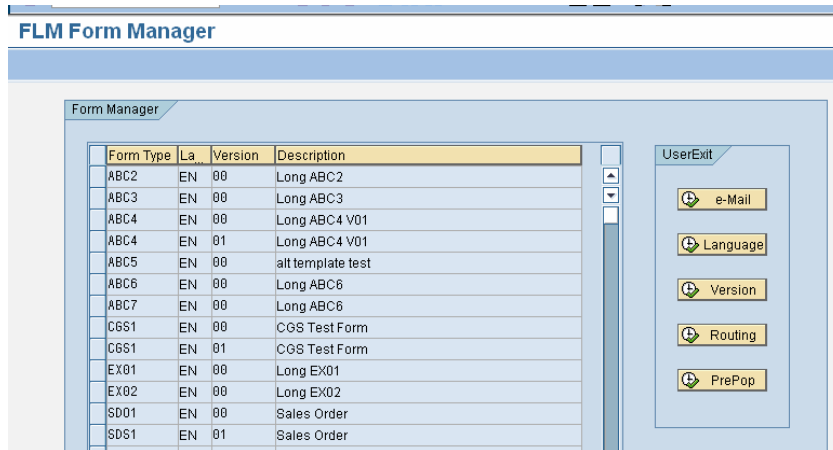
1.5.2 Define Approved Email Addresses

This facility allows you to create a list of Safe Email Recipients recognized by the system to be used in form routings.

1.6 Business Logic

1.6.1 Form Userexits

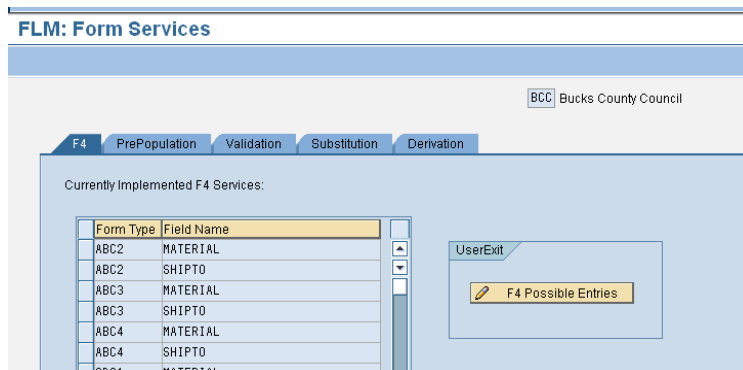
The form manager tool allows you to see an overview of your entire form catalogue, as well as to be able to edit the form template and adjust any of the form level business service routines you have set up for your form [off-line email address determination, version determination, language determination].



To view the settings for an individual form, select the required row and click on one of the Userexits displayed in the Userexit selection screen on the right: Email, Language, Version, Routing or PrePop

1.6.2 Field Userexits

In this activity you define userexits for any field Derivation, Substitution, Prepopulation, F4 (Dropdown) or Validation. This function contains a compiled list of all the fields currently being implemented within each category, according mainly to what has been assigned to them in the Form Wizard. Selecting a row and clicking on the icon available in the Userexit selection screen gives more details of these settings.

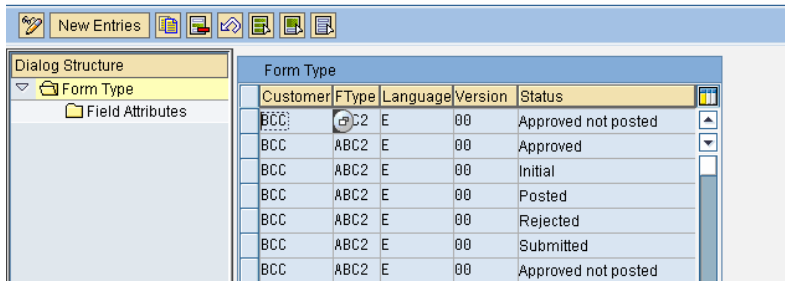


You can select which routine you wish to view (e.g. PrePopulation, Derivation) by selecting the required option from the blue tabs.

1.6.3 Template Look and Feel

Here you can set the look and feel of each field and subform on the template depending on the workflow status of the form. For example, for forms that have been approved, you can determine that certain fields are no longer available for input for the subsequent users.

Change View "Form Type": Overview



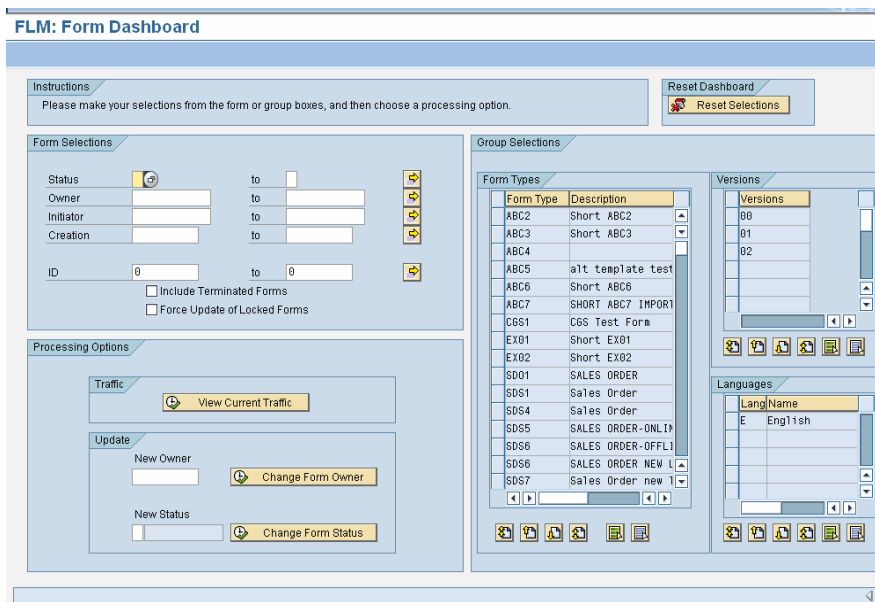
Customer	F Type	Language	Version	Status
BCC	ABC2	E	00	Approved not posted
BCC	ABC2	E	00	Approved
BCC	ABC2	E	00	Initial
BCC	ABC2	E	00	Posted
BCC	ABC2	E	00	Rejected
BCC	ABC2	E	00	Submitted
BCC	ABC2	E	00	Approved not posted

To change field attributes, select the desired form code and status from the list and double-click on Field Attributes in the Dialog Structure menu.

1.7 Execution Tools

1.7.1 Forms Dashboard

FLM forms dashboard allows you to monitor forms traffic, and also to change the forms status and form owner as required.



1.7.2 Preview default Form

In the activity 'Form Types Configuration', one of the options allows you to set a form as default.

In 'preview default form', that form will be displayed as a pdf as it currently appears in the system. You cannot enter any data into this preview form, nor open it for editing.

1.7.3 Dispatch emails

This is a sample program to initiate the creation of offline forms.

Features of this function are described in more detail within the Development Guide

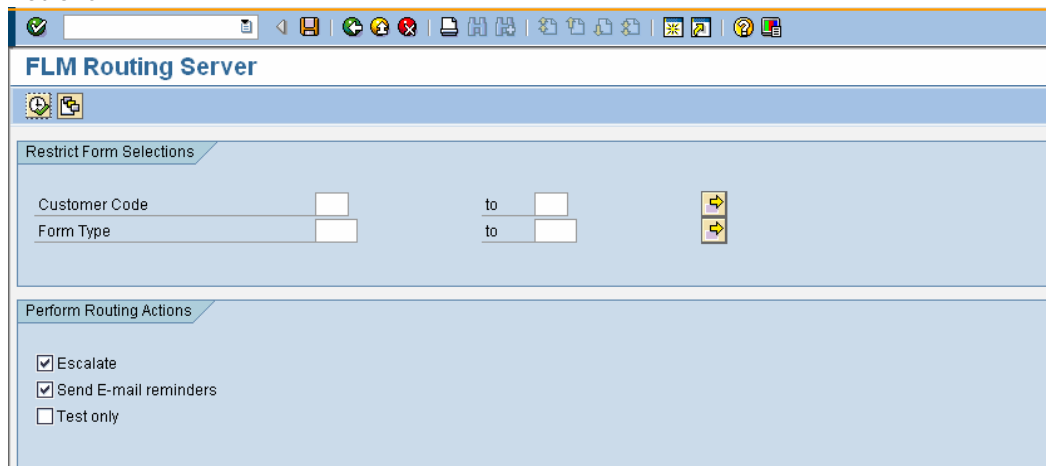
1.7.4 Run Form Routing Service

This function performs the actions Escalate and Send Email Reminders if their corresponding boxes are checked. Enabling these features allows the software to automatically escalate a form's routing, or send an email reminder if this is specified at any stage of a form's workflow, as defined in 'Email Reminder Settings'. This action will normally take place automatically at a predefined frequency.

This routing server is the generator of escalations and email reminders, so if any form has either of these features specified at any stage in its routing, they must be enabled in this routing server in order to be executed.

You can restrict the availability of these routing actions to specific groups of forms, for example to one Customer Code or a range of form types. To do this, enter the required values or ranges in the type fields in the first section of the page.



For example, to enable email reminders only to form types 'ABC1' to 'ABC7', enter ABC1 to ABC7 as the target range and tick 'Send Email Reminders' under 'Perform Routing Actions'.



Enabling the 'Test' option will produce a test report showing all the actions that would take place if the routing service was run with the current settings and restrictions. You can manually execute the test Routing Server by clicking on the Execute button in the top right-hand corner of the screen.

Different variants of the Form Routing Service can be created by clicking on the 'Save' icon at the top of the screen, whereupon a 'variant attributes' option will appear:

Variant Attributes





 Copy Screen Assignment 

Variant Name
 Meaning

Only for Background Processing
 Protect Variant
 Only Display in Catalog
 System Variant (Automatic Transport)

Scrn Assignm.

Created	Selection Scrms
<input checked="" type="checkbox"/>	1000

Objects for selection screen


Selection Scrms	Field name	Type	Protect field	Hide field	Hide field 'BIS'	Save field without values	Switch GPA off	Required field	Selection variable	Option	Name of Va
1.000	Customer Code	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
1.000	Form Type	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
1.000	Escalate	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
1.000	Send E-mail reminders	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
1.000	Test only	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

The settings you have selected in the previous screen can now be saved as a new variant by entering a new variant Name and Meaning, and then selecting 'Save' again. Variants are accessible from the 'Variant' icon at the top left of the screen in the main Routing Server page.


1.7.5 Form History Report


In this activity you can look at the history of an individual report. Please see the Development Guide for further details


Form History Report





Form selections

Customer to 


Form Type to 


Form Version to 


Language Key to 


ID to 

Status selections

Status to 

Form Owner to 

Form Creation Date to 


Form Initiator to 

1.7.6 Form Cleanup Utility


This utility manages the database of forms that were launched but never submitted back to SAP.


Each first instance of a blank form is assigned a form ID which is stored in SAP whether the form then goes on to be completed and submitted or not. The form cleanup utility finds orphan forms, i.e. it enables any forms that were opened but then abandoned by a user to be deleted from the SAP database.


FLM Form table clean-up utility




Form Selections

Status 

Days since form creation 

Customer to 

Form Type to 

Test mode

Test mode

1. Select the status of the forms you wish to find (should usually be Initial)
2. Set the number of days since the form was created
3. Specify a customer code or a range of customer codes if desired
4. Specify a form type or range of form types if desired

Enabling Test Mode produces a report of the actions had they actually been performed. You can use this to judge, for example, an appropriate number of days since form creation that would indicate an orphan form. This may be particularly important for offline form submission, which is likely to take longer than the online scenario.