



User Guide

FLM Release 260

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Version History

Version	Author(s)	Reason for update
1	Chris Smith	Initial release of the document
2	Chris Scott	Amendment
2a	Chris Smith	A draft update on version 2 - this will be released as version 3
3	Emily Burfoot	User guide outline

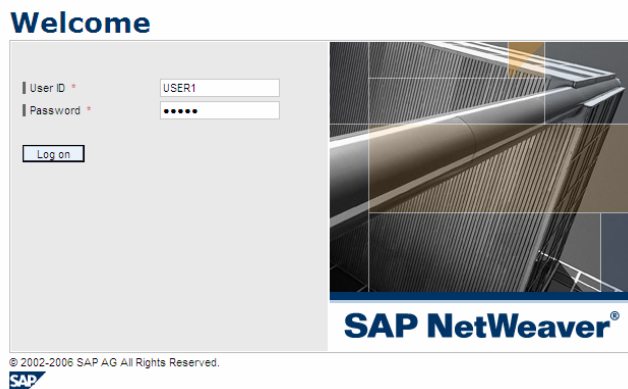
Table of Contents

1. Logging in and out	3
2. Completing a Form	3
1.1 To Open a Blank Form	3
1.2 Entering Form Data	5
1.3 Cancelling a form	6
1.4 Save to Draft	6
1.5 Submitting a Form	6
3. Managing Drafts	7
4. Managing Your Inbox	7
5. History	8

1. Logging in and out

This chapter explains how to navigate around the FLM interface, fill in forms, submit them and manage your inbox

On running the FLM software, a login page opens:



Enter your username and password and click **Log on** to enter the FLM portal

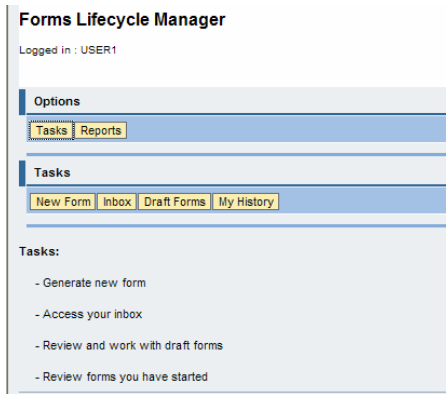
The **Logout** button is on the right hand side of the main screen.

2. Completing a Form

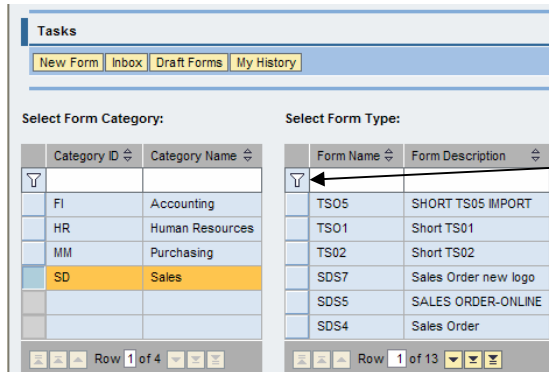
FLM allows users to complete and submit interactive forms stored on the system.

1.1 To Open a Blank Form

On entering FLM, click on **Tasks** and then **New Form**.



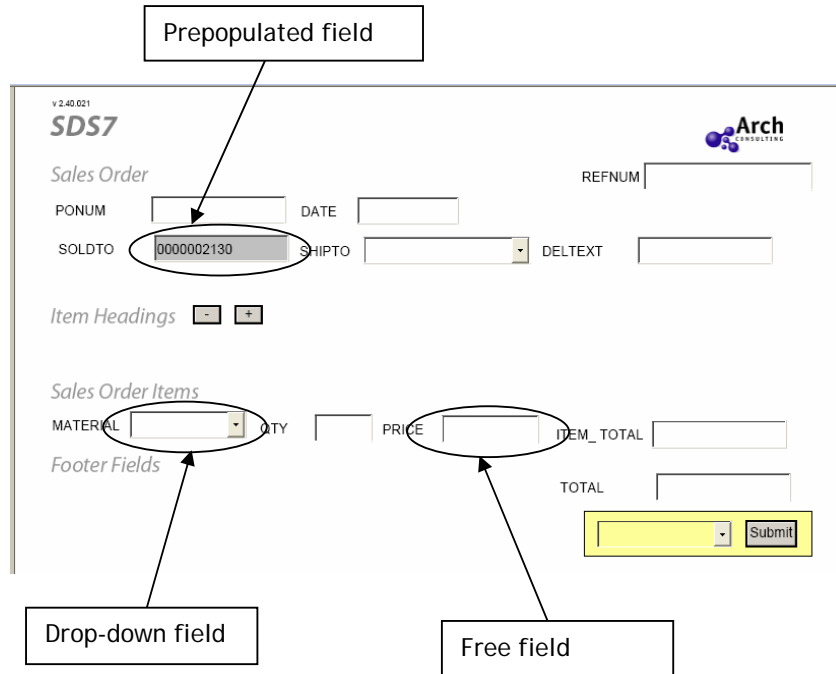
Under **New Form** are a list of form categories. To view the forms contained in each form category, click on the relevant category name or category ID. A list of form types will open in a box to the right. You can scroll through the list of form categories and types using the yellow scroll arrows. To open a form for completion, click on its name or description



Filtering: to refine your search, enter all or part of the form name you are looking for in the white filter bar and press 'enter' This will refine the listed items to only those which match your search criteria. To return to the full list of items, delete the contents of the filter bar and press 'enter' again.

1.2 Entering Form Data

An example form is shown below:



The screenshot shows a form titled "SDS7" with the "Arch" logo. The form is divided into sections: "Sales Order", "Item Headings", "Sales Order Items", and "Footer Fields".

- Sales Order:** Contains fields for PONUM, DATE, REFNUM, SOLDTO (prepopulated with "0000002130"), SHIPTO, and DELTEXT.
- Item Headings:** Includes minus and plus buttons.
- Sales Order Items:** Contains fields for MATERIAL (drop-down), QTY, PRICE, and ITEM_TOTAL.
- Footer Fields:** Contains a TOTAL field and a Submit button.

Annotations with arrows point to specific fields:

- "Prepopulated field" points to the SOLDTO field.
- "Drop-down field" points to the MATERIAL field.
- "Free field" points to the PRICE field.

Within each form there may be several types of field:

- **Prepopulated Fields**, which are automatically generated by the form and cannot be changed. These are shown as greyed-out fields on the form.
- **Drop-Down Fields**, in which the required information can only be selected from a list defined by a drop-down menu. This is accessed by clicking on the arrow to the right of the field.
- **Free Fields**, into which any text can be written manually by the user.

The number of headings available can be increased and decreased using the and buttons.

1.3 Cancelling a form

You can cancel the form and return to the main menu by hitting **Cancel** at the top-left corner of the page

1.4 Save to Draft

At any stage, you can save the form as a draft.

To do this, go to the drop-down menu to the left of the 'submit' button and select **save to draft**.



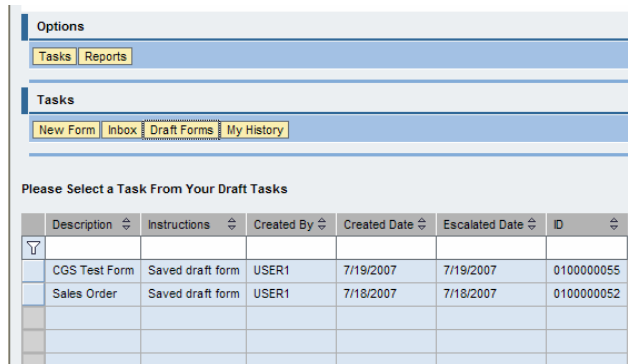
Upon hitting the form will now be stored in your **Draft Forms** box and will not be passed on to any third party.

1.5 Submitting a Form

Once the form has been completed, you can submit it for processing by selecting **submit** from the drop-down menu, and then clicking

3. Managing Drafts

Saved drafts can be accessed via **Draft Forms** in the tasks menu.



Options

Tasks Reports

Tasks

New Form Inbox **Draft Forms** My History

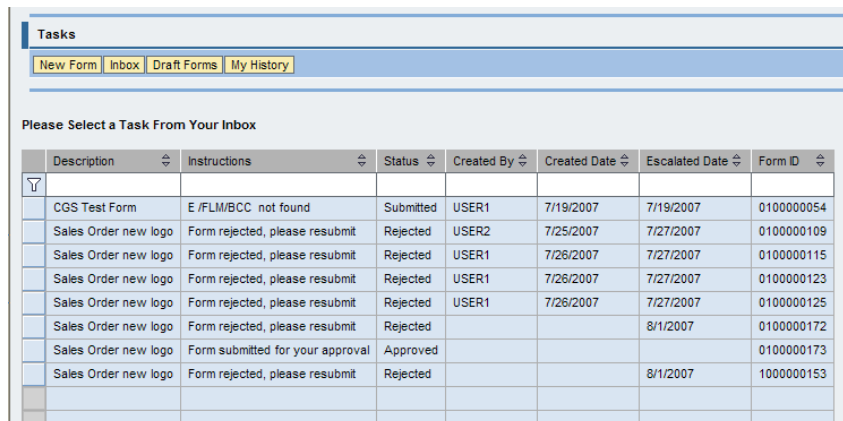
Please Select a Task From Your Draft Tasks

Description	Instructions	Created By	Created Date	Escalated Date	ID
CGS Test Form	Saved draft form	USER1	7/19/2007	7/19/2007	010000055
Sales Order	Saved draft form	USER1	7/18/2007	7/18/2007	010000052

To access a draft, click on the relevant form title. This will enter the form as it was last saved, allowing it to be modified and submitted. You can re-save a modified form to a draft again if you wish, or **Cancel** modifications to revert to the most recently saved version of the draft.

4. Managing Your Inbox

Your **Inbox** collects forms submitted by other users if you are required to authorise them.



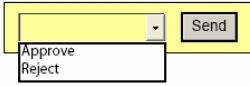
Tasks

New Form **Inbox** Draft Forms My History

Please Select a Task From Your Inbox

Description	Instructions	Status	Created By	Created Date	Escalated Date	Form ID
CGS Test Form	E /FLM/BCC not found	Submitted	USER1	7/19/2007	7/19/2007	010000054
Sales Order new logo	Form rejected, please resubmit	Rejected	USER2	7/25/2007	7/27/2007	010000109
Sales Order new logo	Form rejected, please resubmit	Rejected	USER1	7/26/2007	7/27/2007	010000115
Sales Order new logo	Form rejected, please resubmit	Rejected	USER1	7/26/2007	7/27/2007	010000123
Sales Order new logo	Form rejected, please resubmit	Rejected	USER1	7/26/2007	7/27/2007	010000125
Sales Order new logo	Form rejected, please resubmit	Rejected			8/1/2007	010000172
Sales Order new logo	Form submitted for your approval	Approved				010000173
Sales Order new logo	Form rejected, please resubmit	Rejected			8/1/2007	100000153

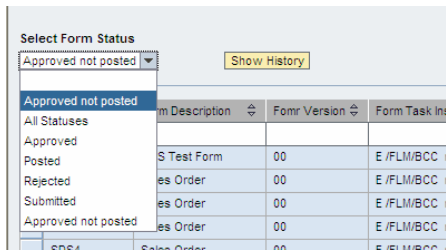
To authorise or reject a submitted form, click on a form's name, check through its content and then go to the Approve/Reject drop down:



Select your preferred option and click 'send'. An approval will cause the form to be routed to the next stage of the workflow, while 'reject' will return it to the inbox of the submitter who will then be able to access and amend it.

5. History

My History contains an archive of all the forms a user has processed. You can view forms history according to any status that can be selected from the drop-down menu at the left-hand side of the screen:



Select Form Status			
Form Status	Form Description	Form Version	Form Task Inst
Approved not posted			
All Statuses			
Approved			
Posted	S Test Form	00	E /FLM/BCC r
Rejected	es Order	00	E /FLM/BCC r
Submitted	es Order	00	E /FLM/BCC r
Approved not posted	es Order	00	E /FLM/BCC r
SNS4	Sales Order	00	E /FLM/BCC r