FLM
FORMS LIFECYCLE MANAGER

User Guide

FLM Release 260

Author: Chris Smith

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Version History

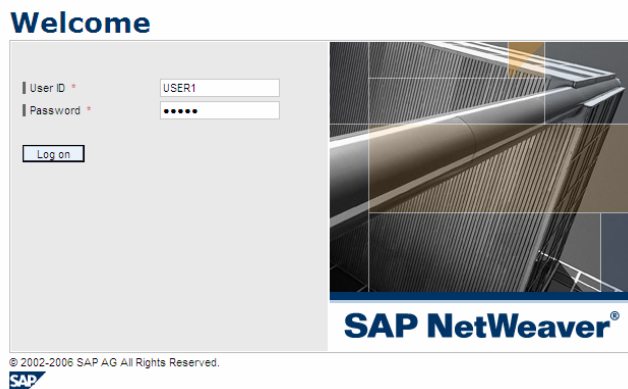| Version	Author(s)	Reason for update
1	Chris Smith	Initial release of the document
2	Chris Scott	Amendment
2a	Chris Smith	A draft update on version 2 - this will be released as version 3
3	Emily Burfoot	User guide outline

Table of Contents

1. Logging in and out

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:

Welcome

| User ID * | USER1 |
| Password * | ••••• |

Log on

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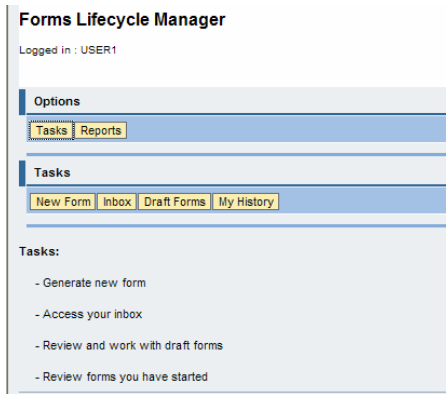Enter your username and password and click Log on to enter the FLM portal

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.

Forms Lifecycle Manager

Logged in : USER1

Options

Tasks | Reports

Tasks

New Form | Inbox | Draft Forms | My History

Tasks:

- Generate new form

- Access your inbox

- Review and work with draft forms
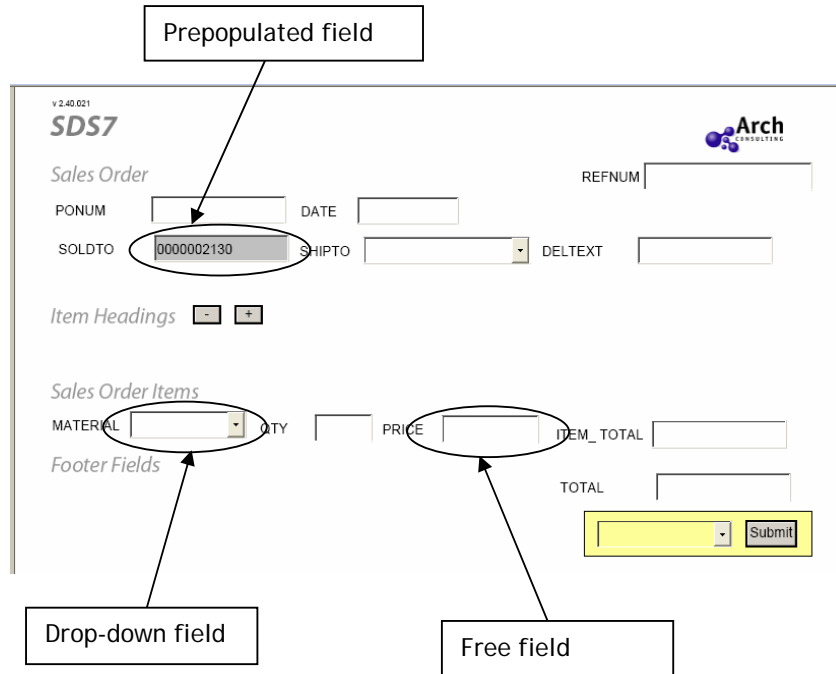
- Review forms you have started

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 though the list of form categories and types using the yellow scroll arrows. To open a form for completion, click on its name or description
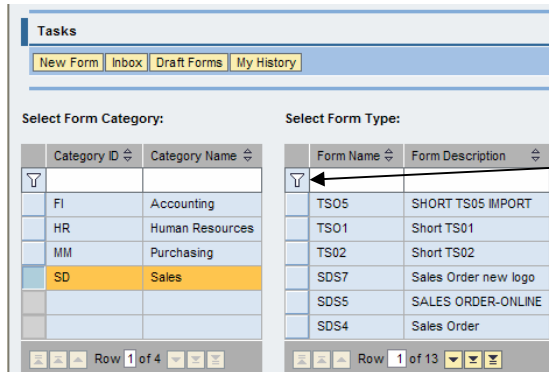
Filtering: to refine your search, enter all or part of the form name you are looking for in the white filter bar and press 'enter' This will refine the listed items to only those which match your search criteria. To return to the full list of items, delete the contents of the filter bar and press 'enter' again.

1.2 Entering Form Data

An example form is shown below:

Within each form there may be several types of field:

- o **Prepopulated Fields**, which are automatically generated by the form and cannot be changed. These are shown as greyed-out fields on the form.

- o **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.

- o **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**.
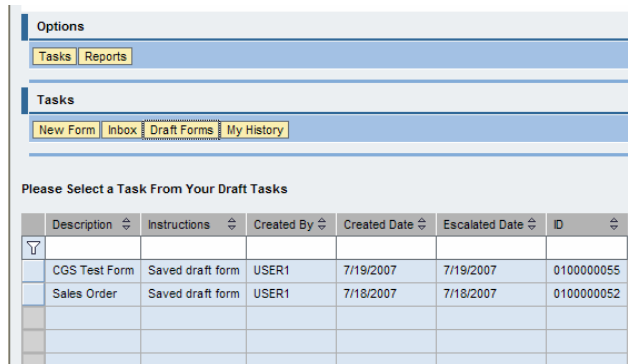

Upon hitting `Submit` the form will now be stored in your `Draft Forms` box and will not be passed on to any third party.

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 `Submit`

3. Managing Drafts

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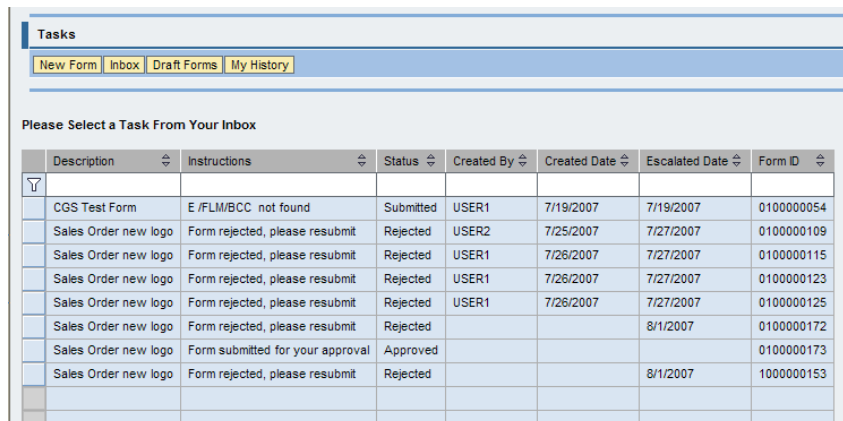
To access a draft, click on the relevant form title. This will enter the form as it was last saved, allowing it to be modified and submitted. You can re-save a modified form to a draft again if you wish, or Cancel modifications to revert to the most recently saved version of the draft.

4. Managing Your Inbox

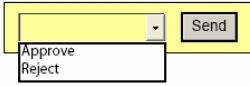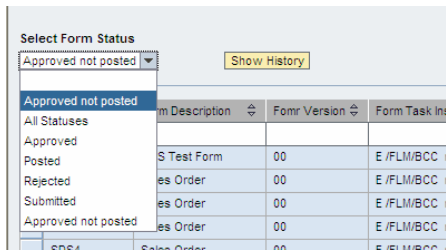Your Inbox collects forms submitted by other users if you are required to authorise them.

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

 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: