Administrators Guide

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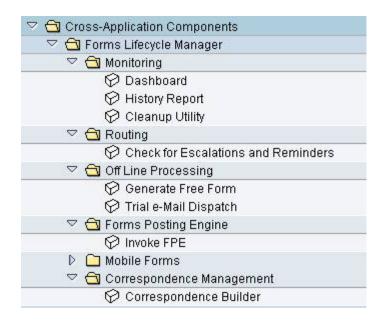
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1 Introduction

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

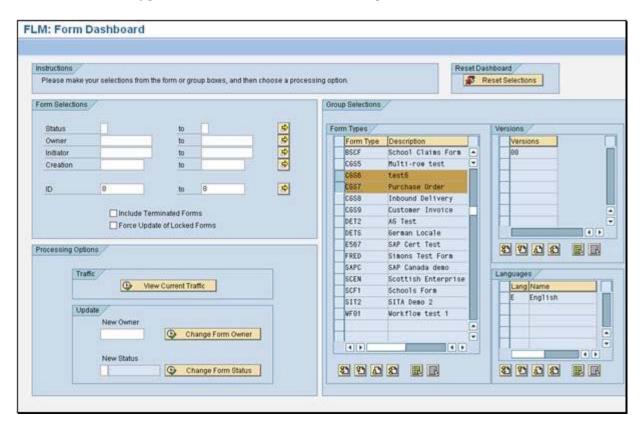
2.1 To access the Form Dashboard

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



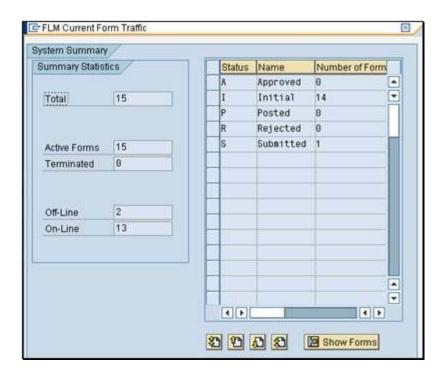
2.2 Viewing Current Forms Traffic

Select the Form Types under review and select the pushbutton 'View Current Traffic'.



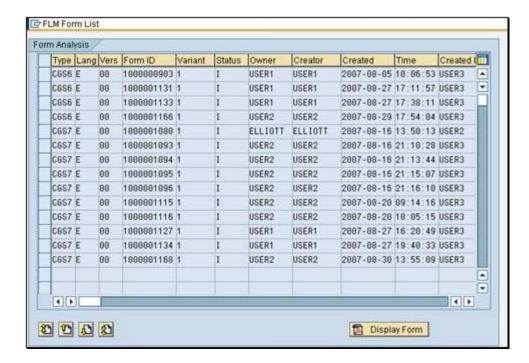
Alternatively, use the 'Form Selections' section for a free selection based on form type, owner, initiator, creation date or form ID.

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 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.

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.

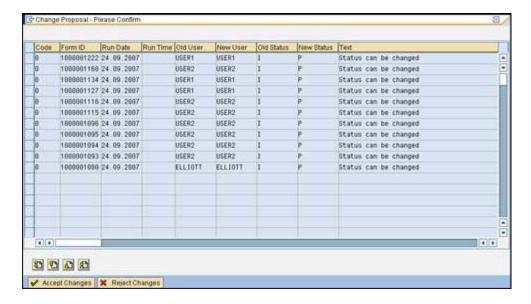
Enter the target status in the 'New Status' field within the 'Update' section of the 'Processing Options' selection box.

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:



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.

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

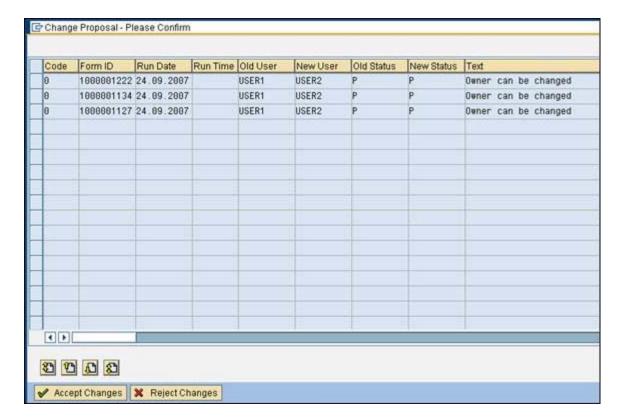
Enter the current owner in the 'Owner' field within the 'Form selections' selection box.

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:



Select 'Accept Changes' to continue.

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

3 Execution Tools

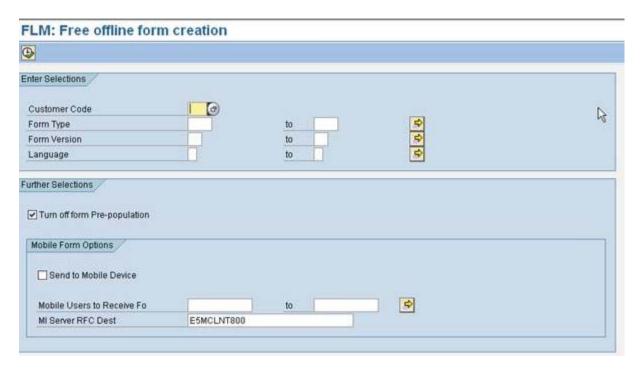
3.1 FLM System Log

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

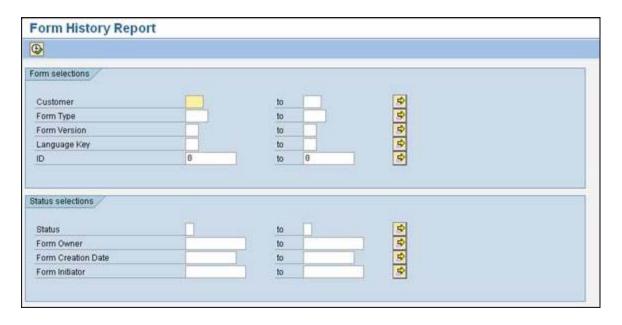
You can generate an offline form independent of any routing scenario using the 'free form generation' facility. Select the form type and version you wish to dispatch, and whether you would like to disenable prepopulation, then click execute. Note that Mobile is not functioning in FLM version 290.



4 Form Monitoring and Processing

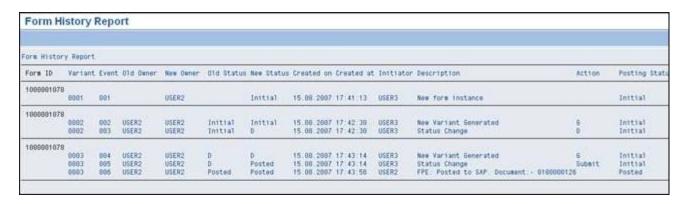
4.1 Form History Report

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



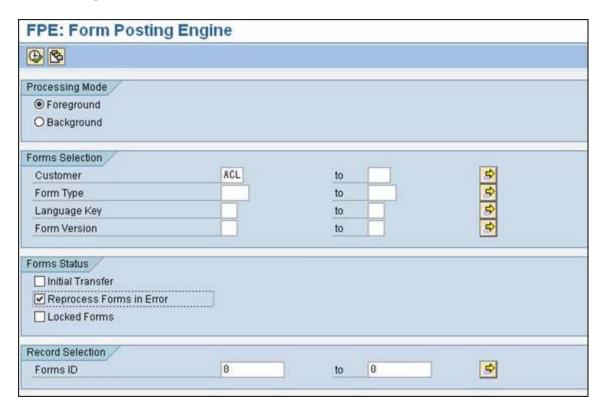
Enter selections as normal for any selection screen.

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



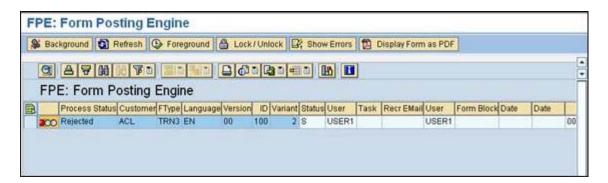
4.2 Manually posting forms using the FPE

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



Leave the Form Type selection empty and select the option 'Reprocess Forms in Error'.

Execute in the Foreground as shown.



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.

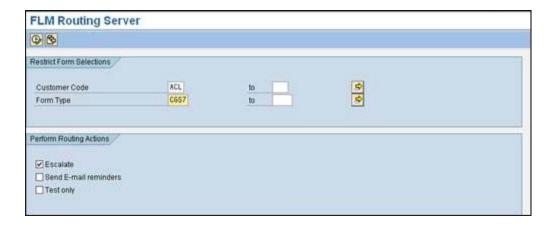
Select the option as desired to further process the form.

5 Background Jobs

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

5.1 Form Escalation

Program: /FLM/WF_ENGINE



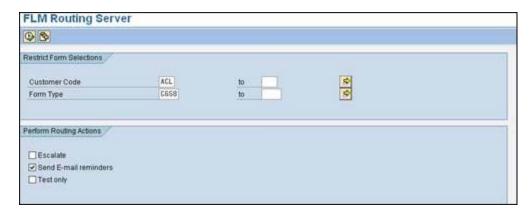
The form routing server should be run with the 'escalate' option for all form types.

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



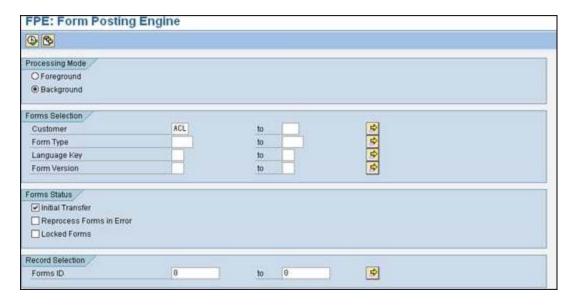
The form routing server should be run with the 'Send e-mail reminders' option for all form types.

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



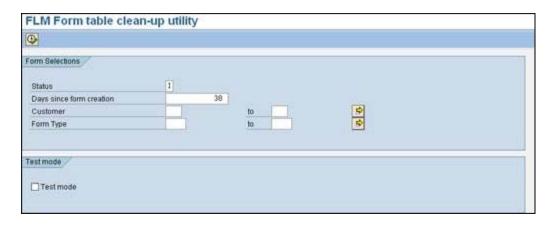
The Form Posting Engine should be run as a background job multiple times per day; for example it could be run once every hour depending on the business requirements.

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



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 and its associated records.	correspondence. This final step will generate the
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ADS Performance Tuning Tips

14/12/09 14:22:45

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Please see SAP's ADS Sizing Guide, ADS Configuration Guide and <u>FLM Sizing Guide</u> for more detail. Specifically Sections 4 of the ADS Sizing Guide which deals with Interact Forms and Section 17 of the Configuration guide which describes how to tune ADS.

https://www.sdn.sap.com/irj/sdn/adobe?rid=/webcontent/uuid/90355269-4d89-2a10-0bb9-f388704f1dcd

Java Connectors:

Check your	FLM Java	Connectors	to ensure	the M	Max size	es are	high	enough:

Maximum Pool Size:

Maximum Connections:

In Visual Administrator: Server -> Services -> JCo RFC Provider

Properties:

MaxConnections:

MaxProcesses:

ADS Processes

You may also want to increase the number of ADS processes available. See section 17 of the ADS Configuration Guide.

In Visual Admin -> Services

PDF Manipulation Module:

Default PoolMax is 4

XML Form Module:

Default PoolMax is 2

These are CPU bound operating system level processes (not in the Java Stack) and should not exceed the number of CPU Cores available. You should also leave CPU capacity for anything else running on the system. If this is an FLM only box with 8 cores its safe to put XML Form Module up to 6. And the

PDF Manipulation Module should be double that.

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What's new: Recently changed articles

Migrating SmartForms

27/07/09 08:47:09

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If you wish to migrate a Smart form to an interactive form (output only form), see:

http://help.sap.com/saphelp_nw70/helpdata/EN/16/a369b1800e4bdda978ee0fe3b7bd2c/frameset.htm

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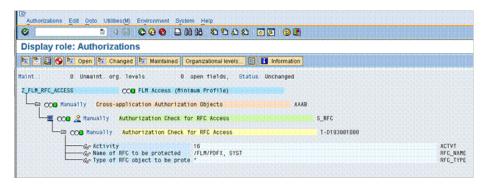
Setting up User Authorizations

01/06/09 23:20:01 Subscribe to receive email when this article changes

Regardless of how users access forms in FLM they need an authorisation profile carrying a set of form categories, form types and activities. In addition, users accessing forms via the FLM Portal need a minimum RFC authorisation. Each of these is described in detail below:

1) Minimum authorisation for FLM Portal Access

This role is based on the authorisation object S_RFC

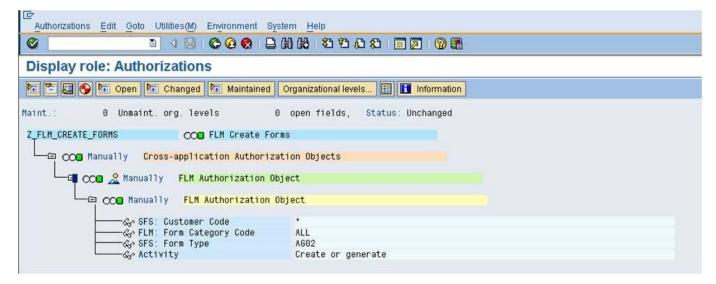


The Name of the RFC to be protected needs to contain SYST and /FLM/PDFX.

Step-by-step instructions for setting this up are given here.

2) FLM Form authorisation.

This is based on the authorisation object defined in customizing under SPRO/Cross-Application Components/General Application Functions/FLM/Initialise Customer Code/Set Customer Code. In a standard installation this is $\rm Z/FLM/0001$



In the example above, you would grant form create access to form category 'ALL' and form type 'AG02'. You can mix and match form categories and form types freely to achieve the effect you require.

Activities that you can choose in FLM are 'Create or Generate', 'Change', 'Display' and 'Post'. Note that 'Create' does not imply 'Change' authorisation and 'Change' does not imply 'Display' authorisation. 'Post' refers to the activity of transferring data from the form into an SAP application using the Form Posting Engine.

Use transaction PFCG to create these roles and assign them to users. Don't forget to do the user comparison step to complete the assignment. This short video illustrates the process of setting up authorisations: FLM Create Authorisation.swf

Note// if your user master records exist on a different system, you must take advantage of the FLM Customer Level User Exit called 'Authorisation'. In here you must remotely call a function on the target system where the users exist (as does the FLM authorization object) that performs the similar functionality as the /flm/core=>check_flm_authorization does on the local system. For example, this code:

```
data: l_auth_object type xuobject,
   l_form_cat type /flm/fcat_code,
          type /flm/uname,
   l_user
   l_ref_fcat type /flm/fcat_code,
   l_cust_class type string,
   l_routine type string.
*_____*
* Authorisation actually has to pass positively to work:
*_____*
ex_result = 4.
check im_user is not initial.
* Get authorisation object.
l_auth_object = 'Z/FLM/0001'.
*_____*
* Some java stacks do not Capitalise the username,
* otherwise will get rc=40 in this case:
*_____*
l_user = im_user.
translate l_user to upper case.
* Execute the check depending on if the form type is supplied:
*_____*
if im_ftype is initial.
 authority-check object l_auth_object for user l_user
   id '/FLM/CUST' field im_ccode
   id '/FLM/FCAT' field l_form_cat
   id 'ACTVT'
            field im_activity.
else.
 authority-check object l_auth_object for user l_user
   id '/FLM/CUST' field im_ccode
   id '/FLM/FTYPE' field im_ftype
   id '/FLM/FCAT' field l_form_cat
   id 'ACTVT' field im_activity.
endif.
*_____*
ex_result = sy-subrc.
```

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What's new: Recently changed articles

Transporting Forms

06/01/10 12:15:19

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1. Transporting forms between DEV->QA->PRD Instances

Note// you must have configured number ranges and the FLM customer master in each receiving system beforehand.

After the initial installation of the software and the customer code configuration has been done, release and migrate all FLM customizing and workbench transports through the landscape.

For subsequent forms there are 3 aspects to doing transports: customizing, workbench and form templates. If STMS is correctly set up, when you execute the form wizard you will be asked for 1 customizing request and 1 workbench request. We recommend strongly that you start a 2 new corrections for each new form type and make sure that you add any subsequent customizing or workbench changes onto the same two transports.

1.1 Transporting form templates using download/upload

To transport the form templates you use the import/export mechanism provided, which creates an external file:

/spro/cross-apps/general app functions/flm/interactive forms/setup forms/migrating form packages/import form package

/spro/cross-apps/general app functions/flm/interactive forms/setup forms/migrating form packages/export form package

Do not choose to add either business logic or posting adaptors to your file for transporting forms between local systems, as these components are transported via the normal SAP tp mechanism.

A logging transaction keeps track of what you are doing:

/spro/cross-apps/general app functions/flm/interactive forms/setup forms/execute FLM transport log

You can do the transports and the import/export in any order.

Export packages including the business logic and/or the posting adaptors are only used for sending requests to your support company, or when downloading existing forms from this website to use as a starting point for your own developments.

1.2 Transporting form templates using transport requests

Notes on adding final form template to a transport request (not automatically added at this version of FLM):

- 1) Transaction OAC0 (oh-ay-see-zero). This shows that the name of the content repository is normally 'ZFLM0001' and the name of the content table is /FLM/SDOKCONT1.
- This table will store all the form templates (and the form data).
- 2) Transaction SE10. You need one customizing transport and one workbench transport.
- 3) Manually add these entries to the customizing transport:

Object	Table	Keys	Example
R3TR TABU	/FLM/FTYPE	<mandt><ccode><ftype>*</ftype></ccode></mandt>	020INFHRLV*
R3TR TABU	/FLM/FDD_SF	<mandt><ccode><ftype>*</ftype></ccode></mandt>	020INFHRLV*
R3TR TABU	/FLM/FDD_FLD	<mandt><ccode><ftype>*</ftype></ccode></mandt>	020INFHRLV*

4) Manually add these entries to the workbench transport:

Object	Table	Keys	Example
R3TR TABU	FLM/SDOKCONT1		ININF-HRLV-E-
		<vers></vers>	00
R3TR TABU	/FLM/SDOKCONT1		IRINF-HRLV-E-
		<vers></vers>	00

5) Release and transport these through the landscape as normal

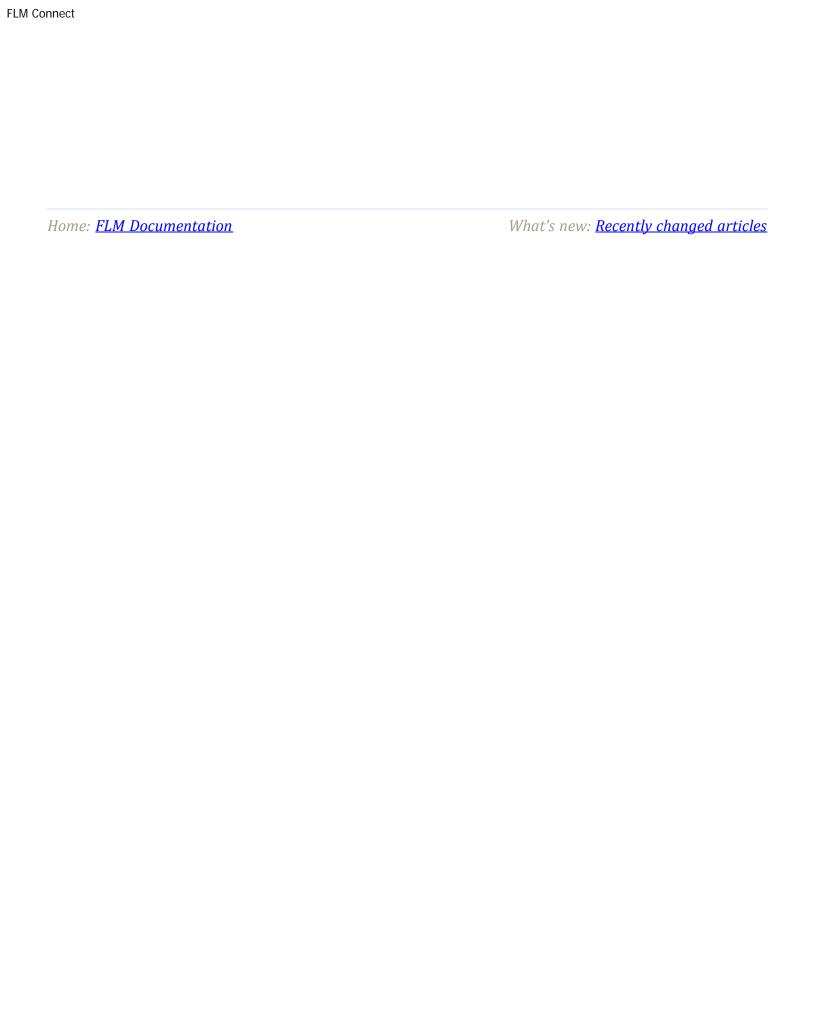
2. Importing a .flm package from another system

Import the package into your DEV system using this transaction

/spro/cross-apps/general app functions/flm/interactive forms/setup forms/migrating form packages/import form package

Execute the form wizard to add the necessary objects to corrections, 1 customizing and 1 workbench (again always use new transports for each form type). You must also download the form to the desktop and then upload it back into the system using the import form template transaction - this last step necessary to add the encoding type to a customizing transport (there's no need to actually modify inside Designer if you have no need to).

Also go into the template look and feel transaction (if no entries exist, go into the form statuses table in the 'Initialize Customer Code' section of the IMG and click the 'Propogate New Status' button), form routing table, form types configuration, escalations and reminders, email setting, FPE valid statuses, FPE control and add the entries onto the same customizing correction.



Web Service Configuration

28/10/09 13:36:42

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This article describes how to set up the web services runtime for an ABAP SP14 and above server (in older machines, use the transactions WSADMIN and WSCONFIG to do the same). For more details please see the SDN article below.

SAP NetWeaver Process Integration 7.1 - Configuring Web Service Scenarios (Guide)

Note 1043195 - Configuration of the Web service runtime

To setup the Web Service Runtime: - this only needs to be done once.

- Run SRT_ADMIN in SE38 ticking box 'Run Technical setup' in client 000
- Run SRT ADMIN in SE38 ticking box 'Run Technical setup' in client (XXX runtime client)
- In SICF activate node /sap/bc/webdynpro/ and everything underneath it
- You may also need to activate a number of other services inside SICF, when you activate select the yes to Activate all children services as well.
 - /sap/public/bc/pictograms
 - /sap/public/bc/webdynpro
 - /sap/public/bc/webicons
 - /sap/public/myssocntl
- If system is slow,
 - in RZ10 add parameter to the Instance Profile under Extended Maint. icm/keep_alive_timeout, set value to 300 (5 minutes) copy and activate the new instance profile.
 - Go to SMICM, then on menu /Administration/ICM/Exit Hard/Local
- Hit refresh a few times until Green icon is showing again. Check new parameter is set by menu /Goto/Parameters/Display

For more information on how to use Web Services see the <u>Web Services Section of the Developers</u> Guide.

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