

ELO Suite for SAP ArchiveLink® (SAP NetWeaver® & SAP S/ 4HANA®)

ELO Workflow Client for SAP® ERP



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ELO Workflow Client for SAP® ERP

Introduction

This documentation describes how to install and configure the ELO Workflow Client for SAP® ERP. This client enables SAP users to participate in ELO workflows within the SAP system. Fully integrated into the SAP system, the client enables users to process all steps of a workflow and is completely integrated into the SAP front end.

In detail, it contains the following functions:

- Accept/delete workflow
- Delegate/hand off/return/postpone workflow
- Structure and document preview, workflow form view, and document feed

Security and licensing requirements

When using the ELO Workflow Client for SAP® ERP, the systems must be licensed properly. The user must be licensed in the SAP system and the ELO system. In case of doubt, clear this up with SAP and/or your system specialist. ELO is not liable for any license violations.

Basics

To use the ELO Workflow Clients for SAP® ERP, your computer must meet the following system requirements and release statuses of ELO and SAP:

- ELOprofessional or ELOenterprise 20.00.000 or higher
- The following SAP versions or higher:
 - SAP_BASIS 702 SAPKB70213
 - SAP_BASIS 730 SAPKB73009
 - SAP_BASIS 731 SAPKB73106

Installation

A license for the ELO Workflow Client for SAP® ERP includes functions for processing ELO workflows in the SAP GUI. This enables SAP users to participate in ELO workflows without having to change programs. The client contains an SAP transport that has to be imported to the SAP target system.

You will find the current installation files on the ELO SupportWeb in the following area:

Integration > SAP® ERP > ELO Suite for SAP ArchiveLink® > [ELO Workflow Client for SAP® ERP](#).

SAP function module

Inform your customer or the SAP partner about the SAP transport to be installed and provide it to them.

The current SAP transport is available on the ELO SupportWeb.

Information

Inform your customers or SAP partner of the following:

- The standard SAP transport routes must be used.
- All developments and functions within the transport in ELO were developed in a separate SAP namespace, called */ELO/*.

You may have to enable the *Ignore Invalid Component Version* option when importing the SAP transport.

It is also possible that you will encounter warnings when importing the transport due to different release statuses (return code 8), which can be ignored.

Once an SAP transport has successfully been transported to the SAP systems, you can provide your customer/the SAP partner with the technical description for the */ELO/WF_CLIENT* transaction.

Configuring permissions

To use the client, permissions are required for all users in the SAP system. The following table provides a list of all permissions required in the SAP system.

| Permissions object | Field name | Value |
|--------------------|------------|----------------|
| S_TCODE | TCD | /ELO/WF_CLIENT |
| --- | --- | --- |
| S_ADMI_FCD | S_ADMI_FCD | ST0M |
| S_RFC_ADM | ACTVT | 3 |
| S_RFC_ADM | RFCTYPE | |

Permissions object Field name Value

| | | |
|------------|------------|---------------------------------|
| S_RFC_ADM | RFCDEST | *<name ihrer="" destination=""> |
| S_RFC_ADM | ICF_VALUE | |
| S_ALV_LAYO | ACTVT | 23 |
| S_GUI | ACTVT | 61 |
| P_RUNTIME | P_APP_ID | /ELO/WF_CLIENT |
| P_RUNTIME | P_ACTVT_FW | 1 |
| P_RUNTIME | P_ACTVT_RT | 1 |
| P_RUNTIME | P_ACTVT_RT | 2 |
| P_RUNTIME | P_ACTVT_RT | 3 |
| P_RUNTIME | P_ACTVT_RT | 4 |
| P_RUNTIME | P_ACTVT_RT | 5 |
| P_RUNTIME | P_ACTVT_RT | 6 |
| P_RUNTIME | P_ACTVT_RT | 7 |

* Enter the name(s) of your configured destination(s) here. You will learn more about configuring the destination in the next chapter.

Configuring a destination

| | | | |
|--|--------------------|----------------------------------|-------------|
| RFC Destination | IX_ELOCCENTW20 | | |
| Connection Type | G | HTTP Connection to External Serv | Description |
| Description | | | |
| Description 1 | | | |
| Description 2 | | | |
| Description 3 | | | |
| <div>Administration Technical Settings Logon & Security Special Options</div> | | | |
| Target System Settings | | | |
| Target Host | ELOCCENTW20 | Service No. | 9090 |
| Path Prefix | /ix-Entwicklung20/ | | |
| HTTP Proxy Options | | | |
| Global Configuration | | | |
| Proxy Host | | | |
| Proxy Service | | | |
| Proxy User | N | | |
| Proxy PW Status | is initial | | |

Fig.: 'Technical Settings' tab

To ensure access from the SAP system to the ELO Indexserver, you will have to configure an *HTTP connection to an external server* in transaction *SM59*.

2. In the *Technical Settings* tab, enter your connection data for the ELO Indexserver.

| | | | |
|-----------------|----------------|----------------------------------|-------------|
| RFC Destination | IX_ELOCCENTW20 | | |
| Connection Type | G | HTTP Connection to External Serv | Description |
| Description | | | |
| Description 1 | | | |
| Description 2 | | | |
| Description 3 | | | |

| | | | |
|----------------|--------------------|------------------|-----------------|
| Administration | Technical Settings | Logon & Security | Special Options |
|----------------|--------------------|------------------|-----------------|

Logon Procedure

Logon with User

☐ Do Not Use a User
☒ Basic Authentication

User

PW Status

Logon with Ticket

☒ Do Not Send Logon Ticket
☐ Send Logon Ticket Without Target System Reference
☐ Send Assertion Ticket for Dedicated Target System

System ID Client

Security Options

Status of Secure Protocol

SSL ☒ Inactive ☐ Active

SSL Certificate Cert. List

Authorization for Destination

Fig.: 'Logon & Security' tab

3. Use the *Basic Authentication* method in the *Logon & Security* tab and enter the logon information for an administrative ELO user.

Configuration

1. To install the interface, go to the ELO SupportWeb and download the current version of the ELO Workflow Client for SAP® ERP to the ELO server, then extract the files to a temporary folder.

Your directory will now contain the transport files for your SAP system.

2. First, you have to upload them to your SAP system (transaction *CG3Z*).

Please note

The files have to be stored in the correct folders so that they can be transferred to the transport chain (transaction *STMS*) manually later on.

- *cofiles* file (K*) in the *cofiles* folder (/usr/sap/trans/cofiles)
- *data* file (R*) in the *data* folder (/usr/sap/trans/data).

Information

The path to the *cofiles* file and *data* file may have been custom-configured depending on the system. For this reason, first check which directory is specified under *DIR_TRANS* (transaction: AL11).

Administration area

Before you can use the client, you will have to configure some settings, which you can open in transaction `/n/ELO/WF_ADMIN`. The following explains all these settings.

Repository settings

In the repository settings, you configure the ELO repositories you want to be available for the client.



| | | | | | |
|---------------------|---|------|-----------------|----------------|---------|
| Repository settings |   | | | | |
| User settings | ID | Name | Logon type | User mapping | Preview |
| Active sessions | 1 | Test | RFC destination | Mapping in ELO | Local |

Fig.: Configure repository, insert line

1. To configure a repository, click *Insert line*.



| | | | | | |
|---------------------|---|----------------------|------------|--------------|---------|
| Repository settings |   | | | | |
| User settings | ID | Name | Logon type | User mapping | Preview |
| Active sessions | 2 | <input type="text"/> | N/A | N/A | Local |

Fig.: Configure repository, edit line

Another line appears. The ID is incremented automatically and cannot be edited.

2. Enter a name here. The user will see the repository under this name in the ELO Workflow Client for SAP® ERP.

Logon type

☒ N/A

☐ RFC destination

RFC-Destination

☐ Manual HTTP server

Host

Port

Path

User

Password N/A

Computer name

SSL ☐ active ☒ inactive

SSL certificate

Proxy Host

PROXY SERVICE

OK Cancel

Fig.: Configure repository, Logon type

3. Confirm *N/A* in the *Logon Type* column.

The client offers two options for configuring a connection to a repository.

4. Select *RFC Destination* and enter the name of your configured RFC destination here. The chapter *Configuring a destination* explains how to configure an RFC destination.

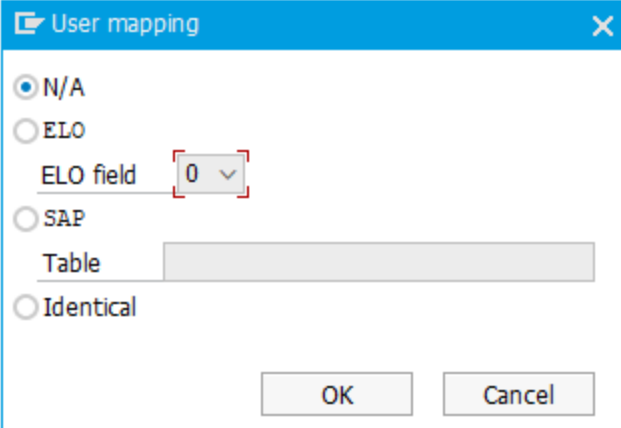
Alternative: Instead of an RFC destination, you can also define settings for a connection here. Select *Manual HTTP server*.

The following parameters must be completed:

- Host: Name of the DNS or IP address of the target system
- Port: Target system port
- Path: Path to the ELOix web app component; /ix-<Repository>/
- User: User name for connecting to the ELO system
- Password: Password of the specified user. This is saved by ELO encrypted if all logon data was correct. If this is not the case, the password is temporarily saved in SAP unencrypted.
- Computer name: Shown under the active sessions in the ELOix.
-

SSL certificate: Required if SSL is set to active

- Proxy Host: DNS or IP address of the proxy host
- PROXY SERVICE: Service name of the proxy service



The 'User mapping' dialog box has a blue title bar with a close button. It contains five radio button options: 'N/A' (selected), 'ELO', 'SAP', and 'Identical'. The 'ELO' option is followed by an 'ELO field' label and a dropdown menu showing '0'. The 'SAP' option is followed by a 'Table' label and an empty text input field. At the bottom are 'OK' and 'Cancel' buttons.

Fig.: Configure repository, user mapping

5. Select *N/A* in the *User mapping* column.

There are three options for creating a reference between SAP users and ELO users.

- ELO field: The ELO field can be set from 1 to 5. These are property fields, which you can access in the *User manager* of the ELO Administration Console for the respective users. Under the ELO user, enter the name of the associated SAP user in the property field.
- SAP table: Maintain the supplied table `/ELO/WF_MAPPING`.
- Identical: If the ELO user name and SAP user name are always identical in your system landscape, select *Identical*.

User settings

All users that have ever logged on to the ELO Workflow Client for SAP® ERP are listed here.

| Repository settings | User | Layout | Repository | Act. sess. |
|-----------------------|--------------|-------------------------------|------------------------|------------|
| User settings | BACKES | Delete layout | ELOCCENTW20 | 0 |
| Active sessions | BIEHL | Delete layout | ELOCCENTW20 | 0 |
| | DEPPEJA | Delete layout | ELOCCENTW20 | 0 |
| | KIEL | Delete layout | ELOCCENTW20 | 0 |
| Notification settings | PRECHTL | Delete layout | ELOCCENTW20 | 0 |
| Transport | SCHMIDT-TUDL | Delete layout | ELOCCENTW11 User in P1 | 0 |
| Advanced settings | TRENZ | Delete layout | ELOCCENTW20 | 0 |

Fig.: User settings

You can reset the layout by clicking *Delete layout* in the line for the corresponding user. The layout is the user's personalized settings for the graphical interface.

The *Repository* column indicates which repository the user logs onto automatically on login. You can manually change the repository here by selecting the table field and pressing the F4 key. The list is made up of the configured repositories, see the chapter [Repository settings](#).

Active sessions

You can get an overview of all active sessions and manually end them here.

| | | | | | | |
|---------------------|----|------------|------------|--|---------------------|---------------------|
| Repository settings | | | | | | |
| User settings | Us | AT | Repository | Cookie | Valid from | Valid until |
| Active sessions | TR | Delete Row | LOCCENTW20 | 71C0A9FD719DCFA8C28F93148516E564.ELO-ELOCCENTW20-1 | 21.06.2021 09:56:32 | 21.06.2021 10:04:38 |

Fig.: Manage active sessions

1. Select the row and click *Delete Row*.

Event settings

The client can respond to special events and run functions according to the configuration. In the ELO forms, a special event embedded in HTML (beginning with `sapevent:`) has to be implemented. This allows you to book a posting document "online" from an ELO form (opened in the ELO Workflow Client for SAP® ERP) in the SAP ERP via batch input, for example.

| | | | |
|-----------------------|----|---------|--------------------------|
| Repository settings | | | |
| User settings | ID | Event | Class name |
| Active sessions | 1 | SHOW | /ELO/CL_WF_C_HTTP_EVENTS |
| Event settings | 3 | TEST | /ELO/CL_WF_C_HTTP_EVENTS |
| Notification settings | 4 | FI_POST | /ELO/CL_WF_C_HTTP_EVENTS |
| Transport | | | |
| Advanced settings | | | |

Fig.: Event settings

For example, if the `sapevent: FI_POST` is thrown, the method `FI_POST` of the class `/ELO/CL_WF_C_HTTP_EVENTS` is called.

Notification settings

So that ELO Workflow Clients for SAP® ERP users are informed of the tasks assigned to them, you can configure notification settings here.

These are read and applied by the supplied report `/ELO/WF_NOTIFY`. We recommend planning the report as a job so that it's started periodically and the user is kept informed.

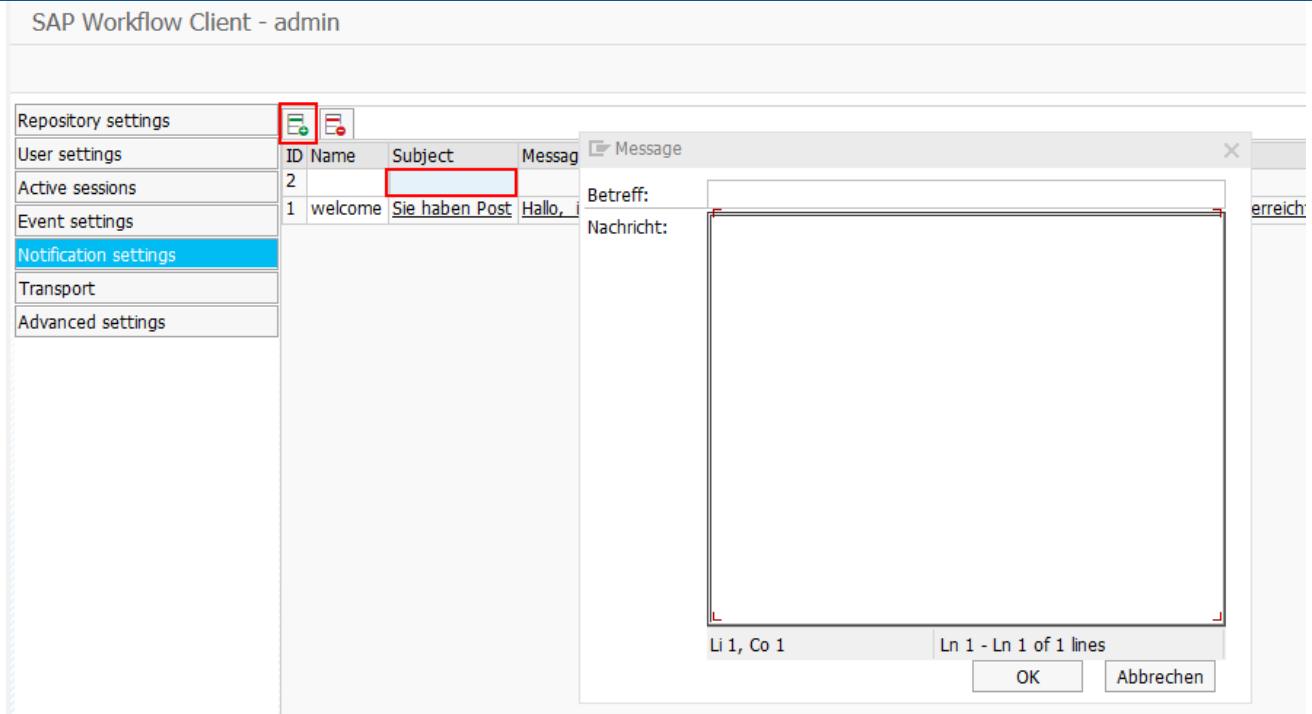


Fig.: Add message

1. To add a notification template, click *Insert line*.

Another line appears. The ID is incremented automatically and cannot be edited.

2. Enter a name for your message here.

3. Click the *Subject* field.


A screen opens where you can enter the message. The placeholders in the following table are intended for the subject and the actual message field.

When used, these placeholders are automatically replaced with information from ELO.


&ITEM_LINK Link to the workflow in the ELO Workflow Client for SAP® ERP

| | |
|-----------|---------------------------|
| &ITEM | Workflow/task item number |
| &NODE | Workflow/task node number |
| &NAME | Name of the workflow/task |
| &KIND | Type (reminder/task/etc.) |
| &NODENAME | Workflow/task node name |

Program /ELO/WF_NOTIFY




Repository ☒

User to 

Message ☒

☒ incl. attachment (SAP file)

Sender 




☒ Test (do not send)

Fig.: Report /ELO/WF_NOTIFY

4. The /ELO/WF_NOTIFY report can then be set.

| Repository | Repository checked for messages |
|-----------------------------|--|
| User | User notifications whose notifications should be sent |
| Message | Message ID; indicates the text to be sent |
| incl. attachment (SAP file) | Include SAP shortcut file |
| Sender | Sender the notification will be sent as. The user requires the relevant permissions. |
| Test (do not send) | No message is sent. |


Display logs


  Technical Information  Help


| Date/Time/User | Nu... | External ID | Object text | Sub-object text | Transac... | Program | Mode | Log number |
|-------------------------------|-------|------------------------|-----------------------|-------------------------|----------------------|---------|------|------------|
| > 15.03.2021 14:40:19 PRECHTL | 13 | /ELO/WF_NOTIFY/ELO/LOG | /ELO/WF_NOTIFYSE38 | /ELO/WF_NODialog proces | 00000000000019627852 | | | |
| > 15.03.2021 14:53:50 PRECHTL | 13 | /ELO/WF_NOTIFY/ELO/LOG | /ELO/WF_NOTIFYSEU_INT | /ELO/WF_NODialog proces | 00000000000019627854 | | | |
| > 15.03.2021 15:02:06 PRECHTL | 13 | /ELO/WF_NOTIFY/ELO/LOG | /ELO/WF_NOTIFYSE38 | /ELO/WF_NODialog proces | 00000000000019627857 | | | |
| > 15.03.2021 15:04:59 PRECHTL | 13 | /ELO/WF_NOTIFY/ELO/LOG | /ELO/WF_NOTIFYSEU_INT | /ELO/WF_NODialog proces | 00000000000019627861 | | | |


xxxxx


Ty... Message Text


 /ELO/CL_WF_M_TASK_COLLECTOR - GET_TASKS: User: PRECHTL, Archive: 6, REM: X, DEF: X, GRP: X, SU...


 User: PRECHTL - Aufgabe 1 - Benachrichtigung wurde erfolgreich versendet.

 User: PRECHTL - Aufgabe 98 - Benachrichtigung wurde erfolgreich versendet.

 User: PRECHTL - Aufgabe 100 - Benachrichtigung wurde erfolgreich versendet.

 User: PRECHTL - Aufgabe 120 - Benachrichtigung wurde erfolgreich versendet.

 User: PRECHTL - Aufgabe 133 - Benachrichtigung wurde erfolgreich versendet.

 User: PRECHTL - Aufgabe 135 - Benachrichtigung wurde erfolgreich versendet.


 User: PRECHTL - Aufgabe 138 - Benachrichtigung wurde erfolgreich versendet.

Fig.: Display log

5. The log of sent messages can be viewed via transaction *SLG1*.

- Use the following object */ELO/LOG*
- Child object: *ELO/WF_NOTIFY*

Transport

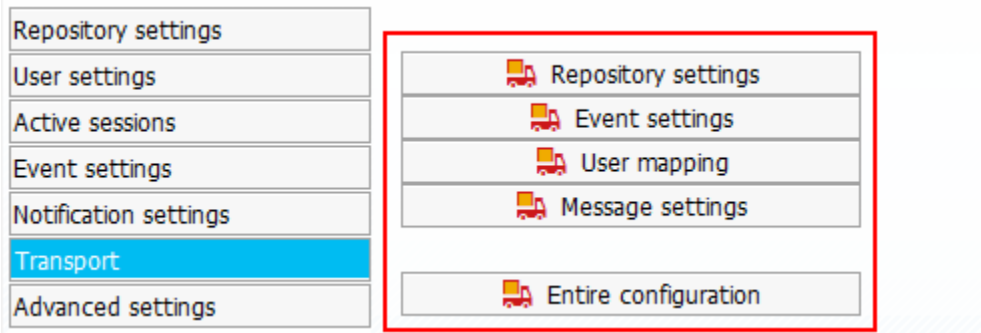


Fig.: Transport

This setting is only available if you have enabled the advanced settings, see the [Advanced settings](#). With this function, you can write all relevant settings as a transport order.

Advanced settings

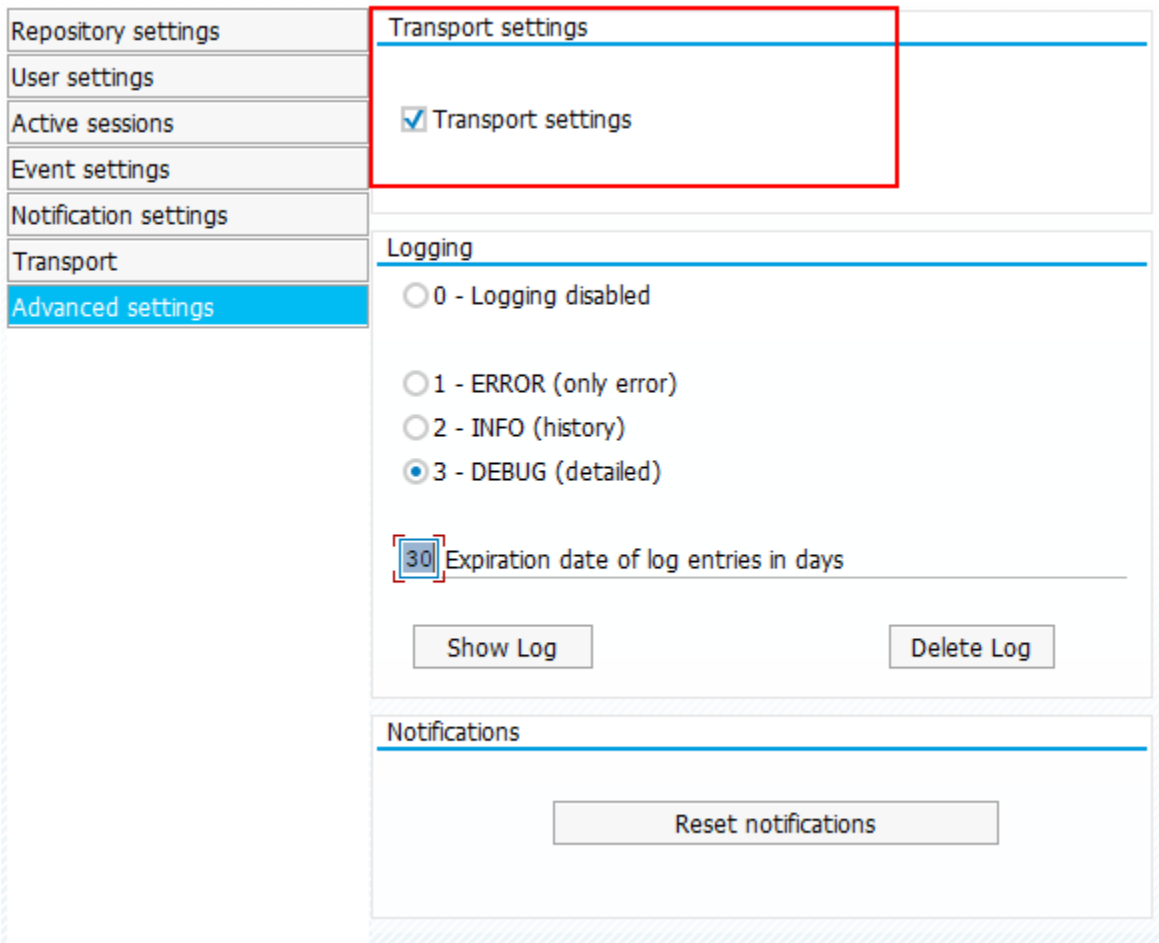


Fig.: Advanced settings, Transport settings

The option under *Transport settings* allows you to enable or disable the transport function. Check this box accordingly. This option applies to the interface immediately.

Repository settings

User settings

Active sessions

Event settings

Notification settings

Transport

Advanced settings

Transport settings

☒ Transport settings

Logging

☐ 0 - Logging disabled

☐ 1 - ERROR (only error)

☐ 2 - INFO (history)

☒ 3 - DEBUG (detailed)

30 Expiration date of log entries in days

Show Log

Delete Log

Notifications

Reset notifications

Fig.: Advanced settings, Logging

You can also enable app logging here. Four log levels are available.

Please note: A great deal of information is logged. This function should only be enabled if necessary and old log entries should be deleted in regular cycles.

Repository settings

User settings

Active sessions

Event settings

Notification settings

Transport

Advanced settings

Transport settings

☒ Transport settings

Logging

☐ 0 - Logging disabled

☐ 1 - ERROR (only error)

☐ 2 - INFO (history)

☒ 3 - DEBUG (detailed)

Expiration date of log entries in days

Show Log

Delete Log

Notifications

Reset notifications

Fig.: Advanced settings, Reset notifications

To delete the history of sent notifications, click *Reset notification* within this function group.

Using the client

To start the ELO Workflow Client for SAP® ERP, use transaction `/n/ELO/WF_CLIENT`.

Logon takes place automatically based on the settings in the administrative area.

Overview

After logon, the client starts with the following overview:

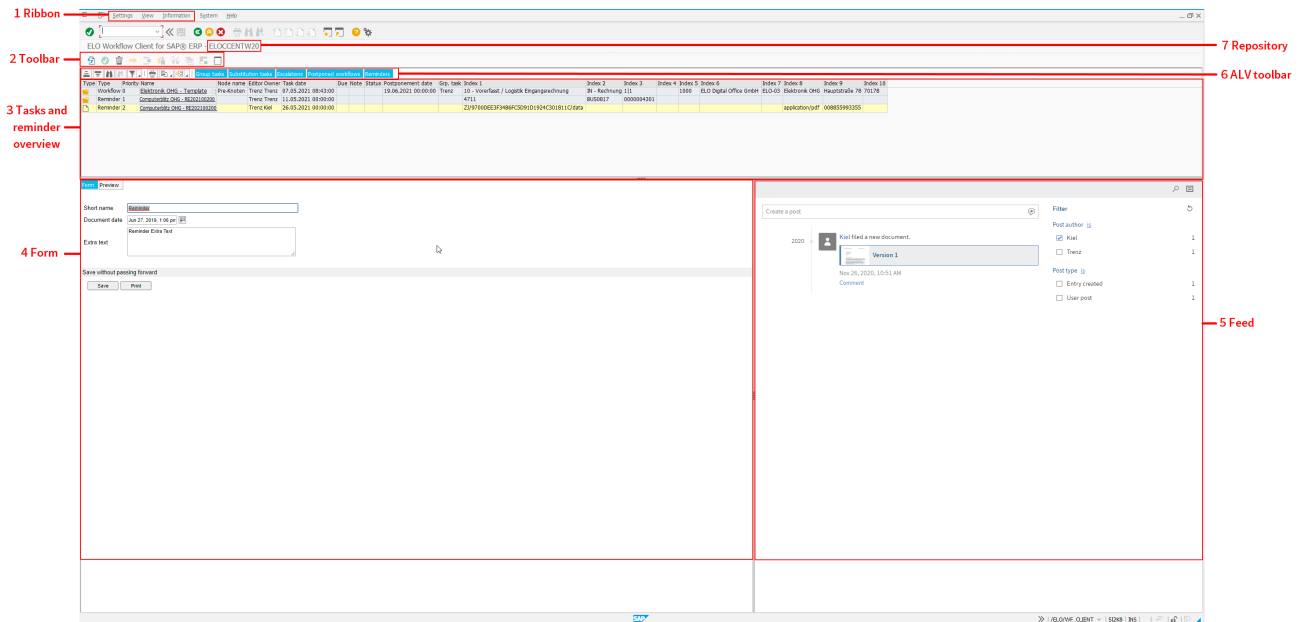


Fig.: ELO Workflow Client for SAP® ERP overview

1 Ribbon: The selected area is only available for settings in the ELO Workflow Client for SAP® ERP. The area that is left out contains the standard SAP menu navigation.

- Settings:
- Change repository:

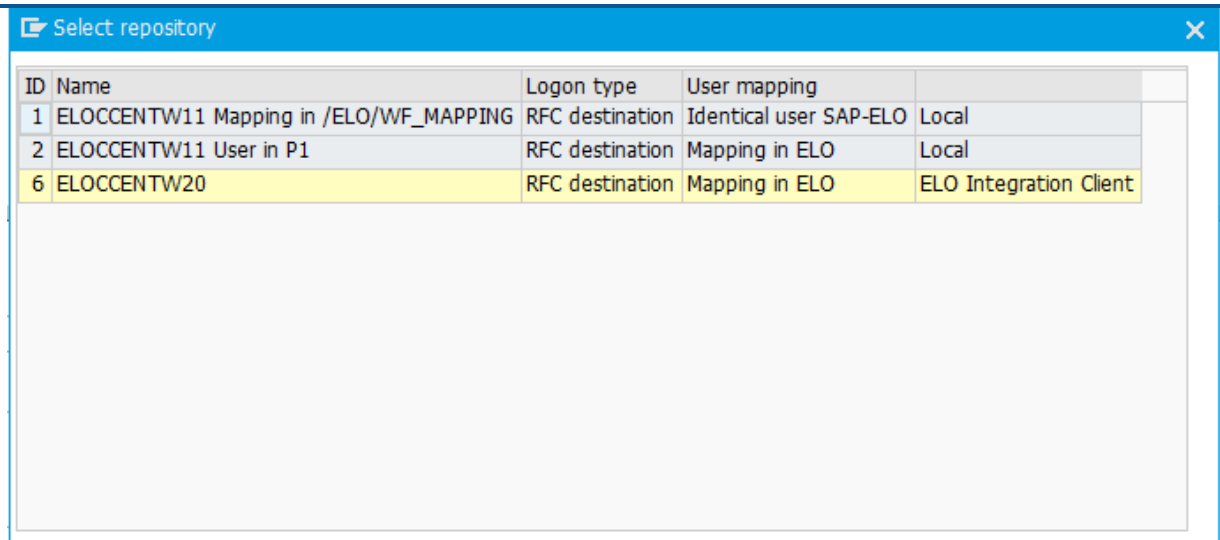


Fig.: Settings: Change repository

Switch between configured repositories.

- Set notifications:

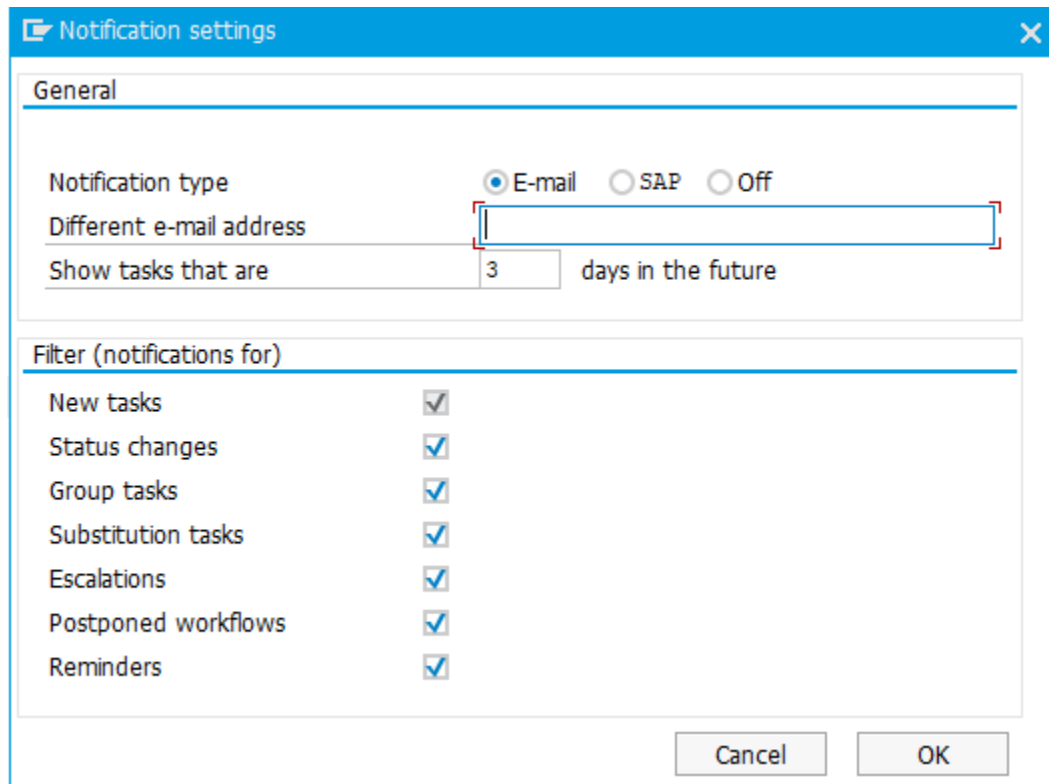


Fig.: Notification settings

Set whether, how, and for which types you want to receive notifications. The *Show tasks that are X days in the future* setting controls whether you want to see future tasks on start-up.

- View:

-

Toggle list: Two layouts are available. With this option, you switch between the two of them.

- Reset layout: Reset the client to the default layout setting.
- Show additional columns: Show additional columns that are hidden by default. This includes *ID*, *Node ID*, and *Type*.
- Hide additional columns: Hide the additional columns again.
- Info:
 - About: Provides information on the product. You will find all the information regarding the version in use for possible support cases.

2 Toolbar: This bar provides functions for the selected task/reminder and is explained in more detail in the chapter [Toolbar](#).

3 Tasks and reminder overview: This area contains an overview of your workflows and reminders. The functions on the toolbar are used for editing workflows and reminders. You can access all functions from the toolbar via the context menu (right-click). This tab contains options for editing workflows, and provides an overview of your existing tasks. The tasks are sorted according to their priority: 0 (high), 1 (medium), and 2 (low). Overdue tasks are denoted with a red icon with a white exclamation mark. You can create additional views for the *Tasks* work area. With the filter function, you can show a part of the tasks in each of the views. You can define different views so that you are only shown reminders or workflows, for example.

4 Form: In the form area, you will see the form provided by ELOwf for the task. To view the document linked to the workflow, select the *Preview* tab. If the workflow is linked to a folder, you will see a tree view with all the linked child elements. Double-click the file to display or download it.

5 Feed: The feed is used to share information on an entry in ELO (document or folder) and track changes. New feed posts are denoted with a green dot. The feed presents the history of the selected task/reminder.

6 ALV toolbar: The ALV toolbar offers the standard SAP functions belonging to what is referred to as the ALV grid and are described in the documentation for the SAP client. All functions deviating from the standard in this area are explained in the chapter [ALV toolbar](#).

7 Repository: The name of the repository the user is logged onto.

Toolbar

The buttons shown on the toolbar depend on the selected task/reminder.

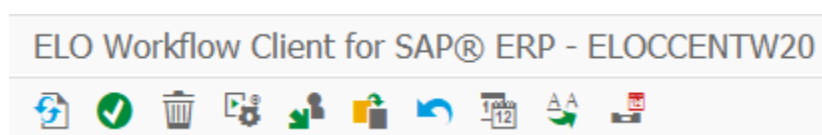


Fig.: Toolbar

Refresh

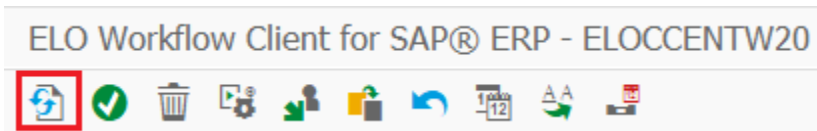


Fig.: Refresh

Click the *Refresh* button or use the keyboard combination CTRL + F5 to refresh your client and your tasks/reminder view.

Accept workflow

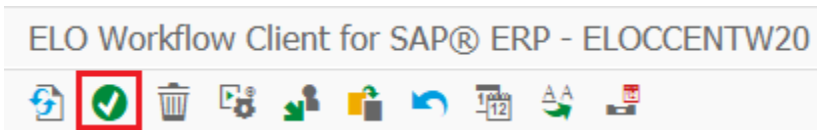


Fig.: Accept workflow

Can also be called via the context menu or by pressing F2.

Use this function to accept a workflow node that was assigned to a group. You will be entered as the user in the workflow node. The workflow is no longer displayed in the work areas of the other group members.

Use the [Return workflow](#) function to undo this action.

Delete

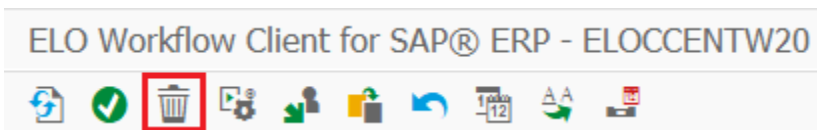


Fig.: Delete

Can also be called via the context menu or by using the keyboard shortcut SHIFT + F9.

Forward workflow

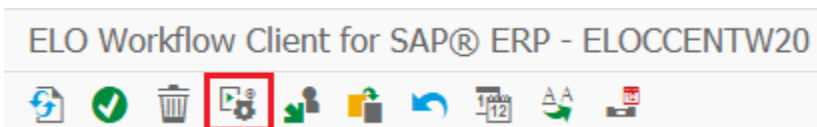


Fig.: Forward workflow

Can also be called via the context menu or by pressing F5.

Use this function to forward the selected workflow to the next workflow node. This ends your own workflow task and sends it to the next user.

Delegate workflow

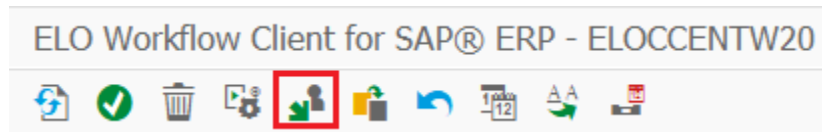


Fig.: Delegate workflow

Can also be called via the context menu or by pressing F6.

Use this function to delegate a workflow node to another user. The user is displayed in an additional node in the workflow. Use the *Delegate workflow* dialog box to specify whether you want to be notified after completing the workflow task.

Information

Whereas in the *Hand off workflow* function, another user is assigned the workflow node, the *Delegate workflow* function creates an additional node for the user. The original assignment remains unchanged.

Hand off workflow

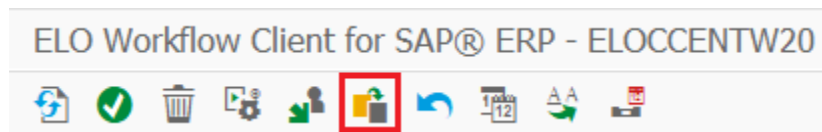


Fig.: Hand off workflow

Can also be called via the context menu or by pressing F7.

Use this function to transfer an active workflow node to another user. The user is displayed in the node and the workflow appears in the user's work area. The new user is entered in place of the original user.

Return workflow

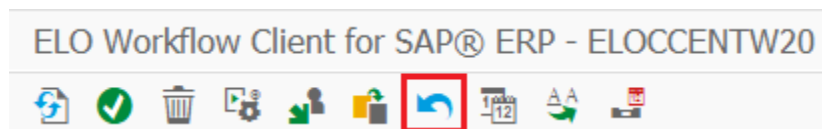


Fig.: Return workflow

Can also be called via the context menu or by using the keyboard shortcut SHIFT + F8.

Use this function to return a workflow node to the group that was originally assigned the node. The group is displayed again in the workflow node.

Postpone workflow

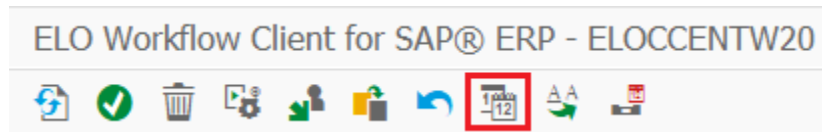


Fig.: Postpone workflow

Can also be called via the context menu or by pressing F8.

Use this function to determine the date until which a workflow should be hidden from the work area. Once the date has been reached, the workflow appears in the list again. Use the [Cancel postponement](#) function to cancel a workflow postponement.

Cancel postponement

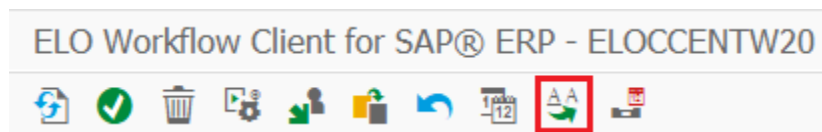


Fig.: Cancel postponement

Can also be called via the context menu or by pressing F9.

Use this function to cancel postponement of a workflow. If a workflow has been postponed, it remains active but is hidden in the work area, unless you explicitly enabled the display of postponed workflows.

To cancel a postponement, select the corresponding workflow and click the *Cancel postponement* button.

Edit reminder

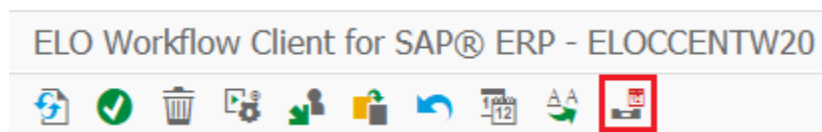


Fig.: Edit reminder

Can also be called via the context menu or by using the keyboard shortcut SHIFT + F1.

ALV toolbar

The client shows tasks with an extended ALV grid. The advanced functions are explained in the following.

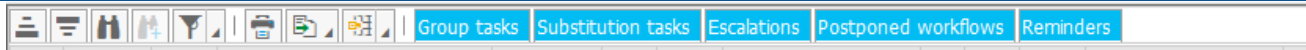


Fig.: ALV toolbar

Group tasks: Filters all tasks whose nodes are assigned to groups that the user is in

Substitution tasks: Filters all tasks the user is assigned as substitute for

Escalations: Filters all tasks whose nodes have exceeded the escalation deadline

Postponements: Shows all tasks that have been postponed to a date after the current date

Reminders: Filters all reminders

Feed

The following message types are shown in the feed:

- Posts (written by a user)
- Comments (on a post)
- Polls
- Events (e.g. when a new version of a document is filed or changes are made to the working version)

The image shows a web form for creating a post. It consists of a large, empty text input area with the placeholder text 'Create a post' in a light gray font. Below the input area is a horizontal bar. On the left side of this bar is a small eye icon, and on the right side is a blue button with the white text 'Create'.

Fig.: Feed; Create/comment on post

The feed enables you to write posts related to entries in ELO and comment on posts uploaded by other users.

1. Enter your post/comment in the respective input fields.
2. Click *Create* to upload the post/comment.