



FileNet Accounts Payable Processing Agency View

AGENCY DESKTOP – SEARCHING FOR INVOICES

SEARCH is activated by clicking on the magnifying glass icon, which opens the SEARCH CRITERIA window

Searches can be created, Recent Searches can be re-used, and Saved Searches can be accessed

The Search will be started by the button at the bottom of the window



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Search folder locations are provided in a drop-down box

The screenshot shows the BSC Workflow Agency Desktop interface. The main window has a search bar with the text "Name contains". Below it, there are sections for "Recent Searches" (including "Invoice Search" and "All Searches") and "Document Title" with an "Add Property" button. The "Search Criteria" section is active, showing "Search in:" set to "BSC (including subfolders)" and "Search options:" set to "Documents, Released version". A dialog box is open, showing a "Repository" list with "BSC" selected. The "Search in:" field in the dialog is set to "BSC". The dialog also shows a tree view of folders under "BSC": "Entire Repository", "Audit Folder", "BSC", "BSC_Test", "Email Attachments", "Entry Templates", "Search Templates", and "Workflow Templates". The "Include subfolders" checkbox is checked. At the bottom of the dialog are "OK" and "Cancel" buttons. Below the dialog, there are buttons for "Search", "Reset", "Save", "Save As...", "Cancel", "Results Display", and a checkbox for "Keep search criteria open". The status bar at the bottom shows "3/19/2014, 3:12 PM - The Entire Repository folder returned 7 items." and "Trusted sites | Protected Mode: Off".



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Document types are also provided via a drop-down box

The screenshot shows the 'BSC Workflow Agency Desktop' interface. At the top, there are tabs for 'Invoice Search', 'New Search', and another 'New Search'. The main area is titled 'Search Criteria'. Under 'Search in:', there is a dropdown menu set to 'BSC (including subfolders)'. To the right, it says 'Search options: Documents, Released version'. Below this, the 'Class:' dropdown menu is open, showing a list of document classes: 'Document (including subclasses)', 'Document', 'Email', 'Finance', 'Form Data', 'Form Policy', and 'Stored Search'. The 'Document (including subclasses)' option is highlighted. Below the list, there are two checkboxes: 'Include subclasses' (checked) and 'Search in multiple classes ?' (unchecked). At the bottom of the dropdown are 'OK' and 'Cancel' buttons. Below the search criteria, there are buttons for 'Search', 'Reset', 'Save', 'Save As...', 'Cancel', and 'Results Display'. A checkbox 'Keep search criteria open' is also present. At the bottom of the window, a status bar shows the date and time '3/19/2014, 3:12 PM' and a message 'The Entire Repository folder returned 7 items.' The IBM logo is visible in the top right corner of the interface.



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Search results are displayed in the same format as a Work List

Highlighting an item will display the Properties bar on the right side of the window

BSC Workflow Agency Desktop
DMN AP Agency Review
IBM

+ New Search

Name contains

Recent Searches

- DOH01 Test - Ryan
- Invoice Search
- Credit Card Search

All Searches

- Credit Card Search
- DOH01 Test - Ryan
- Invoice Search

Invoice Search x
DOH01 Test - Ryan x
New Search x

Search Criteria: Class: Document including subclasses Search in: BSC Search options: Released version Property options: Match all

Search Results

Refresh
Add Document
New Folder
Check In
Check Out
Properties
Actions

Showing results for: Invoice Search

Invoice Number	InvoiceDocType	Invoice Type	Date Received	Date Checked In
1089	Invoice	PO	2/19/2014, 12:00 AM	2/19/2014, 1:54 PM
1089	Invoice	PO	2/19/2014, 12:00 AM	2/19/2014, 12:01 PM
111	Invoice	Contract	2/12/2014, 12:00 AM	2/12/2014, 12:36 PM
1111	Invoice	Contract	2/13/2014, 12:00 AM	2/13/2014, 12:26 PM
11111	Invoice	Contract	2/12/2014, 12:00 AM	2/12/2014, 10:20 AM
1159244491	Invoice	Utility	2/19/2014, 12:00 AM	2/20/2014, 8:49 AM
12011349	Invoice	PO	3/2/2014, 12:00 AM	3/3/2014, 1:53 PM
1203	Invoice	PO	2/19/2014, 12:00 AM	2/20/2014, 8:40 AM
1228040	Invoice	Contract	2/6/2014, 12:00 AM	2/18/2014, 2:41 PM
123	Invoice	Contract	2/12/2014, 12:00 AM	2/12/2014, 11:04 AM
12345	Invoice	Contract	2/3/2014, 12:00 AM	2/13/2014, 10:05 AM
13-851967	Invoice	Special Ops (or Other)	2/13/2014, 12:00 AM	2/13/2014, 12:46 PM
15686-75106	Invoice	Utility	2/19/2014, 12:00 AM	2/20/2014, 8:49 AM
1961	Invoice	Utility	3/12/2014, 1:00 AM	3/12/2014, 2:52 PM

Properties

Class: Invoice

Document Title: Invoice "1111"

Business Unit: DHS01

Date Received: 2/13/2014, 12:00 AM

Invoice Type: Contract

InvoiceDocType: Invoice

Invoice Number: 1111

Invoice Date: 12/31/2013, 12:00 AM

Invoice Amount: 500

PO Number: 5555

Vendor Number: 1000008751

Vendor Name: IBM CORPORATION

System Properties

3/19/2014, 1:13 PM - 5 items were found.



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The item can be opened either through clicking on the Document icon, or by using the ACTIONS drop-down box

The Workflow can be launched from this box as well

The screenshot shows the 'BSC Workflow Agency Desktop' interface. At the top, there's a search bar with 'Invoice Search' selected. Below it, search criteria are listed: 'Class: Document including subclasses', 'Search in: BSC', 'Search options: Released version', and 'Property options: Match all'. The search results table shows a list of invoices with columns for Invoice Number, Invoice Doc Type, Invoice Type, Date Received, and Checked In. The 'Actions' dropdown menu is open over the table, showing options like Open, Preview, Properties, Download, Add to Favorites, Export, Delete, Check Out, Check In, Cancel Check Out, Link, Send Email, Version, Folders, Print, and Workflow. The 'Workflow' option is highlighted, and a sub-menu is visible with 'Launch Workflow' selected. On the right side, there's a 'Properties' panel showing details for the selected invoice, including Class (Invoice), Document Title (Invoice! *1111), Business Unit (DHS01), Date Received (2/13/2014, 12:00 AM), Invoice Type (Contract), Invoice Document Type (Invoice), Invoice Number (1111), Invoice Date (12/31/2013, 12:00 AM), Invoice Amount (500), PO Number (5555), Vendor Number (1000008751), and Vendor Name (IBM CORPORATION).

Invoice Number	Invoice Doc Type	Invoice Type	Date Received	Checked In
1089	Invoice	PO	2/19/20	4, 1:54 PM
1089	Invoice	PO	2/19/20	4, 12:01 PM
111	Invoice	Contract	2/12/20	4, 12:36 PM
1111	Invoice	Contract	2/13/20	4, 12:26 PM
11111	Invoice	Contract	2/12/20	4, 10:20 AM
1159244491	Invoice	Utility	2/19/20	4, 8:49 AM
12011349	Invoice	PO	3/2/20	1:53 PM
1203	Invoice	PO	2/19/20	4, 8:40 AM
1228040	Invoice	Contract	2/6/20	4, 2:41 PM
123	Invoice	Contract	2/12/20	4, 11:04 AM
12345	Invoice	Contract	2/3/20	4, 10:05 AM
13-851967	Invoice	Special Ops (or Other)	2/13/20	
15686-75106	Invoice	Utility	2/19/2014, 12:00 AM	2/20/2014, 8:49 AM
1961	Invoice	Utility	3/12/2014, 1:00 AM	3/12/2014, 2:52 PM