



FileNet Accounts Payable Processing Agency View

AGENCY DESKTOP – PROPERTIES

Opening the item will bring up the PROPERTIES screen

This view provides the detail of the item, as well as a COMMENTS section providing background and / or instructions for the next step

The choices in the MORE RESPONSES box will move the item to the next step

The screenshot shows a web browser window displaying the 'Agency Review' screen for an invoice. The browser address bar shows the URL: https://sit.contentnow.ny.gov/?queueName=AP_Invoices_Agency&wobNum=5025E039B55EC04791CB8A71319C. The page title is 'Business Unit: DHS01/Vendor: AT&T GOVERNMENT SOLUTIONS INC/Invoice Number: 287255904201X01282014/Workflow Version5'. The 'Step' is 'Agency Review'. A red box highlights the instruction: 'Respond to each of the requests as indicated in the Agency Review Details.' Below this, the 'Properties' tab is active, showing a list of invoice details: Business Unit (DHS01), Invoice Type (Utility), Date Received (3/13/2014, 1:00 AM), Invoice Number (287255904201X01282014), Invoice Date (12/23/2013, 12:00 AM), Invoice Amount (14.5), Vendor Number (1100039542), and Vendor Name (AT&T GOVERNMENT SOLUTIONS INC). At the bottom, there are buttons for 'Ok To Pay', 'Not Ok To Pay', 'More Responses', 'Save', and 'Cancel'. A red box highlights the 'More Responses' dropdown menu, which is open, showing options: 'Agency Question', 'Requires PO Change', and 'Ok To Pay After PO Change'. Red arrows point from the 'Save' and 'Cancel' buttons to the text block below.

When closing the PROPERTIES, ATTACHMENTS, or HISTORY windows, always use the SAVE or CANCEL button. If the upper right "X" is used, the Work Item will be locked so that no one but the User who locked it can unlock it



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AGENCY DESKTOP – HISTORY

The HISTORY tab opens a window that shows every previous action related to the Work Item

Business Unit: DHS01/Vendor: AT&T GOVERNMENT SOLUTIONS INC/Invoice Number: 287255904201X01282014/Workflow Version5

Due date: Not set | Started by: p8admin | Received on: 3/17/2014, 10:59 AM | Step: Agency Review

Respond to each of the requests as indicated in the Agency Review Details.

Properties Attachments **History** Hide Instructions

Filter by map: All maps

Step	Cycle	Participant	Completed	Response	Comments
StartStep	1		3/13/2014, 2:57 PM		
Agency Review	1				
StartStep	1		3/13/2014, 1:46 PM		
StartStep	1		3/13/2014, 1:46 PM		
Research	1	bscadminuser	3/13/2014, 2:54 PM	Agency Review	
StartStep	1		3/13/2014, 2:54 PM		
Start	1	p8admin	3/13/2014, 1:46 PM		

Agency Question
Requires PO Change
Ok To Pay After PO Change

Get next work item

Ok To Pay Not Ok To Pay More Responses Save Cancel

Done

3/17/2014, 10:59 AM - The selected work item was opened.



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AGENCY DESKTOP – ATTACHMENTS

The ATTACHMENTS TAB provides access to all documents related to the original Work Item

The Work Item can be opened by clicking on the icon to the left of the Item, or by using the "ACTIONS" drop-down box

The screenshot displays the BSC Workflow Agency Desktop interface. The main window title is "Business Unit: DHS01/Vendor: AT&T GOVERNMENT SOLUTIONS INC/Invoice Number: 287255904201X01282014/Workflow Version5". The interface includes a navigation pane on the left with "Attachments" selected. The main content area shows a table of attachments with the following data:

Name	Business Unit
Invoice287255904201X01282014	DHS01

Annotations in the screenshot include:

- A red box around the "Attachments" tab in the navigation pane.
- A red box around the "Invoice" icon in the left sidebar.
- A red box around the "ACTIONS" dropdown menu.
- A red box around the "Invoice287255904201X01282014" row in the table, with a red arrow pointing to it and a text box saying "Click to open".
- A red box around the "Agency Question" dropdown menu.

At the bottom of the interface, there are buttons for "Ok To Pay", "Not Ok To Pay", "More Responses", "Save", and "Cancel". A status bar at the very bottom shows "Done" and "3/17/2014, 10:26 AM - The selected work item was opened."



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AGENCY DESKTOP – ATTACHMENTS

The "ACTIONS" drop-down box provides choices for the next step, including the ability to Open, Print, or attach the Invoice to an e-mail

The screenshot displays the BSC Workflow Agency Desktop interface. The main window shows an invoice attachment for 'Business Unit: DHS01/Vendor: AT&T GOVERNMENT SOLUTIONS INC/Invoice Number: 287255904201X01282014/Workflow Version5'. The 'Attachments' tab is active, showing a table with one entry: 'Invoice287255904201X01282014' from 'DHS01'. The 'ACTIONS' menu is open, highlighting 'Open', 'Preview', 'Properties', 'Download', 'Add to Favorites', 'Delete', 'View Link', 'Send Email', and 'Print'. Red arrows point from the 'ACTIONS' menu to the 'Open', 'Print', and 'Send Email' options. The interface includes a search bar, a left sidebar with navigation options, and a bottom status bar.

Name	Business Unit
Invoice287255904201X01282014	DHS01



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AGENCY DESKTOP – ATTACHMENTS – SUPPORTING DOCUMENTS

Using the “Supporting Documents” queue, and the “ADD DOCUMENT” drop-down, the User can browse for, select, and update the Work Item by attaching a document using the “Add Document Using Entry Template” function

The screenshot displays the FileNet Agency Desktop interface. The main window shows a work item for Business Unit: DHS01/Vendor: AT&T GOVERNMENT SOLUTIONS INC/Invoice Number: 287255904201X01282014/Workflow Version5. The interface includes a left sidebar with navigation options like AP, CardS, and Purch. The main content area has tabs for Properties, Attachments, and History. The Attachments tab is active, showing a list of attachments including Invoice, PO, Possible Duplicates, and Supporting Documents. The Supporting Documents attachment is highlighted with a red box. A red arrow points from the Supporting Documents attachment to the 'Add Document' dropdown menu. The dropdown menu is open, showing options: From Local Directory, From Repository, and Add Document Using Entry Template. The 'Add Document Using Entry Template' option is highlighted with a red box. Below the dropdown menu, a table shows a single entry: Supporting Document - Invoice, DHS01. At the bottom of the interface, there are buttons for 'Ok To Pay', 'Not Ok To Pay', 'More Responses', 'Save', and 'Cancel'. The status bar at the bottom indicates 'Done' and 'Trusted sites | Protected Mode: Off'.



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AGENCY DESKTOP – ATTACHMENTS – SUPPORTING DOCUMENTS – ADD DOCUMENT USING ENTRY TEMPLATE

By choosing the “Add Document Using Entry Template” function, a new screen will be generated that allows the User to browse for the necessary document, and add it to the Work Item

The screenshot shows the FileNet Agency Desktop interface. A dialog box titled "Add Document by Using Entry Template" is open. The dialog box has a "General" section with the following fields: "Entry template" (Invoice Supporting Document), "What do you want to save?" (Local document), and "File name" (C:\Users\...\Desktop\Test.txt) with a "Browse..." button. The "Properties" section has "Class" (Invoice) and "Document Title" (Supporting Document - Invoice). "Add" and "Cancel" buttons are at the bottom right. The background shows the Agency Desktop interface with a search bar and a list of work items.



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AGENCY DESKTOP – ATTACHMENTS – SUPPORTING DOCUMENTS

The Work Item now shows the added document as a Supporting Document

The screenshot displays the BSC Workflow Agency Desktop interface. The main window shows a work item for 'Business Unit: DHS01/Vendor: AT&T GOVERNMENT SOLUTIONS INC/Invoice Number: 287256904201X01282014/Workflow Version5'. The 'Attachments' tab is active, showing a table of supporting documents. The table has columns for 'Name' and 'Business Unit'. Two documents are listed: 'Supporting Document - Invoice' for DHS01 and 'Supporting Document - Invoice' for ABC01. The second document is highlighted with a red box. The interface includes navigation buttons like 'Refresh', 'Add Document', and 'Add Folder', and a status bar at the bottom indicating the work item was opened on 3/17/2014 at 10:26 AM.

Name	Business Unit
Supporting Document - Invoice	DHS01
Supporting Document - Invoice	ABC01