

## Working Items through the Agency Desktop

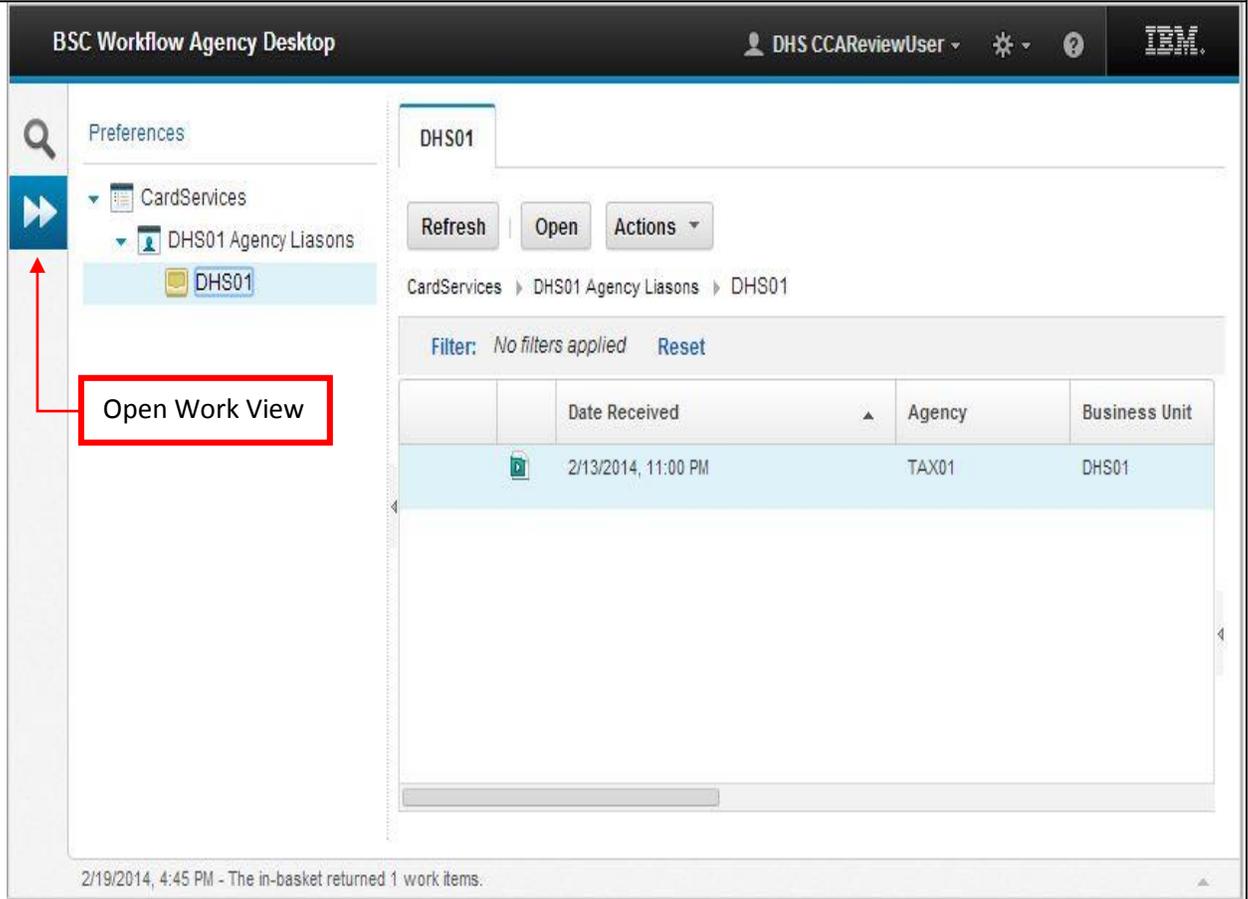
This aid will walk through the step of working items in the Agency Process In-Basket(s).

By clicking  
on the Open  
Work View



Icon  
you can  
open the  
Work Items  
in the  
FileNet  
Workflow  
Solution.

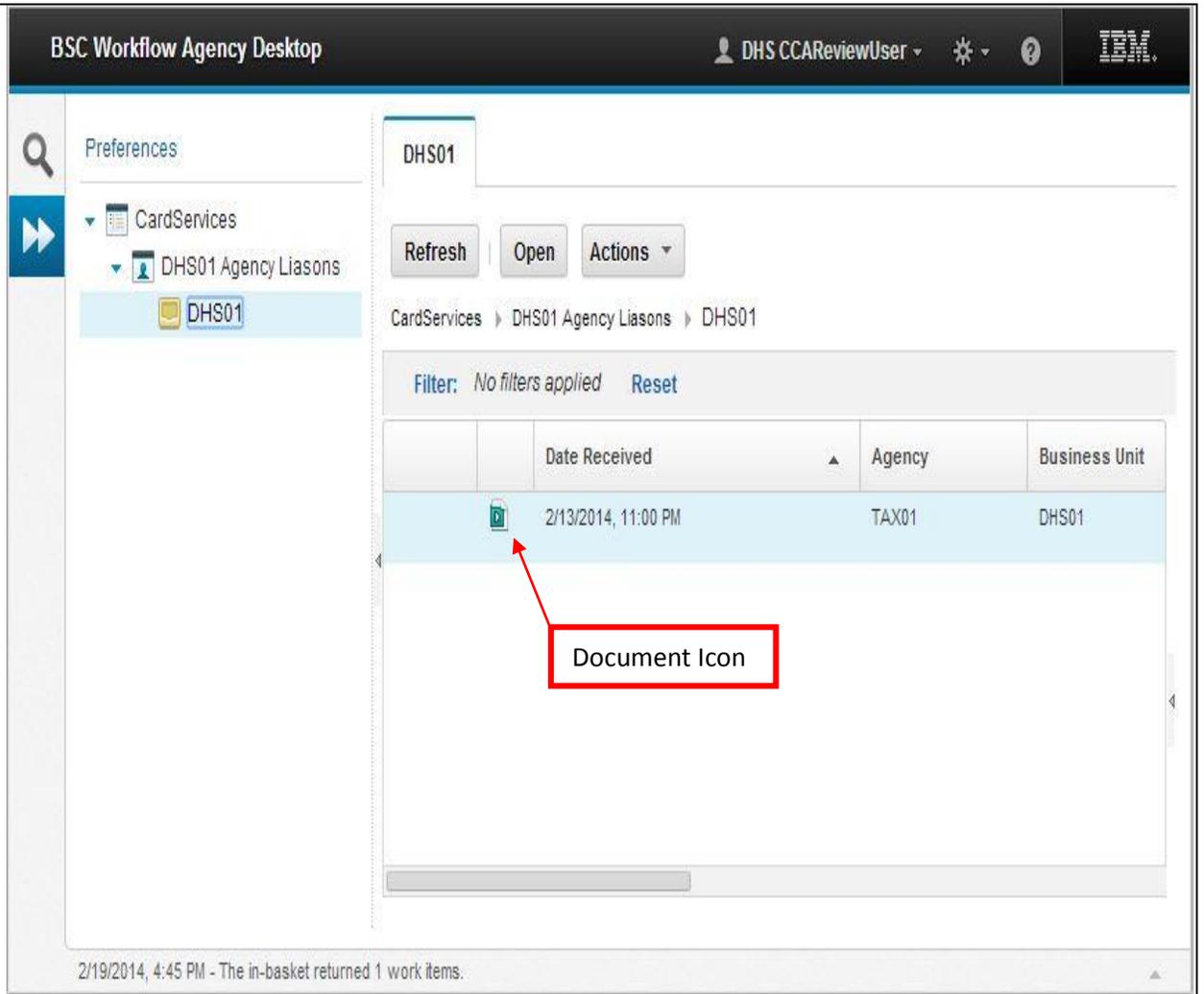
Access to  
the Work  
Item Process  
Queues is  
assigned  
based on  
your role in  
the FileNet  
Workflow  
Solution.



The screenshot shows the 'BSC Workflow Agency Desktop' interface. The top navigation bar includes the user name 'DHS CCARReviewUser', settings, help, and the FileNet logo. The left sidebar contains a search icon and a list of preferences: 'CardServices', 'DHS01 Agency Liasons', and 'DHS01'. A red box highlights the 'Open Work View' icon in the sidebar, with a red arrow pointing to it. The main content area shows the 'DHS01' view with 'Refresh', 'Open', and 'Actions' buttons. Below these is a breadcrumb trail: 'CardServices > DHS01 Agency Liasons > DHS01'. A filter section indicates 'No filters applied' with a 'Reset' button. A table displays work items with columns for 'Date Received', 'Agency', and 'Business Unit'. One item is listed: '2/13/2014, 11:00 PM' from 'TAX01' agency, 'DHS01' business unit. The status bar at the bottom reads: '2/19/2014, 4:45 PM - The in-basket returned 1 work items.'

Date Received	Agency	Business Unit
2/13/2014, 11:00 PM	TAX01	DHS01

To open a Work Item from the Process In-Basket, click on the  Document Icon next to the Work Item.



The screenshot shows the 'BSC Workflow Agency Desktop' interface. The top navigation bar includes the user name 'DHS CCARReviewUser', a settings icon, a help icon, and a logo. The left sidebar shows a navigation tree with 'CardServices' expanded to 'DHS01 Agency Liasons', where 'DHS01' is selected. The main content area displays a table with columns for 'Date Received', 'Agency', and 'Business Unit'. A single row is highlighted in blue, containing the date '2/13/2014, 11:00 PM', agency 'TAX01', and business unit 'DHS01'. A small document icon is visible in the first column of this row, which is pointed to by a red arrow and labeled 'Document Icon' in a red-bordered box. Above the table, there are buttons for 'Refresh', 'Open', and 'Actions', and a filter section indicating 'No filters applied'. A status bar at the bottom of the interface reads '2/19/2014, 4:45 PM - The in-basket returned 1 work items.'

	Date Received	Agency	Business Unit
	2/13/2014, 11:00 PM	TAX01	DHS01

After opening a Work Item from the Process Queue by clicking on the Document Icon  next to the Work Item, the **Properties** Page will open.

From this page, you will be able to update an Employee Email or add a Comment.

Click on the **History** Tab in order to see the instructions from the BSC that describe what is needed to complete this work item and route it back to the BSC.

## Agency Work Item – Properties

### Card Processing

Due date: 2/21/2014, 1:23 PM | Started by: iedfrnuser | Received on: 2/14/2014, 1:23 PM | Step: Agency Liaison Follow-up

The attached Credit Card Application has been routed to you for additional information or approval. Select the History Tab for comments from the BSC processing team.

[Instructions](#) Hide Instructions

**Properties** | Attachments | History

Agency GL Business Unit: ?	TAX01
Approver Email: ?	dhsestinance@dheses.ny.gov
Approver ID: ?	N01618789
Business Unit: ?	DHS01
Date Received: ?	2/13/2014, 11:00 PM 
Document Type: ?	New Traveler / Travel Card Application
Employee Email: ?	kwasi.busia@tax.ny.gov
Employee ID: ?	N01379871
First Name: ?	KWASI
Last Name: ?	BUSIA
Middle Initial: ?	A
Name on Credit Card: ?	
Status: ?	Agency Outreach
Comment: ?	<div style="border: 1px solid #ccc; padding: 5px; min-height: 30px;">Add your comments here.</div>

Get next work item

By clicking on the **History** Tab, you will see the History information for the Work Item.

You will see the comments that were added to instruct you on how to process this work item from the Process In-Basket.

## Agency Work Item – History

### Card Processing

Due date: 3/6/2014, 9:33 AM | Started by: iedrfnuser | Received on: 2/27/2014, 9:33 AM | Step: Agency Liaison Follow-up

The attached Credit Card Application has been routed to you for additional information or approval. Select the History Tab for comments from the BSC processing team.

[Hide Instructions](#)

Properties

Attachments

**History**

Filter by map: All maps

Step	Cycle	Participant	Completed	Response	Comments
StartStep	1		2/27/2014, 9:33 AM		
Agency Liaison Follow-up	1				
StartStep	1		2/27/2014, 9:32 AM		
LaunchStep	1	iedrfnuser	2/14/2014, 2:13 PM		
Review Application	1	bscccadminuser	2/27/2014, 9:32 AM	Agency Outreach	Please upload the proper supporting documents and return.
Validate Email Addresses	1		2/27/2014, 9:32 AM		

Reviewer instructions

Get next work item

Agency Complete

Save

Cancel

To view the application, select the **Attachments Tab**, the page displayed as shown here. You can view the **Application** or the **Supporting Document** by expanding the node and double clicking the desired document.

## Attachments – Application Document(s)

**Card Processing**

Due date: Not set | Started by: iedrfnuser | Received on: 2/11/2014, 4:19 PM | Step: Review Application

Please review attached application for processing. Hide Instructions

Properties | **Attachments** | History

Application  
Supporting Documents

Refresh | Add Document | Add Folder | Remove | Actions

Attachments > Application

	Name	Business Unit	Employee Id
	New Traveler / Travel Card Application' "N01057944	DOH01	N01057944

Get next work item

Agency Complete | Save | Cancel

Double  
Click

Adding objects to the FileNet Workflow Solution is discussed in the “Adding Documents in the FileNet Workflow Solution” job aid.

## Attachments – Supporting Documents

### Card Processing

Due date: Not set | Started by: iedrnfuser | Received on: 2/11/2014, 4:19 PM | Step: Review Application

Please review attached application for processing.

[Hide Instructions](#)

Properties | **Attachments** | History

Application

Supporting Documents

Refresh | Add Document | Add Folder | Remove | Actions

Attachments > Supporting Documents

	Name	Business Unit	Employee Id
	Supporting Document	ABC01	12345

Double Click

Get next work item

Agency Complete

Save

Cancel

The double click action will open the document in a separate window for you to view the document as shown.

When finished viewing the document, close the window and return to the work page.

## Viewing a Document

BSC Workflow Desktop - Viewer

New Traveler / Travel Card Application' "N01057944 x

Submit completed form with original signatures to:  
**NYS Office of General Services**  
 BSC Finance-Credit Card Unit  
 50 Wolf Road, 3rd Floor  
 Albany, NY 12233  
 518-457-4272  
 BSC.CC.Applications@ogsr.ny.gov

**NEW TRAVELER/TRAVEL CARD APPLICATION**

Please Print or Type

Section I Employee Information			
First Name	MI	Last Name	Title/Department
Joseph	F	Pasquini	Health Program Administrator 3
Agency GLBU	Employee ID No. (can be found on pay stub)		SFS User ID
DOH01	N01057944		jfp09
Work Address (full mailing address)			
875 Central Avenue, Albany, NY 12206			
Official Station City			Last 4 digits of Social Security No.
Albany			6391
Email address		Work Phone No.	Require a Citibank Travel Credit Card?
jfp09@health.state.ny.us		(518) 402 - 1045	<input checked="" type="radio"/> Yes <input type="radio"/> No

Your use of a NYS Citibank Travel Card is subject to the following terms and conditions:

1. You are being entrusted with a valuable tool - a NYS Citibank Travel Card - which is to be used for business travel expenses. Because you will be making a financial commitment on behalf of the State, you must strive to obtain best value for the State by following established travel policies as appropriate.

Page 1 of 2...

After completing all described steps, you can add a comment in the field provided and then route the item back to the BSC by clicking the **“Agency Complete”** button.

Selecting **Save** or **Cancel** will allow the work item to remain in your work list until you elect to complete the process.

Do not close the page using the **“X”**, as it will lock the item until the same user unlocks it.

## Agency Work Item – Properties

https://sit.contentnow.ny.gov/?queueName=Agency&wobNum=0CB738C38E354D45B1E1DA336398D6EF&stepNam - Microsoft Internet Explorer p

### Card Processing

Due date: 3/3/2014, 1:59 PM | Started by: iedrfnuser | Received on: 3/6/2014, 3:13 PM | Step: Agency Liaison Follow-up

The attached Credit Card Application has been routed to you for additional information or approval. Select the History Tab for comments from the BSC processing team.

Hide Instructions

Properties Attachments History

Agency GL Business Unit: DMN01

Approver Email: JULIA.BAILEY@SIRIUSCOMSERVICES.COM

Approver ID: N01285673

Business Unit: DMN01

Date Received: 2/14/2014, 12:00 AM

Document Type: Non-Employee Travel Card Authorization

Employee Email: JULIA.BAILEY@SIRIUSCOMSERVICES.COM

Employee ID: N01548713

First Name: LAKIA

Last Name: RUCKER

Middle Initial: S

Name on Credit Card:

Status: Agency Outreach

Comment:

Get next work item

Agency Complete Save Cancel

Done Trusted sites | Protected Mode: Off 100%

Do not close this page using the **“X”**, as it will lock the item

Always complete this step by using 1 of these buttons