



Office of General Services Business Services Center

Working Items Through the Agency Desktop

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

To view all the Work Items in the Process In-Basket, select:

1. **Card Services**
2. **Agency Liaisons**
3. **Agency GLBU**

Access to Work Items is assigned based on your role in the FileNet Workflow Solution.

The screenshot shows the 'BSC Workflow Agency Desktop' interface. On the left, a 'Preferences' sidebar is expanded to 'CardServices' > 'DOH01 Agency Liasons' > 'DOH01'. The main content area shows a breadcrumb trail: 'CardServices > DOH01 Agency Liasons > DOH01'. Below this, there is a table with one row of data:

Date Received	Agency	Business Unit
3/3/2014, 1:38 PM	DOH01	DOH01

To open a Work Item from the Process In-Basket, click the **workflow icon** next to the work item.

This screenshot is identical to the one above, but with a black arrow pointing to the workflow icon (a document with a circular arrow) located to the left of the data row in the table.

The Properties Page will open. From this page, you will be able to view instructions from the BSC that describe what is needed to complete the work item. You will also be able to update an **Employee email** or add a **comment**.

Due date: 7/3/2018, 4:45 PM | Started by: BSC CCAAdminUser | Received on: 6/26/2018, 4:45 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: ? DOH01

Approver Email: ?

Approver ID: ?

Business Unit: ? DOH01

Comments: ?

Date Received: ? 3/3/2014, 1:38 PM

Document Type: ? New Traveler / Travel Card Application

Employee Email: ? Deanna.Franklin@Ogs.ny.gov

Employee ID: ? N01012345

First Name: ? Frannie

Last Name: ? Sunshine

LastUserId: ? bsccadminuser

Location: ?

Middle Initial: ?

Name on Credit Card: ?

Status: ? Agency Outreach

Comment: ?

Get next work item

To view the Application or Supporting Documentation, click the **Attachments** tab. You can view the document by clicking the **document icon**.



Due date: 6/29/2018, 2:37 PM | Started by: BSC CCAAdminUser | Received on: 6/29/2018, 2:07 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

Application
 Supporting Documents

Attachments > Application

	Name	Size	Modified By	Modified On
	New Card	247 KB	ecmaas_BSCfinance_operations	6/29/2018, 2:07 PM

The document will open in a separate window for you to view.

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

Procurement Card Application *N00123456*

Agency Liaison: Submit completed form with original signature to:
NYS Office of General Services
 BSC Finance-Credit Card Unit
 1225 Washington Ave.
 Building 5
 Albany, NY 12226
 Phone: 518-457-4272
 Fax: 518-485-7047
 BSC.CC.Applications@ops.ny.gov

PROCUREMENT CARD APPLICATION

Please Print or Type

Employee Information			
First Name Jane	MI A	Last Name Jones	Last 4 digits of Social Security No. 1234
Agency GLBU OFT01		Title/Department Contract Mgt Spec T1- Finance	SFS User ID if known, otherwise use NYSOS/SLMS user id USERID
Employee ID No. (can be found on pay stub) N00123456			
SFS User ID if known, otherwise use NYSOS/SLMS user id USERID			
Work Address (full mailing address) South Swan St Bldg, Core 4 Albany, NY 12223			
Email address Jane.Jones@agency.ny.gov			Work Phone No. (518) 555 - 4874
SFS Approver Name John Smith	SFS Approver Emp ID N00123457	Proxy Name (if applicable) Sarah Sumer	Proxy Employee ID N00123456
Alternate SFS Approver Name John James	Alt SFS Appvr Emp ID N00123458	Alternate SFS Approver Name Kelly Smith	Alt SFS Appvr Emp ID N00123458

Additional Information

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

- You are being entrusted with a valuable tool - a NYS Citibank Procurement Card - which is to be used for the State's purchase of services and commodities. 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 purchasing policies as appropriate.

When finished, you can add a **comment** in the field provided and route the item back to the BSC by clicking the **Agency Complete** button.

Properties | Attachments | History

Comments: ?

Date Received: ? 3/3/2014, 1:38 PM

Document Type: ? New Traveler / Travel Card Application

Employee Email: ?

Employee ID: ? N01012345

First Name: ? Frannie

Last Name: ? Sunshine

LastUserid: ? bsccadminuser

Location: ?

Middle Initial: ?

Name on Credit Card: ?

Status: ? Agency Outreach

Comment: ?

Get next work item

Add Comment | **Agency Complete** | Move to In-basket | Save | Cancel