



Office of General Services Business Services Center

Attach Support Documents to a Work Item

This aid illustrates how to attach supporting documents in the workflow.

From the Process In-basket, click on the **Document Icon** next to the Work Item.

BSC Workflow Agency Desktop

Work

Preferences

- AP
- Purchasing
- Agencies
- CardServices
 - DOH01 Agency Liasons
 - DOH01

DOH01

Get All Refresh Open Export Actions

CardServices > DOH01 Agency Liasons > DOH01

Filter: No filters applied Reset

Date Received	Agency	Business Unit	Last Name	First Name	Employee ID	Document Type
3/3/2014, 1:38 PM	DOH01	DOH01	Sunshine	Frannie	N01012345	New Traveler / Travel Card Application

The Work Item defaults to the **Properties** tab.

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

Click on the Attachments tab.

Card Processing V2

Due date: 7/3/2018, 4:43 PM | Started by: iedrIEDRfuser | Received on: 6/26/2018, 4:43 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: ? liaison@doh.ny.gov

Approver ID: ? N00123456

Business Unit: ? DOH01

Comments: ?

06/08/2018 00:34:57PM [Review Application]bsccadminuser
Please provide the travel card acknowledgement form.

Date Received: ? 6/8/2018, 1:00 AM

Document Type: ? New Traveler / Travel Card Application

Employee Email: ? employee@doh.ny.gov

Employee ID: ? N00123456

First Name: ? Jane

Last Name: ? Smith

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](#)

By clicking on the **Attachments** tab, you can view the **Application** or the **Supporting Documents**.

Double Click on the **document icon** to open.

Card Processing

Due date: 5/28/2018, 1:27 PM | Started by: ecmaas_BSCfinance_scan | Received on: 5/21/2018, 1:27 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

Document Icon

Refresh | Add Document | Add Folder | Remove | Actions

Attachments > Application

	Name	Size	Modified By	Modified On	Major Version
	New Traveler / Travel Card Application"	425 KB	iedr P8admin	5/21/2018, 1:27 PM	

Get next work item

Add Comment Agency Complete Save Cancel

From **Supporting Documents**, you will be able to add documents as described in the next pages.

Card Processing

Due date: 5/28/2018, 1:27 PM | Started by: ecmaas_BSCfinance_scan | Received on: 5/21/2018, 1:27 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

Refresh | Add Document | Add Folder | Remove | Actions

Attachments > Supporting Documents

Name	Business Unit	Employee Id
Supporting Documents	ABC01	N00123456

Get next work item

Add Comment | Agency Complete | Save | Cancel

By clicking on the **Add Document** drop down button, you will see options.

Select **Add Document Using Entry Template**.

Card Processing

Due date: 5/28/2018, 1:27 PM | Started by: ecmaas_BSCfinance_scan | Received on: 5/21/2018, 1:27 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

Refresh | Add Document ▼ | Add Folder ▼ | Remove | Actions ▼

Add Document Using Entry Template

Attachments Supporting Documents

	Name	Size	Modified By	Modified On	Major Version
--	------	------	-------------	-------------	---------------

No items to display

Get next work item

Add Comment Agency Complete Save Cancel

From the Entry Template drop down, select the **Supporting Document Entry Template**.

Click the **Browse** button to find the appropriate file.

You can also provide the **Approver** and **Employee** email addresses.

BSC Workflow Agency Desktop Process Work Item - Internet Explorer

▼ General

* Entry template: Supporting Document Entry Template

What do you want to save? Local document

* File name: C:\Users\Waldronr\Desktop\Test.docx **Browse...**

▼ Properties

* Class: Credit Cards

Document Title: ? Supporting Document

* Document Type: ? Support

Approver Email: ? test.bsc.com

Employee Email: ? test.bsc.com

Indexed User: ?

Location: ?

Account Name: ?

BillingAccountType: ?

Statement Date: ? M/d/yyyy, h:mm a

Business Unit Security Proxy Object: ?

Provide as necessary

Add

Cancel **Cancel** Save **Cancel**

Add Document by Using Entry Template

When you add a document by using an entry template, the values that you enter for the document are consistent. [Learn more](#)

Click the **Add** button to upload the document and attach it to the work item.

BSC Workflow Agency Desktop Process Work Item - Internet Explorer

General

* Entry template: Supporting Document Entry Template

What do you want to save? Local document

* File name: C:\Users\Waldronr\Desktop\Test.docx [Browse...](#)

Properties

* Class: Credit Cards

Document Title: ? Supporting Document

* Document Type: ? Support

Approver Email: ? test.bsc.com

Employee Email: ? test.bsc.com

Indexed User: ?

Location: ?

Account Name: ?

BillingAccountType: ?

Statement Date: ? M/d/yyyy, h:mm a

Business Unit
Security Proxy
Object: ?

Add Document by Using Entry Template

When you add a document by using an entry template, the values that you enter for the document are consistent. [Learn more](#)

[Hide instructions](#)

Modified On:
Major Version:
[Add](#)

Cancel [Cancel](#) [Save](#) [Cancel](#)

Complete the workflow by adding the necessary comments in the bottom comment box and clicking the **Agency Complete** button.

Card Processing
Due date: 6/5/2018, 1:25 PM | Started by: BSC CCAdminUser | Received on: 5/29/2018, 1:25 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: ? liaison@doh.gov
Approver ID: ? N00123456
Business Unit: ? DOH01

Comments: ?
06/08/2018 00:34:57PM [Review Application]bscccadminuser
Please provide the travel card acknowledgement form.

Date Received: ? 6/10/2014, 2:07 PM

Document Type: ? New Traveler / Travel Card Application

Employee Email: ? employee@doh.ny.gov
Employee ID: ? N00123458
First Name: ? JANE
Last Name: ? SMITH
Middle Initial: ?
Name on Credit Card: ?

Status: ? Agency Outreach

Comment: ? Please see the attached document.

Get next work item

Agency Complete | Move to In-basket | Save | Cancel