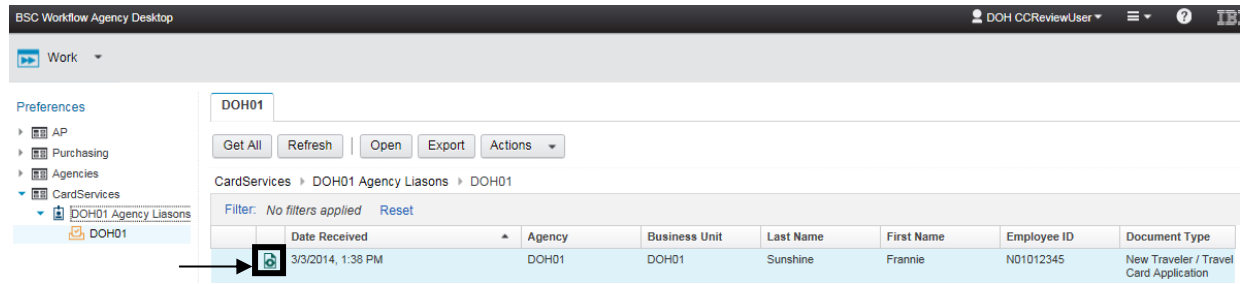


How to Send a FileNet Document via Email

This aid illustrates how to email documents out of the Workflow from the Agency Step.

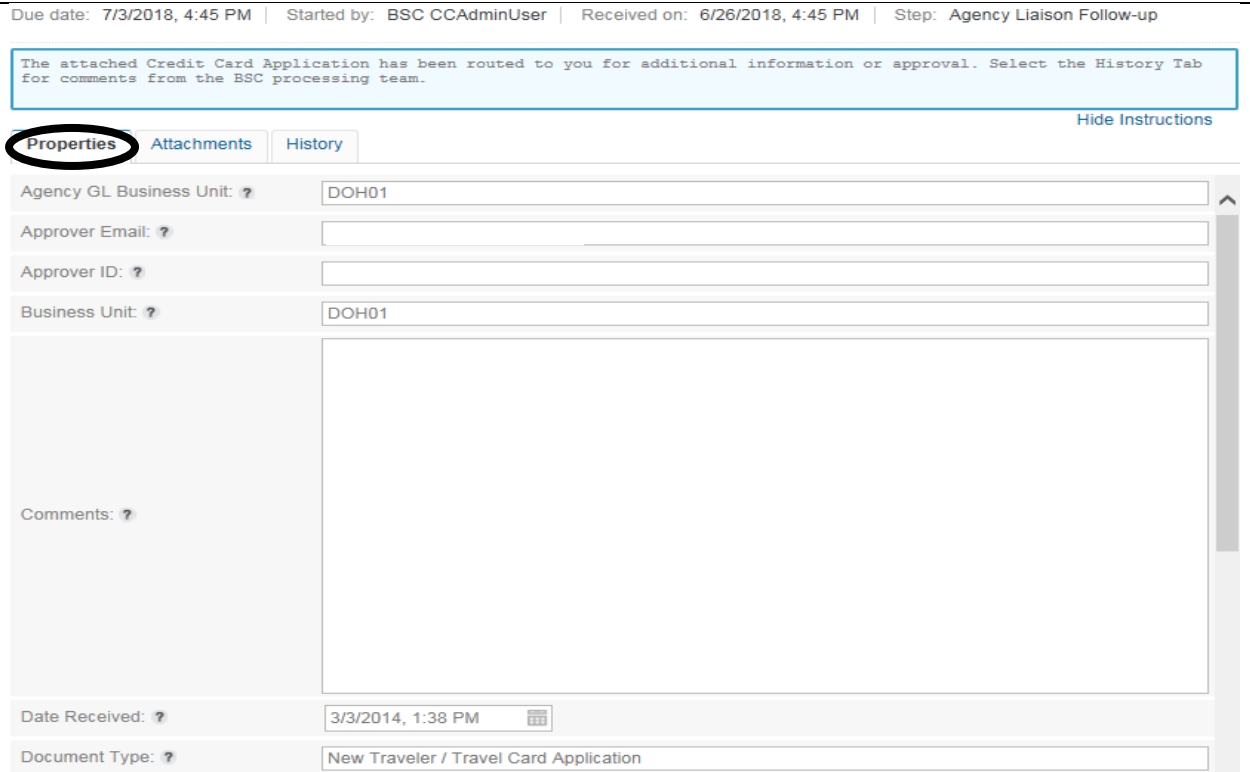
From the Process In-Basket, click on the **Document Icon** next to the work item.



The screenshot shows the 'BSC Workflow Agency Desktop' interface. On the left is a navigation tree with 'DOH01' selected. The main area displays a table of work items. The first row is highlighted, and a red box with an arrow points to a document icon in the 'Date Received' column.

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.



The screenshot shows the 'Properties' tab of a work item. At the top, it displays metadata: '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'. Below this is a blue notification box: '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.' The 'Properties' tab is selected and circled in red. It contains several input fields: 'Agency GL Business Unit' (DOH01), 'Approver Email', 'Approver ID', and 'Business Unit' (DOH01). A large 'Comments' text area is empty. At the bottom, 'Date Received' is 3/3/2014, 1:38 PM and 'Document Type' is 'New Traveler / Travel Card Application'.

Click on the **Attachments** tab.

To view the application, double click on **Application** and then click the **document icon**.

To view the Supporting Documents double click on **Supporting Documents** and then click the **document icon**.

Card Processing

Due date: 6/5/2018, 1:25 PM | Started by: BSC CCAAdminUser | 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

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	736 KB	ecmaas_BSCfinance_operations	5/29/2018, 1:25 PM	

Get next work item

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

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 > Supporting Documents

Name	Business Unit	Employee Id
 Supporting Documents	ABC01	N00123456

Get next work item

Add Comment | Agency Complete | Save | Cancel

To add the item in an email, highlight and select a document as shown using either **Application** or **Supporting Documents**.

Click **Actions**, then **Send Email** and **As an Attachment**.

Card Processing

Due date: 6/5/2018, 1:25 PM | Started by: BSC CCAAdminUser | 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

Application

Supporting Documents

Refresh | Add Document | Add Folder | Remove

Actions

Attachments > Application

Name	Size	Modified	Created On	Major Version
New Card	736 KB	ecmaas_ erations	8, 1:25 PM	

- Open
- Preview
- Properties
- Download
- Add to Favorites
- Delete
- View Link
- Send Email**
 - As a Link
 - As an Attachment**
 - All Parts as a Compressed File
- Print

Get next work item

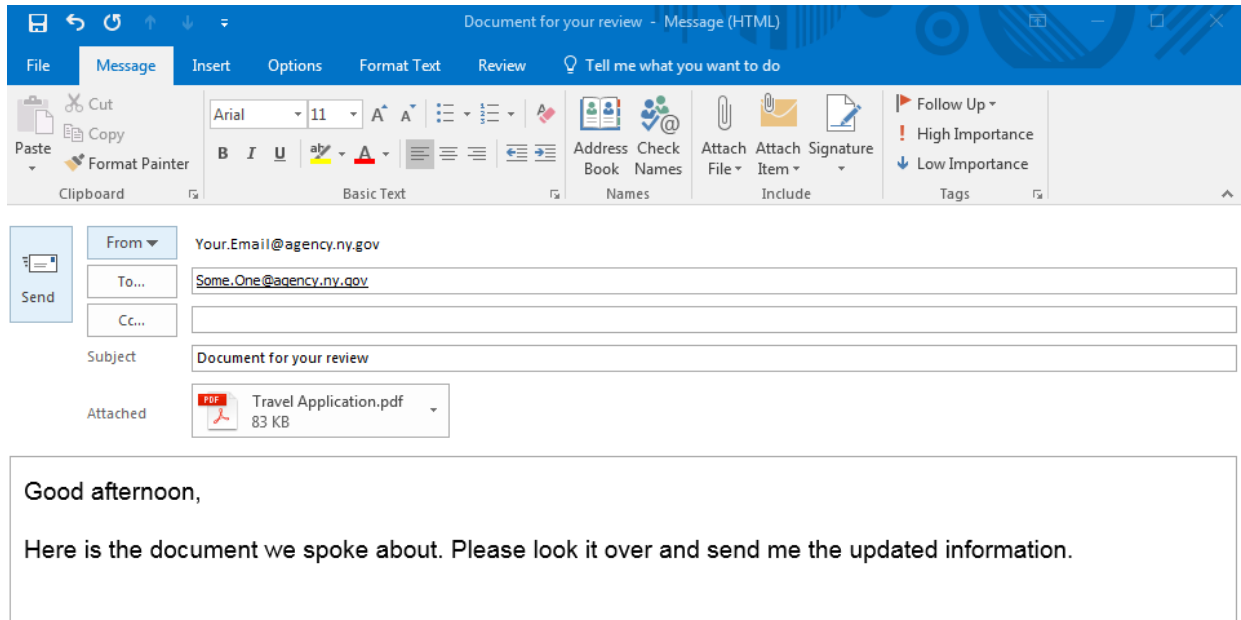
Agency Complete

Move to In-basket

Save

Cancel

The FileNet Workflow Solution will open your email and you can send your document as an attachment.



Who should you call if you run into login issues or problems during processing tasks?

For login issues to my.NY.gov, contact your IT Department.
For problems processing tasks, email BSCFinance@ogs.ny.gov.