



How to attach a supporting document to the Work item

This aid illustrates how to attach supporting documents in the work step as a participant in the Credit Card Application Process starting from the Agency Step in the workflow.

From the Agency Step processor, select the attachments tab.

Agency Work Item Properties

Card Processing

Due date: 2/21/2014, 1:23 PM | Started by: iedfruser | 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.

Hide Instructions

Properties

Attachments

History

Agency GL Business Unit: ?	TAX01
Approver Email: ?	dhsesfinance@dhses.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: ?	<input type="text" value="Add your comments here."/>

Get next work item

Agency Complete

Save

Cancel

By clicking on the Attachments Tab, you will see a page as shown here.

You can view the Application document or the Supporting Documents.

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

Document
Icon

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

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

Attachments – Supporting Documents

Card Processing

Due date: Not set | Started by: iedrnuser | 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

Document Icon

Get next work item

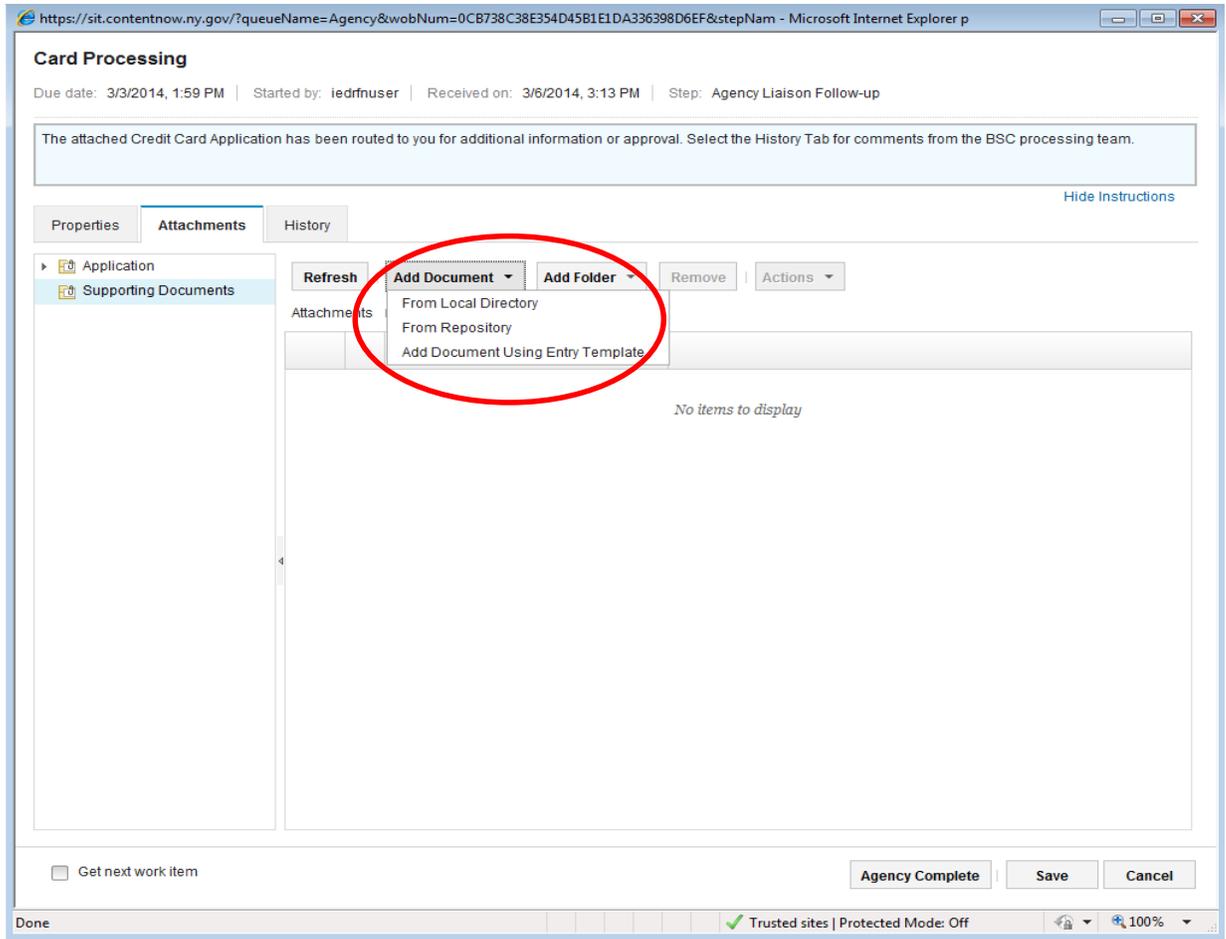
Agency Complete

Save

Cancel

By clicking on the **Add Documents** drop down button, you will see options for adding documents.

Click on the Add Documents Drop Down Button



Select **Add Document** using **Entry Template**.

Options for Adding Documents

Card Processing

Due date: Not set | Started by: iedrfnuser | Received on: 2/14/2014, 12:57 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

- From Local Directory
- From Repository
- Add Document Using Entry Template

Select

No items to display

Get next work item

Pending Citibank Rejected More Responses Save Cancel

From the **Entry Template** field, select the **Supporting Document Entry Template**.

Select the **Browse** button to navigate your desktop or file share to attach the document.

You can provide the **Approver** and **Employee Email**.

Options for Adding Documents

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

Card Processing

Due date: 3/13/2014, 4:44 PM | Started by: iedrfuser | Received on: 3/6/2014, 3:44 PM | Step: Agency Liaison Follow-up

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](#)

General

* Entry template: Supporting Document Entry Template

What do you want to save? Local document

* File name: C:\Users\obryanm\Desktop\Test.txt **Browse...**

Properties

Class: Credit Cards

Document Title: Supporting Document

*Document Type: Support

Approver Email: test@bsc.com

Employee Email: test@bsc.com

Provide as Necessary

Add Cancel

Get next work item Agency Complete Save Cancel

Done Trusted sites | Protected Mode: Off 100%

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

Options for Adding Documents

The screenshot shows a web browser window displaying a 'Card Processing' work item. The URL is <https://sit.contentnow.ny.gov/?queueName=Agency&wobNum=0CB738C38E354D45B1E1DA336398D6EF&stepNam>. The work item details include: Due date: 3/13/2014, 4:44 PM; Started by: iedrfuser; Received on: 3/6/2014, 3:44 PM; Step: Agency Liaison Follow-up.

The main content area shows a dialog box titled 'Add Document by Using Entry Template'. The dialog box contains the following fields and options:

- General**
 - * Entry template: Supporting Document Entry Template
 - What do you want to save?: Local document
 - * File name: C:\Users\obryanm\Desktop\Test.txt
- Properties**
 - Class: Credit Cards
 - Document Title: Supporting Document
 - * Document Type: Support
 - Approver Email: test@bsc.com
 - Employee Email: test@bsc.com

The 'Add' button is circled in red. Below the dialog box, there are buttons for 'Agency Complete', 'Save', and 'Cancel'. At the bottom of the browser window, the status bar shows 'Done', 'Trusted sites | Protected Mode: Off', and '100%'.

Complete the workflow adding necessary comments and completing the step.

Options for Adding Documents

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

Card Processing

Due date: 3/13/2014, 4:44 PM | Started by: iedrfuser | Received on: 3/6/2014, 3:44 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

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 Deadline Expired

Comment:

Get next work item

Agency Complete | Save | Cancel

Done | Trusted sites | Protected Mode: Off | 100%