

Accounts Payable FileNet Users' Guide



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How Do I Find FileNet on My Computer?

To access FileNet, you must first go to <http://my.ny.gov/> and click “Sign In”
SLMS ID and Password are required to sign in



The screenshot displays the 'My NY.gov Online Services' interface. At the top, there is a navigation bar with three small images of people working on laptops and a white outline of New York State. Below this, the text 'My NY.gov Online Services' is prominently displayed. On the left side, there is a vertical menu with several options: 'NY.gov ID', 'Online Services', 'FAQs', 'About NY.gov ID', 'Privacy Policy', and 'Terms of Service'. Below the menu, there is a section for 'Help Desk Information' which includes the 'Ny.gov ID Call Center (518)-474-7494'. The main content area on the right features a 'NY.gov ID' header, a 'Sign In' button highlighted with a red rectangle, and links for 'Forgot your Username or Password?' and 'NY.gov ID - Terms of Service'. At the bottom of the main content area, there is a 'Don't have an Account?' button and a note: 'If you do not have an NY.gov ID Username and Password, click the above link to sign up.'



What if I Have Questions about Signing Into FileNet?

For questions or issues regarding Signing into FileNet:

<http://bsc.ogs.ny.gov/content/accounts-payable>

New York State State Agencies Search all of NY.gov

NEW YORK STATE BUSINESS SERVICES CENTER

Search

I am a State Employee I am an Agency Administrator I am a Vendor

Accounts Payable

Accounts Payable (AP) is responsible for processing and paying vendor invoices on behalf of customer agencies. Services provided to our customers include the following:

- Receiving vendor invoices, securing approvals and processing for payment.
- Processing interagency bills.
- Responding to questions from vendors and our customer agencies.

Questions on AP transactions should be referred to the Accounts Payable Unit via email at APIquiries@ogs.ny.gov or by phone at (518) 457-4272.

Vendor invoices should be sent directly to the BSC at P.O. Box 2117, Albany, NY 12220-0117 or electronically to AccountsPayable@ogs.ny.gov.

- Accounts Payable Forms & Publications
- Accounts Payable FAQs
- Accounts Payable Training Resources

FileNet - AP Agency Technical Support Sheet | [Guide](#)

FileNet - AP emailing from FileNet | [Guide](#)

Sign-up for BSC Email Notifications

Enter Email Here

Submit

Contact the BSC

BSC Announcements

Training Events

Educational Resources

Forms and Publications

Frequently Asked Questions

BSC@ogs.ny.gov (518) 457-4272

- Go to the BSC Website's Accounts Payable Page
- Click on "Accounts Payable Training Resources"
- Click on "FileNet - AP Agency Technical Support Sheet"



Click on “BSC Agency FileNet Services” Button to Access FileNet

Search all of NY.gov

My NY.gov Online Services

State Agencies

You are logged in as [Log Out](#)

Welcome to the My NY User Management site at [NY.gov](#)
Your NY.gov ID is
You previously logged in at Fri Oct 03 12:59:58 EDT 2014

You have access to the following applications

analyzeNY	SFS Secure
BSC Agency FileNet Services	Statewide Learning Management
NYS IT Service Management System	Statewide Telephone Directory

Click on the BSC Agency FileNet Services button.

Change Password ▶

Update My Account ▶

App Enrollment ▶

About NY.gov ID ▶

FAQs ▶

Help Desk Information

[List of Agency and Online Services Help Desk Information](#)



There are Three Main Queues that Agencies See in FileNet

1. AP Processed Queue* (Quality Control)

Completed invoices being verified by a BSC supervisor before being sent to File/Repository. Includes invoices that are: Paid in SFS, considered duplicates, deemed paid by P-Card or statements.

2. AP Active Queue * (BSC Active)

All invoices currently being worked on by BSC staff. This is a read-only view for Agency Liaisons to ensure invoices are processed accordingly.

3. Agency Review Queue

These are invoices that are sent to your queue requesting additional information or clarification for processing. Please access these through FileNet and provide the requested information and send them back to the BSC Disposition queue.

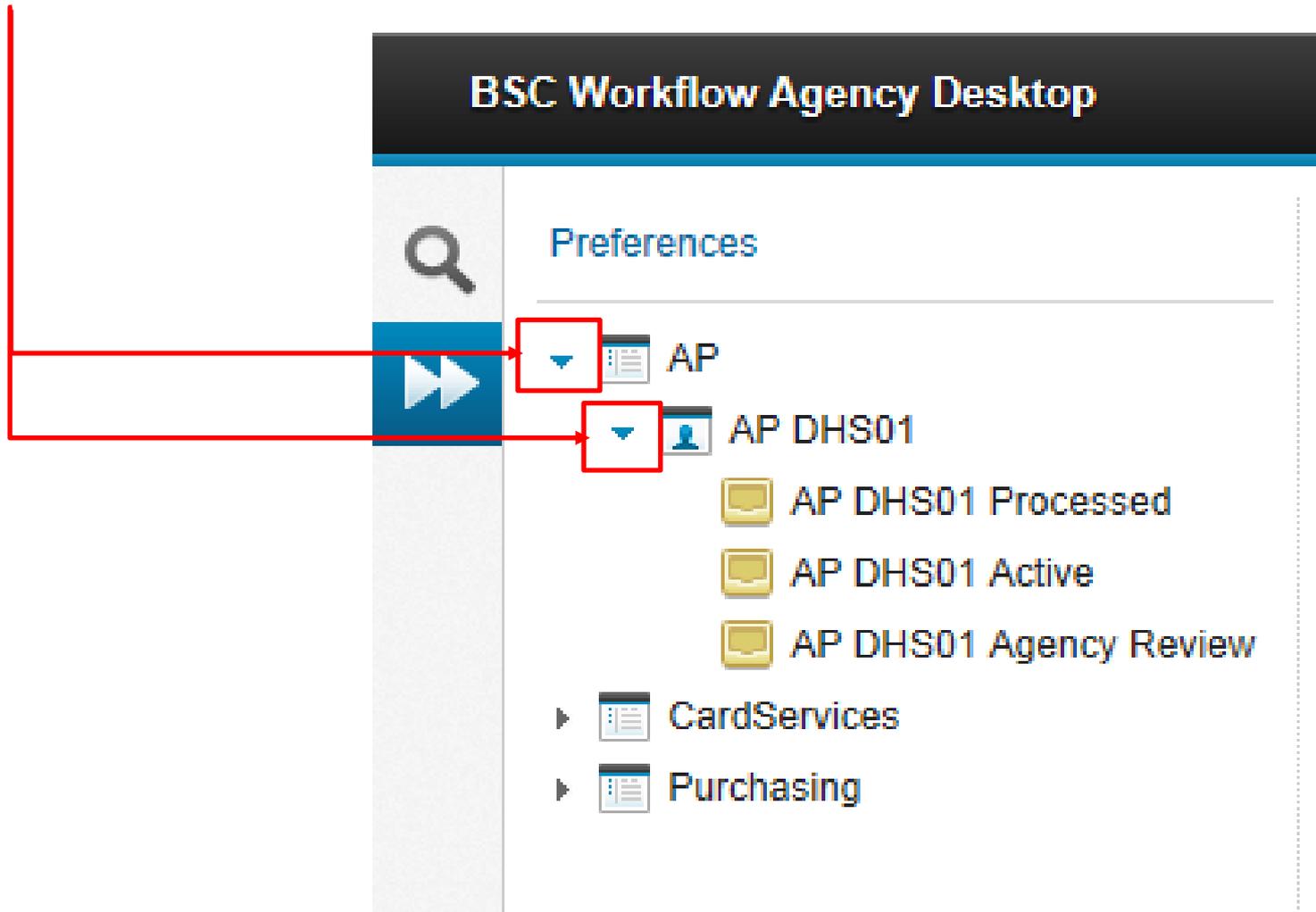
Important Note:

- * You will not be able to work transactions, change index fields, or view invoices via the AP Processed and AP Active queues.
- * You will only be able to see the index fields in these queues.
- * If Agency Attempts to open work item in these Queues an error message will be displayed
 - See Slide 7 for image of error
- To view an image of an invoice in these queues you will need to use the search function. See slides 25-30 for details on how to search.



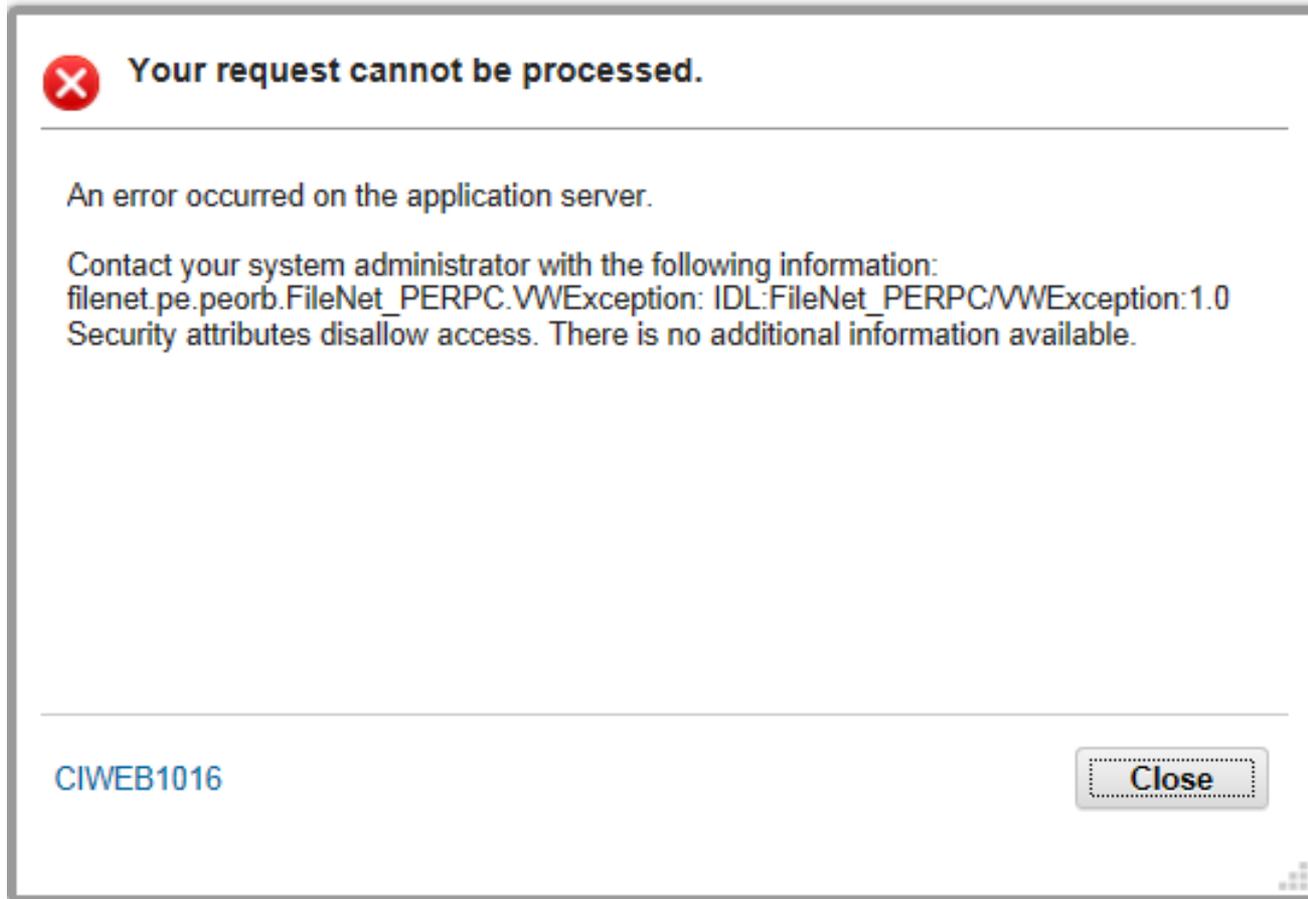
How to Locate the Queues in FileNet

Click once on the drop-down arrows (upside down triangles) to expand inboxes/folders, see below.



Security Error Message in FileNet

The below error will be displayed if you attempt to access an item in either AP Active or AP Processed.



There are Multiple BSC Queues in FileNet

See Diagram on Slide 9

1. Research

First step in which the invoice is inspected to ensure all required information is provided for processing, if not the invoice is routed to the Agency.

2. Agency Review

Work completed in this queue is done by the agency. This queue contains invoices which require additional information from the agency in order to be processed. Once the requested information is provided the agency will need to send the invoice back to Disposition for processing.

3. Disposition

These invoices are researched a second time to ensure all requested information requested by/of the Agency is provided. (Note: Disposition has the ability to send the invoice back to Agency Review if required information is inaccurate or not submitted as requested.)

4. SFS Entry

BSC staff, utilizing the State Financial System, enter the invoice into the system to obtain a voucher number.

5. SFS Approval

BSC supervisors compare SFS data and FileNet data to verify accuracy. If everything is correct the invoice is approved within SFS, if not the invoice will be rejected and further investigation is required.

6. SFS Exception

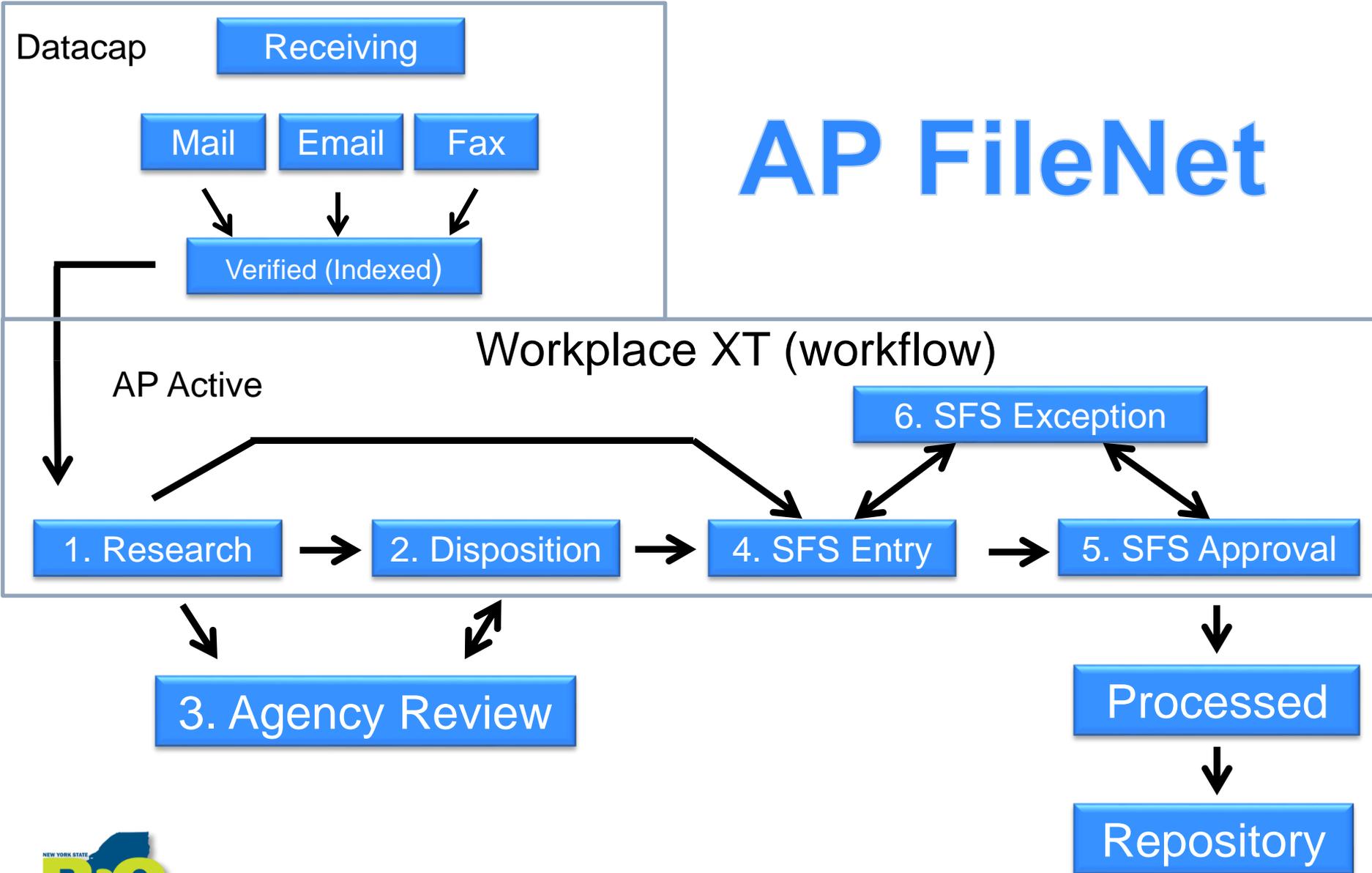
The queue within the BSC in which invoices are sent if there are any exceptions within SFS. These will stay in this queue until the exception is resolved.

Note: Research, Disposition, SFS Entry, SFS Approval and SFS Exception are all part of the AP Active queue.



Path of an Invoice through FileNet

AP FileNet



Accessing an Invoice in FileNet

The screenshot shows the BSC Workflow Agency Desktop interface. The browser address bar displays <https://sit.contentnow.ny.gov/navigator/?desktop=Agency>. The page title is "BSC Workflow Agency Desktop". The interface includes a navigation pane on the left with "Preferences" and a tree view showing "AP" > "AP DHS01" > "AP DHS01 Agency Review". The main content area has tabs for "AP DHS01 Processed", "AP DHS01 Active", and "AP DHS01 Agency Review". Below the tabs are buttons for "Get All", "Refresh", "Open", "Export", and "Actions". A breadcrumb path reads "AP > AP DHS01 > AP DHS01 Agency Review". A filter section shows "Filter: No filters applied" and a "Reset" button. The main area contains a table with the following columns: BSCDateReceived, InvoiceNumber, Status, BusinessUnit, UnitCode, InvoiceType, InvoiceDate, VendorNumber, and InvoiceAmount. The first row is highlighted in light blue and enclosed in a red box. A red arrow points to the "BusinessUnit" column header. The status bar at the bottom indicates "5/7/2014, 3:30 PM - The in-basket returned 11 work items."

	BSCDateReceived	InvoiceNumber	Status	BusinessUnit	UnitCode	InvoiceType	InvoiceDate	VendorNumber	InvoiceAmount
	3/27/2014, 1:00 AM	131	Agency Review	DHS01	3450230	PO	2/4/2014, 12:00 AM	1100018227	300
	3/27/2014, 1:00 AM	T4285716	Agency Review	DHS01	3450230	PO	2/23/2013, 12:00 AM	1000012808	523.28
	3/27/2014, 1:00 AM	1370122-RS	Agency Review	DHS01	3450123	PO	7/4/2013, 1:00 AM	1000001334	2.6018
	4/1/2014, 3:00 AM	INV092168	Agency Review	DHS01	3450213	Utility	4/1/2014, 3:00 AM	VEN001	123
	4/1/2014, 3:00 AM	INV020466	Agency Review	DHS01	3450213	Utility	4/1/2014, 3:00 AM	VEN001	123
	4/2/2014, 12:00 AM	20643	Agency Review	DHS01	3450226	Travel	4/26/2014, 12:00 AM		2869.06
	4/2/2014, 1:00 AM	7423249AR	Agency Review	DHS01	3450226	PO	1/13/2014, 12:00 AM	1000032208	10340
	4/2/2014, 1:00 AM	40662573	Agency Review	DHS01	3450213	Contract	3/20/2014, 1:00 AM	1000018330	151920.22
	4/8/2014, 1:00 AM	536-104-6034-031102-7	Agency Review	DHS01	3450226	Utility	8/19/2013, 1:00 AM	1000016034	7.31
	4/29/2014, 1:00 AM	69944823	Agency Review	DHS01	3450226	Utility	3/21/2014, 1:00 AM	1000018330	1594.13
	4/29/2014, 1:00 AM	76921235	Agency Review	DHS01	3450226	PO	4/4/2014, 1:00 AM	1000032326	360.23

You can open an Invoice/Workflow item by clicking once on the icon just to the left of the line or double-clicking anywhere else on the line of index fields.



Sorting Within the FileNet Agency Review Queue

- When data appears in the FileNet Agency Review Queue, it is often unorganized, making it difficult to examine.
- You can arrange the data in different ways to answer different questions.
- FileNet's sorting feature can help you rearrange your data so you can access invoices more efficiently.

BSC Workflow Agency Desktop

Preferences

AP

- AP DHS01
 - AP DHS01 Processed
 - AP DHS01 Active
 - AP DHS01 Agency Review
- CardServices
- Purchasing

AP DHS01 Processed | AP DHS01 Active | AP DHS01 Agency Review

Get All | Refresh | Open | Export | Actions

AP > AP DHS01 > AP DHS01 Agency Review

Filter: No filters applied | Reset

	BSCDateReceived	InvoiceNumber	
	3/27/2014, 1:00 AM	131	A
	3/27/2014, 1:00 AM	T4285716	A
	3/27/2014, 1:00 AM	4285716	A

- Each index field can be sorted. To sort either by ascending or descending, just click the column header.

Filtering Within the FileNet Agency Review Queue

- Filtering is a way that you can use FileNet to quickly extract certain data from the FileNet Agency Review Queue. Unlike sorting, filtering doesn't just reorder the list. It actually hides the rows or columns containing data that do not meet the filter criteria you define.
- Each index field can be filtered. To do this click “Filter”

The screenshot shows the 'BSC Workflow Agency Desktop' interface. On the left is a 'Preferences' sidebar with a tree view containing 'AP', 'AP DHS01', 'AP DHS01 Processed', 'AP DHS01 Active', and 'AP DHS01 Agency Review'. The main area has tabs for 'AP DHS01 Processed', 'AP DHS01 Active', and 'AP DHS01 Agency Review'. Below the tabs are buttons for 'Get All', 'Refresh', 'Open', 'Export', and 'Actions'. A 'Filter:' button is highlighted with a red box, and a red arrow points from it to the right-hand screenshot. Below the filter button is a table with columns 'BSCDateReceived' and 'InvoiceNumber'. The table contains two rows of data.

BSCDateReceived	InvoiceNumber	S
3/27/2014, 1:00 AM	131	A
3/27/2014, 1:00 AM	T4285716	A

The screenshot shows the 'BSC Workflow Desktop' interface. On the left is a 'Preferences' sidebar with a tree view containing 'CardServices', 'AP', 'AP Admin', 'AP Processed', 'AP Active', 'AP Research', 'AP SFS Entry', 'AP SFS Exception', 'AP SFS Approval', 'AP Agency Rev', 'AP Processing', 'AP SFS Entry', 'AP SFS Approval', 'AP Customer Servic', 'AP DOH01', 'AP DHS01', 'AP DMN01', 'AP OFT01', 'AP OMH01', 'AP OER01', 'AP ABC01', 'AP AGM01', 'AP APA01', 'AP ART01', and 'AP BOE01'. The main area has tabs for 'AP Processed', 'AP Active', 'AP Research', 'AP SFS Entry', 'AP SFS Exception', and 'AP SFS Approval'. Below the tabs are buttons for 'Get All', 'Refresh', 'Open', 'Launch Workflow', 'Export', 'Unlock', and 'Actions'. A 'Filter:' dropdown menu is open, showing a list of fields with search criteria like '(s like)', '(equals)', and '(is like)'. A red arrow points from the 'Filter:' button in the left screenshot to this dropdown menu.

Field	Criteria
WorkStep	(s like)
Status	(s like)
BusinessUnit	(s like)
UnitCode	(s like)
InvoiceType	(s like)
IsEarlyPay	(equals)
IsPossibleDup	(equals)
IsExpedited	(equals)
InvoiceNumber	(s like)
PONumber	(s like)
ContractNumber	(s like)
VendorNumber	(s like)
VendorName	(s like)
VoucherNumber	(s like)

- Select the field in which you would like to filter, type in text to be filtered (Case Sensitive) and press “Enter” on your keyboard.



Viewing Results In the FileNet Agency Review Queue

- The default setting or limit in each Queue is 200 Invoices. If the queue exceeds 200 you must select the “Get All” function to retrieve all invoices

The screenshot displays the 'BSC Workflow Agency Desktop' interface. On the left is a navigation pane with a search icon and a 'Preferences' section. Under 'Preferences', there is a tree view with 'AP' expanded to 'AP DHS01', which includes 'AP DHS01 Processed', 'AP DHS01 Active', and 'AP DHS01 Agency Review' (the last one is selected). Below this are 'CardServices' and 'Purchasing'. The main area shows three tabs: 'AP DHS01 Processed', 'AP DHS01 Active', and 'AP DHS01 Agency Review'. Below the tabs are buttons for 'Get All', 'Refresh', 'Open', 'Export', and 'Actions'. A red box highlights the 'Get All' button, with a red arrow pointing to it from the text above. Below the buttons is a breadcrumb trail: 'AP > AP DHS01 > AP DHS01 Agency Review'. A filter section shows 'Filter: No filters applied' and a 'Reset' link. Below that is a table with columns for 'BSCDateReceived', 'InvoiceNumber', and 'S'. The table contains three rows of data.

	BSCDateReceived	InvoiceNumber	S
	3/27/2014, 1:00 AM	131	A
	3/27/2014, 1:00 AM	T4285716	A
	3/27/2014, 1:00 AM	4285716	A

Agency Properties Tab

- All index fields or properties are listed on this tab.
- The BSC uses these fields to properly route the invoice to staff.
- If you notice any discrepancies in these fields please notify the BSC using the comments box.
- See next slide for more information about the Comments Field.

The screenshot displays a web application window titled "BSC Workflow Desktop Process Work Item - Microsoft Internet Explorer provided by New York State OGS". The main content area shows the following information:

Business Unit: DOH01/Vendor: JENNIFER TEMPS INC/Invoice Number: 1574686

Due date: Not set | Started by: p8admin | Received on: 10/9/2014, 4:31 PM | Step: Agency Review

Respond to each of the requests as indicated in the Agency Review Details.

Hide Instructions

The "Properties" tab is highlighted with a red box. Below the tabs, the following fields are visible:

[inv-k] PO Number: ?	<input type="text"/>
[inv-l] Contract Number: ?	<input type="text"/>
[inv-m] IRD: ?	10/8/2014 <input type="button" value="Calendar"/>
[inv-n] Accounting Date: ?	7/27/2014 <input type="button" value="Calendar"/>
[inv-o] Special Ops Payment Type: ?	<input type="text"/>
[inv-p] Special Ops Specific: ?	<input type="text"/>
[inv-q] Voucher Number: ?	<input type="text"/>
[last-a] Last Step: ?	Research
[last-b] Last Status: ?	New
[last-c] Last UserId: ?	ax7604
[pocn-a] POCN Request Details: ?	<input type="text"/>
[pocn-b] POCN Status: ?	<input type="text"/>
[stat-a] Status: ?	Agency Review



Comments Fields/Boxes

- The comments boxes are the last fields on the Properties Tab.

The screenshot shows a web interface with three tabs: 'Properties', 'Attachments', and 'History'. The 'Properties' tab is active. Below the tabs, there are two comment boxes. The top box is larger and contains the following text: '10/09/2014 04:31:02 PM [Research] ax7604', 'Please provide the following: (Expedite)', a numbered list: '1. Ok to Pay?', '2. Purchase Order #:', '3. Line Breakdown/Amounts per line and distribution lines if needed:', and 'Return to Disposition. Thank you.'. The bottom box is smaller and empty. At the bottom of the interface, there is a checkbox labeled 'Get next work item' and several buttons: 'Ok To Pay', 'Not Ok To Pay', 'More Responses', 'Save', and 'Cancel'. Red arrows point from the text on the right to the top and bottom comment boxes.

- The first and larger comments box contains previous comments.
- This box is utilized by the BSC to reach out for clarification on making payment on this invoice.
- A timestamp and signature (Employee ID) is created for all entries

- The second or smaller comments box is for you at the agency to provide clarification on requested info or to provide specific direction for processing payment on this invoice.
 - This box is also for notifying the BSC of a discrepancy of any kind in the properties or indexed fields as mentioned above.



Returning the Invoice to the BSC

Once you have provided all comments and direction, you can send the Invoice back to the BSC Disposition Queue using 1 of 3 AP functions

(Please note, Requires PO Change and OK to Pay After PO Change are not functional at this time.)

- Ok To Pay**
- This will send the invoice back to the BSC with a status of OK To Pay
 - Please remember to add any required comments before selecting

- Not Ok To Pay**
- When using this function please indicate why the invoice is not OK to Pay in the comments fields.
 - This is not to be used for invoices that are waiting on clarification.
 - This is strictly for invoices that are never going to be OK to Pay and that should be sent to file.

- Agency Question**
- Enter question in Comments Box then click button to send back to the BSC for clarification. The BSC will answer question and send back to your queue.

All functions are “save and send” functions and you will *NOT* have the ability to edit your comments once selected. Once selected the invoice is routed back to the BSC

Payment: Use PO XXXX Line 3 to Process Payment. OK to Pay Ryan S

Agency Question
Requires PO Change
Ok To Pay After PO Change
More Responses ▾ | Save

Ok To Pay | Not Ok To Pay | More Responses ▾ | Save | Cancel

125%



Key Index Fields

BSCDateReceived

Date the invoice was scanned or emailed into DataCap (DataCap is the Scanning Software part of FileNet).

InvoiceNumber

Unique number on the invoice or created by the BSC.

F_StepName (Work Step)

The Queue or step the invoice is in.

Status

Additional information within a queue (definitions on following slide).

BusinessUnit

Five character indicator of which agency the invoice is associated with.

- Example: OGS01

UnitCode

Groups within a business unit used to categorize items.

InvoiceType

AP Unit Team (Contract, PO, Special Ops, Utility, or Travel).



Status Definitions – AP Archive

New

New invoice which does not match previous invoices already in FileNet.

Possible Duplicate

Initial scan showed same invoice number and date already in FileNet.

Pending Contract

Invoice currently being held awaiting an amendment.

Future Lease

Lease invoice for a future period.

Travel

AP invoice that needs Non-Employee Travel approval to process.

Need Docs

More information required.

Other - See Comments

Please refer to the comments in the workflow item for direction

Ok to Pay

Indicates the agency gave permission to pay this invoice.

Requires PO Change - Has been sent to the Purchasing Unit to request a PO change.

Ready For SFS - Was deemed ready to be entered into SFS by a Researcher/Dispositioner.

SFS Complete - Invoice submitted in SFS.

SFS Exception Resolved - Invoice that previously had an exception that delayed it.

All invoices Received by the BSC prior to 6/15/2014 have a status of “Complete” when sent to the processed Queue.



Status Definitions – AP Processed

Incomplete Invoice

Incomplete invoices that cannot be paid, the vendor will be contacted and the invoice will be sent to the Processed Queue.

Duplicate Invoice

Invoice determined to be a duplicate, will be reviewed one last time by Approver.

Do Not Pay

Agency instructed the BSC not to pay the invoice.

Paid by Procurement Card

Invoice already paid by P-card.

Statement

Statement that BSC does not pay off of.

Zero Balance

Invoice that required no further action.

Approved

Invoice has been Approved in SFS.

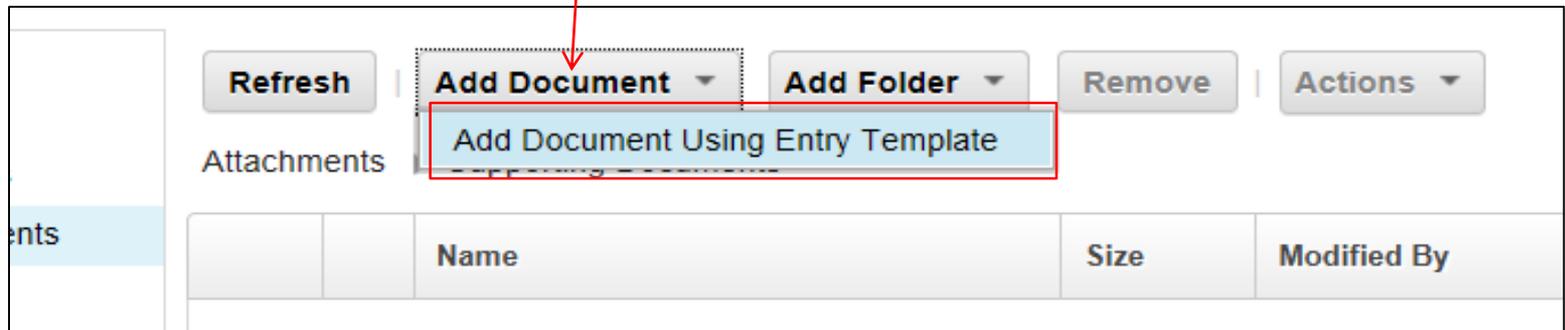
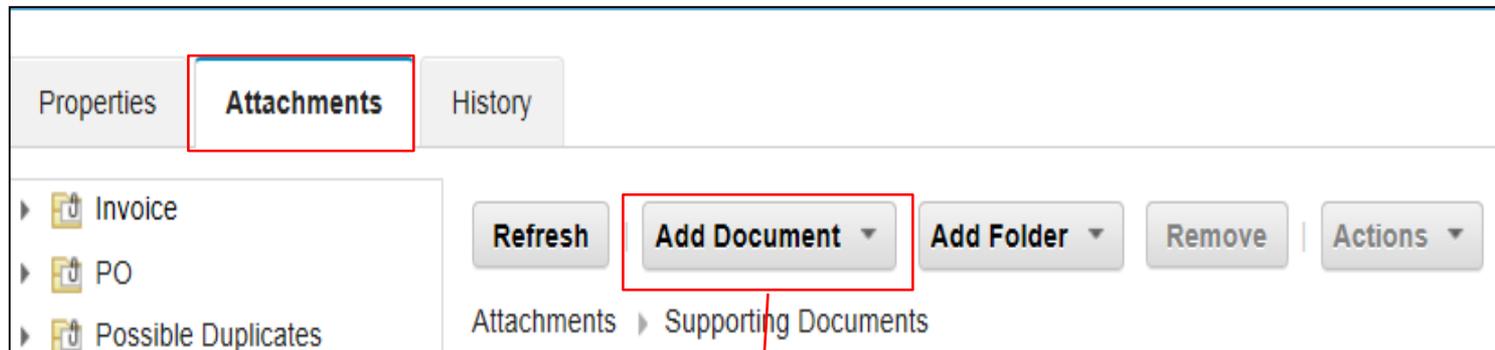
All invoices Received by the BSC prior to 6/15/2014 have a status of “Complete” when sent to the processed Queue.



Adding Supporting Documents

To attach a document to an open invoice or work item:

- Click on the Attachments tab
- Select “Supporting Documents” by clicking once
 - Once clicked you will see “Add Document” is no longer greyed out
- Click on Add Document and select “Add Document Using Entry Template”



Adding Supporting Documents (continued)

- Select “Invoice Supporting Document” from the dropdown box in Entry Template

Note: Be Sure to select Invoice Supporting Document, if the wrong template is selected it can cause the invoice to be lost or started over.

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:

* Save in: **Invoice Supporting Document**

What do you want to save?

* File name:

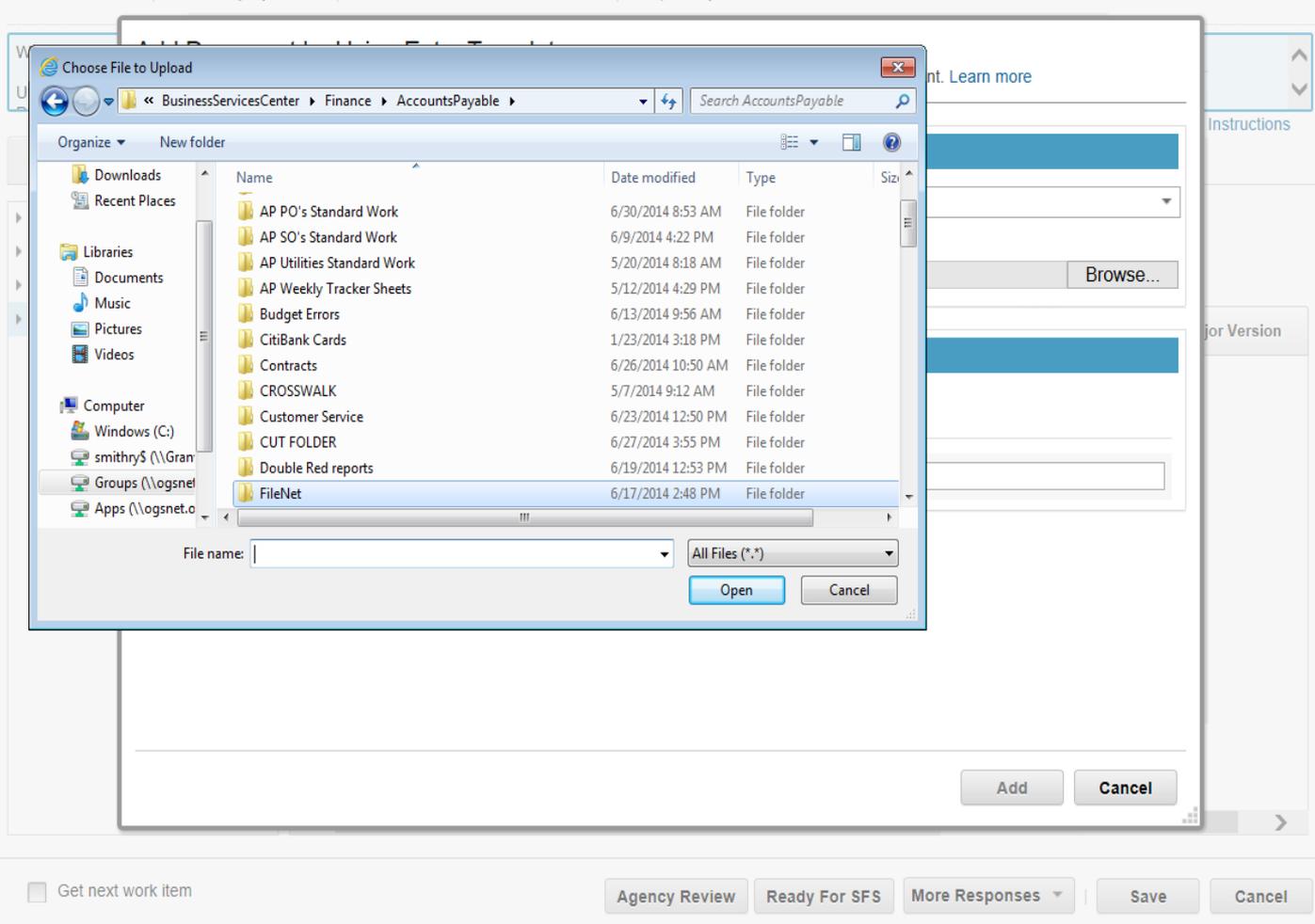
Major version [?](#)

Properties

Class:

Adding Supporting Documents (continued)

- After the template is selected click on browse and select the file you wish to attach



Adding Supporting Documents (continued)

Properties

Class: Invoice

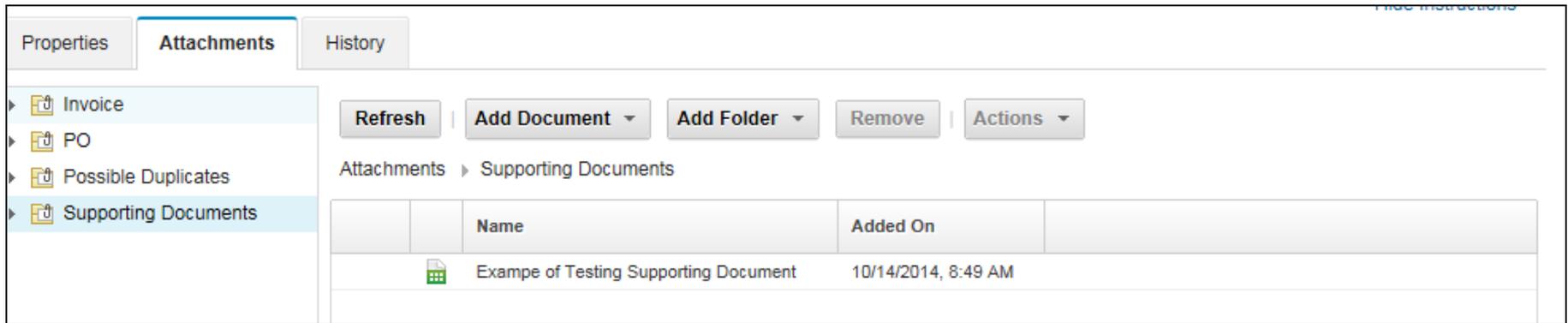
Document Title: ? Supporting Document - Invoice

- After the document is selected, you may name the supporting document.
- If you want to rename the document, select the document title field insert the name.
- Once the name is entered or you wish to use the default “Supporting Document – Invoice,” you will then click Add and the document will be attached to the Invoice/work item

Add Cancel

Adding Supporting Documents (continued)

- To confirm the document was added successfully you will see the document displayed on the Attachments Tab under Supporting Documents. Click on the document to ensure it opens correctly and the correct document was selected.



The screenshot displays a software interface with three tabs: Properties, Attachments, and History. The Attachments tab is active. On the left, a sidebar lists folders: Invoice, PO, Possible Duplicates, and Supporting Documents. The Supporting Documents folder is selected. In the main area, there are buttons for Refresh, Add Document, Add Folder, Remove, and Actions. Below these buttons, the breadcrumb path is 'Attachments > Supporting Documents'. A table lists the documents:

	Name	Added On
	Exampe of Testing Supporting Document	10/14/2014, 8:49 AM

Searching

Click on the Search Icon



The screenshot shows the 'BSC Workflow Desktop' interface. On the left is a vertical sidebar containing several icons: a bookmark, a list, a search icon (magnifying glass), and a play button. The search icon is highlighted with a red box. To the right of the sidebar is the main content area, which is currently displaying a 'Preferences' menu. This menu is expanded to show a tree view of workflow categories: 'CardServices', 'AP', and 'AP DHS01'. Under 'AP', there are sub-items like 'AP Admin', 'AP Processing', 'AP SFS Entry', 'AP SFS Approval', 'AP Customer Service', and 'AP DOH01'. Under 'AP DHS01', there are three sub-items: 'AP DHS01 Processed', 'AP DHS01 Active', and 'AP DHS01 Agency Review', each with a yellow folder icon.



Searching for an Invoice (continued)

1. Click on New Search

+ New Search

Name contains

Recent Searches

All Searches

Contracts Search

Duplicate Search

Invoice Number Search

MIG

mig search

Utility Search

Invoice Number Search x

New Search x

Search Criteria

Search in: \BSC (Including subfolders)

Search options: Documents, Released version

Class: Document (Including subclasses)

Document Title

Starts With

Add Property

Show All Properties

Property options: Match all

3. This dropdown will give the ability to change what index field you are searching by.

2. Click Add Property to add more index fields or properties to search.

4. Using a “%” sign or “wildcard” symbol before or after text being searched, will return all combinations before or after text

Search

Reset

Save

Save As...

Cancel

Results Display

Keep search criteria open

Search Results



Searching for an Invoice (continued)

Search Criteria

Search in: Search options: Documents, Released version

Class:

Business Unit Equals

Invoice Number Starts With

Keep search criteria open

- Click the Results Display button to customize the fields that will be displayed in the search results.
- Any of the index fields can be selected for this step as well.

Most Common Results Display

- Workstep - Current Location
- Invoice Type - Contract, PO, Special Ops, Utility
- Status - Invoice Status

Search Results Display

Available		Selected
AP Invoice Number		Name (DocumentTitle)
AP Wob		Size
Active Markings	<input type="checkbox"/>	Modified By
Added By	<input type="checkbox"/>	Modified On
Added On	<input type="checkbox"/>	Major Version
Agency		Status
Application Name		WorkStep
Approver		Business Unit

Sort by: Sort order: Ascending Descending



Searching for an Invoice (continued)

Search Criteria

Search in: \BSC (Including subfolders) Search options: Documents, Released version

Class: Document (Including subclasses)

Business Unit: ? Equals DHS01

Invoice Number: ? Starts With B01155908

Buttons: Search, Reset, Save, Save As..., Cancel, Results Display Keep search criteria open

All Newly Created searches can be saved for later use

- Once “Save” is selected, you will be prompted to Name the search
- You will have the option to add a description
- You will be able to select which users can utilize this search.

Save Search

* Name:

Description:

Save in: BSC

Run the search when opened

Show the search in the folder structure

Share search with: Only me



Searching for an Invoice (continued)

- Once search is selected, all the documents related to the fields selected will be displayed, including:
 - the invoice;
 - all supporting documents; and
 - if processed/complete, the html audit document created when a work item enters the Processed Queue

Search Results

Refresh

Add Document

Properties

Actions ▾

Showing results for: New Search

	Name	Size	Modified By	Modified On	Major Version
	InvoiceB01155908	36 KB	iedr P8admin	5/6/2014, 8:26 AM	1
		6 KB	iedr P8admin	5/6/2014, 8:25 AM	1

Click on pdf icon to see copy of invoice.

The Blue Icon or html icon is an audit document or complete history for the searched invoice. This is created and available when the invoice is completed or sent to the processed queue.

Searching for an Invoice (continued)

- All invoices will use the same viewer to open the pdf
- If the document is Microsoft related you will be prompted to save the item locally and open using the designated program
- The audit document, because it is an html document, will open in a new browser window or tab

If the window will not open please contact BSC Technical Services

BSCFileNet@ogs.ny.gov

or

Call 518-457-4272
Prompt #3

BSC Workflow Desktop - Viewer

Invoice 58333



Van Bortel Ford, Inc.
71 Marsh Road • East Rochester, NY 14445
Phone (585) 586-4415 • Fax (585) 389-0184
Toll Free 1-888-690-FORD (3673)

Fleet & Government Sales
Phone (585) 586-7705 • Fax (585) 586-7706
Toll Free 1 (888) 826-2678

VEHICLE INVOICE

SOLD TO:
New York State
Albany, NY 12205

Line 3

CUSTOMER NO. N/A DEAL NO. 16

SALESPERSON James Smith

YEAR	NEW OR USED	MAKE	COLOR	MODEL	STOCK NO.	
2014	NEW	FORD	WH	FOCUS	F37555	1FADP3E2

KEY CODE KEYLESS ENTRY CODE PRICE OF VEHICLE

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Who should the Agency staff contact for access to FileNet?

BSC Technical Services should be contacted for any access or technical issues with FileNet. They can be contacted by either calling (518) 457-4272 Prompt #3 or BSCFileNet@ogs.ny.gov

How does the agency change indexed fields on an invoice?

If the agency notices that the index fields are incomplete or inaccurate they should write a message in the Comments box indicating the needed correction and send it back to Disposition. The agency cannot make the correction themselves as their access only allows them to request a Purchase Order Change, provide an Okay to Pay/Do Not Pay, or write a comment/ask a question.

Why is there a lock next to the invoice I am trying to look at?

The lock indicates someone else is in the invoice or that it was exited incorrectly by the last person to view it. The user ID of the person who has the file locked will be displayed when hovering the cursor over the lock.

Why is the BSC requesting Contract or PO information?

This information is essential for the BSC to correctly process the invoice. If the agency does not provide the requested information the BSC will not be able process the invoice. Requested information should be communicated through the Comments box.

