



MANAGE WORKFLOW-RELATED CONFIGURATION

EX

QUICK REFERENCE GUIDE EX-12

Purpose


The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Manage Workflow-Related Configuration in the North Carolina Financial System (**NCFS**).

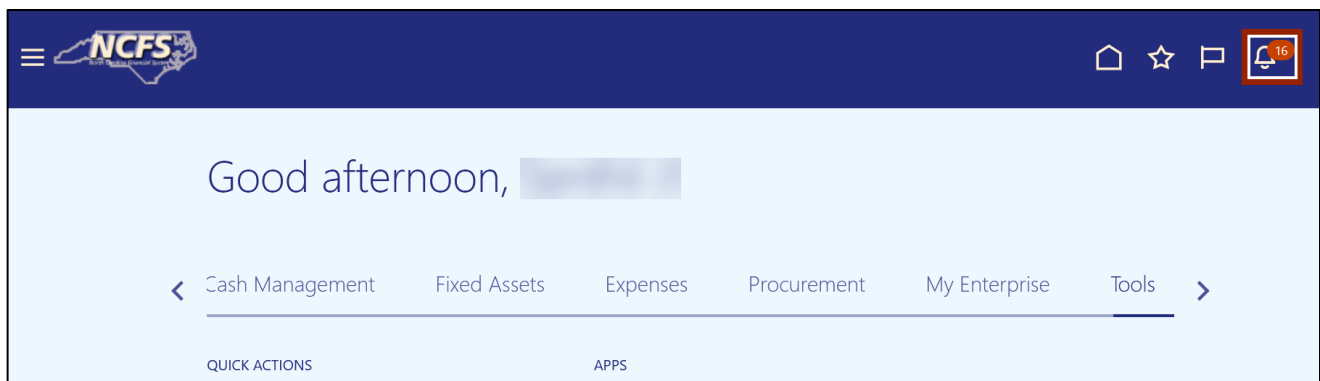
Introduction and Overview

This QRG covers the steps to add, delete, and update the conditions of Accounts Payable (**AP**) Invoice Approval Rules in NCFS.

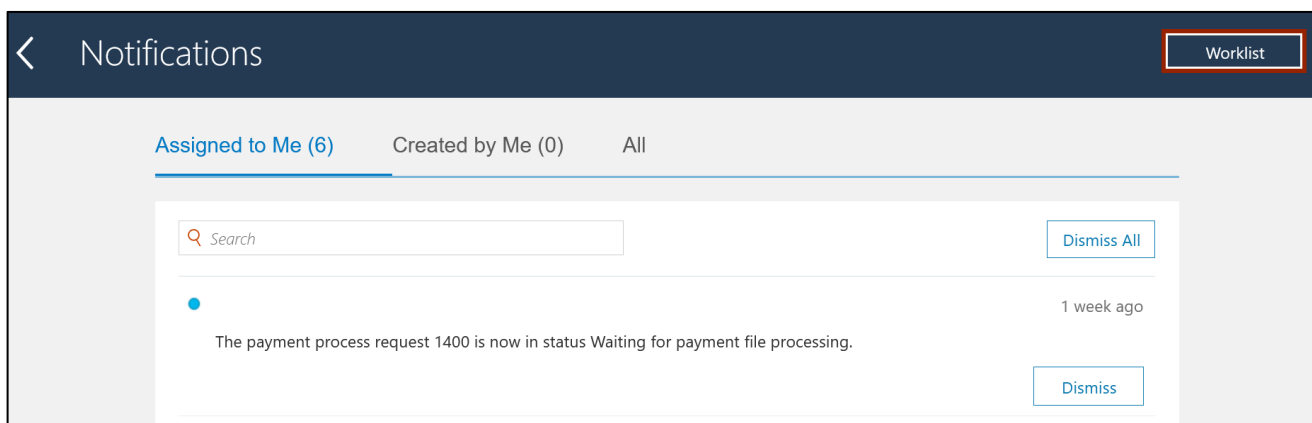
Manage Workflow-Related Configuration


To Manage Workflow-Related Configuration in NCFS, please follow the steps below:

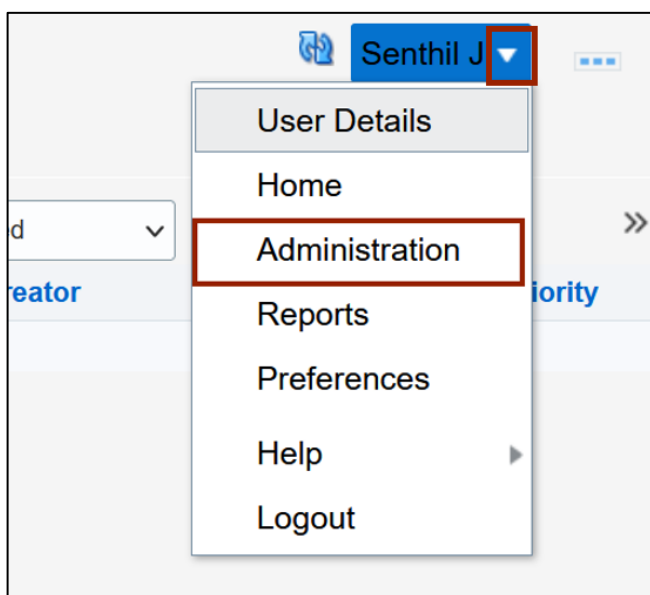
1. Log in to the NCFS portal with your credentials to access the system.
2. In the top right corner of **Home** page, Click the **Notifications** icon [].



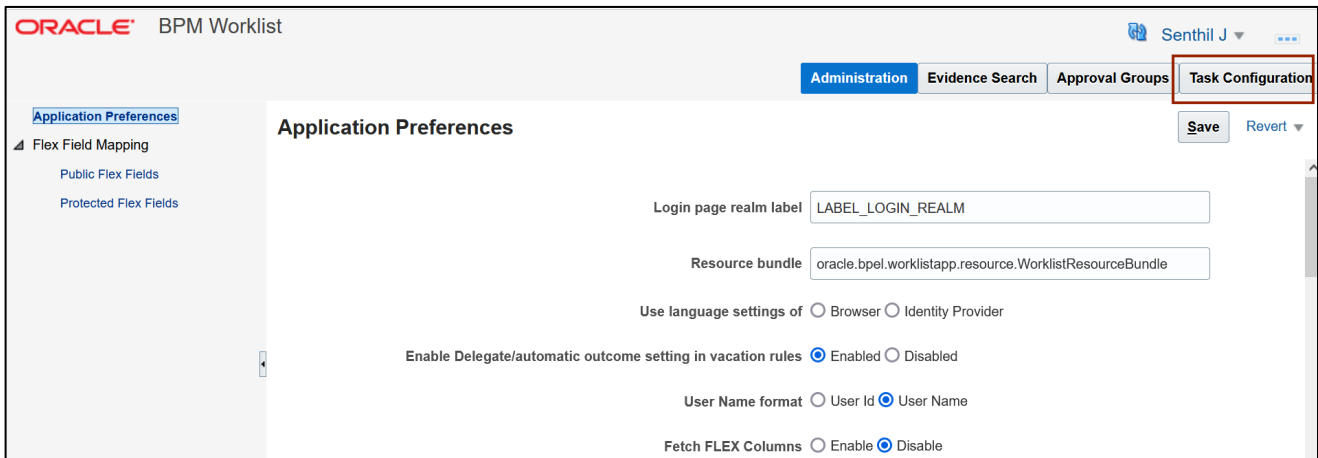
3. On the **Notifications** page, Click the **Worklist** button.



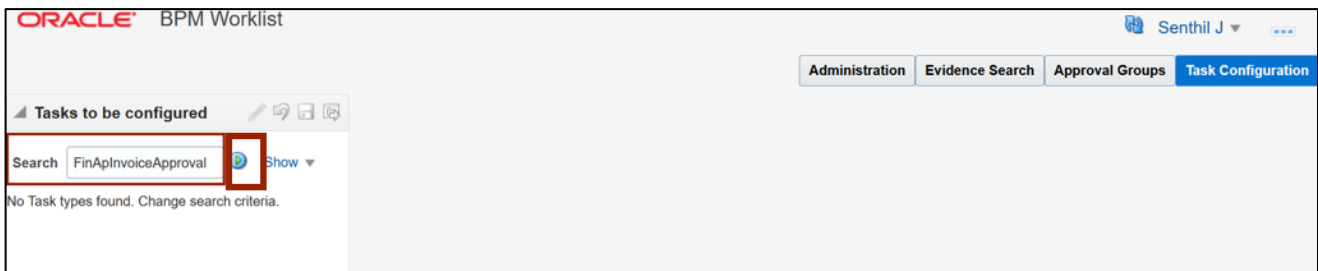
4. In the top right corner of the **BPM Worklist** page, click the drop-down choice list icon [] and select **Administration**.



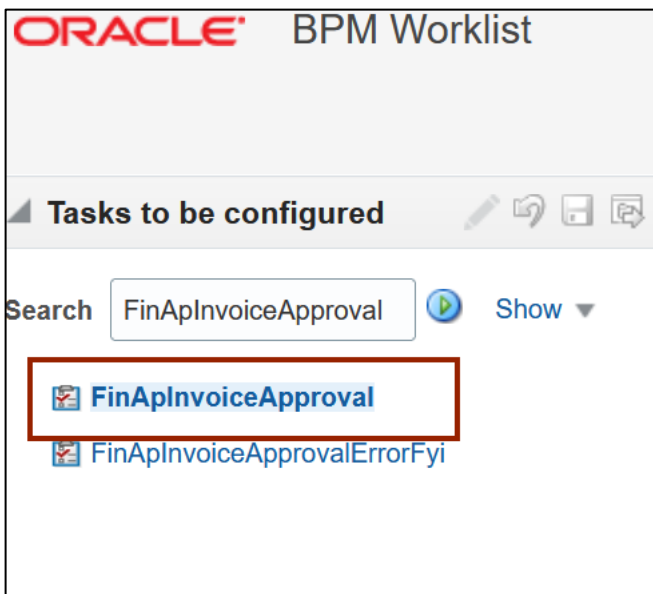
5. In the top right corner of the **BPM Worklist** page, click the **Task Configuration** button.




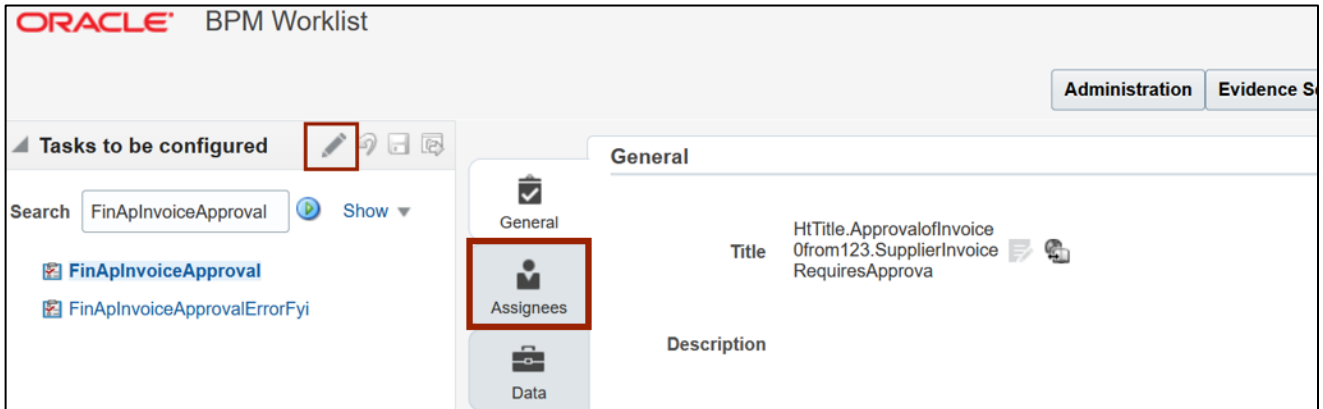
6. Enter the **Search** field and click the **Search [🔍]** icon. In this example, we choose **FinApInvoiceApproval**.



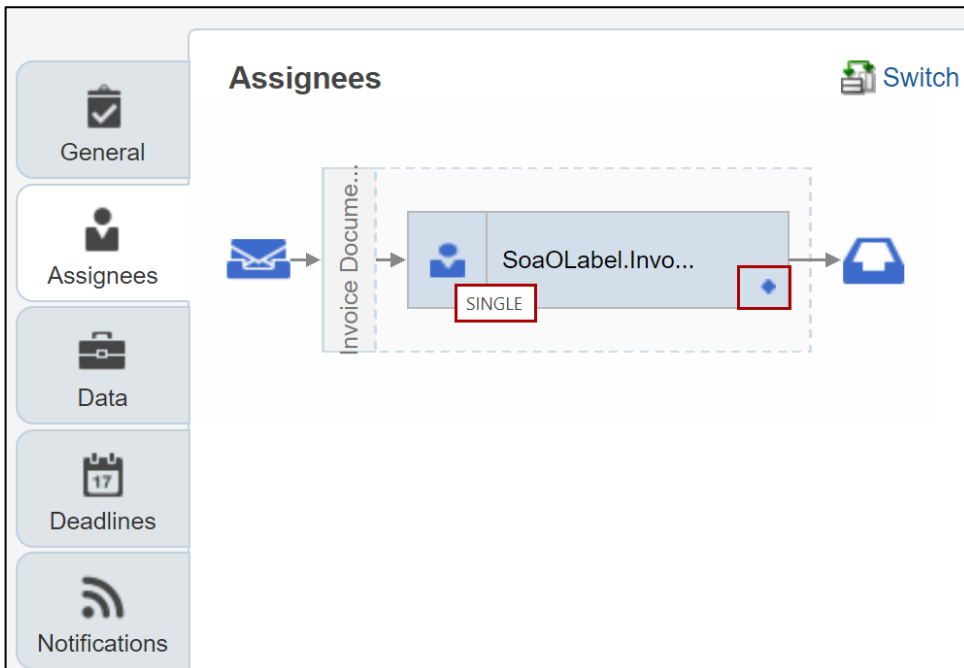
7. Select the **FinApInvoiceApproval** Task.



- Click the **Edit** [] icon to update the Invoice Approval Configuration and click the **Assignees** tab to open the Invoice Business Rules.



- Click the **Single Participant** [] button and click the **Go to Rule** [] icon.

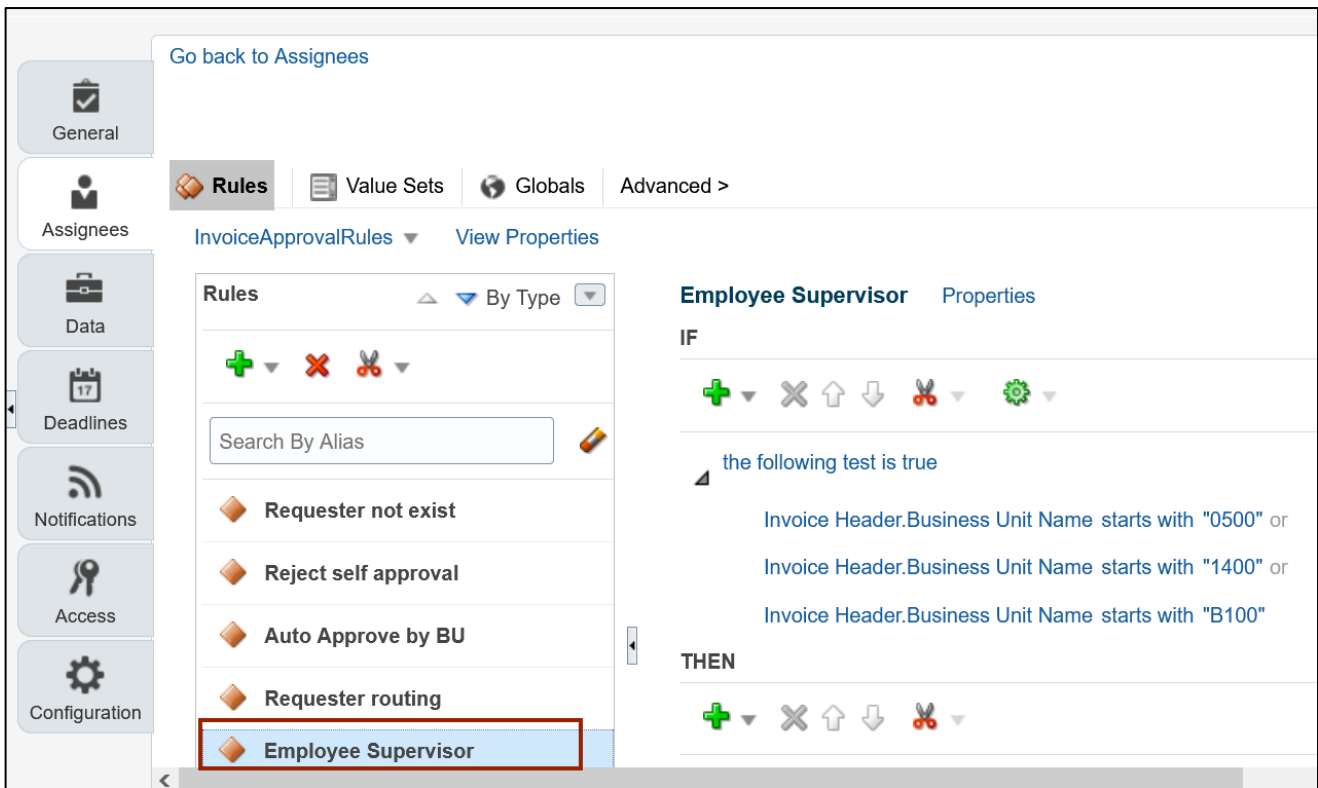


10. Select the **Go to Rule** option to view rules.

The screenshot shows a configuration interface for workflow assignees. On the left is a vertical navigation menu with icons and labels for: General, Assignees, Data, Deadlines, Notifications, Access, and Configuration. The main content area is titled 'Assignees' and features a workflow diagram. The diagram starts with an 'Invoice Document' icon, followed by a task box labeled 'SoaOLabel.Invo...' with a person icon, and ends with a printer icon. A red-bordered button labeled 'Go to Rule' is positioned below the task box. Below the diagram, the configuration is for 'SoaOLabel.InvoiceApproversfinal'. It has two tabs: 'Basic' (selected) and 'Advanced'. Under the 'Basic' tab, there is a text field containing 'SoaOLabel.InvoiceAppr'. Below this is a dropdown menu labeled 'Assignees based on' with 'Rule-based' selected. At the bottom, there is a 'Business rule' section with the text 'InvoiceApprovalRules' and a pencil icon.

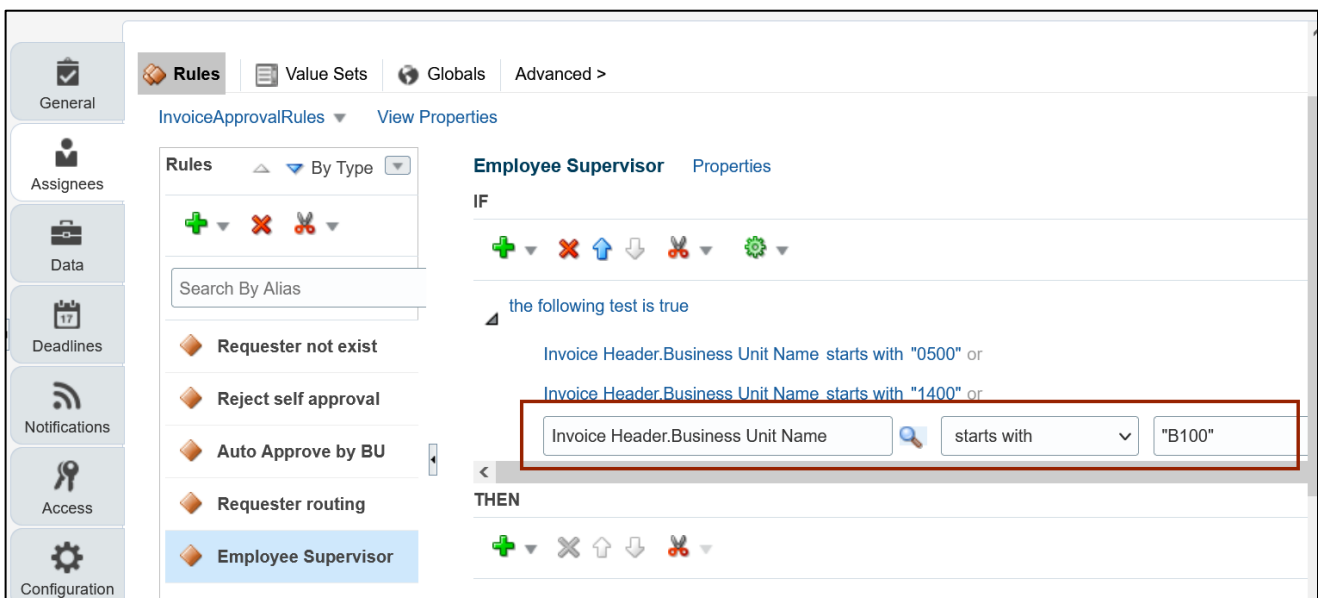
11. Under the **Rules** section, select the **Rule name** you wish to update.

In this example, we choose **Employee Supervisor**.



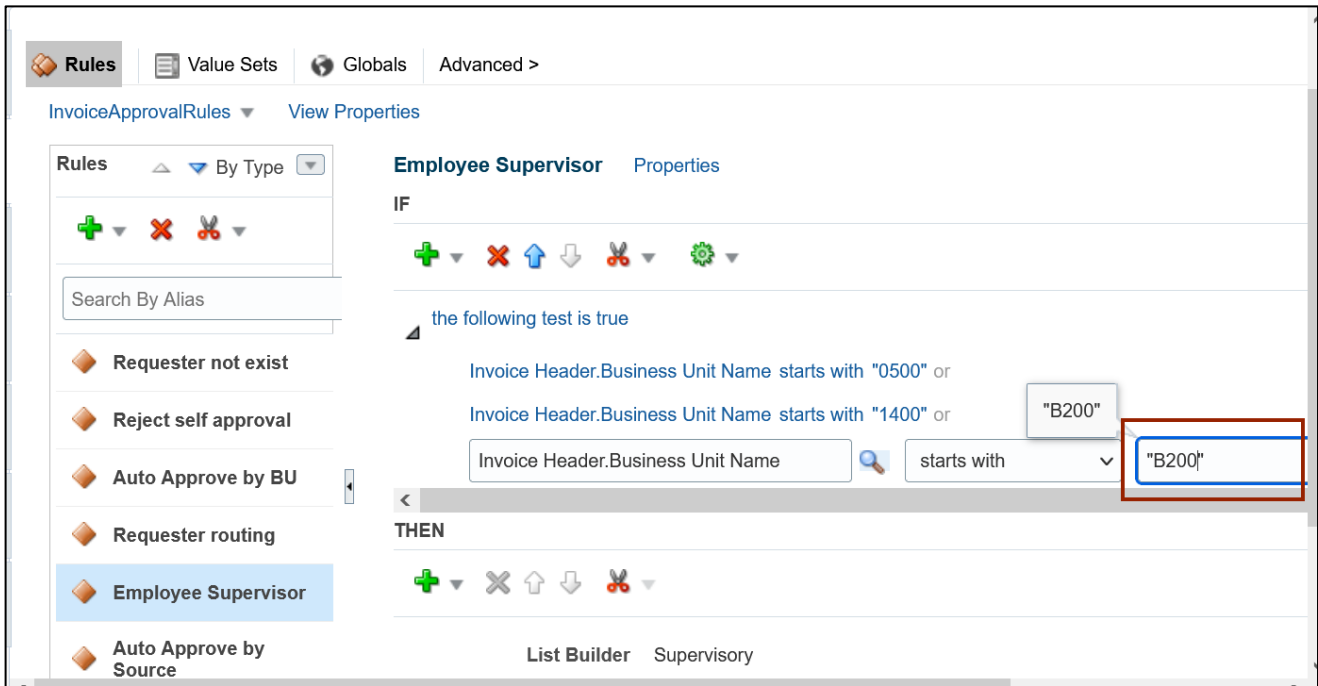
12. Click on the **individual condition** to update.


In this example, we choose **Invoice Header.Business Unit Name starts with "B100"**.



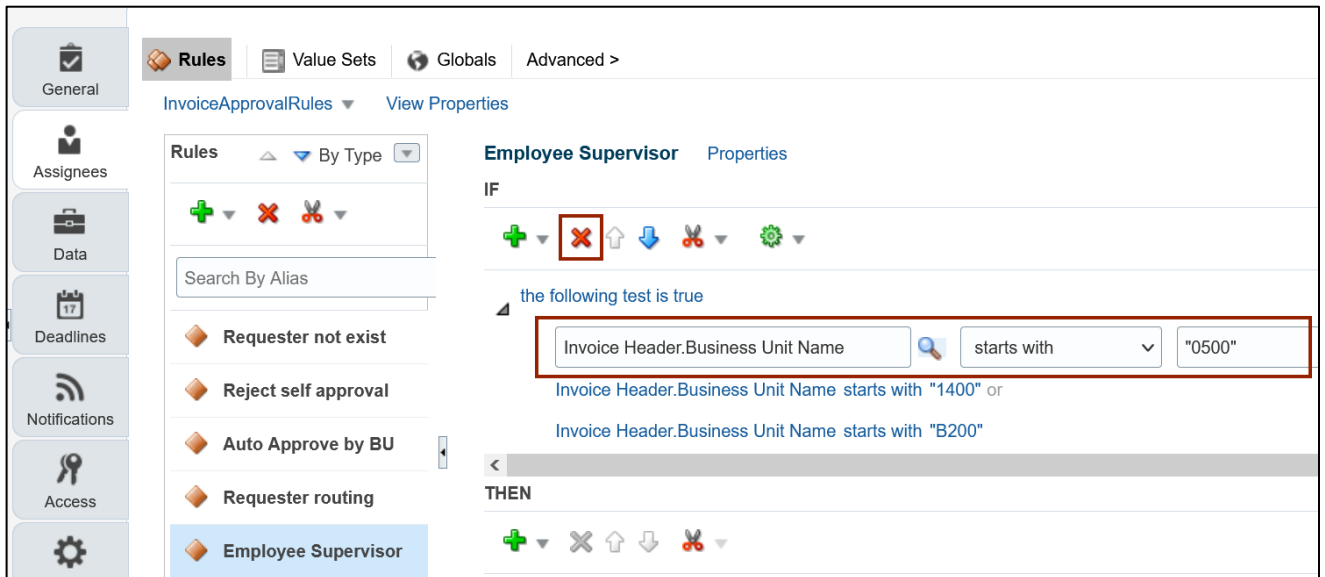
13. To update the Business Unit code, Enter the appropriate Business Unit code in the **Value** field.

In this example, we choose **“B200”**.

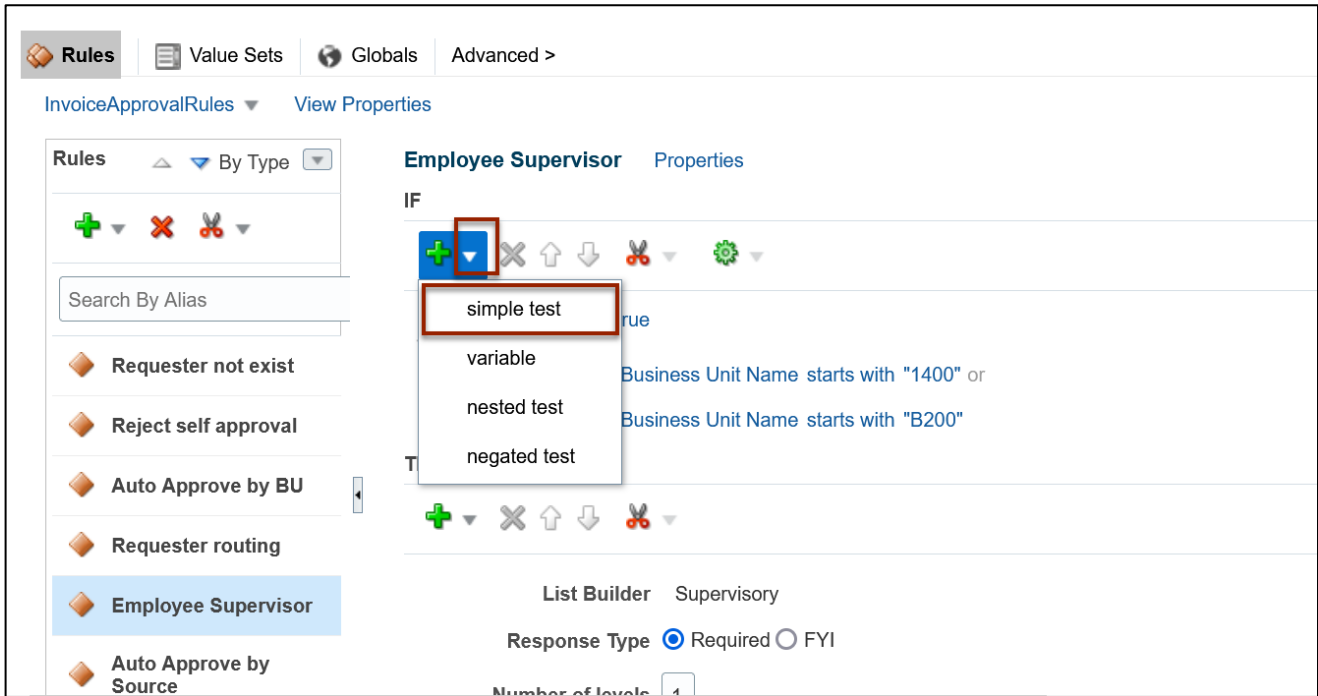


14. Click the **Delete** icon [] to delete a condition.

In this example, we choose **Invoice Header.Business Unit Name starts with “0500”**.

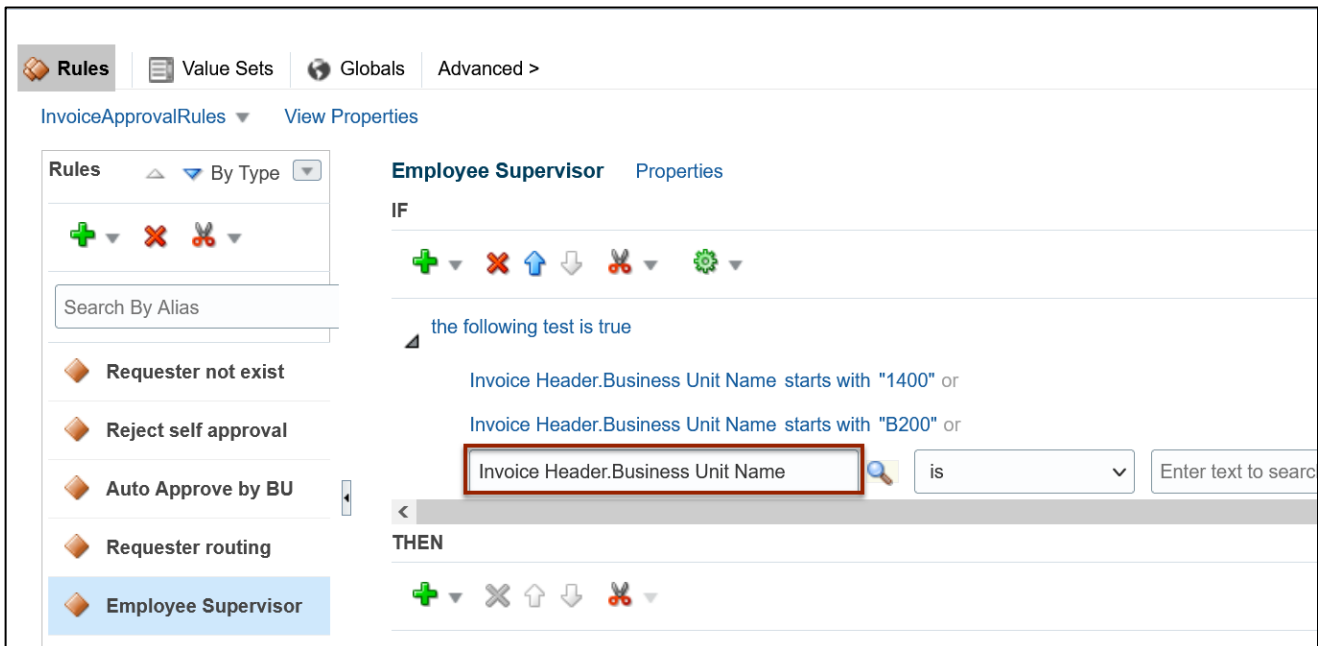


15. Select the **simple test** option from the drop-down choice list of **Advanced Add or Modify Options** to add a new condition in the existing approval rule.



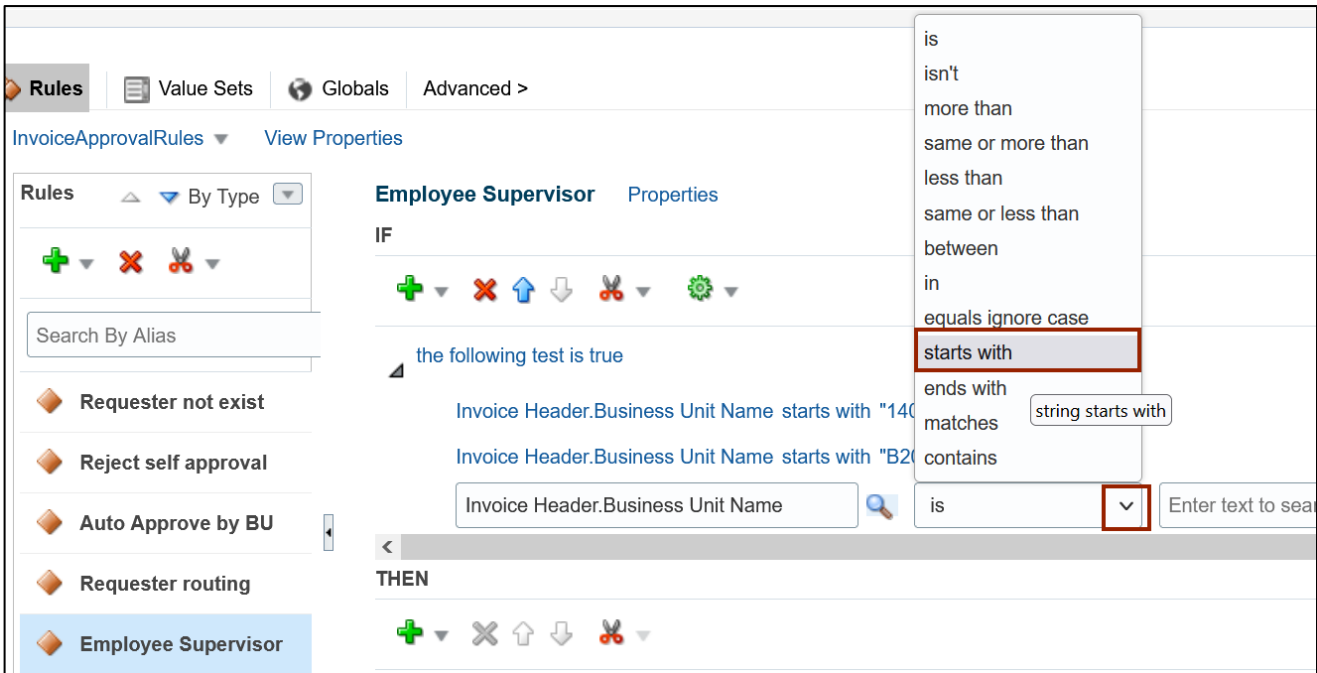
16. Enter the condition in the *condition* field.

In this example, choose **“Invoice Header.Business Unit Name”** for the condition.



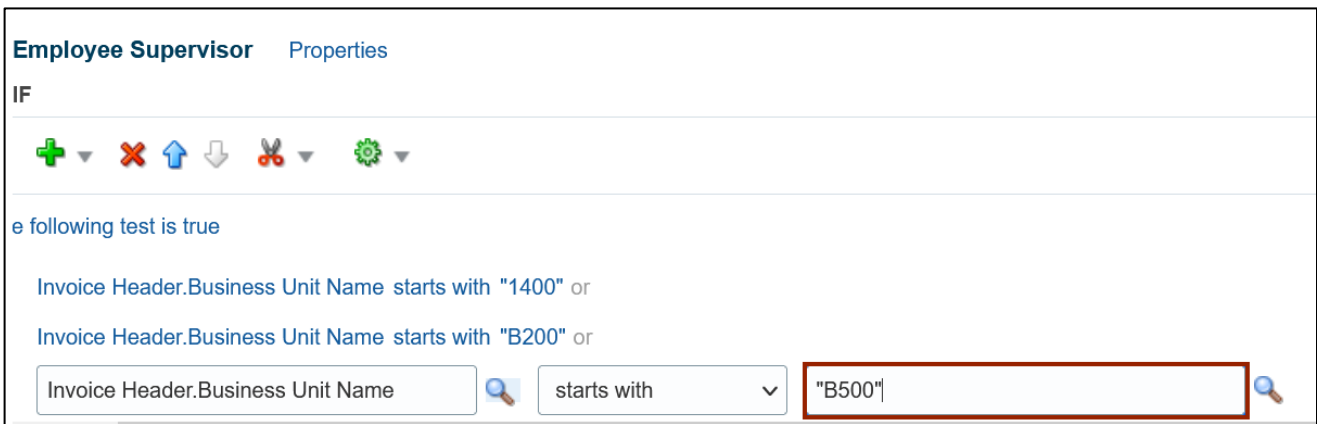
17. Select the corresponding *operator* from the drop-down choice list.

In this example, we choose **starts with** for the *operator*.

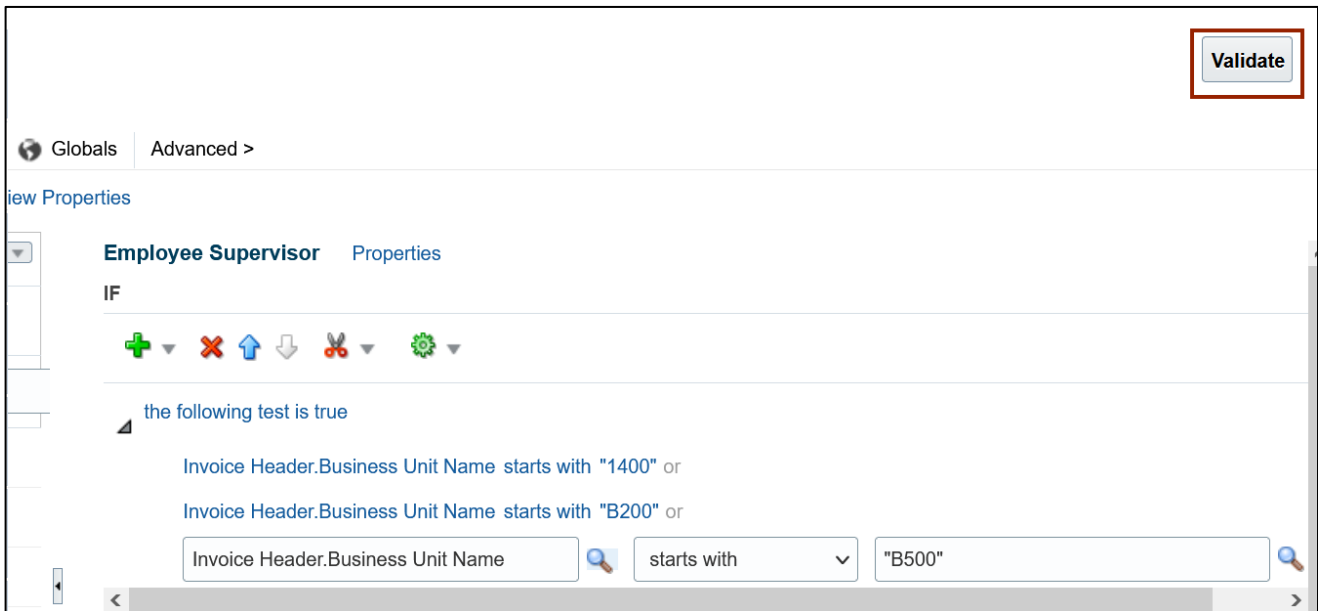


18. Enter the **condition value** in the *value* field.

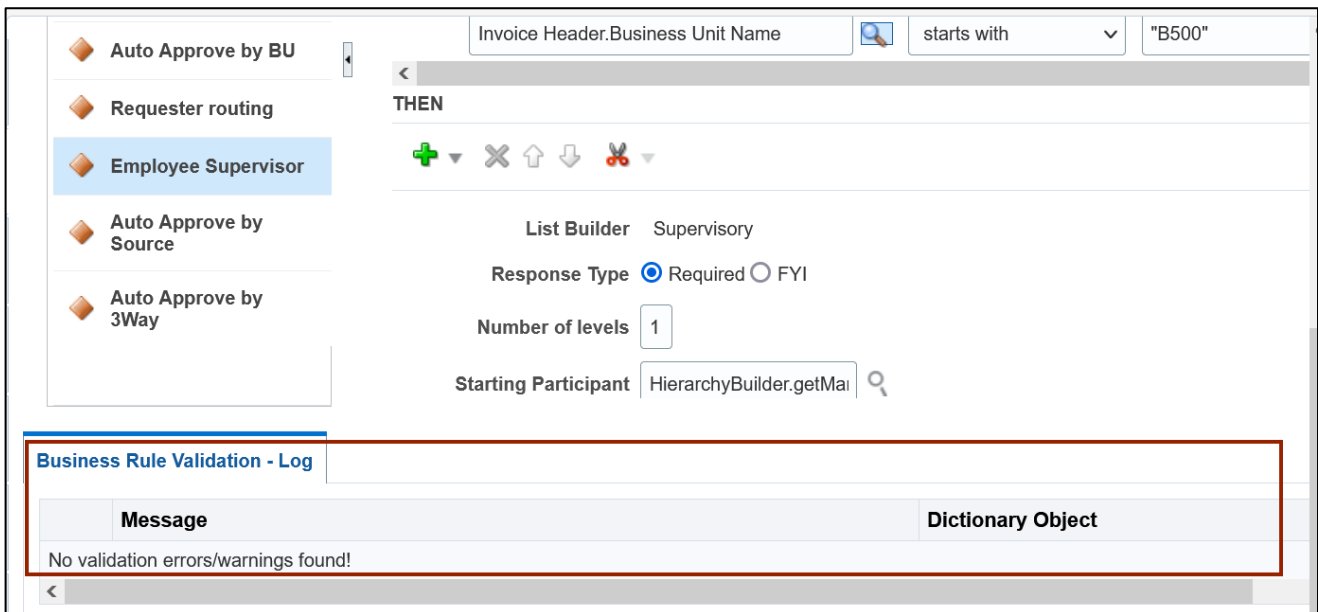
In this example, we choose **"B500"** as the **condition value**.



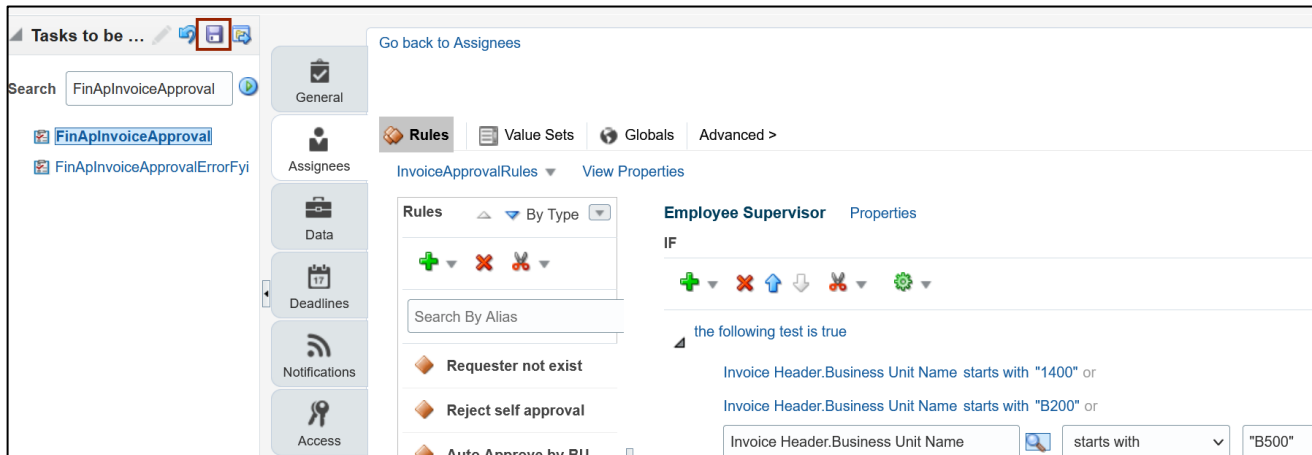
19. Click the **Validate** button to validate the rules.



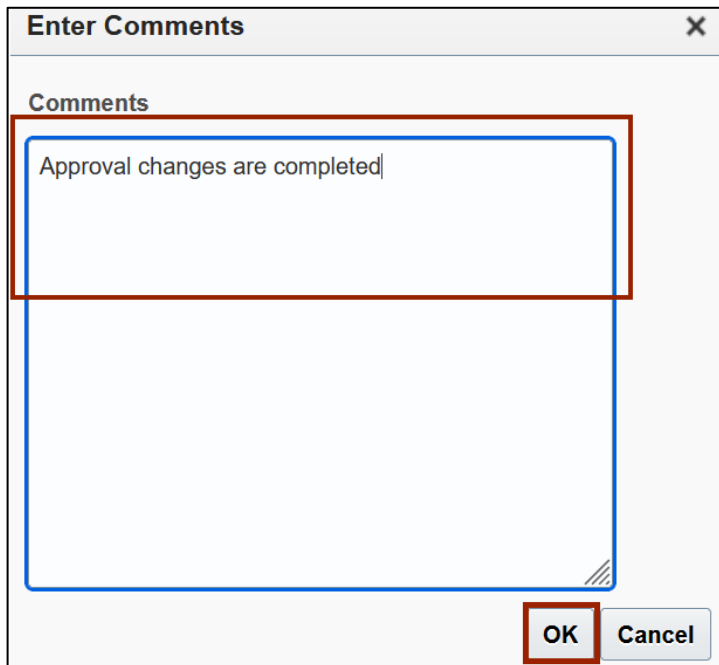
20. Review the **Validation log** at the bottom of the **Rules** section to check if there are any errors/warnings found. Correct the rules and re-validate in case of any errors/warnings found.



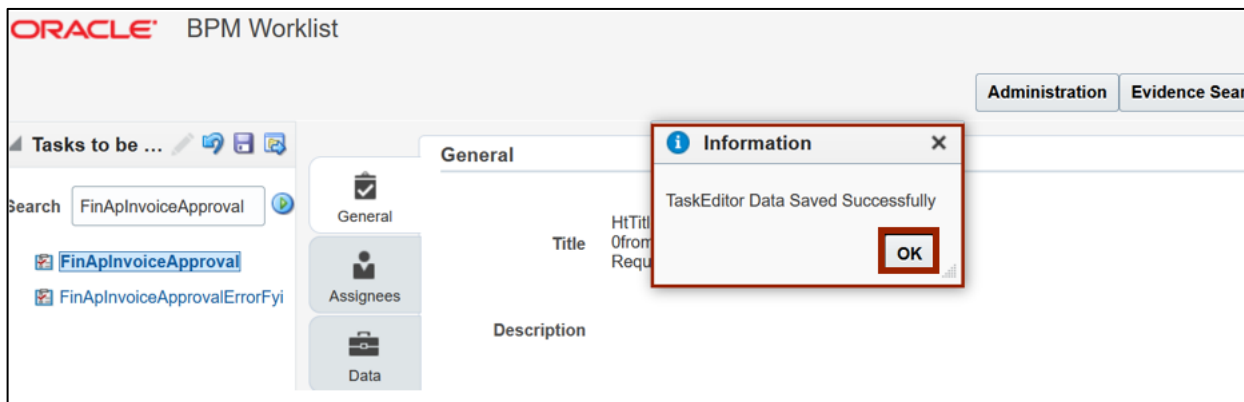
21. In the top left corner of the **BPM Worklist** page, click on the **Save** icon [] to save the changes.



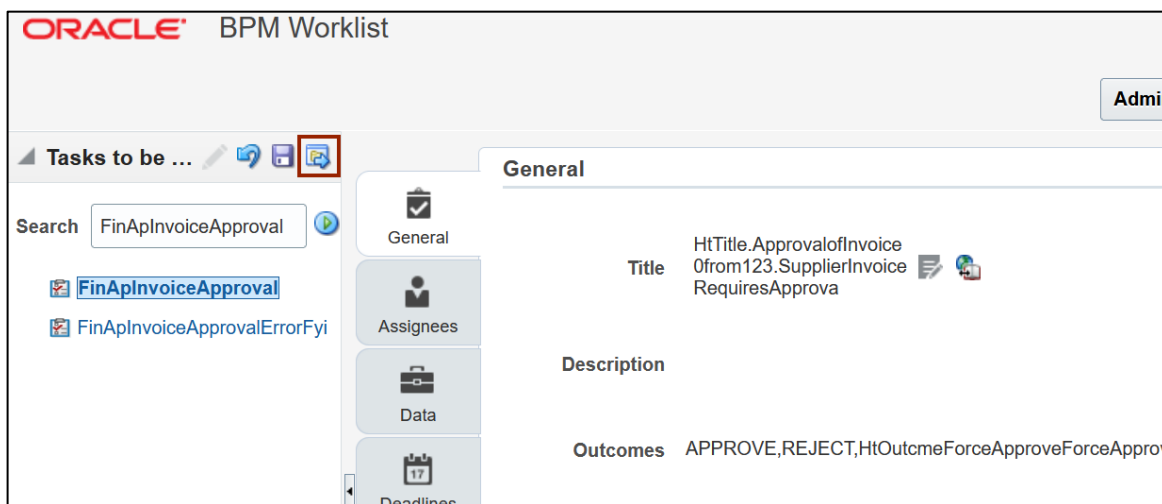
22. On the *Enter Comments* pop-up page, enter appropriate comments and click the **OK** button.



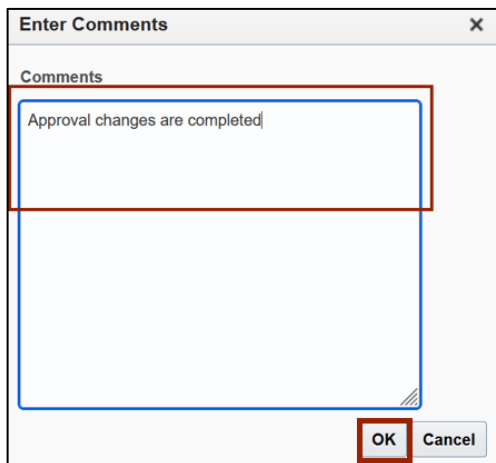
23. *Information* pop-up appears as a confirmation to save the changes. Click the **OK** button.



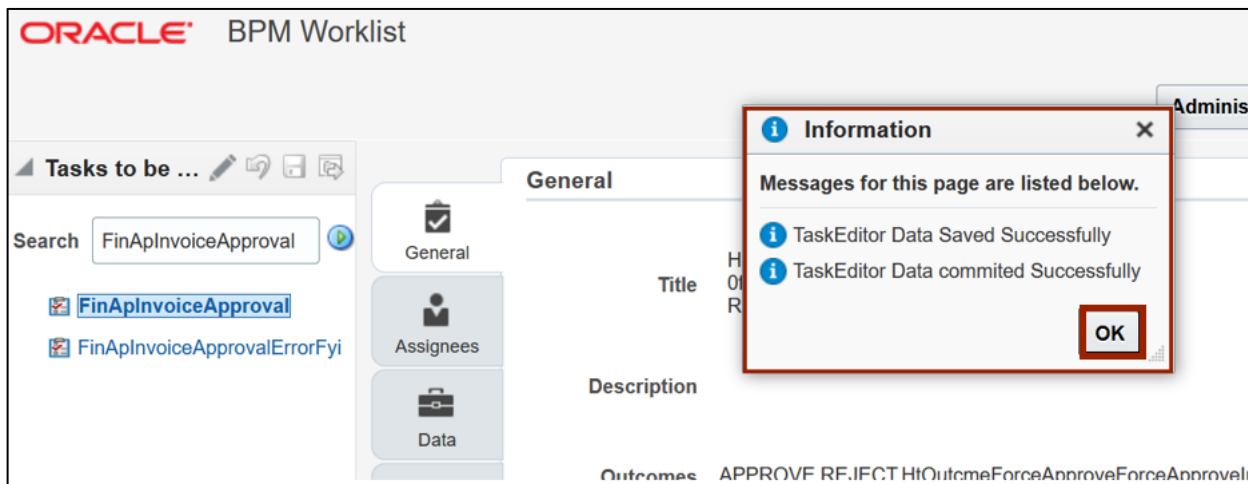
24. Click on the **Commit Task** icon [] to deploy the changes.



25. On the *Enter Comments* pop-up page, enter appropriate comments and click the **OK** button.



26. *Information* pop-up appears as a confirmation to deploy the changes. Click the **OK** button.



Wrap-Up

Managing Workflow-Related Configuration using the steps above to add, delete, and update the conditions of AP Invoice Approval Rules in the NCFS.

Additional Resources

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