EX-12 Manage Workflow-Related Configuration

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.

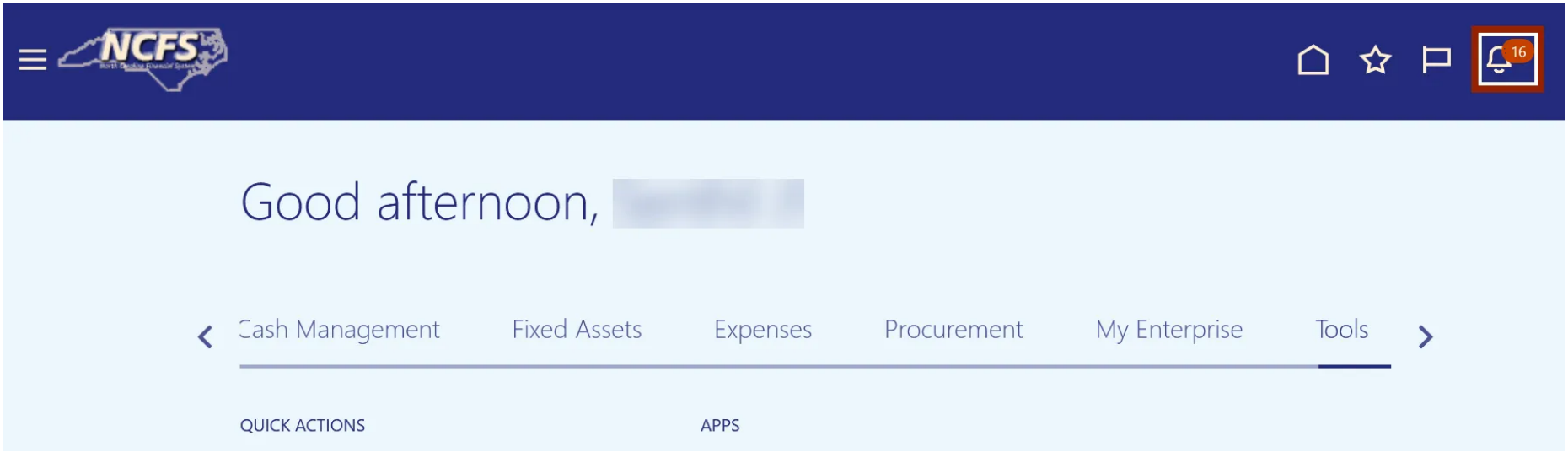
Manage Workflow-Related Configuration

To Manage Workflow-Related Configuration in NCFS, please follow the steps below. There are 26 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

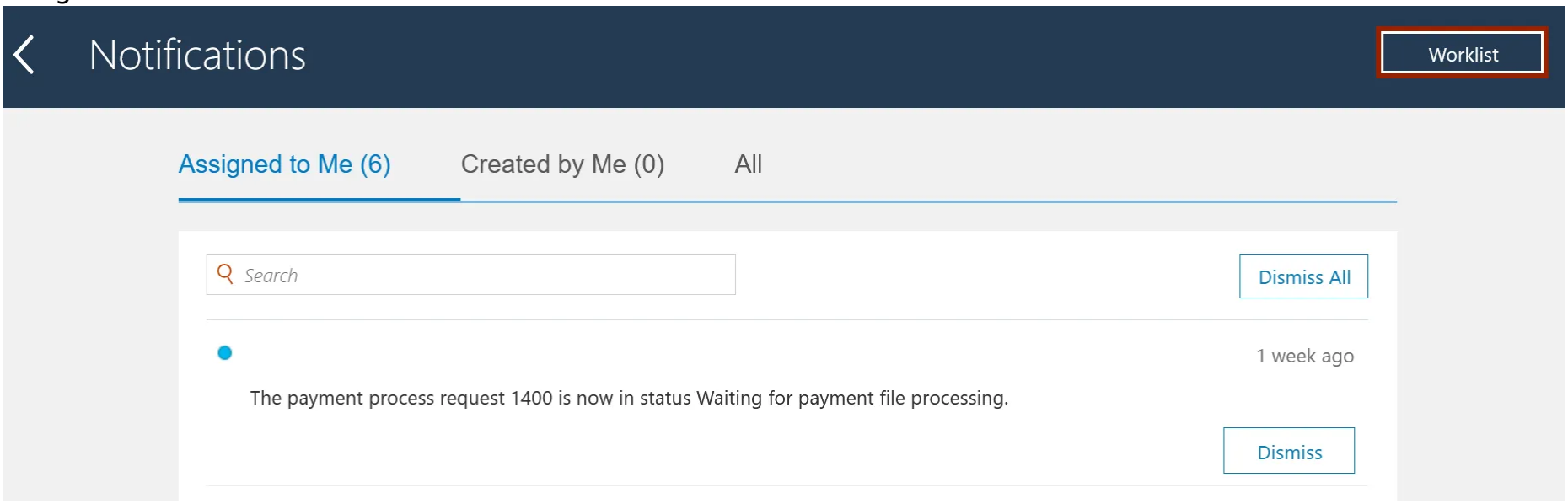
Step 2. In the top right corner of **Home** page, click the **Notifications** icon.

Image



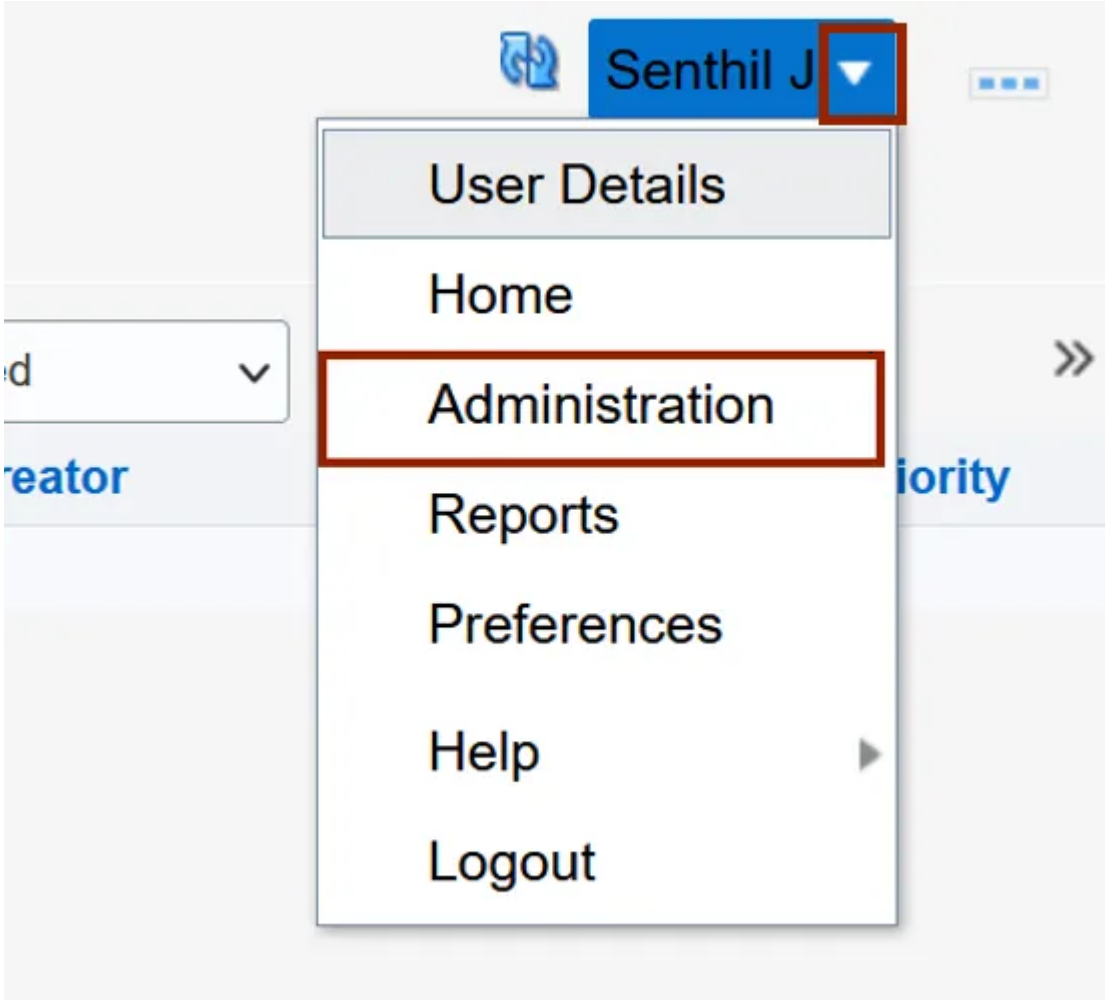
Step 3. On the **Notifications** page, Click the **Worklist** button.

Image



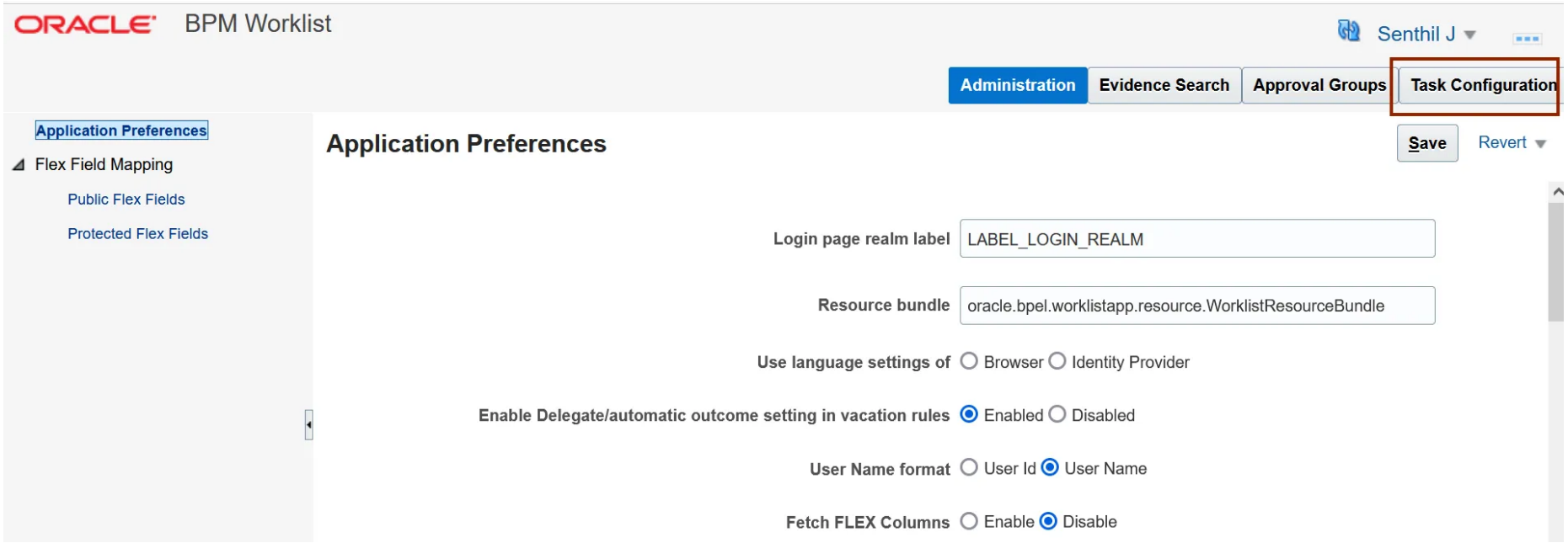
Step 4. In the top right corner of the **BPM Worklist** page, click the drop-down choice list icon and select **Administration**.

Image



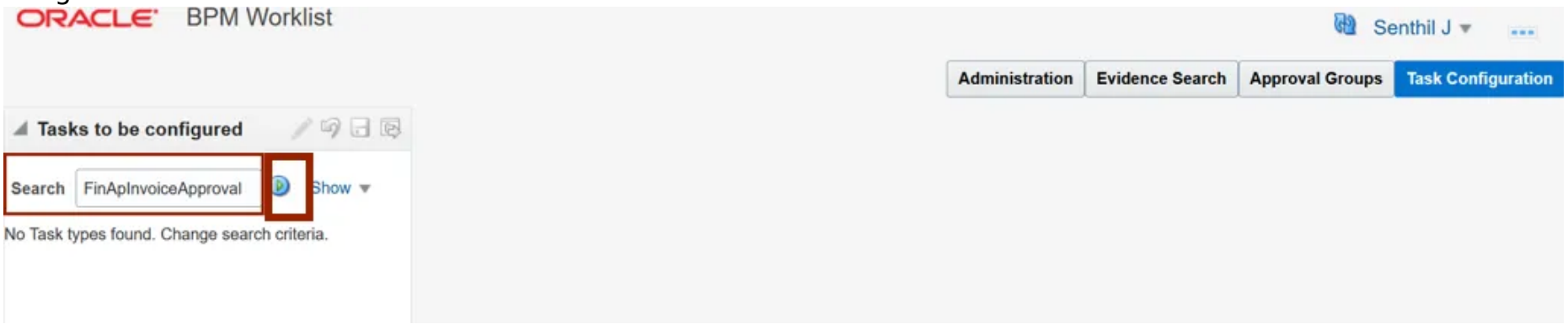
Step 5. In the top right corner of the **BPM Worklist** page, click the **Task Configuration** button.

Image



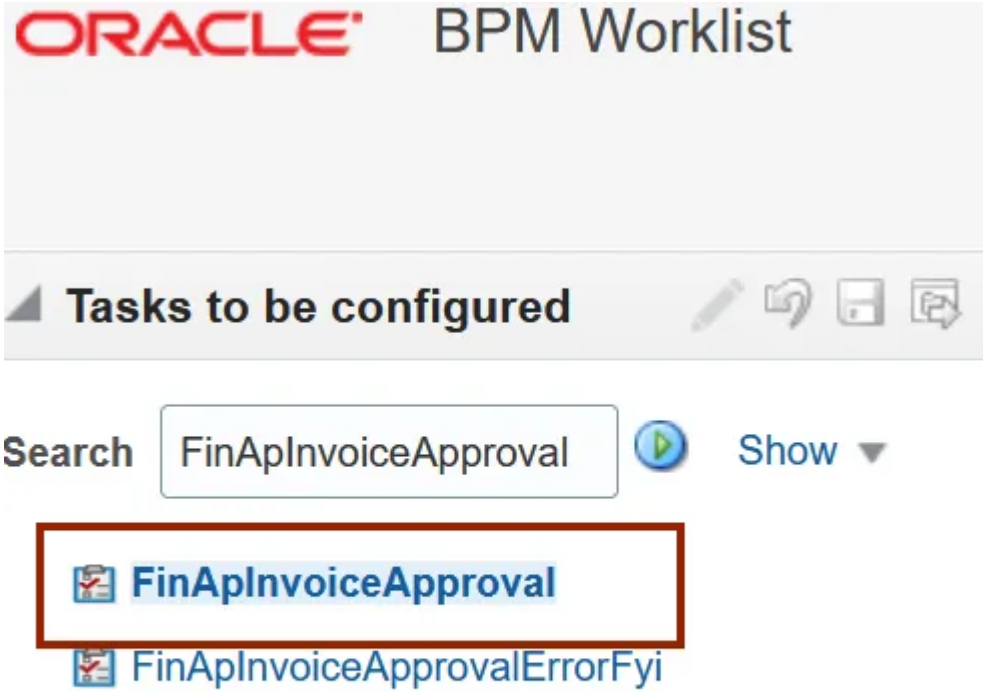
Step 6. Enter the **Search** field and click the **Search** icon. In this example, we choose **FinApInvoiceApproval**.

Image



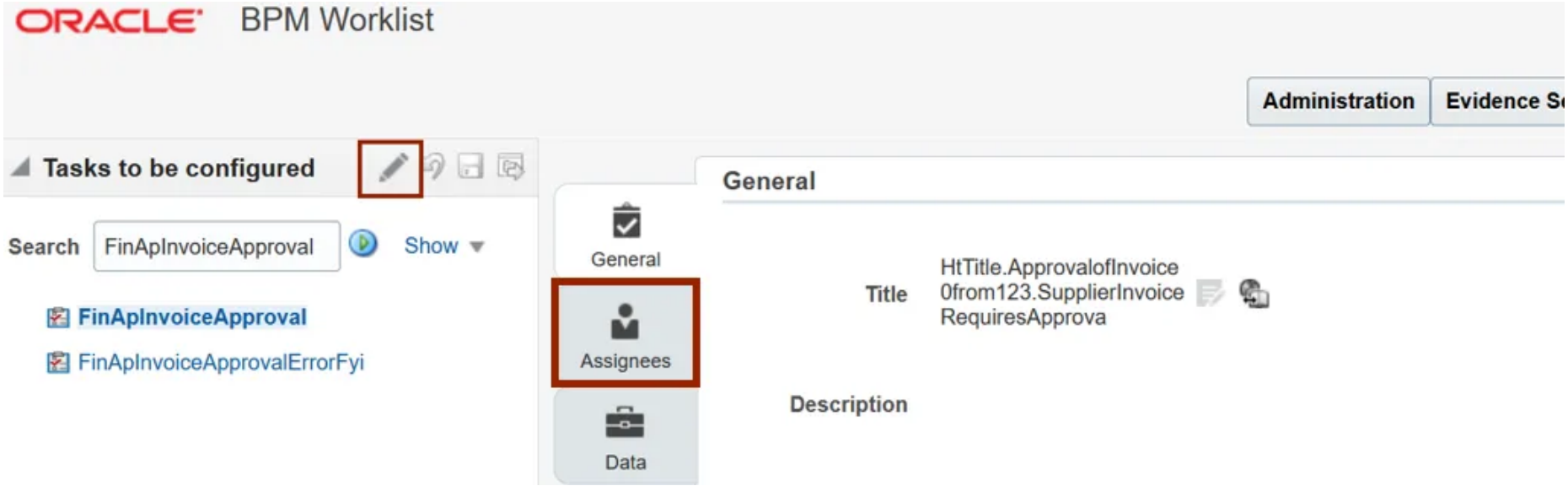
Step 7. Select the **FinApInvoiceApproval** Task.

Image



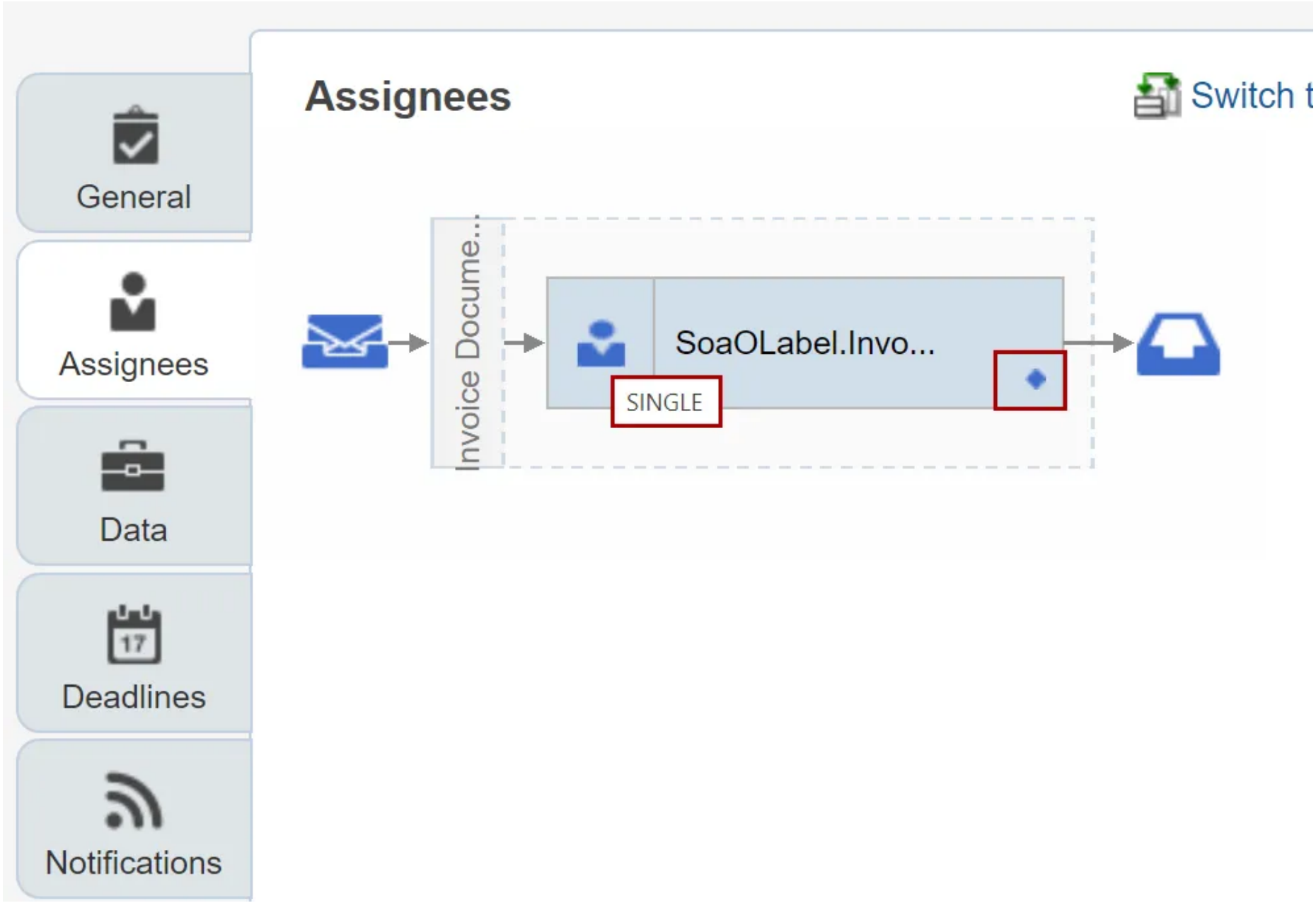
Step 8. Click the **Edit** icon to update the Invoice Approval Configuration and click the **Assignees** tab to open the Invoice Business Rules.

Image



Step 9. Click the **Single Participant** button and click the **Go to Rule** icon.

Image


General
Assignees
Data
Deadlines
Notifications
Assignees
Switch t
Invoice Docume...
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SINGLE

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

Image

General

Assignees

Data

Deadlines

Notifications

Access

Configuration

Assignees



SoaOLabel.InvoiceApproversfinal

Basic Advanced

SoaOLabel.InvoiceAppr

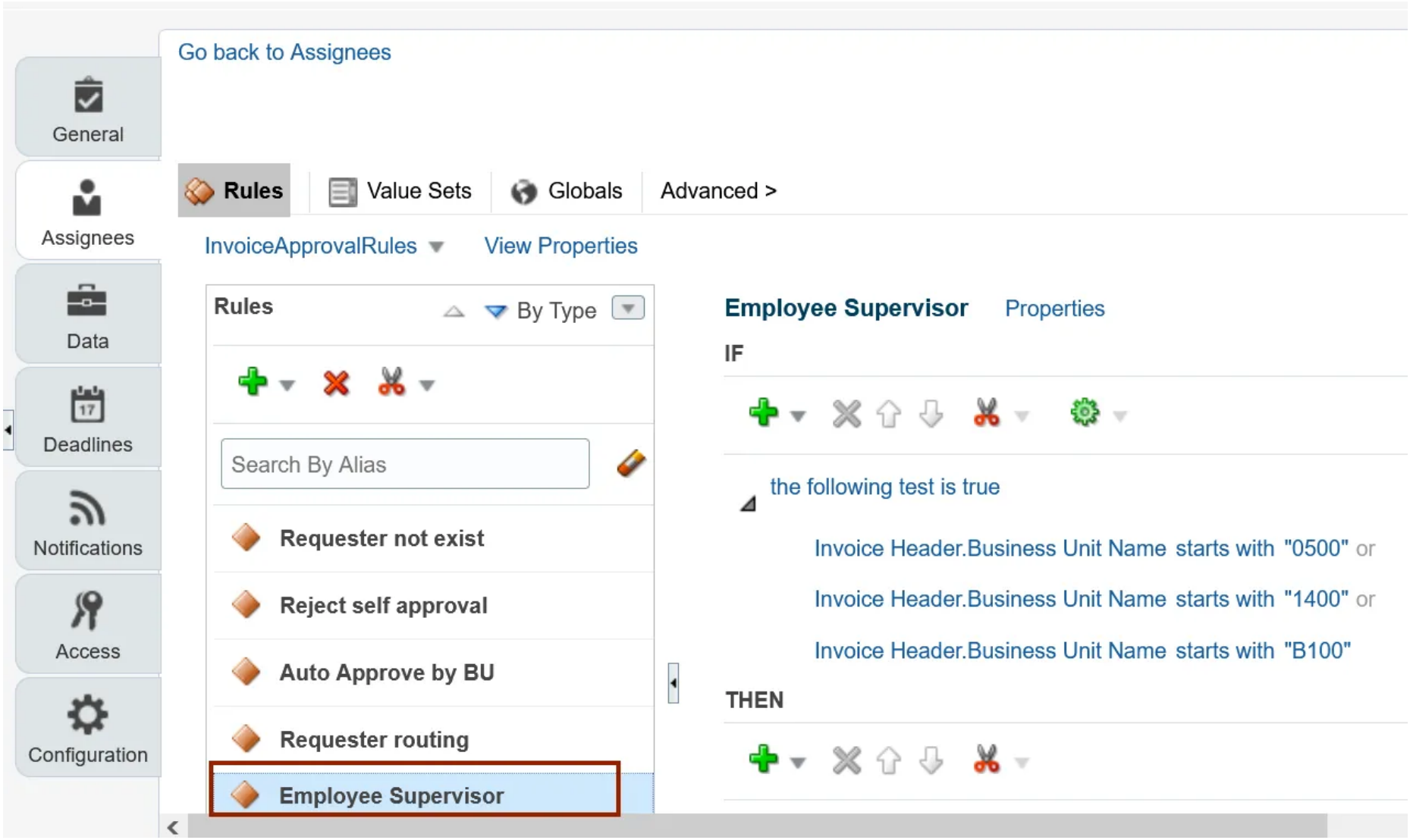
Asignees based on Rule-based

Business rule InvoiceApprovalRules

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

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

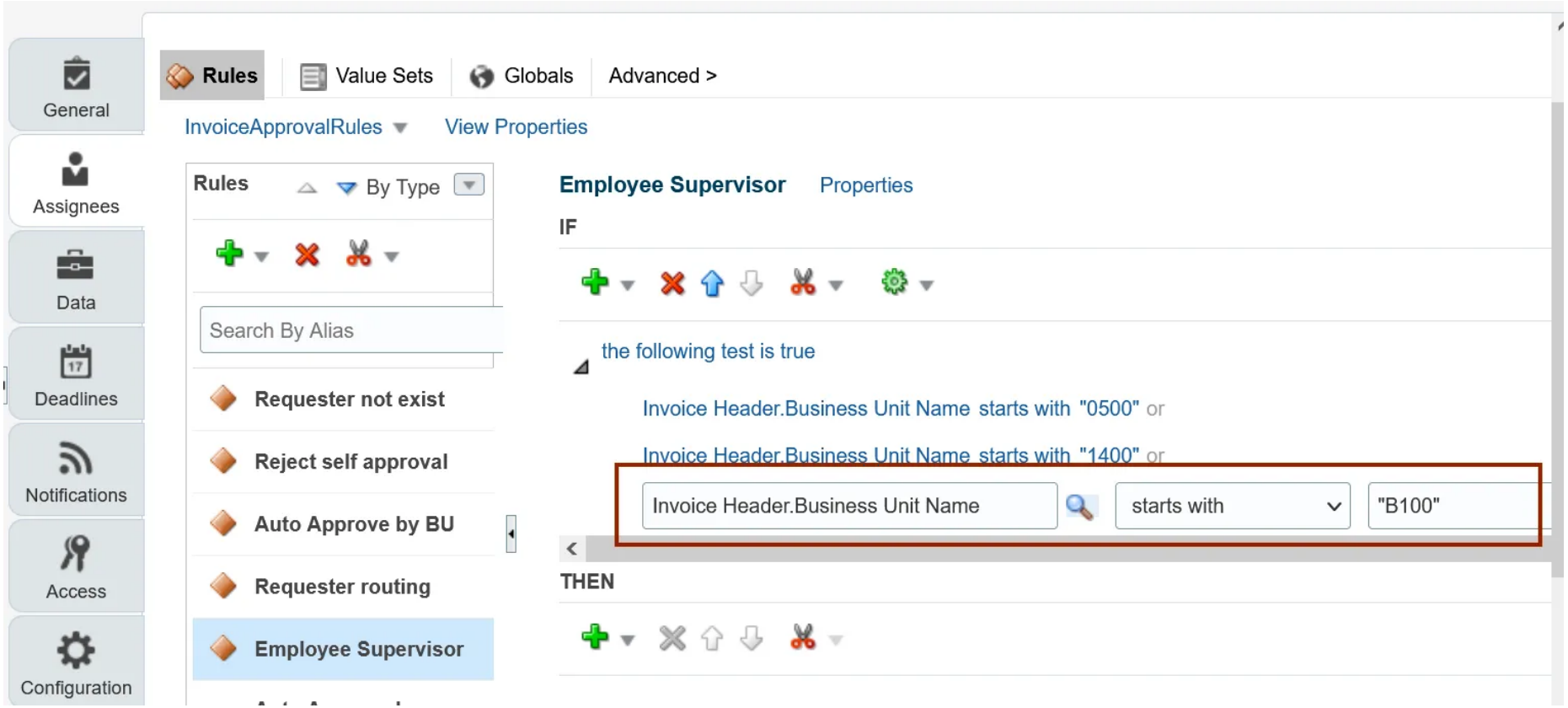
Image



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

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

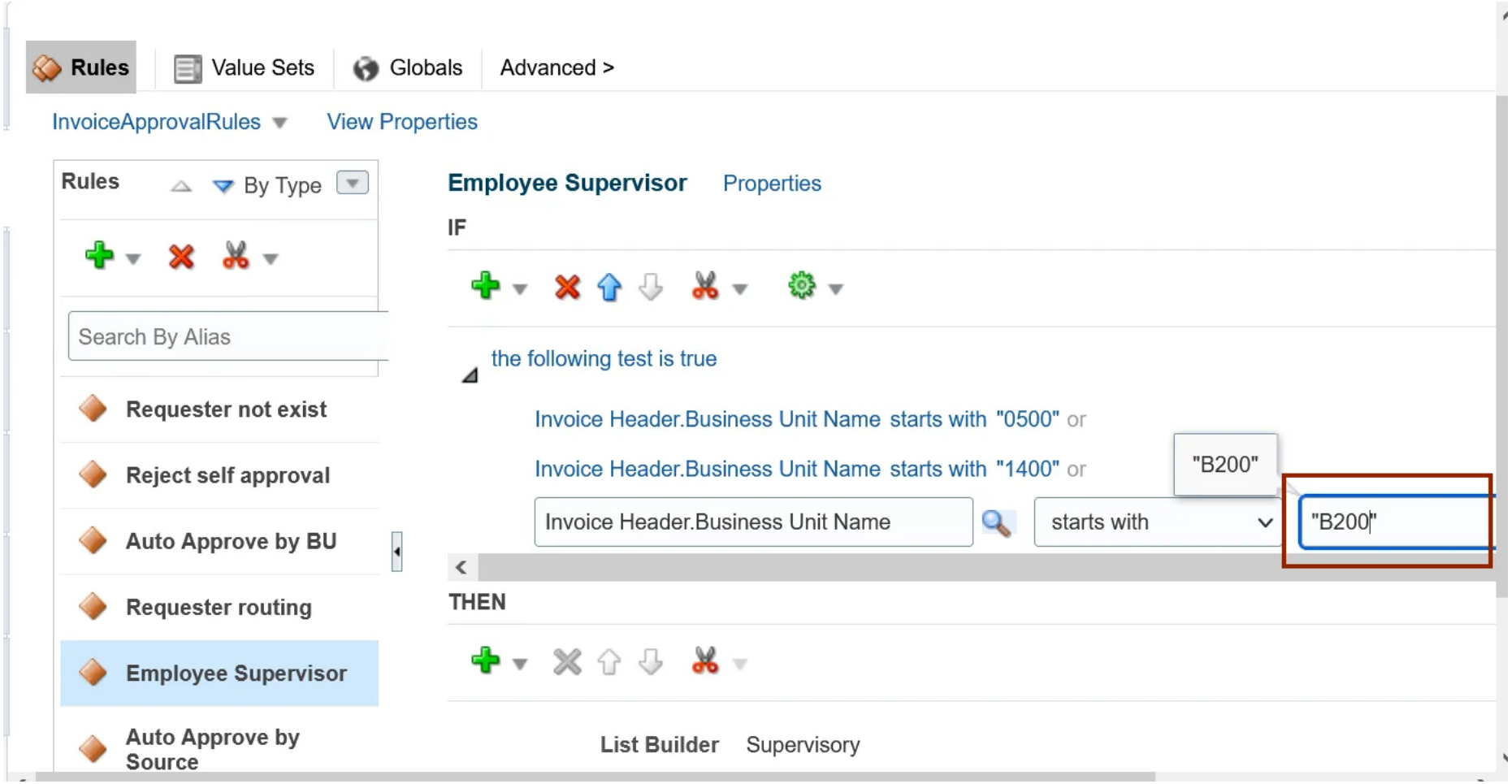
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Step 13. To update the Business Unit code, Enter the appropriate Business Unit code in the **Value** field.

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

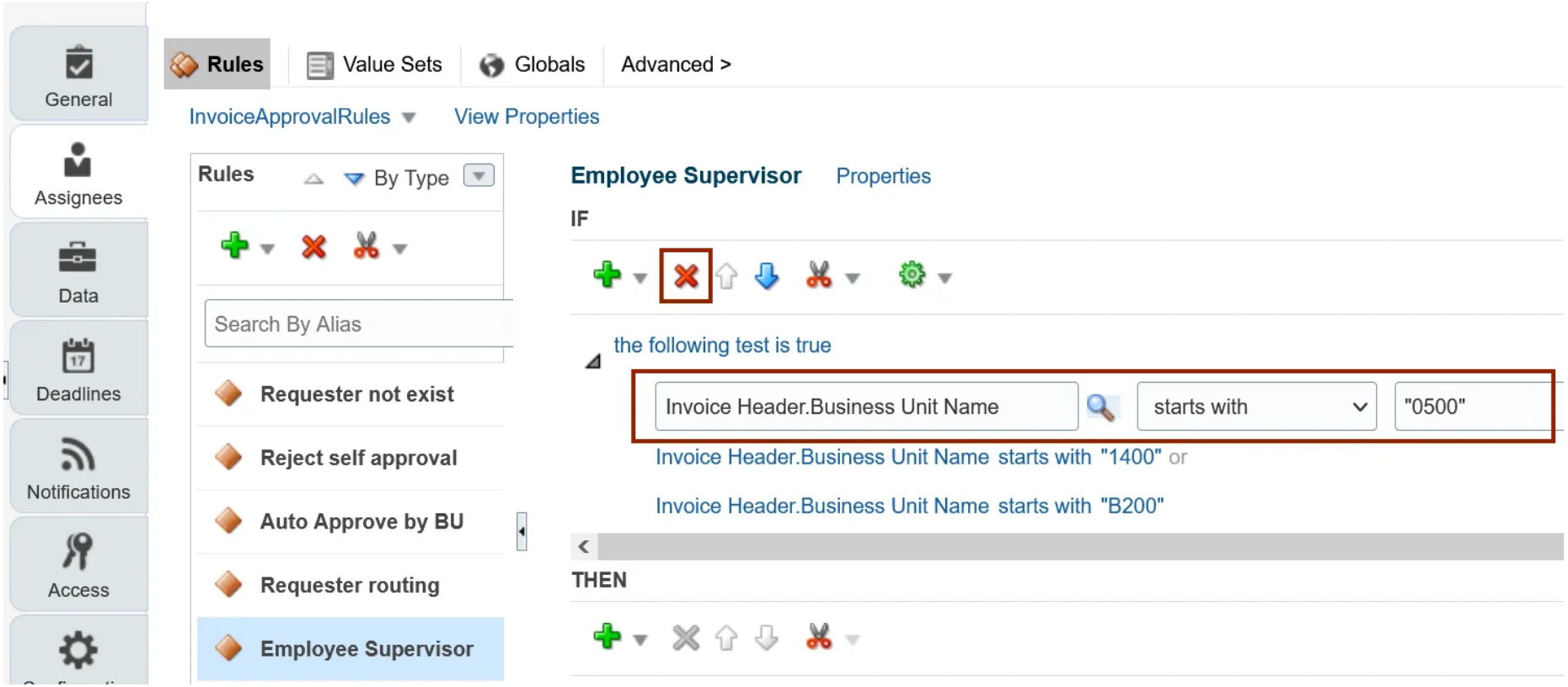
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Step 14. Click the **Delete** icon to delete a condition.

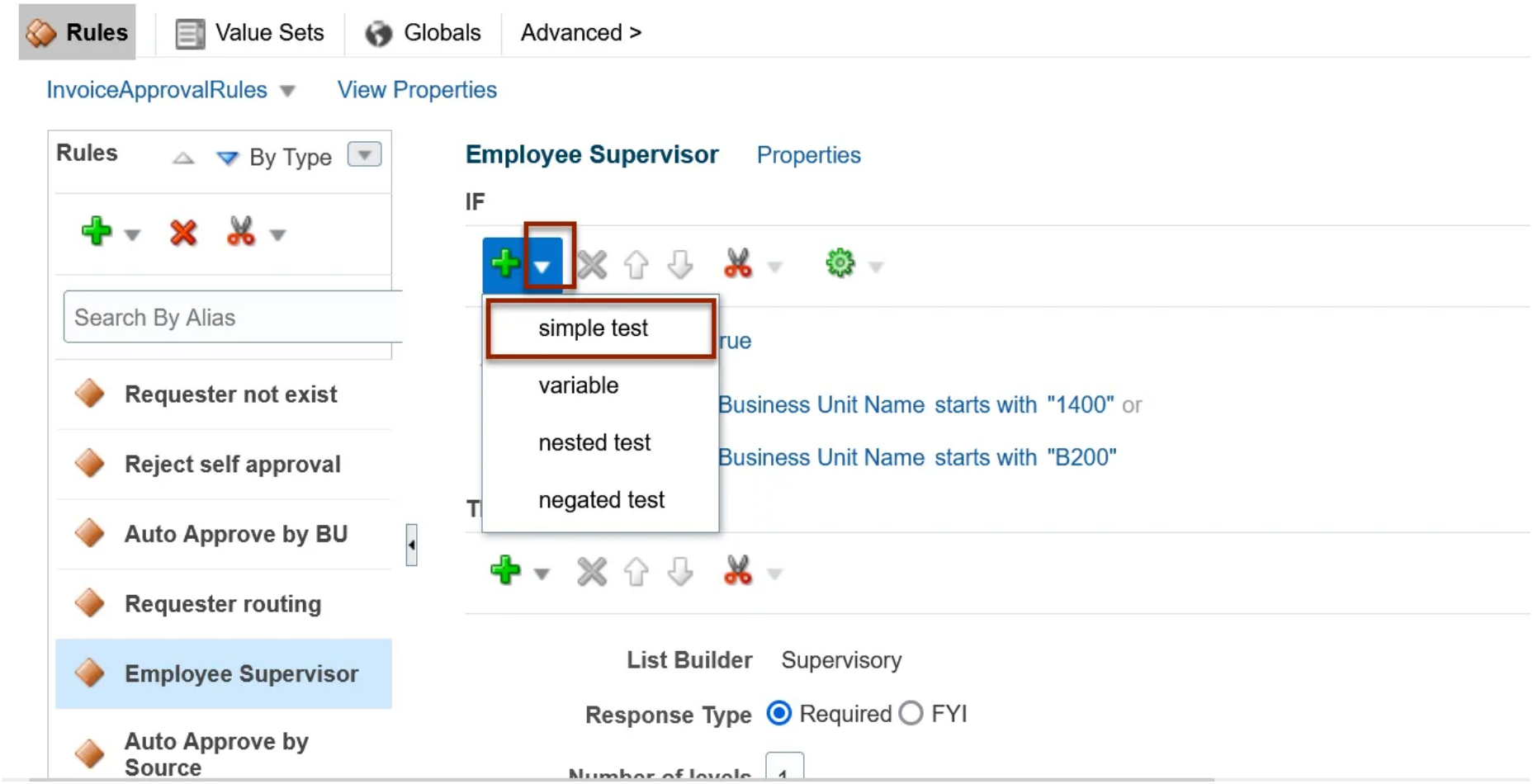
In this example, we choose **Invoice Header.Business Unit Name starts with “0500”**.

Image



Step 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.

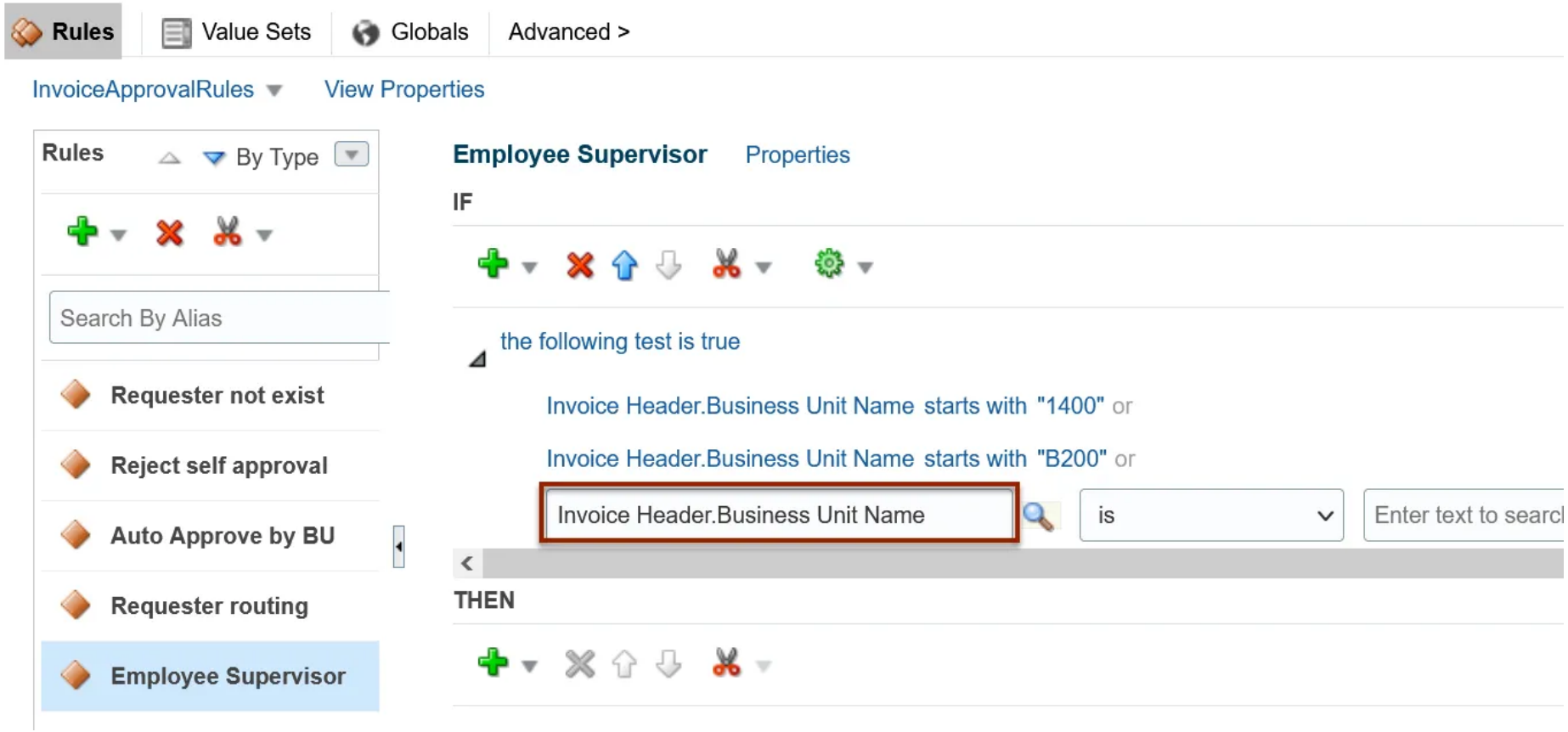
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Step 16. Enter the condition in the ***condition*** field.

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

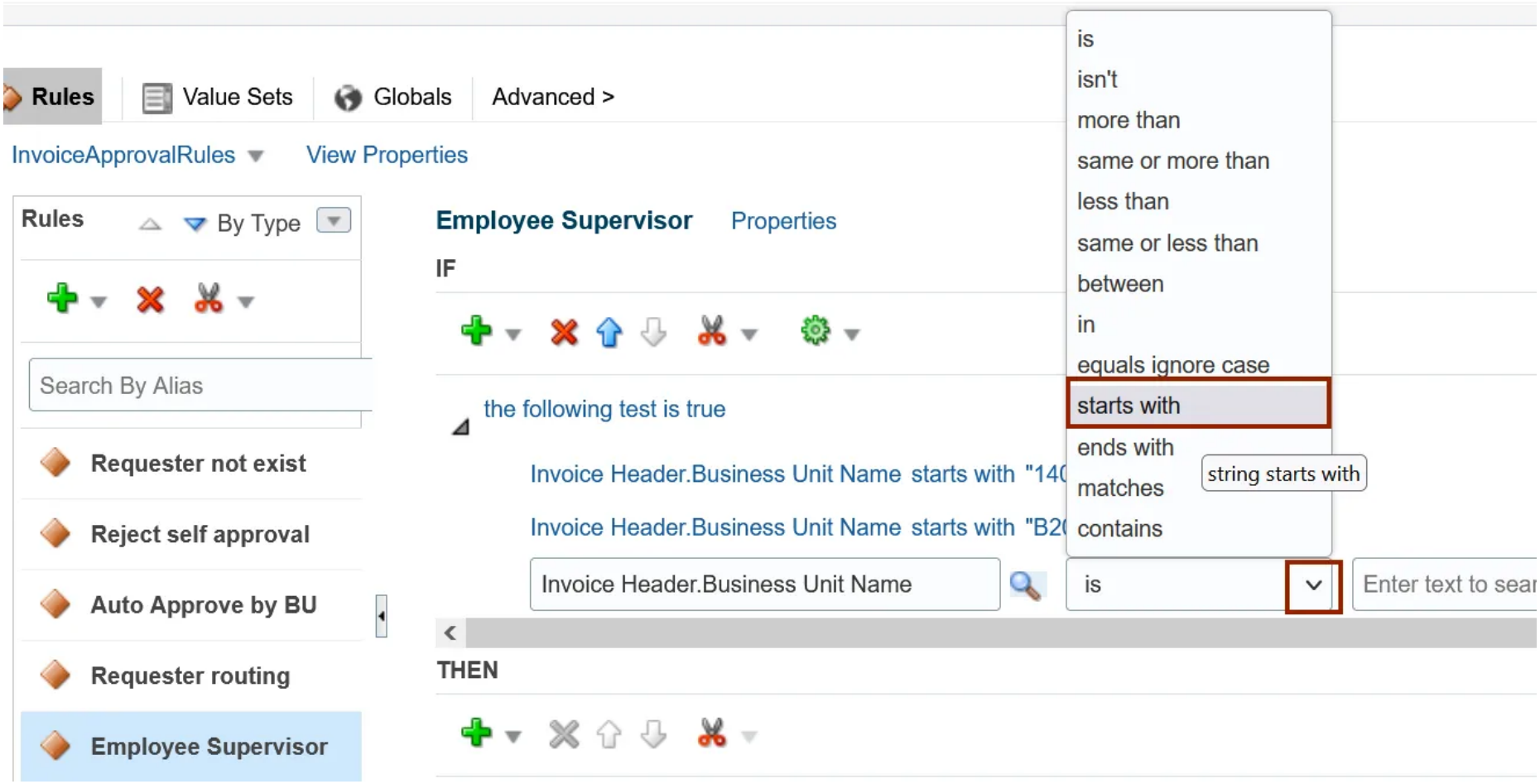
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Step 17. Select the corresponding *operator* from the drop-down choice list.

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

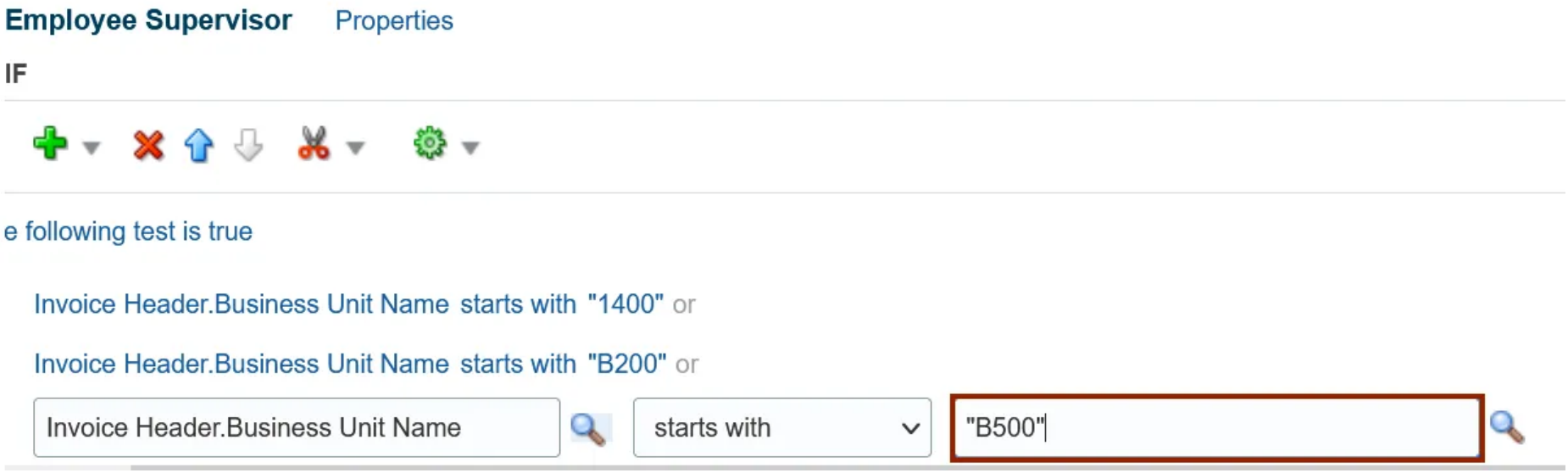
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Step 18. Enter the **condition value** in the ***value*** field.

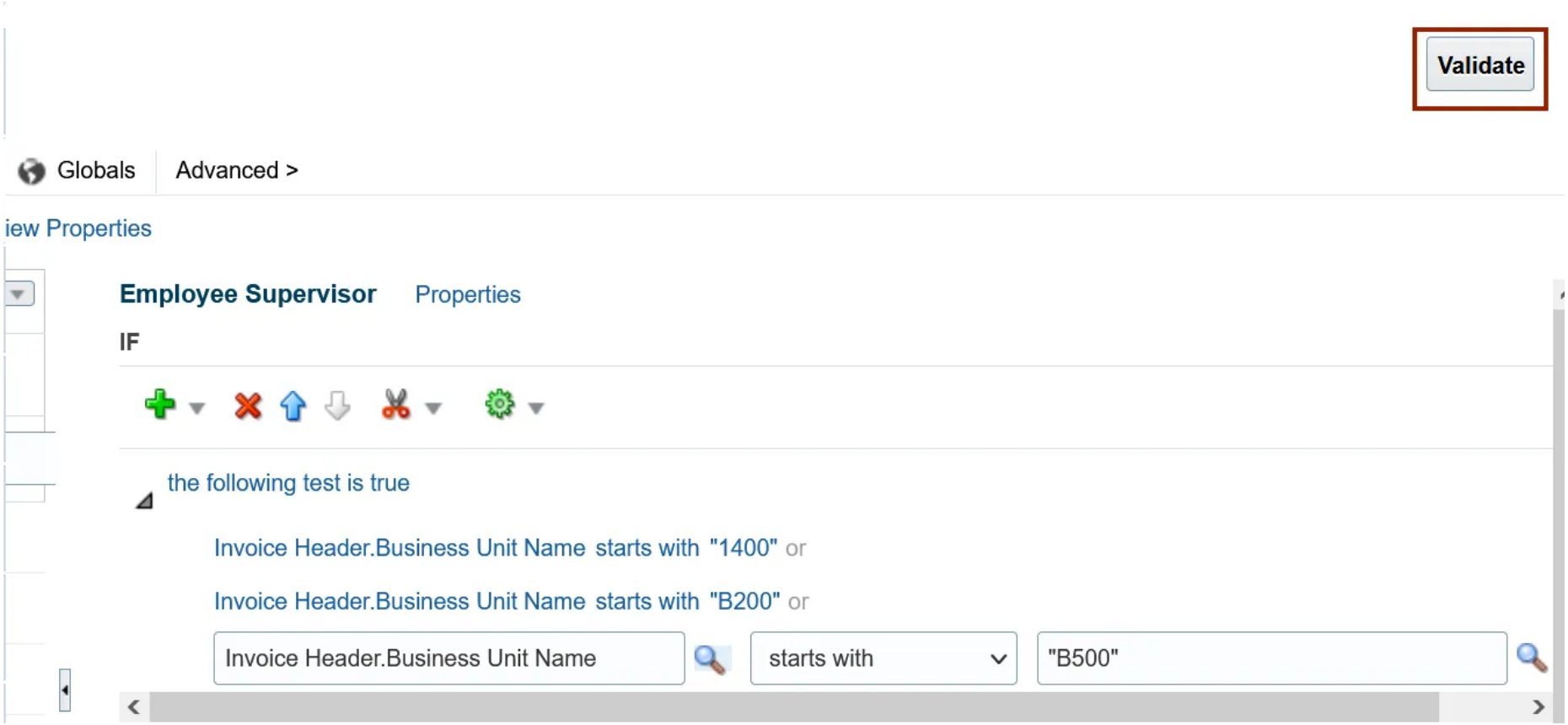
In this example, we choose **“B500”** as the **condition value**.

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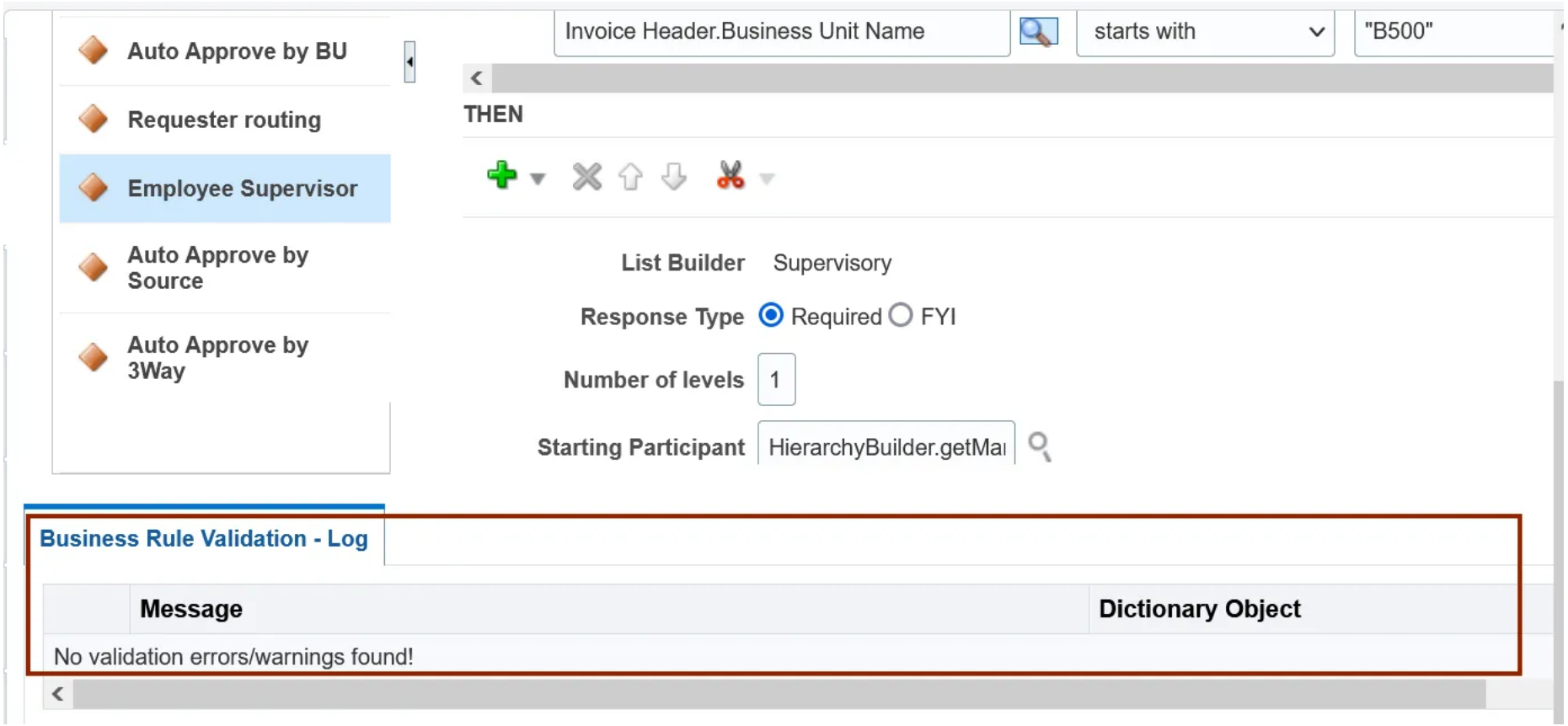
Step 19. Click the **Validate** button to validate the rules.

Image



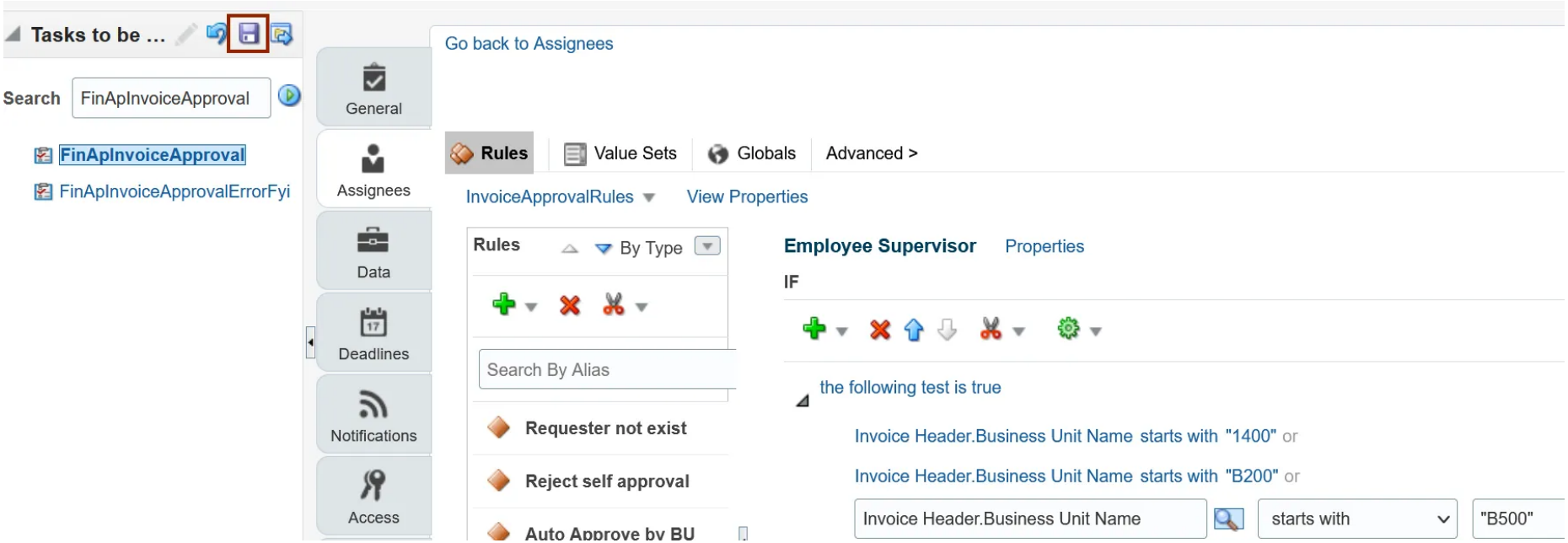
Step 20. Review the **Validation log** at the bottom of the ***Rules*** section to check if there are any errors/warnings found. Correct the rules and re-validate in case of any errors/warnings found.

Image



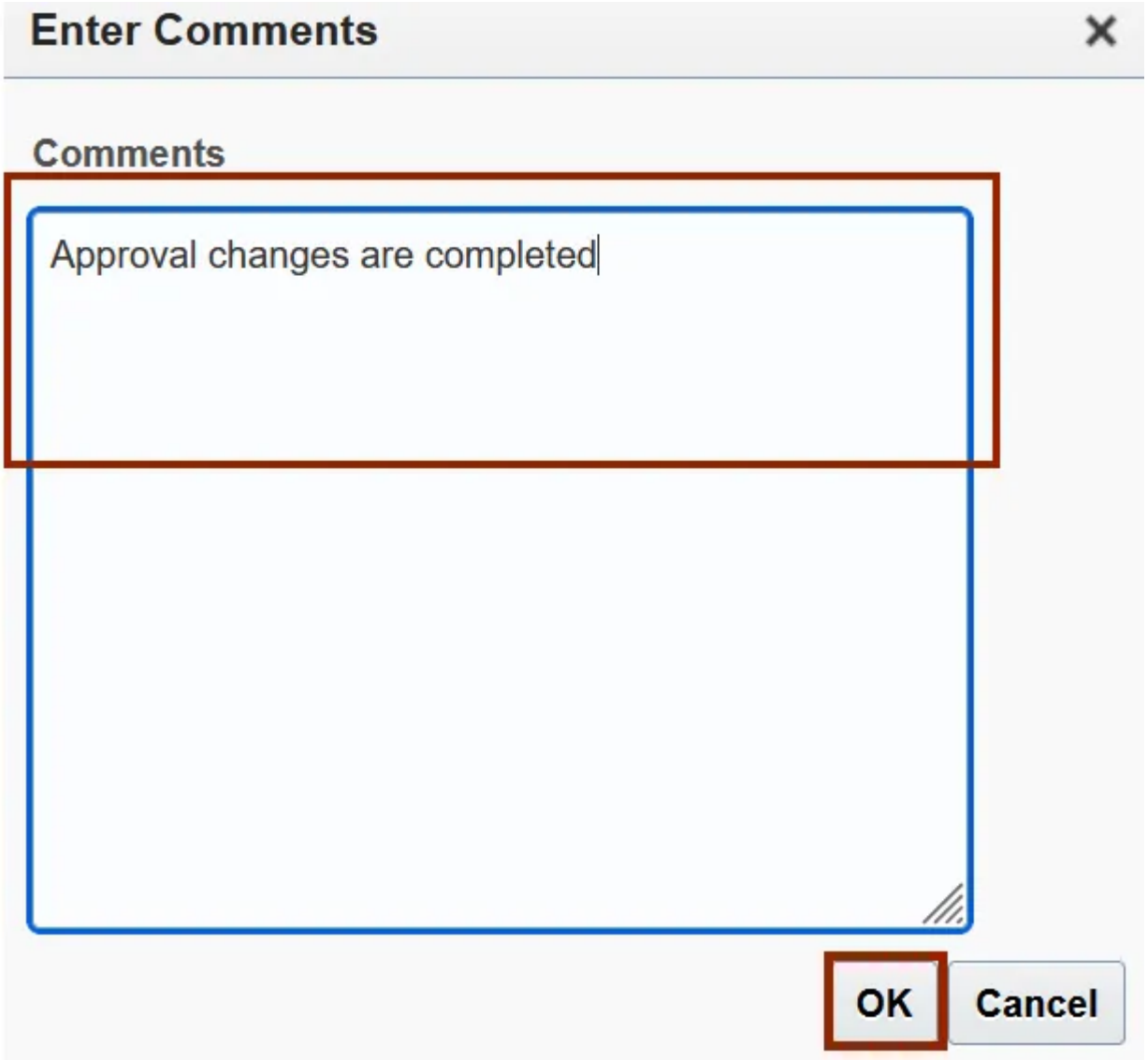
Step 21. In the top left corner of the **BPM Worklist** page, click on the **Save** icon to save the changes.

Image



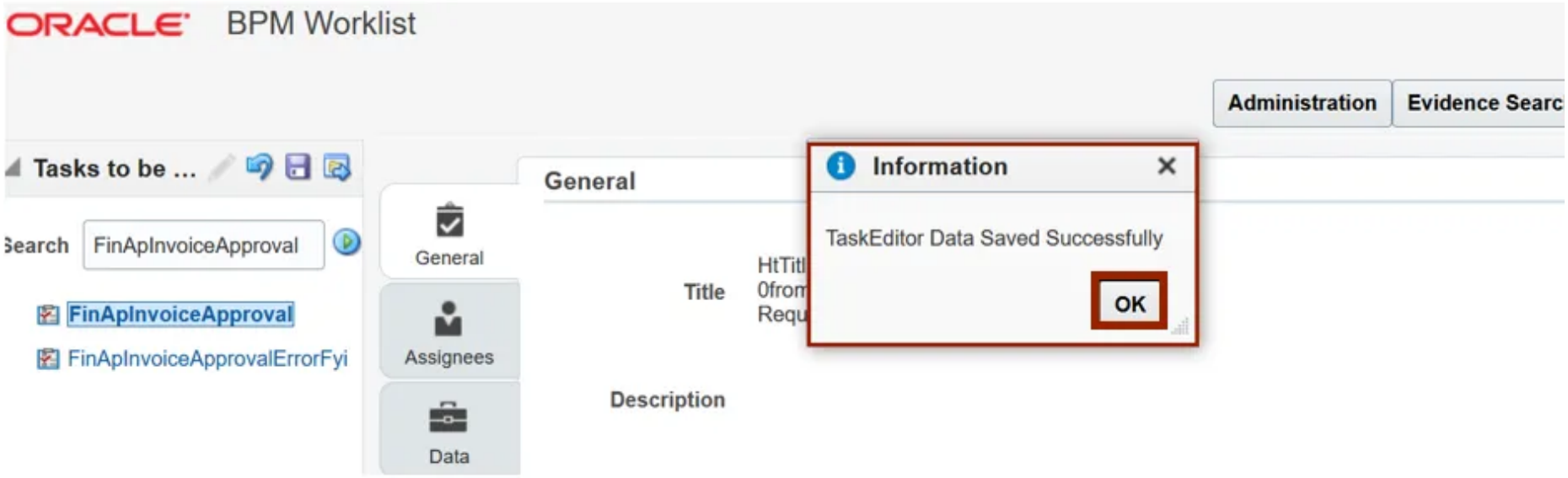
Step 22. On the *Enter Comments* pop-up page, enter appropriate comments and click the **OK** button.

Image



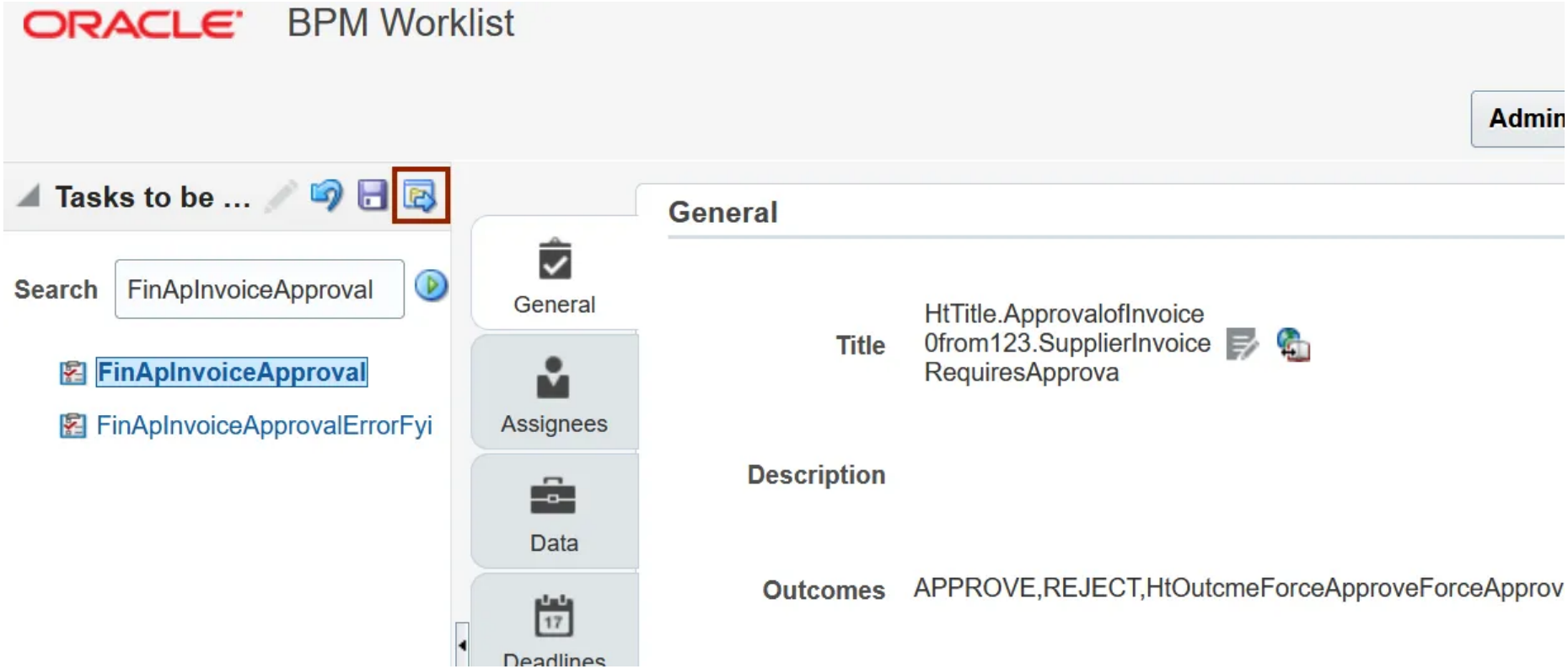
Step 23. The *Information* pop-up appears as a confirmation to save the changes. Click the **OK** button.

Image



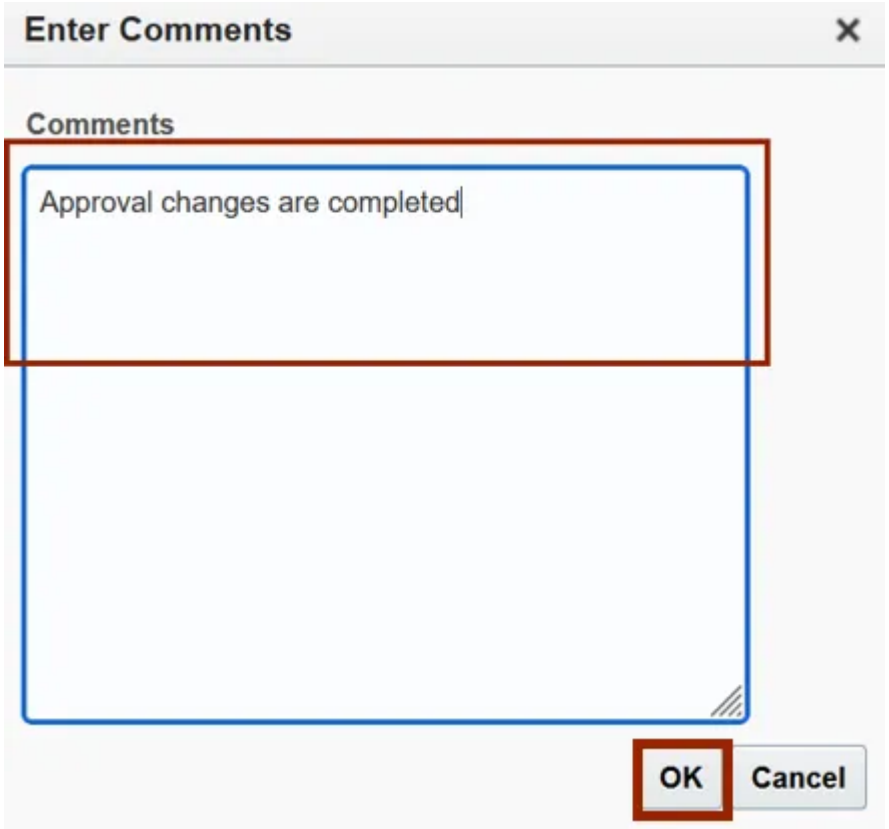
Step 24. Click on the **Commit Task** icon to deploy the changes.

Image



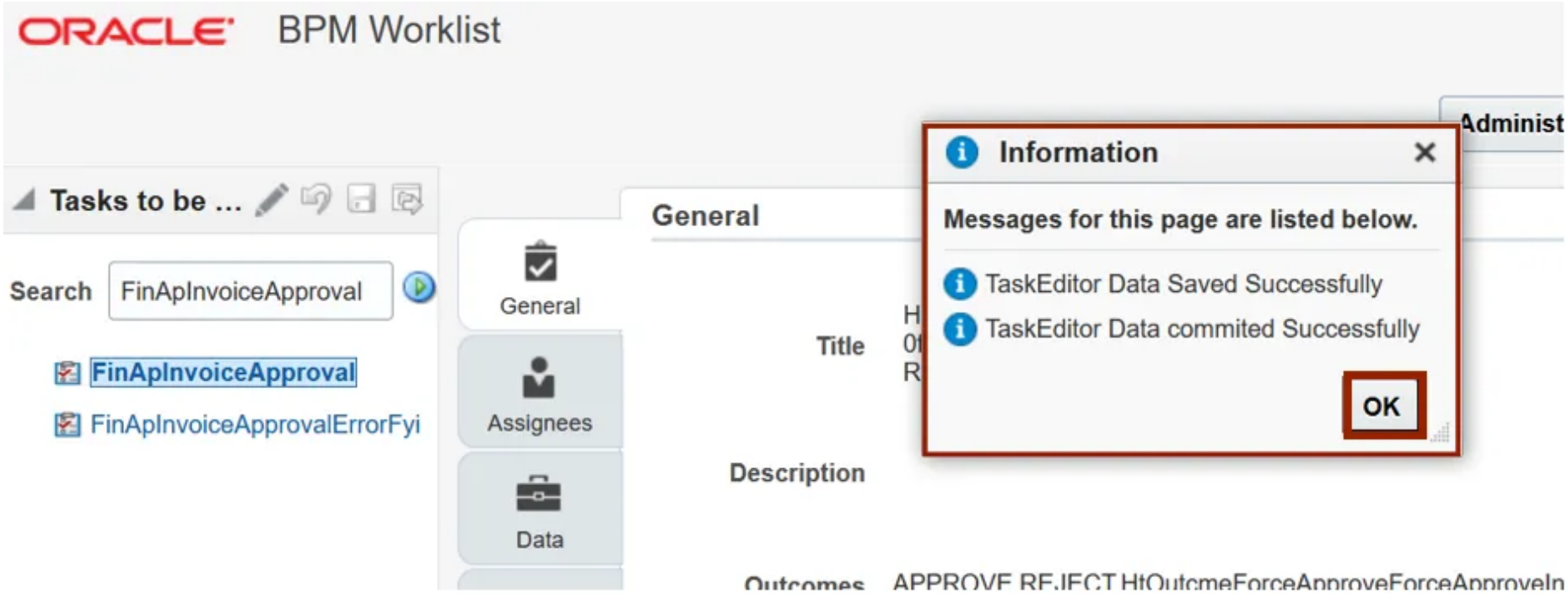
Step 25. On the *Enter Comments* pop-up page, enter appropriate comments and click the **OK** button.

Image



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

Image



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.

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