



Office of General Services Business Services Center

Purchase Order Change Notices In FileNet

June 26, 2019

Log into MyNY.gov to Access the Login Screen



The screenshot shows the MyNY.gov website. At the top left is the New York State logo. To its right are navigation links: Services, News, Government, and Local. Below this is a dark blue banner with three small images of people using technology and the text 'My NY.gov Online Services'. Under the banner, a message reads 'Please login after reading the Acceptable Use Policy below'. The main login area is titled 'NY.gov ID' and contains a 'Username:' label with an input field, a 'Password:' label with an input field, and a 'Sign In' button. Below the button are links for 'Forgot your Username or Password?' and 'NY.gov ID - Terms of Service'. At the bottom of the login area is a link for 'Agency Assistance & Contact Information'. At the very bottom of the page is the text 'ACCEPTABLE USE POLICY FOR USERS OF NY.gov'.

NEW YORK STATE

Services News Government Local

My NY.gov Online Services

Please login after reading the Acceptable Use Policy below

NY.gov ID

Username:

Password:

Sign In

Forgot your [Username](#) or [Password](#) ?

[NY.gov ID - Terms of Service](#)

[Agency Assistance & Contact Information](#)

ACCEPTABLE USE POLICY FOR USERS OF NY.gov

- 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.

Click “BSC FileNet POCN”

You have access to the following applications

BSC FileNet POCN

BSC FileNet Services

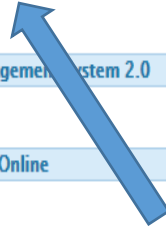
NEW NYS IT Service Management System 2.0

NYS IT Service Management System

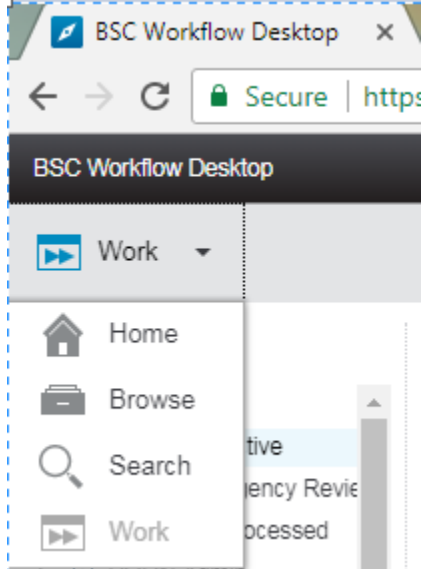
NYS Payroll Online

SFS Secure

Statewide Learning Management



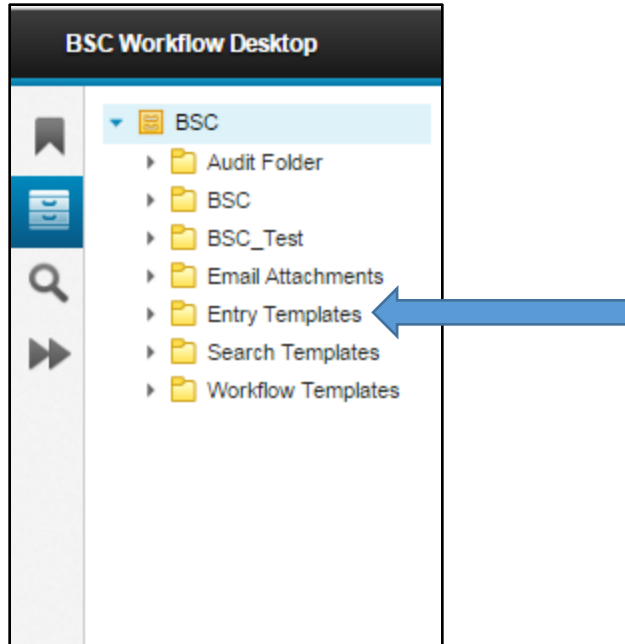
Click on “Open Browse View”



- The icon for “Open Browse View” is a file cabinet:



Click “Entry Templates”



Click “PO Change Notice Entry Template”





BSC Workflow Desktop

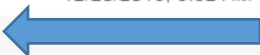
BSC

- Audit Folder
- BSC
- BSC_Test
- Email Attachments
- Entry Templates**
- Search Templates
- Workflow Templates

Refresh **Add Document** **Properties** **Actions**

BSC ▶ Entry Templates

	Name	Added On
	Cashier Add Document	8/3/2016, 10:22 AM
	Cashier Support Document	7/15/2016, 3:20 PM
	Invoice Lease Template	12/20/2016, 8:32 AM
	PO Change Notice Entry Template	



Entry Template

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: PO Change Notice Entry Template

What do you want to save?

Local document ▼

* File name: No file chosen

Properties

Class:

*Business Unit: ?

*PO Number: ?

*ContactName: ?

*ContactPhone: ?

*ContactEmail: ?

*SendToVendor: ?

Add

Cancel

POCN request WITHOUT attachment

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: PO Change Notice Entry Template

What do you want to save?

* File name:

Local document

Local document

Information about a document

Link to an external document

Properties

Class: Change Notices

*Business Unit: ? ABC01

*PO Number: ?

*ContactName: ?

*ContactPhone: ?

*ContactEmail: ?

*SendToVendor: ?

Add Cancel

- Select “Information about a document” from drop down menu.
- This allows you to create a work item without attaching a document.

POCN request WITH attachment

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:

PO Change Notice Entry Template

What do you want to save?

Local document

* File name:

Choose Files

No file chosen

Properties

Class: Change Notices

*Business Unit: ?

ABC01

*PO Number: ?

*ContactName: ?

*ContactPhone: ?

*ContactEmail: ?

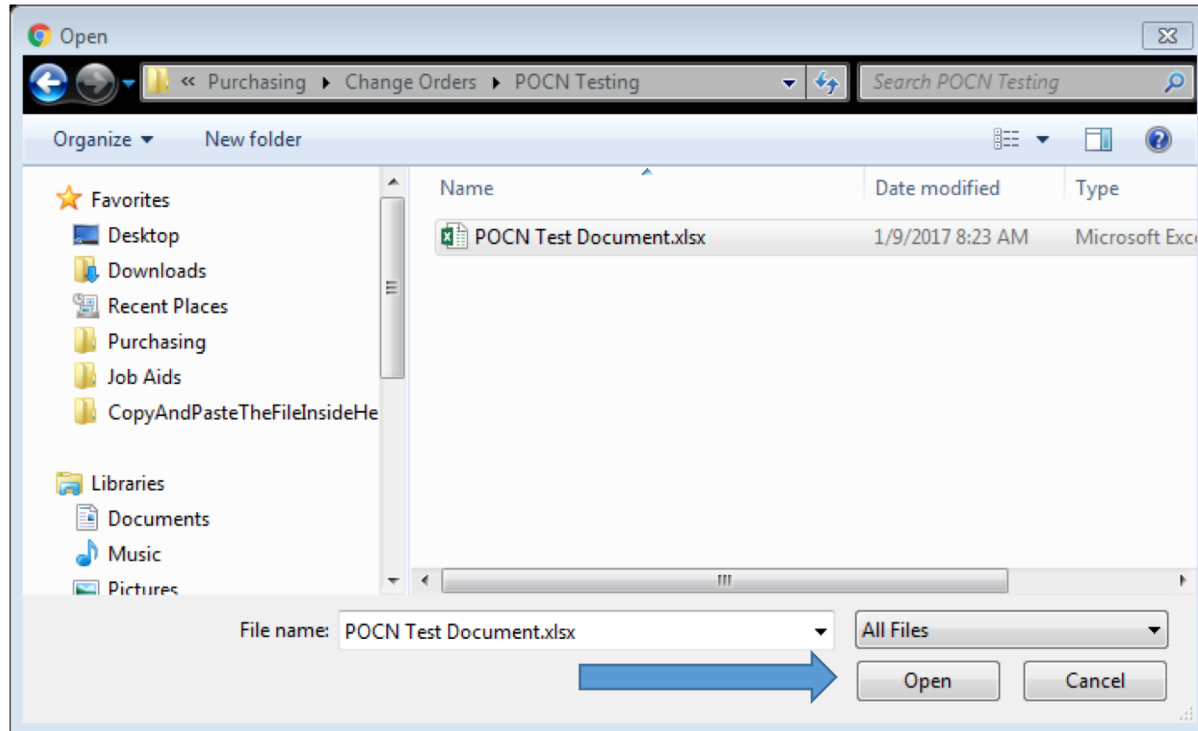
*SendToVendor: ?

Add

Cancel

- Leave “What do you want to save?” as “Local Document.”
- Click on “Choose Files.”

POCN request WITH attachment (continued)



- This allows you to search your computer for the file to attach.
- Select the file you want to attach and click “Open.”

POCN request WITH attachment (continued)

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:

PO Change Notice Entry Template

What do you want to save?

Local document ▼

* File name:

Choose Files

POCN Test Document.xlsx

▼ Properties

Class:

Change Notices

*Business Unit: ⓘ

ABC01 ▼

*PO Number: ⓘ

*ContactName: ⓘ

Add

Cancel

The uploaded file
will show here.

Fill in All Required Fields on Entry Template

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](#)

What do you want to save? Information about a document ▼

▼ Properties

Class:

*Business Unit:

*PO Number:

*ContactName:

*ContactPhone:

*ContactEmail:

*SendToVendor:

*Vendor Name:

*TypeOfRequest:

*Comments:

- ***PO Number:** Should be full 10 digit number including all zeros.
- ***ContactEmail:** the e-mail entered here will receive system generated notifications if agency action is required and upon POCN completion.
- ***Send to vendor field:**
 - If marked “True” the updated PO will be sent to the vendor.
 - If marked “False” the updated PO will NOT be sent to the vendor.
- ***Comments:** Specify the exact change requested.

Entry Template (continued)

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](#)

Properties

Class: Change Notices

*Business Unit: ?	OGS01
*PO Number: ?	1234567890
*ContactName: ?	Tricia Huff
*ContactPhone: ?	555-555-5555
*ContactEmail: ?	Tricia.Huff@ogs.ny.gov
*SendToVendor: ?	False
*Vendor Name: ?	Test Vendor
*TypeOfRequest: ?	Increase
*Comments: ?	Increase quantity on line 2 from 5 to 10
Unit ID: ?	



Add

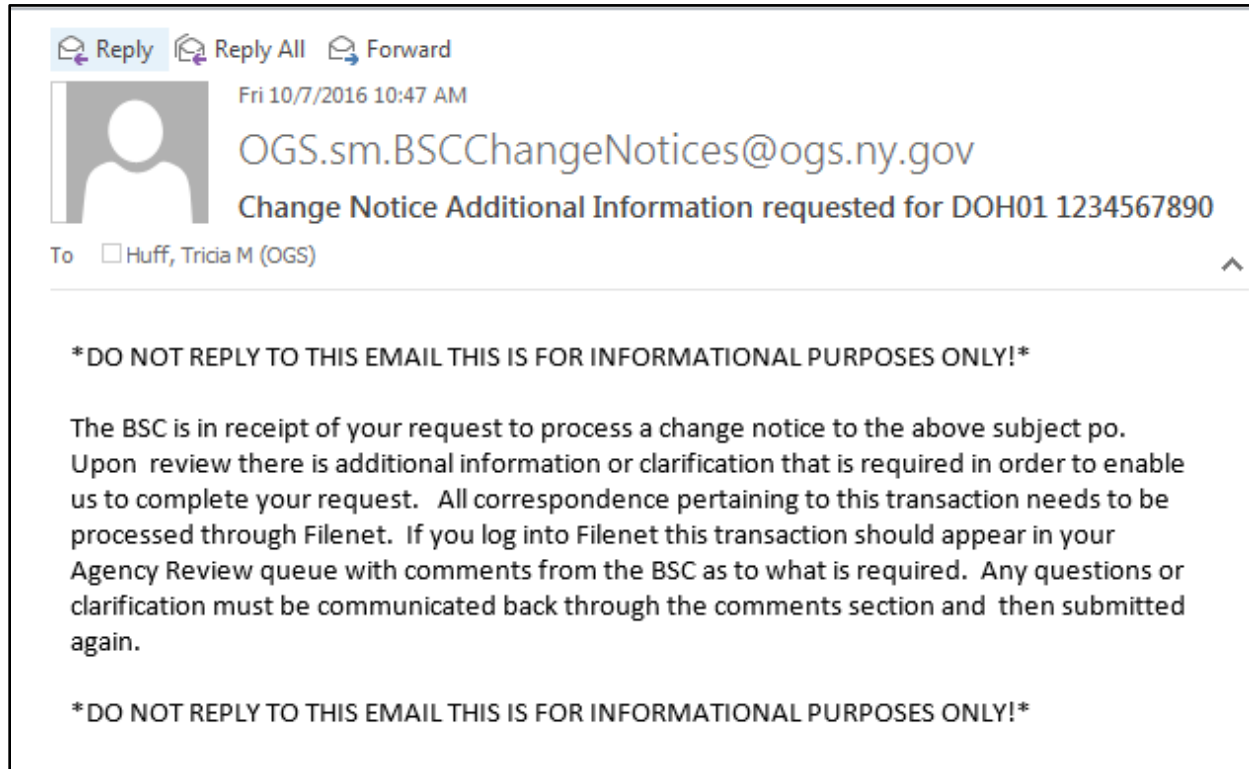
Cancel

- POCN requests cannot be submitted until all required fields are entered.
- Required fields are marked with an asterisk.
- Once all required fields are entered the “Add” button will activate (bold).
- Click “Add” to submit request for processing.

Agency Review

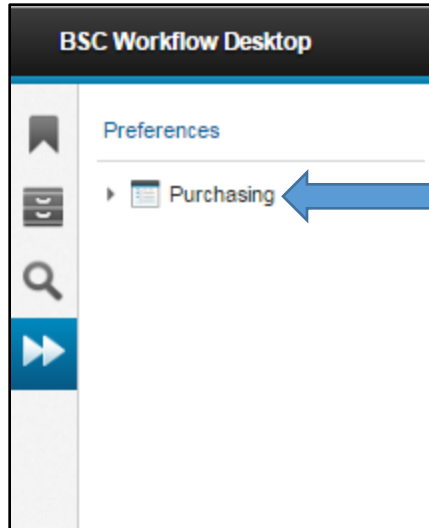
- When additional information or clarification is needed, the BSC will send the work item to the Agency Review queue.
- An email notification is automatically sent by the system when an item is sent to Agency Review.

E-mail notification for additional information

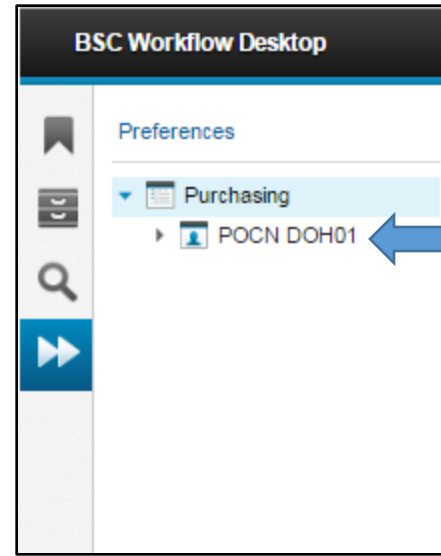


- **DO NOT REPLY TO THIS EMAIL** as it is for informational purposes only.
- All communication is done directly through FileNet.

Accessing Agency Review Queue



Click "Purchasing"



Then "POCN"

Agency Review Queue

This displays work items that require action by your agency. Double click on a work item to open it.

BSC Workflow Desktop

Preferences

- Purchasing
 - POCN DOH01
 - POCN DOH01 Agency Review


POCN DOH01 Agency Review

Get All Refresh Open Launch Workflow Export Unlock Actions

Purchasing > POCN DOH01 > POCN DOH01 Agency Review

Filter: No filters applied Reset

		BSCDateReceived	BusinessUnit	PONumber	Status	BuyerName	ContactEmail	Co
		12/7/2016, 11:16 AM	DOH01	0000000002	Pending Agency	Zelda	dania.marro@ogs.ny.gov	Dai
		12/7/2016, 11:49 AM	DOH01	0000000008	Pending Agency	Dania	dania.marro@ogs.ny.gov	Dai
		12/7/2016, 12:17 PM	DOH01	0000000019	Pending Agency	Dania	dania.marro@ogs.ny.gov	Dai
		1/9/2017, 11:08 AM	DOH01	0000022222	Pending Agency	Tricia	Tricia.Huff@ogs.ny.gov	Tric
		1/9/2017, 11:08 AM	DOH01	0000033333	Pending Agency	Tricia	Tricia.Huff@ogs.ny.gov	Tric
		1/9/2017, 11:09 AM	DOH01	0000044444	Pending Agency	Tricia	Tricia.Huff@ogs.ny.gov	Tric



Agency Review Queue (continued)

BSC Workflow Desktop Process Work Item - Google Chrome

https://sit.contentnow.ny.gov/navigator/stepprocessor.jsp?queueName=POCN_Agency&wobNum=86003326CD9E3D4F91B1404B4F70BA85&stepName=Agency%20F

Business Unit: DOH01PO Number: 0000000008

Due date: Not set | Started by: bscpo Agency | Received on: 12/7/2016, 1:50 PM | Step: Agency Review

Properties Attachments History

BSCDateReceived: 12/7/2016

BusinessUnit: DOH01

BuyerName: Dania

Comments:

12/07/2016 01:50:16 PM [Active] bscpoprocess
Unable to make amount only because it's already been invoiced. I can bring the line down to the invoiced amount and open a new line with the balance and make it amount only. Please let me know if this is how you would like to proceed.

12/07/2016 11:49:48 AM [Start] bscpoagency
Please make line 3 amount only.

ContactEmail: dania.marro@ogs.ny.gov

ContactName: Dania

ContactPhone: 555-555-5555

PONumber: 0000000008

SendToVendor: False

TypeOfRequest: Other

UnitID:

☐ Get next work item

Add Comment Agency Updated Save Cancel

- Comments field will display date/time stamped comments entered by both the agency and the BSC.
- The BSC will enter comments detailing the action required by the agency.
- Once comments are saved, they cannot be edited.

Agency Review Queue (continued)

BSC Workflow Desktop Process Work Item - Google Chrome

https://sit.contentnow.ny.gov/navigator/stepprocessor.jsp?queueName=POCN_Agency&wobNum=86003326CD9E3D4F91B1404B4F70BA85&stepName=

Business Unit: DOH01PO Number: 0000000008

Due date: Not set | Started by: bscpo Agency | Received on: 12/7/2016, 1:50 PM | Step: Agency Review

Properties Attachments History

12/07/2016 11:49:48 AM [Start] bscpoagency
Please make line 3 amount only.

Comments: ?

ContactEmail: ? dania.marro@ogs.ny.gov

ContactName: ? Dania

ContactPhone: ? 555-555-5555

PONumber: ? 0000000008

SendToVendor: ? False

TypeOfRequest: ? Other

UnitID: ?

VendorName: ? Kasselman

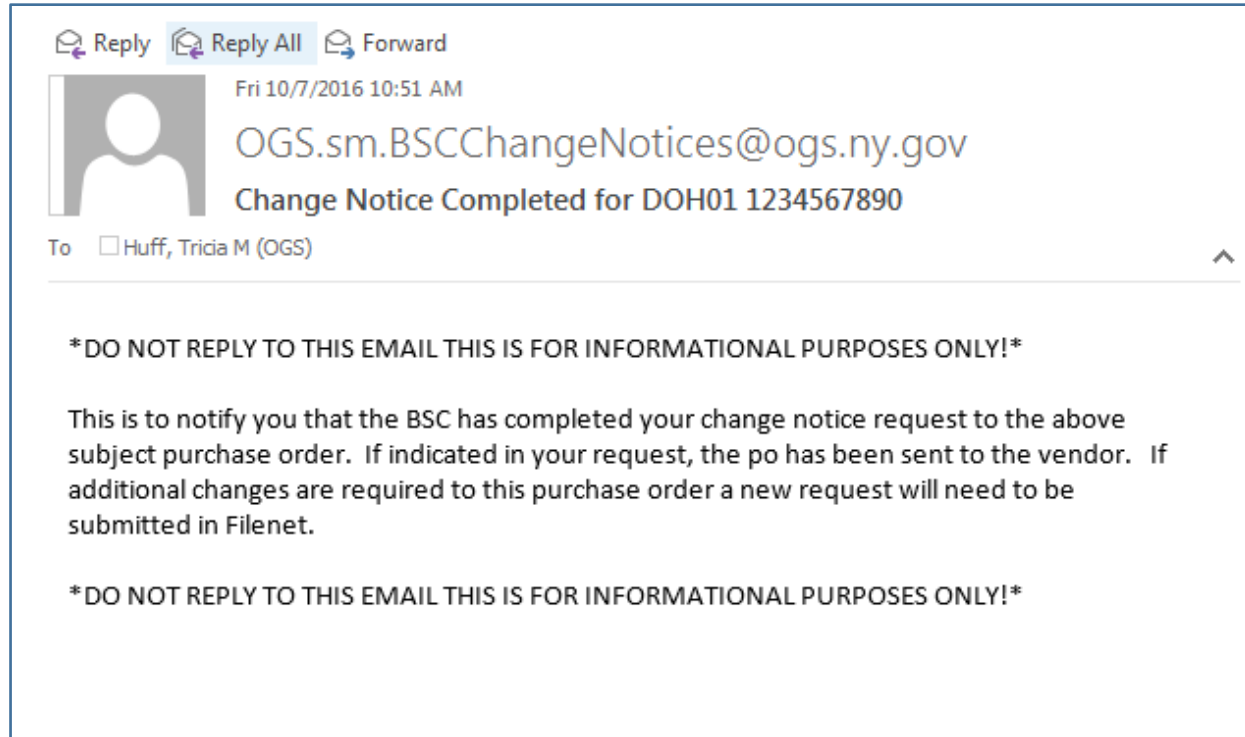
Comment: ?

☐ Get next work item

Add Comment Agency Updated Save Cancel

- When the agency action is complete, click “Agency Updated.”
- This will remove the item from your agency review queue and send it back to the BSC.

E-mail Notification for Completed POCN



- Once the POCN is completed by the BSC, a system generated email notification is sent to the agency.
- **DO NOT REPLY TO THIS EMAIL** as it is for informational purposes only.
- All communication is done directly through FileNet.

Filtering results in Agency Review

POCN DOH01 Agency Review

Get All Refresh Open Launch Workflow Export Unlock Actions

Purchasing > POCN DOH01 > POCN DOH01 Agency Review

Filter: No filters applied Reset

	BSCDateReceived	BusinessUnit	PONumber
	12/7/2018, 11:18 AM	DOH01	0000000002

- Click "Filter."
- This opens fields that you can filter results by.

POCN DOH01 Agency Review

Get All Refresh Open Launch Workflow Export Unlock Actions

Purchasing > POCN DOH01 > POCN DOH01 Agency Review

Filter: No filters applied Reset

BSCDateReceived From (is greater than):

BSCDateReceived To (is less than or equal to):

PONumber (is like):

Status (is like):

VendorNumber (is like):

VendorName (is like):

BusinessUnit (equals):

BuyerName (equals):

ContactEmail (equals):

ContactName (equals):

Filtering results in Agency Review (continued)

- You can filter using the exact information for that field or;
- You can also search using the percent sign (%) as a wildcard symbol.

POCN DOH01 Agency Review

Get All Refresh Open Launch Workflow Export Unlock Actions

Purchasing > POCN DOH01 > POCN DOH01 Agency Review

Filter: No filters applied Reset

BSCDateReceived From (is greater than):	M/d/yyyy, h:mm a
BSCDateReceived To (is less than or equal to):	M/d/yyyy, h:mm a
PONumber (is like):	
Status (is like):	
VendorNumber (is like):	
VendorName (is like):	T%
BusinessUnit (equals):	
BuyerName (equals):	
ContactEmail (equals):	
ContactName (equals):	

- For example: To filter results for any items with a vendor name that starts with T, enter T%.
- Scroll to the bottom and click "OK."

ContactName (equals):	
ContactPhone (equals):	
SendToVendor (equals):	
TypeOfRequest (equals):	
UnitID (equals):	

OK Reset Cancel

Filtering results in Agency Review (continued)

The queue is now filtered to show any items with a vendor name starting with T.

POCN DOH01 Agency Review

Get All

Refresh

Open

Launch Workflow




Export

Unlock

Actions ▾

Purchasing > POCN DOH01 > POCN DOH01 Agency Review

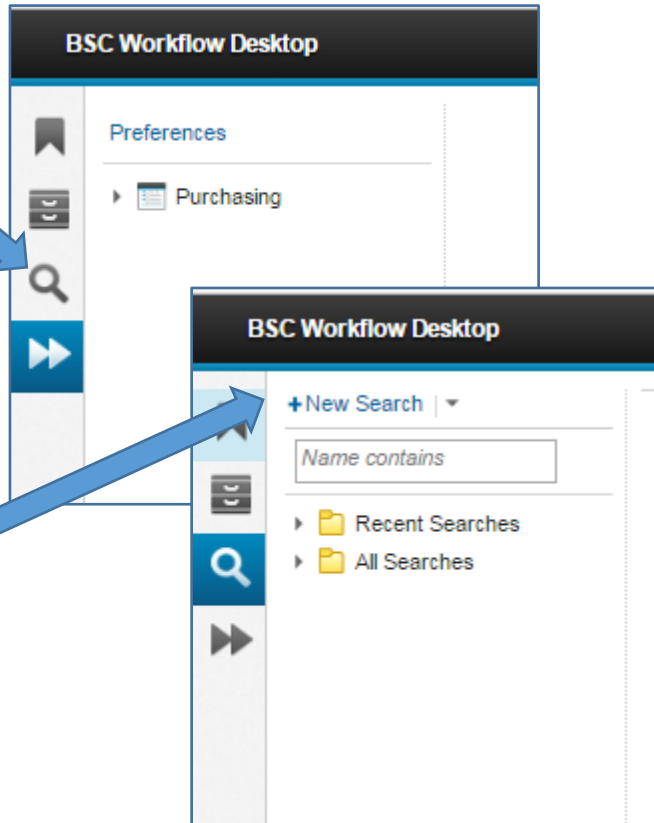
Filter: 1 applied [Reset](#)

	BSCDateReceived ▲	BusinessUnit	PONumber	Status	BuyerName	ContactEmail	ContactName	ContactPhone	SendToVendor	TypeOfRequest	VendorName
	1/9/2017, 11:08 AM	DOH01	0000022222	Pending Agency	Tricia	Tricia.Huff@ogs.ny.go	Tricia Huff	518-555-5555	True	Increase	Training Vendor 1
	1/9/2017, 11:08 AM	DOH01	0000033333	Pending Agency	Tricia	Tricia.Huff@ogs.ny.go	Tricia Huff	518-555-5555	False	Decrease	Training vendor 2
	1/9/2017, 11:09 AM	DOH01	0000044444	Pending Agency	Tricia	Tricia.Huff@ogs.ny.go	Tricia Huff	518-555-5555	False	Change Coding	Training Vendor 3

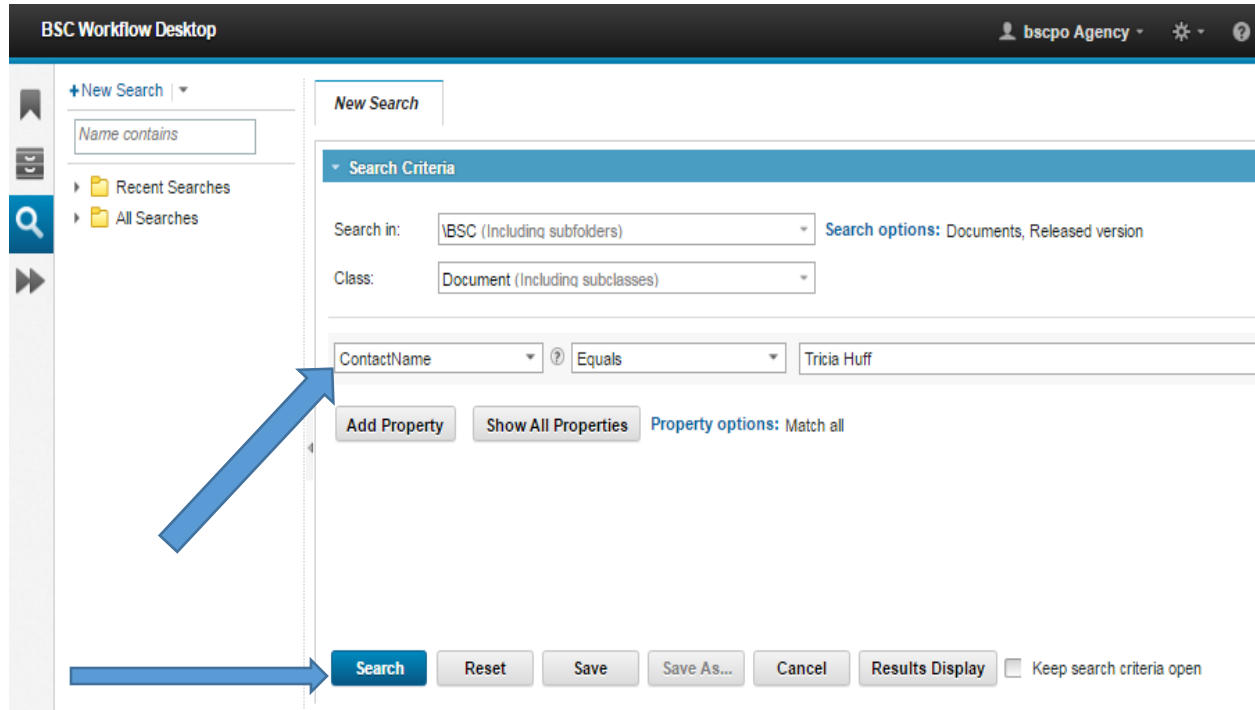
Search

Click “Open Search View.”

Click “+New Search.”



You can select the field to search by using the dropdown.



The screenshot shows the 'BSC Workflow Desktop' interface. On the left, there is a sidebar with a search icon and a list of search criteria: 'Name contains', 'Recent Searches', and 'All Searches'. The main area is titled 'New Search' and contains a 'Search Criteria' section. This section has two dropdown menus: 'Search in:' set to '\BSC (Including subfolders)' and 'Class:' set to 'Document (Including subclasses)'. Below these, there is a search criteria row with a dropdown menu set to 'ContactName', a comparison operator dropdown set to 'Equals', and a text input field containing 'Tricia Huff'. To the right of this row are buttons for 'Add Property' and 'Show All Properties', and a 'Property options: Match all' label. At the bottom of the interface, there is a row of buttons: 'Search', 'Reset', 'Save', 'Save As...', 'Cancel', and 'Results Display'. A checkbox labeled 'Keep search criteria open' is located to the right of the 'Results Display' button. Two blue arrows are overlaid on the image: one points from the left towards the 'ContactName' dropdown menu, and the other points from the bottom left towards the 'Search' button.

For example: to search by Contact Name—select “ContactName” from the dropdown, enter a name, and click “Search.”

All requests including the contact name selected will populate.

Search Results

Refresh Add Document Properties Actions

Showing results for: New Search

	Name	Size	Modified By	Modified On	Major Version
	0000003432.pdf	14 KB	iedr P8admin	10/14/2016, 2:21 PM	1
	ABC01 0000000001	14 KB	iedr P8admin	12/29/2016, 10:23 AM	1
	DOH01 0000012345		iedr P8admin	10/14/2016, 2:21 PM	1
	DOH01 0000022222		iedr P8admin	9/30/2016, 11:24 AM	1
	DOH01 1111111111		iedr P8admin	12/13/2016, 8:01 AM	1
	DOH01 1111122222		iedr P8admin	10/5/2016, 10:09 AM	1
	DOH01 1234567890		iedr P8admin	12/9/2016, 3:05 PM	1
	DOH01 1234567890		iedr P8admin	10/7/2016, 10:51 AM	1
	DOH01 2222222222		iedr P8admin	10/19/2016, 9:23 AM	1
	DOH01 2222244444	11 KB	iedr P8admin	10/18/2016, 8:09 AM	1
	DOH01 4444455555		iedr P8admin	10/7/2016, 1:32 PM	1
	POCNAudit 0000012345	4 KB	iedr P8admin	10/14/2016, 2:21 PM	1
	POCNAudit 0000022222	4 KB	iedr P8admin	9/30/2016, 11:24 AM	1
	POCNAudit 1111111111	4 KB	iedr P8admin	12/13/2016, 8:01 AM	1
	POCNAudit 1111122222	3 KB	iedr P8admin	10/5/2016, 10:09 AM	1
	POCNAudit 1234567890	4 KB	iedr P8admin	10/7/2016, 10:51 AM	1
	POCNAudit 2222222222	3 KB	iedr P8admin	10/19/2016, 9:23 AM	1
	POCNAudit 2222244444	3 KB	iedr P8admin	10/18/2016, 8:09 AM	1
	POCNAudit 4444455555	4 KB	iedr P8admin	10/7/2016, 1:32 PM	1

Click on a search result and the properties box will open on the right showing details, including the status (WorkStep).

Properties Edit

Class:	Change Notices
Document Title:	DOH01 1234567890
Business Unit:	DOH01
Date Received:	12/9/2016, 12:00 AM
PO Number:	1234567890
POCNDocType:	Change Notice
WorkStep:	Processing
Vendor Name:	test vendor
SendToVendor:	True
ContactEmail:	tricia.huff@ogs.ny.gov
ContactName:	Tricia Huff
ContactPhone:	518-408-7145
TypeOfRequest:	Increase
Comments:	add \$200

Example of a search by WorkStep:

The screenshot shows the BSC Workflow Desktop interface. On the left is a sidebar with navigation icons. The main area is titled 'New Search' and contains a 'Search Criteria' section. In this section, 'Search In:' is set to 'BSC (including subfolders)', 'Class:' is 'Document (including subclasses)', and 'WorkStep' is set to 'Agency Review'. A blue arrow points to the 'WorkStep' dropdown. Below the search criteria are buttons for 'Add Property', 'Show All Properties', and 'Property options: Match all'. At the bottom of the search criteria section are buttons for 'Search', 'Reset', 'Save', 'Save As...', 'Cancel', and 'Results Display'. Below the search criteria is a 'Search Results' section with buttons for 'Refresh', 'Add Document', 'Properties', and 'Actions'. It shows 'Showing results for: New Search' and a table of results.

	Name	Size	Modified By	Modified On	Major Version
	DOCD1 0000000005		ledr P8admin	12/13/2016, 3:28 PM	1
	DOHD1 0000000002		ledr P8admin	12/13/2016, 3:28 PM	1
	DOHD1 0000000008		ledr P8admin	12/7/2016, 1:50 PM	1
	DOHD1 0000000009		ledr P8admin	12/13/2016, 3:31 PM	1
	DOHD1 0000000012		ledr P8admin	12/7/2016, 2:16 PM	1
	DOHD1 0000000014		ledr P8admin	12/30/2016, 8:17 AM	1
	DOHD1 0000000016		ledr P8admin	12/13/2016, 8:01 AM	1
	DOHD1 0000000018		ledr P8admin	12/7/2016, 2:56 PM	1
	DOHD1 0000000019		ledr P8admin	12/12/2016, 1:37 PM	1
	DOHD1 1111111	19 KB	ledr P8admin	12/30/2016, 8:17 AM	1
	DOHD1 1337133700		ledr P8admin	12/5/2016, 11:47 AM	1
	PO Change Order - 0000000345	11 KB	ledr P8admin	8/28/2014, 3:47 PM	1

Select WorkStep from the dropdown and enter the title of WorkStep you are looking for:

- Agency Review
- Processing
- Processed

Exporting to MS Excel

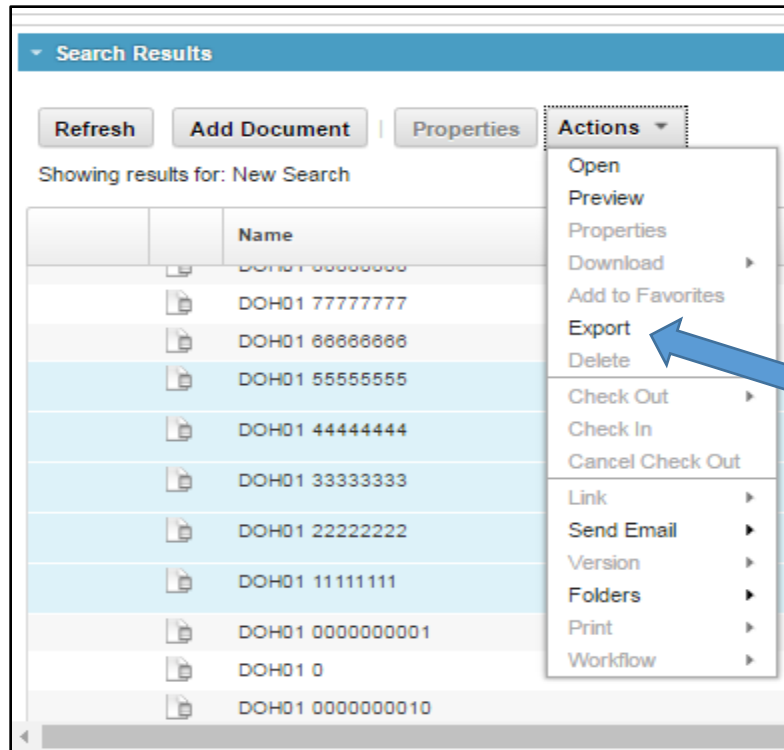
Items can be exported into MS Excel by clicking the “Actions” button.

The screenshot displays the BSC Workflow Desktop application. The top bar shows 'BSC Workflow Desktop' and a user profile 'bapco'. On the left, there's a sidebar with 'New Search' and a search input field. The main area is titled 'New Search' and contains search criteria: 'Search in: BSC (Including subfolders)', 'Search options: Documents, Released version', 'Class: Document (Including subclasses)', 'WorkStep', 'Starts With', and 'P%'. Below these are buttons for 'Add Property', 'Show All Properties', and 'Property options: Match all'. A 'Search' button is at the bottom left of the search criteria section. The 'Search Results' section shows a table of results with columns: Name, Size, Modified By, Major Version, and a 'Actions' button. A blue arrow points to the 'Actions' button. The table contains 10 rows of search results.

Name	Size	Modified By	Major Version
DOH01 77777777		ledr P8admin	12/15/2016, 1:27 PM
DOH01 66666666		ledr P8admin	12/15/2016, 1:27 PM
DOH01 55555555		ledr P8admin	12/15/2016, 12:49 PM
DOH01 44444444		ledr P8admin	12/15/2016, 12:49 PM
DOH01 33333333		ledr P8admin	12/15/2016, 12:48 PM
DOH01 22222222		ledr P8admin	12/15/2016, 12:48 PM
DOH01 11111111		ledr P8admin	12/15/2016, 12:48 PM
DOH01 000000001		ledr P8admin	12/14/2016, 7:40 AM
DOH01 0		ledr P8admin	12/14/2016, 7:40 AM
DOH01 0000000010		ledr P8admin	12/13/2016, 3:30 PM

Exporting to MS Excel (continued)

And then export:



This will send the selected items to an excel spreadsheet.