NEW YORK
STATE OF
OPPORTUNITY.

Office of General Services
Business Services Center

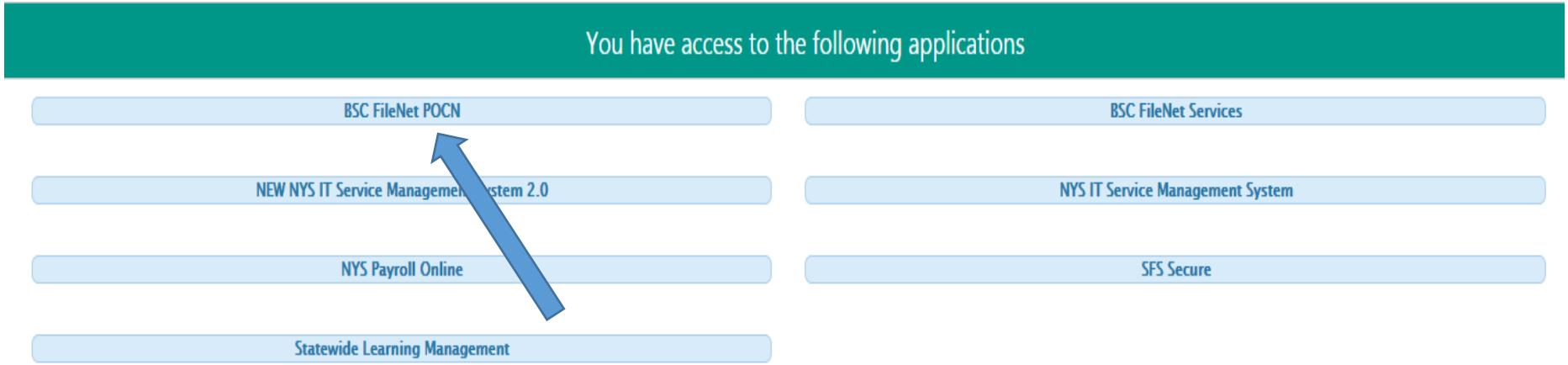
Purchase Order Change Notices In FileNet

June 26, 2019

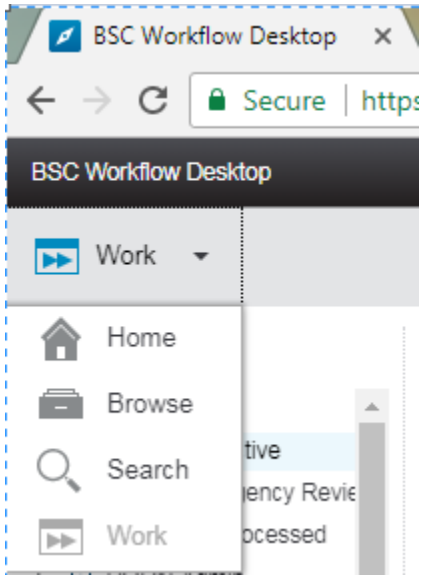
Log into MyNY.gov to Access the Login Screen

- 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”

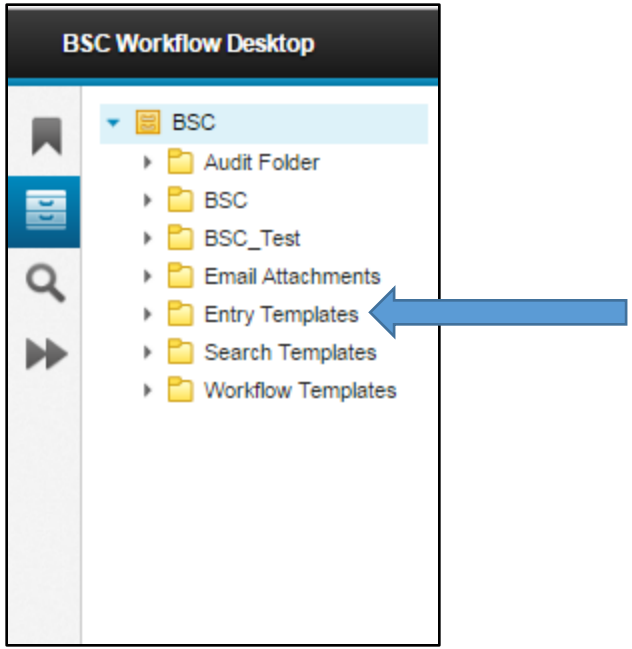


Click on “Open Browse View”

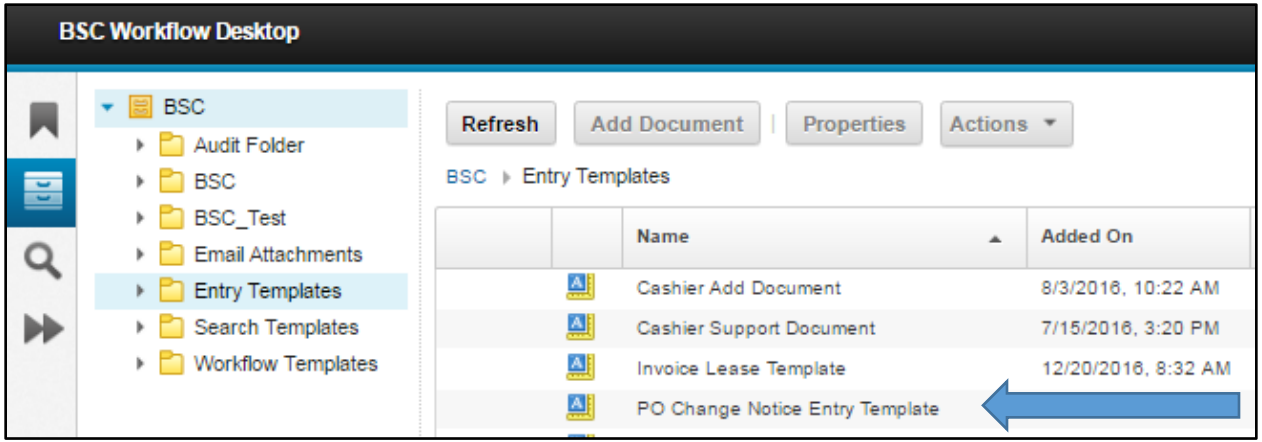


- The icon for “Open Browse View” is a file cabinet:

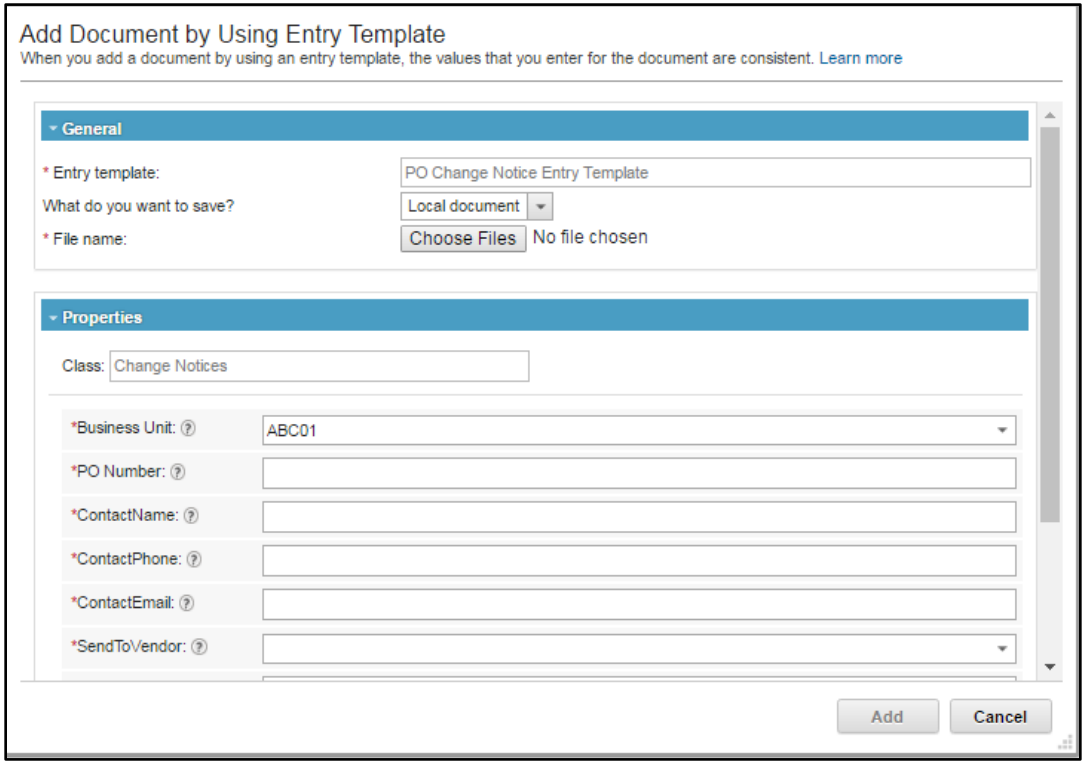
Click “Entry Templates”



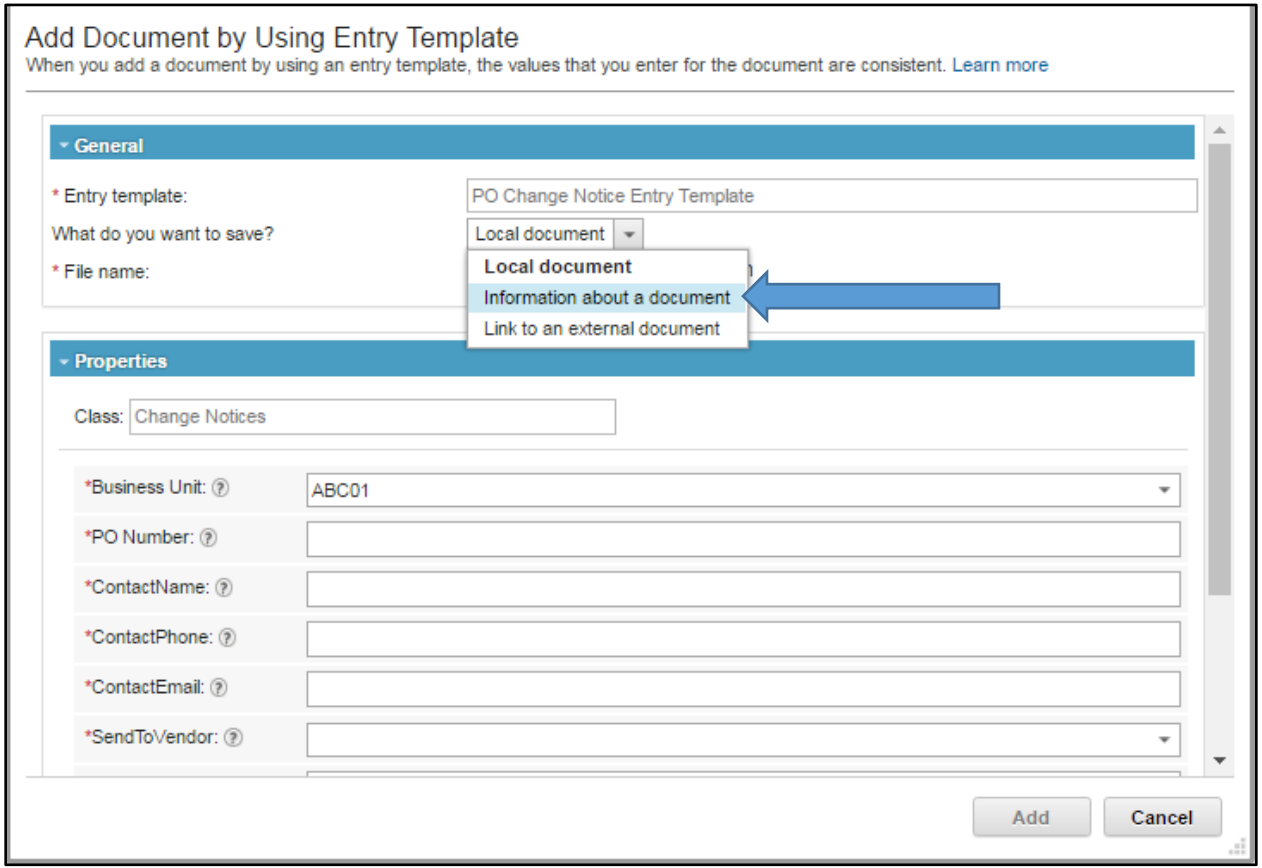
Click “PO Change Notice Entry Template”



Entry Template



POCN request WITHOUT attachment



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

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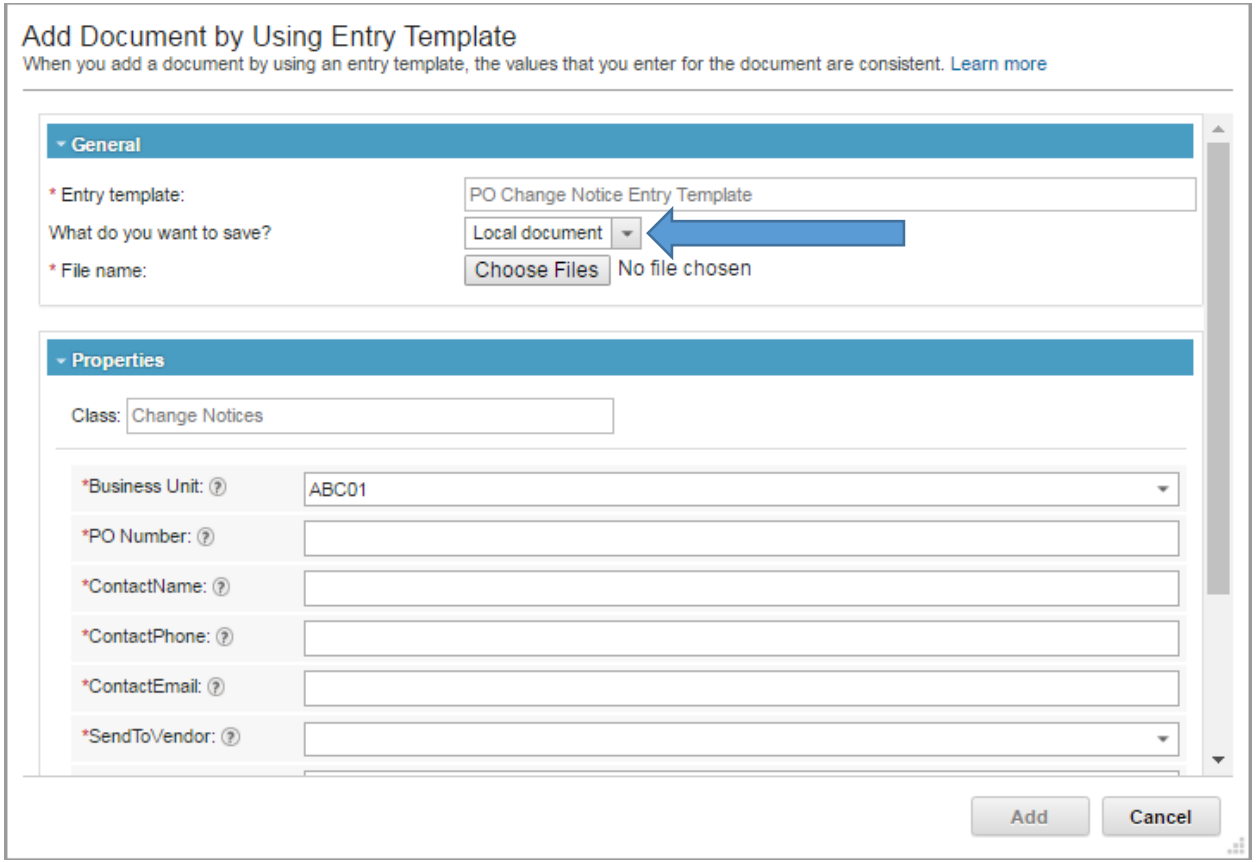
POCN request WITH attachment



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

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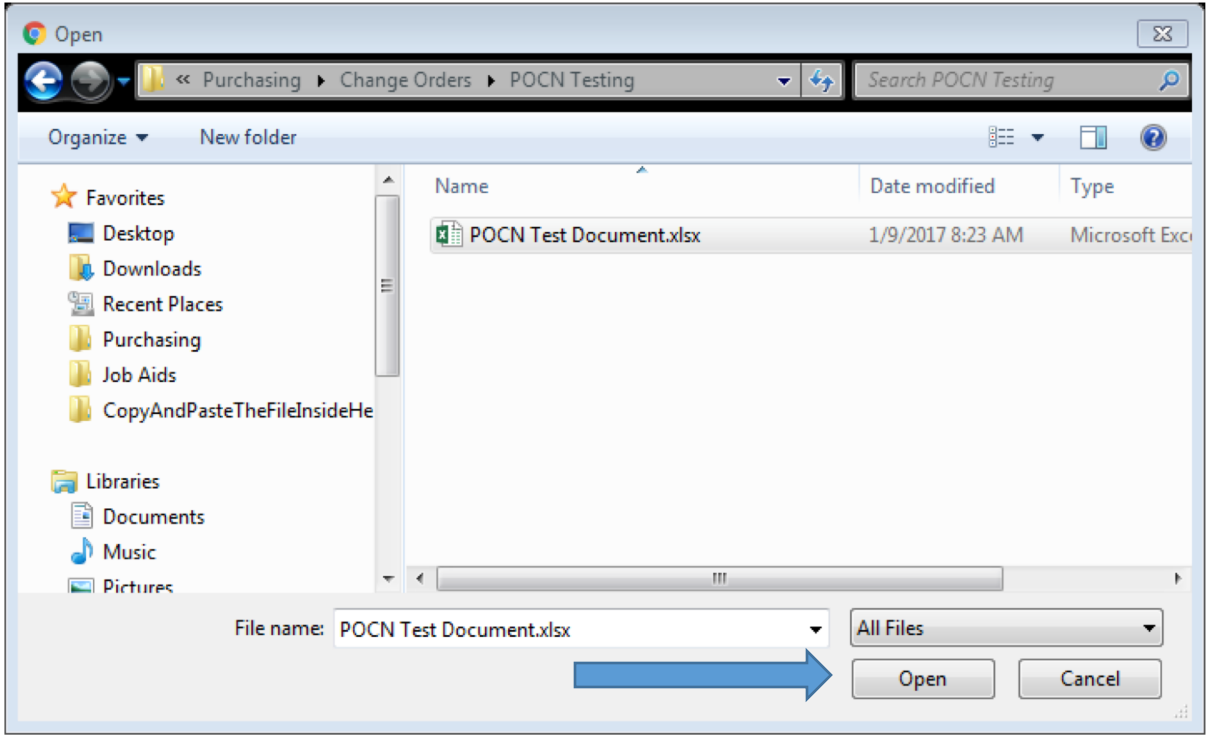
POCN request WITH attachment (continued)



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

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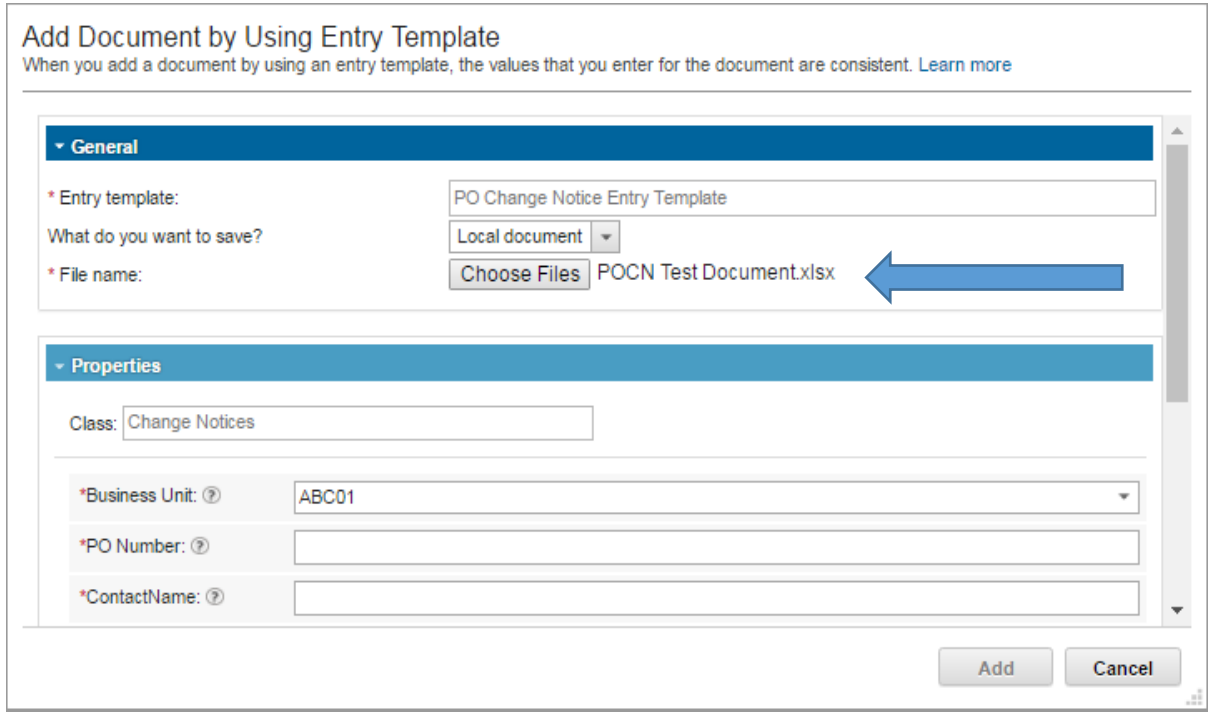
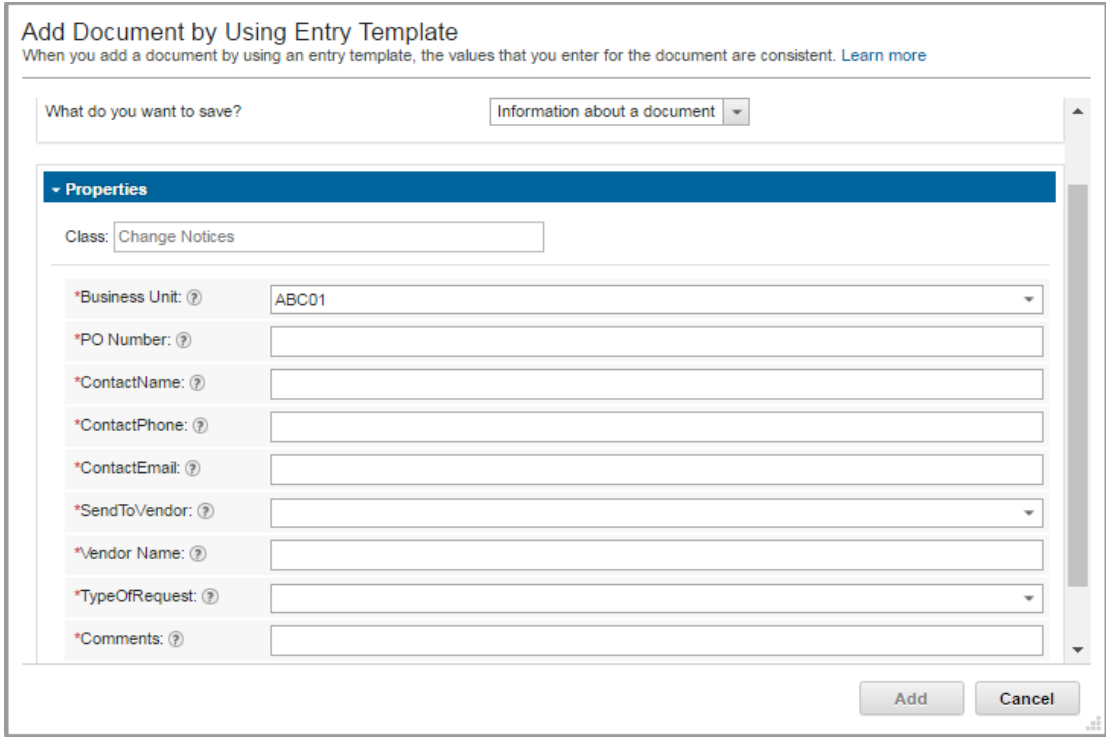
POCN request WITH attachment (continued)



The uploaded file will show here.

Fill in All Required Fields on Entry Template



- *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.

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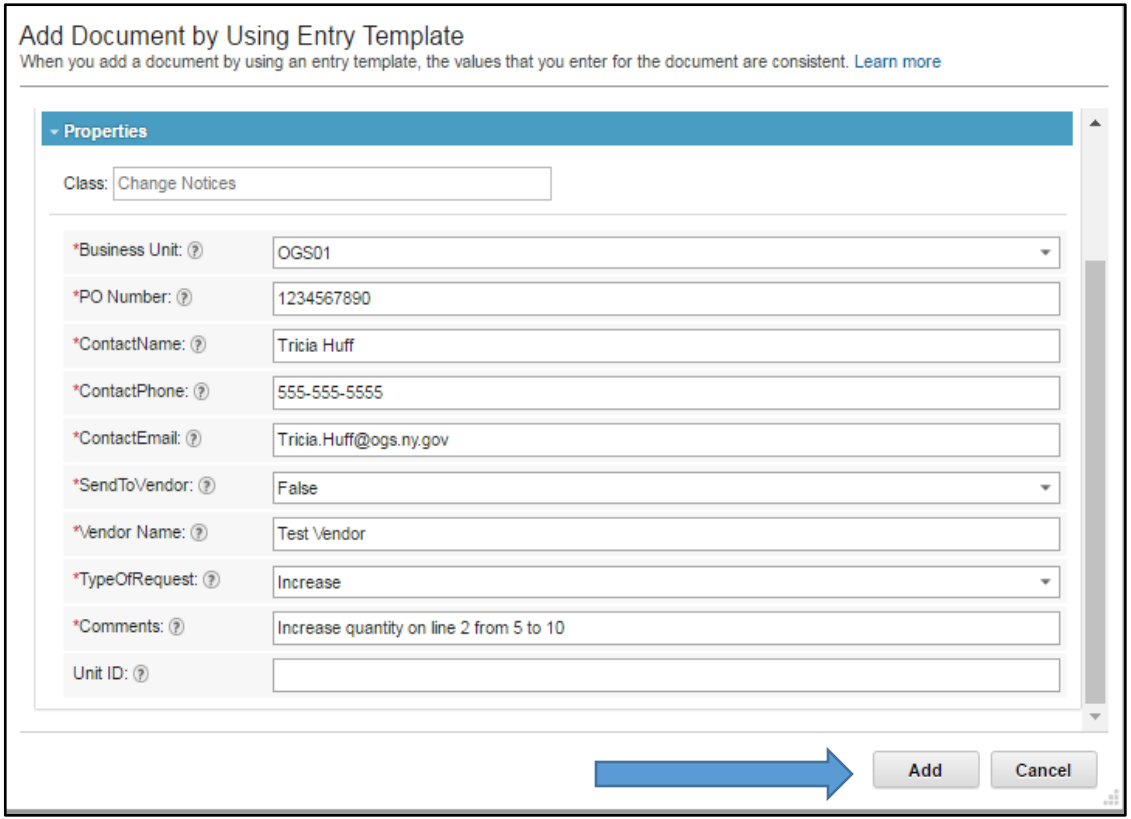
Entry Template (continued)



- 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.

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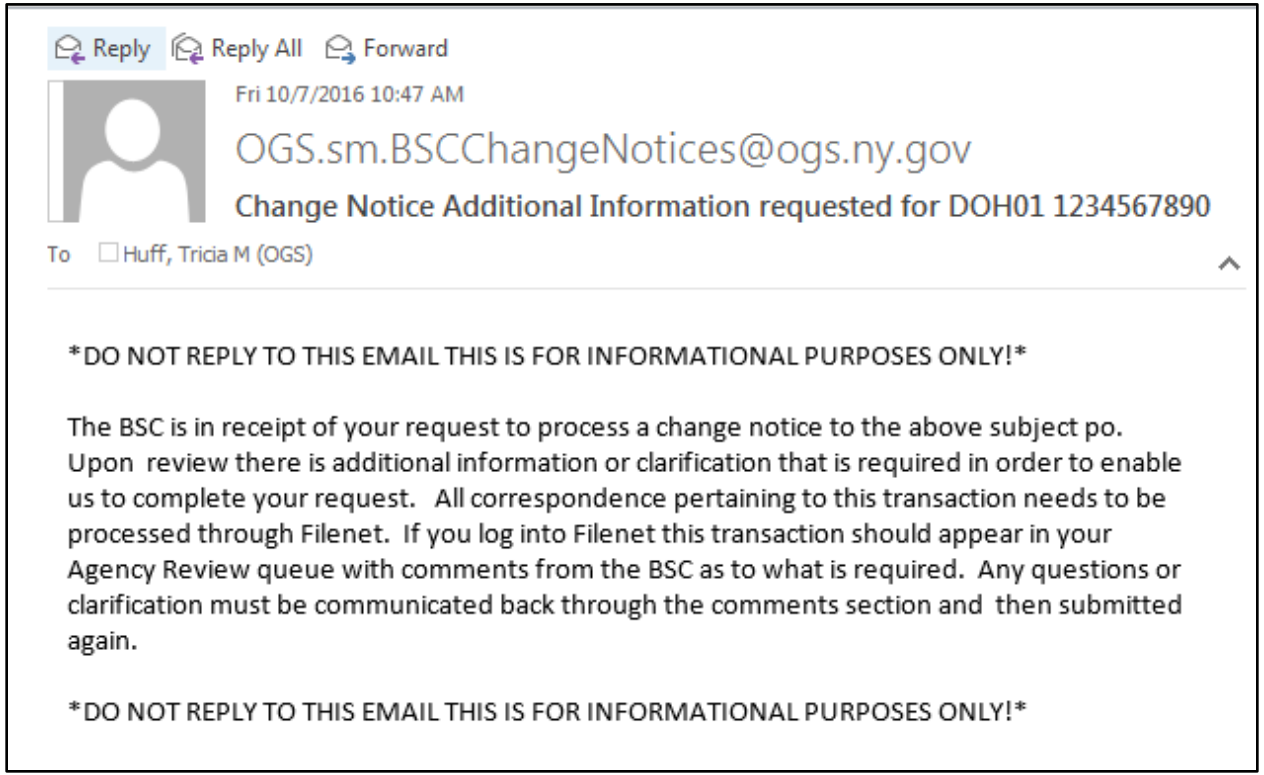
Agency Review

- 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



Reply Reply All Forward

Fri 10/7/2016 10:47 AM

OGS.sm.BSCChangeNotices@ogs.ny.gov

Change Notice Additional Information requested for DOH01 1234567890

To Huff, Tricia M (OGS)

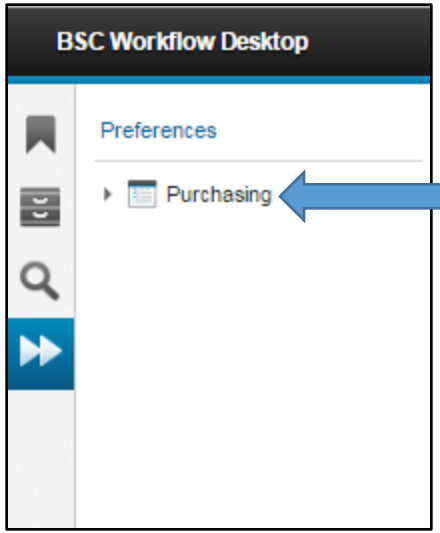
DO NOT REPLY TO THIS EMAIL THIS IS FOR INFORMATIONAL PURPOSES ONLY!

The BSC is in receipt of your request to process a change notice to the above subject po. Upon review there is additional information or clarification that is required in order to enable us to complete your request. All correspondence pertaining to this transaction needs to be processed through Filenet. If you log into Filenet this transaction should appear in your Agency Review queue with comments from the BSC as to what is required. Any questions or clarification must be communicated back through the comments section and then submitted again.

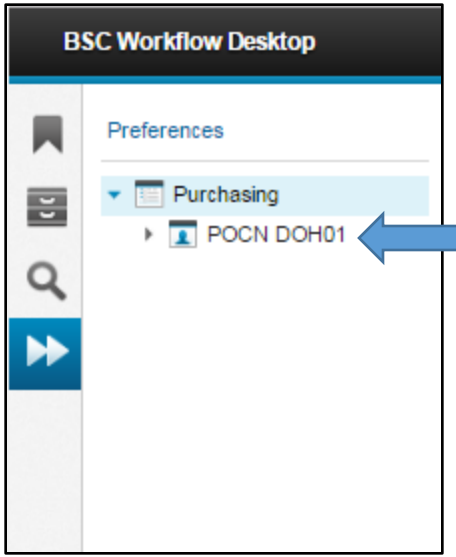
DO NOT REPLY TO THIS EMAIL THIS IS FOR INFORMATIONAL PURPOSES ONLY!

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

Accessing Agency Review Queue



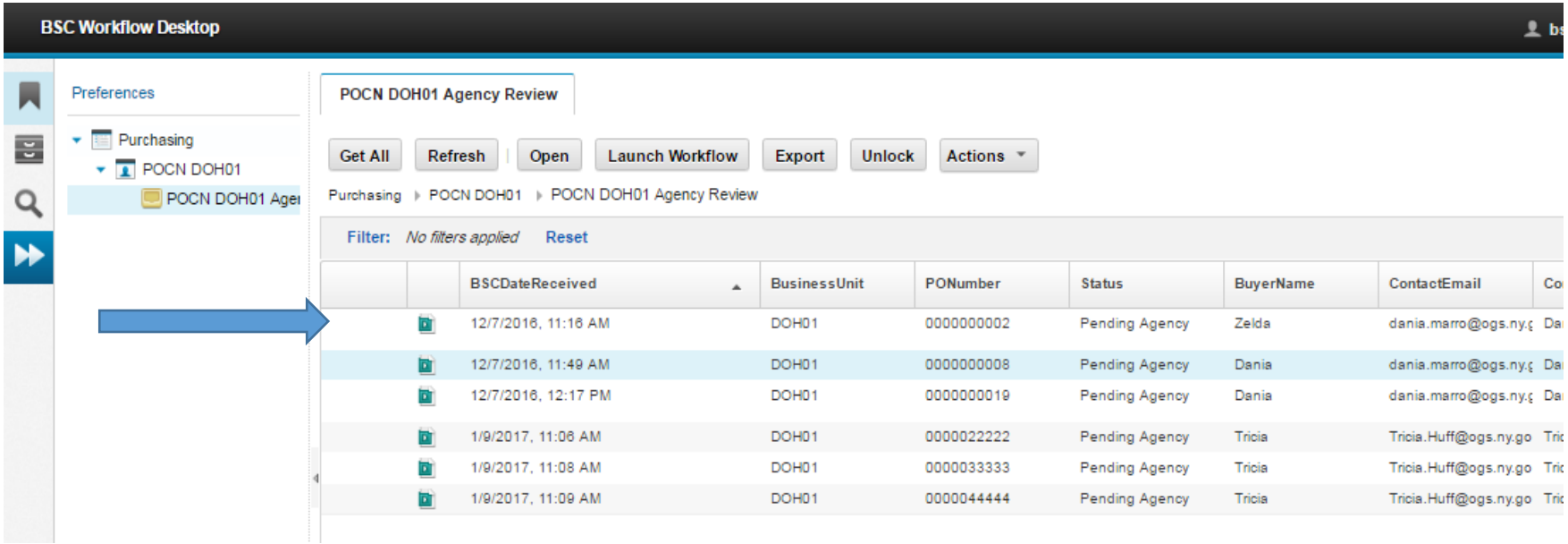
Click “Purchasing”



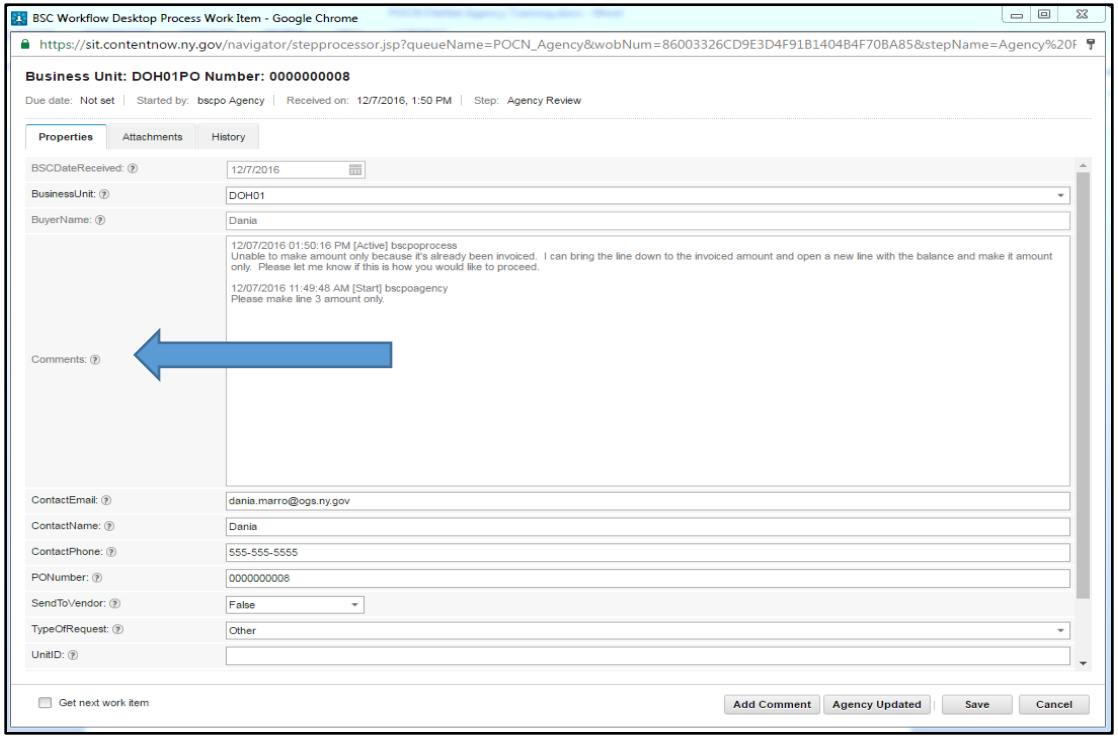
Then “POCN”

Agency Review Queue

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



Agency Review Queue (continued)



- 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.

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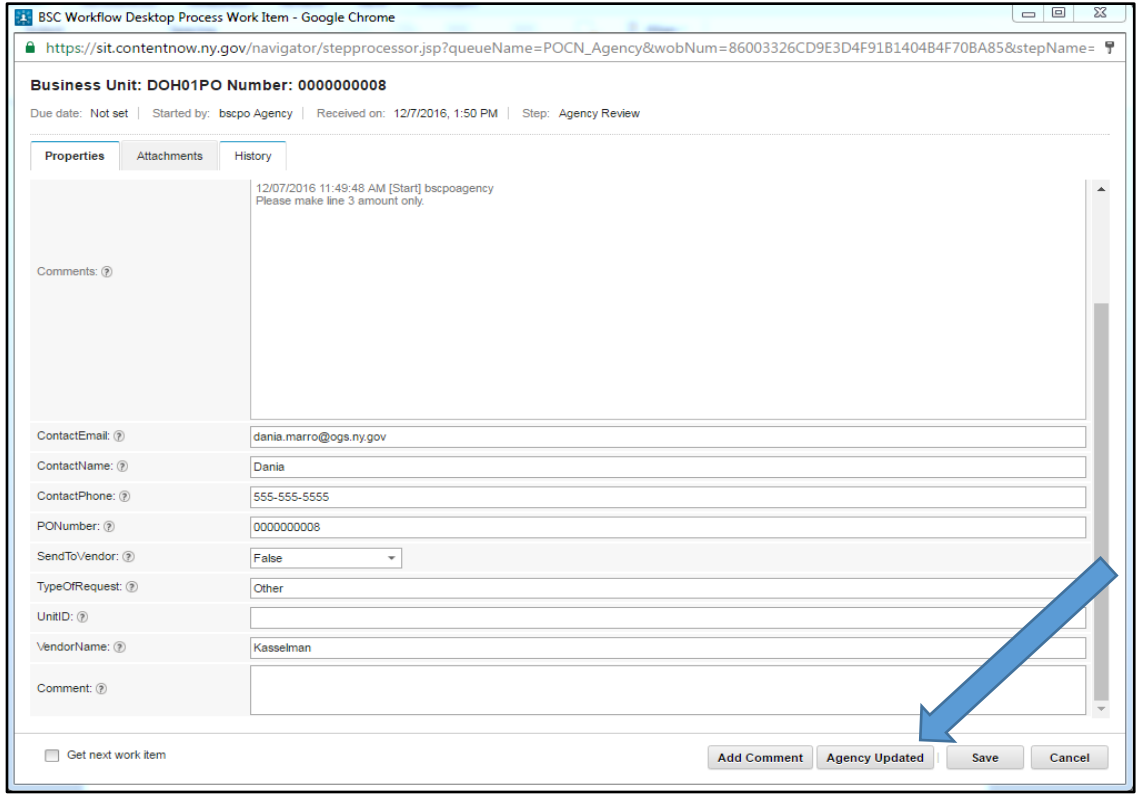
Agency Review Queue (continued)



- 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.

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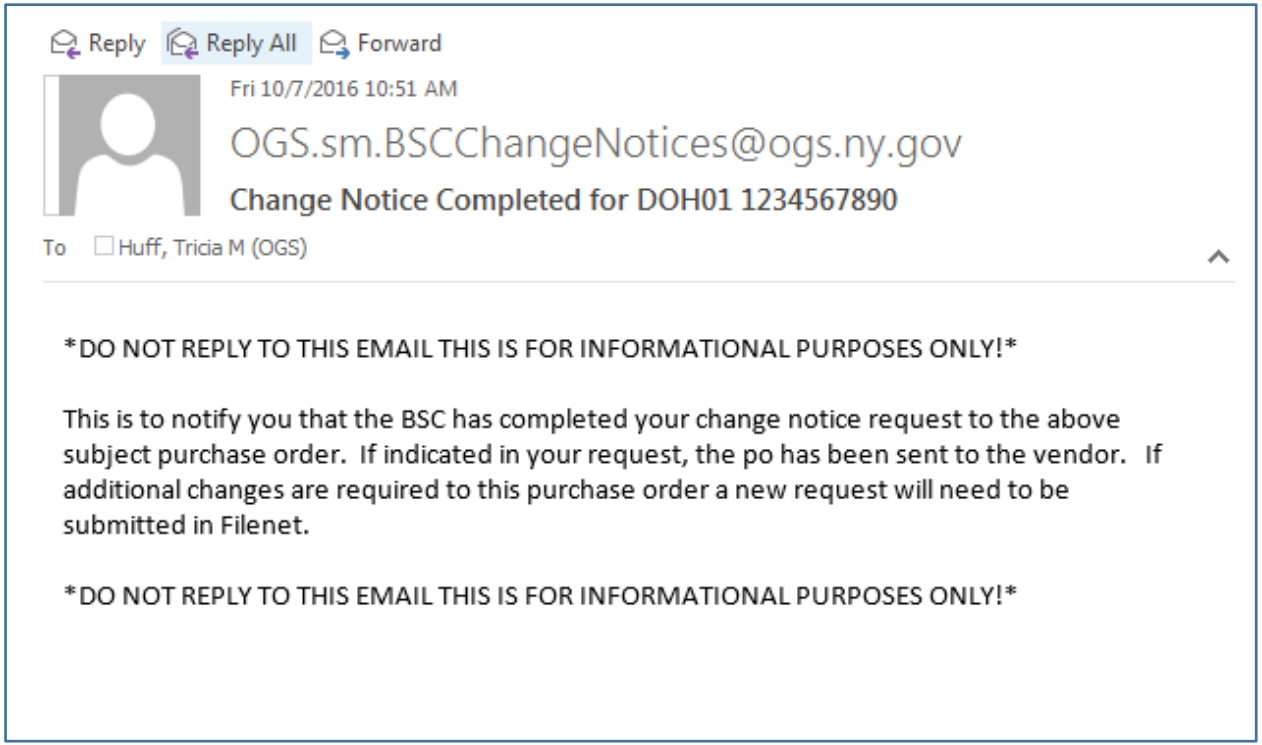
E-mail Notification for Completed POCN



Reply | Reply All | Forward

Fri 10/7/2016 10:51 AM

OGS.sm.BSCChangeNotices@ogs.ny.gov

Change Notice Completed for DOH01 1234567890

To Huff, Tricia M (OGS)

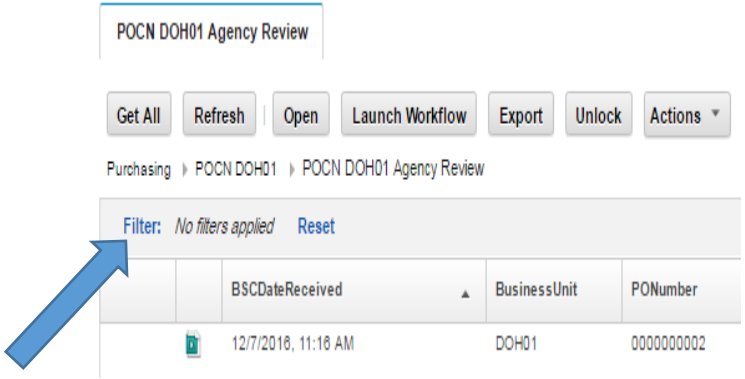
DO NOT REPLY TO THIS EMAIL THIS IS FOR INFORMATIONAL PURPOSES ONLY!

This is to notify you that the BSC has completed your change notice request to the above subject purchase order. If indicated in your request, the po has been sent to the vendor. If additional changes are required to this purchase order a new request will need to be submitted in Filenet.

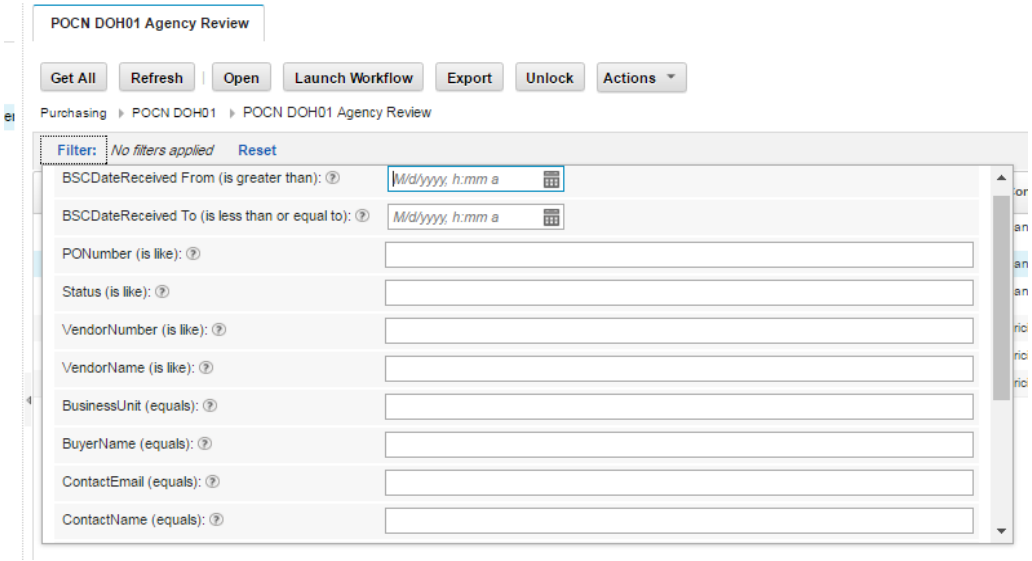
DO NOT REPLY TO THIS EMAIL THIS IS FOR INFORMATIONAL PURPOSES ONLY!

- 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

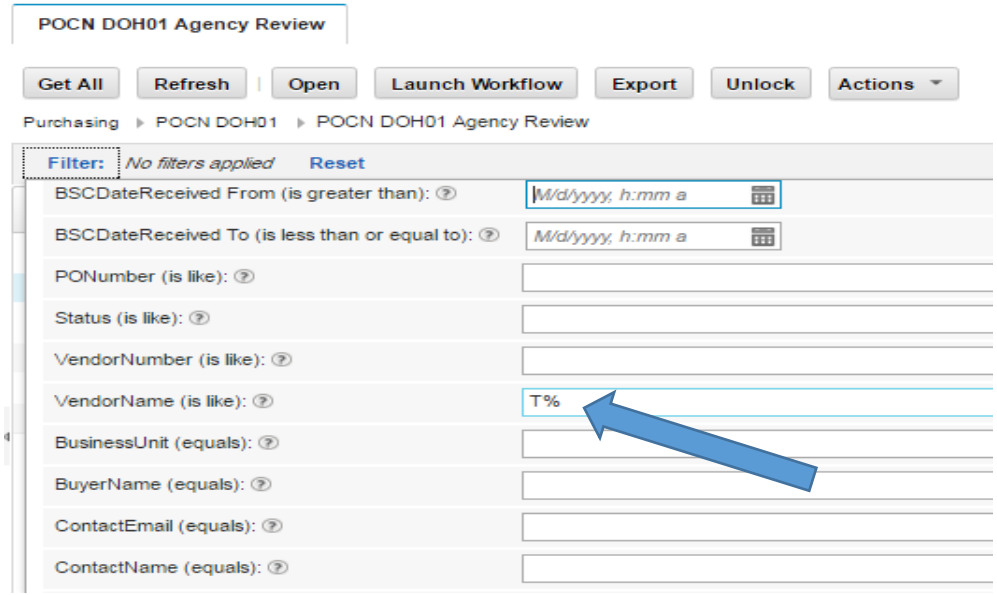


- Click “Filter.”
- This opens fields that you can filter results by.



Filtering results in Agency Review (continued)

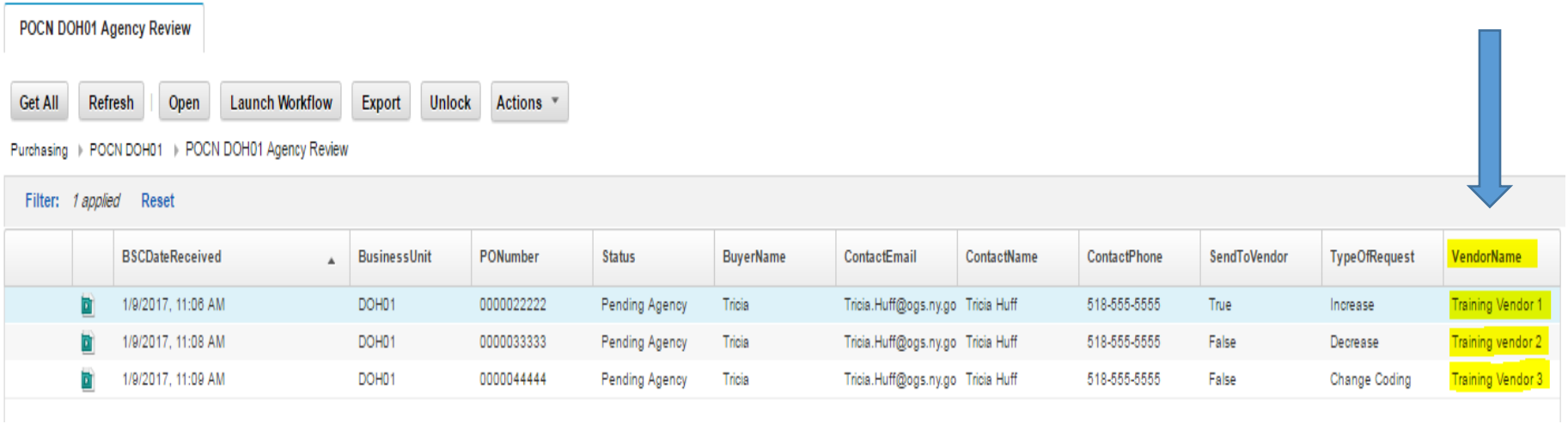
- You can filter using the exact information for that field or;
- You can also search using the percent sign (%) as a wildcard symbol.



- 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.”

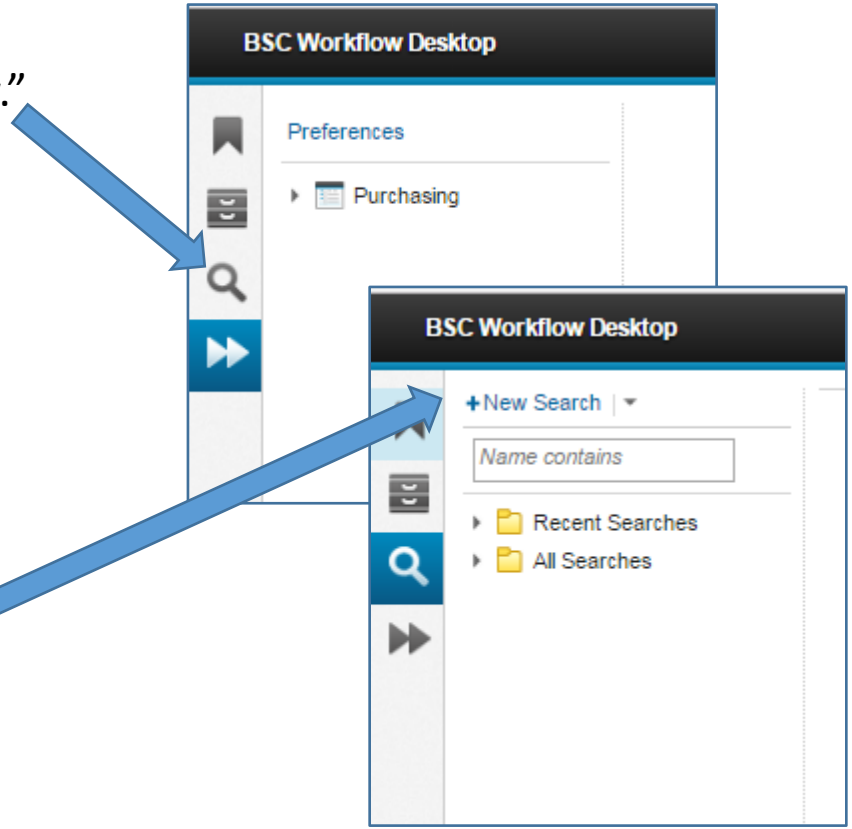
Filtering results in Agency Review (continued)

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



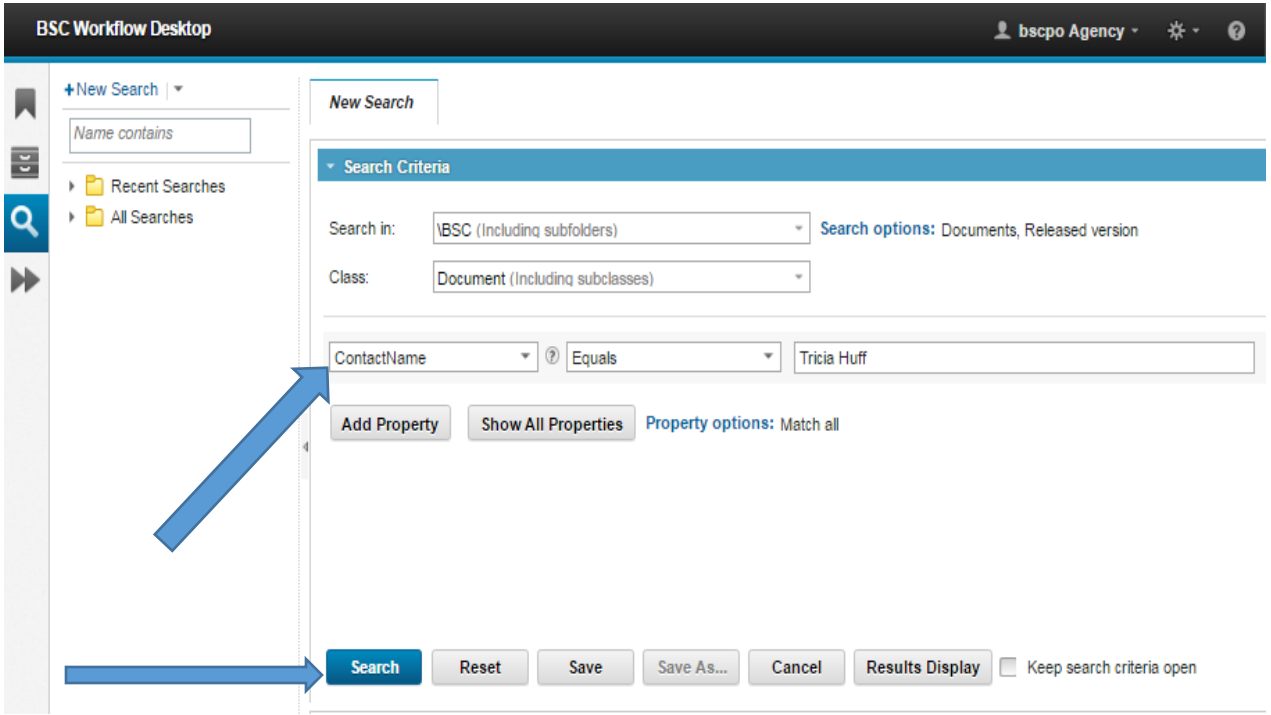
Search

Click “Open Search View.”



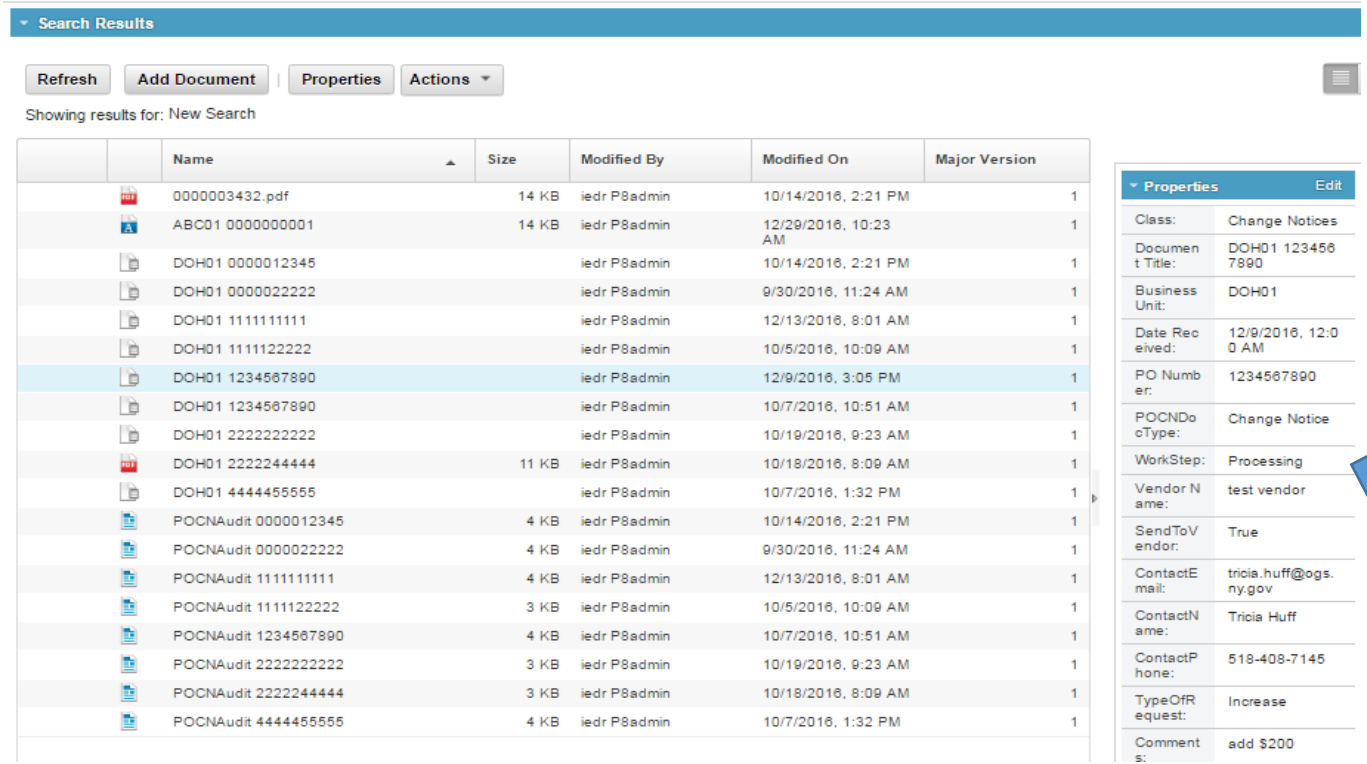
Click “+New Search.”

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



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.



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

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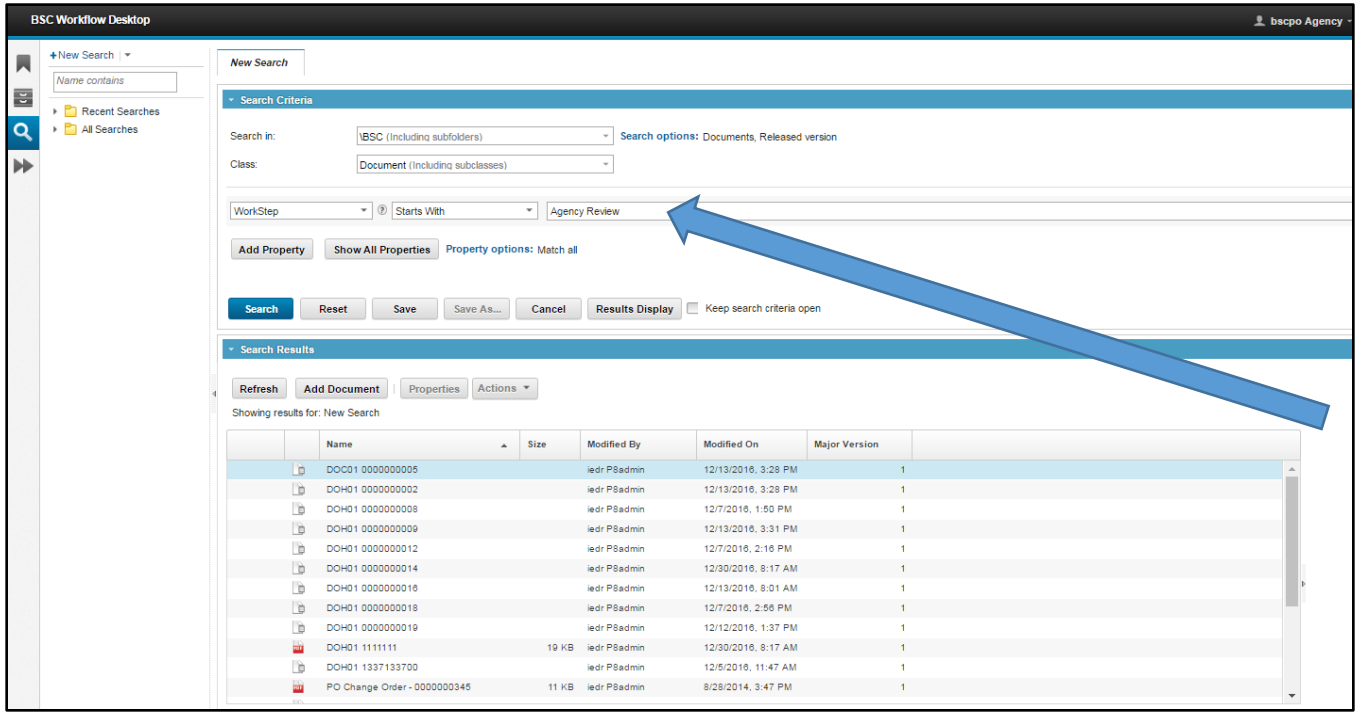
Example of a search by WorkStep:



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

- Agency Review
- Processing
- Processed

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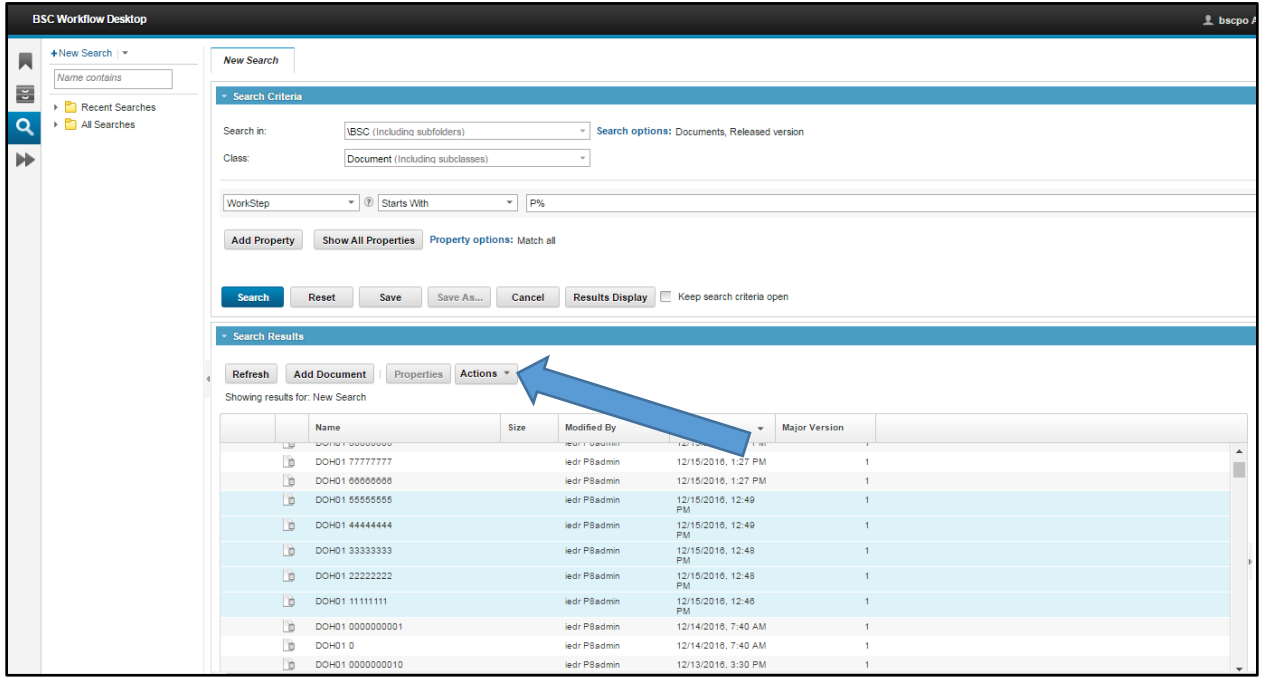
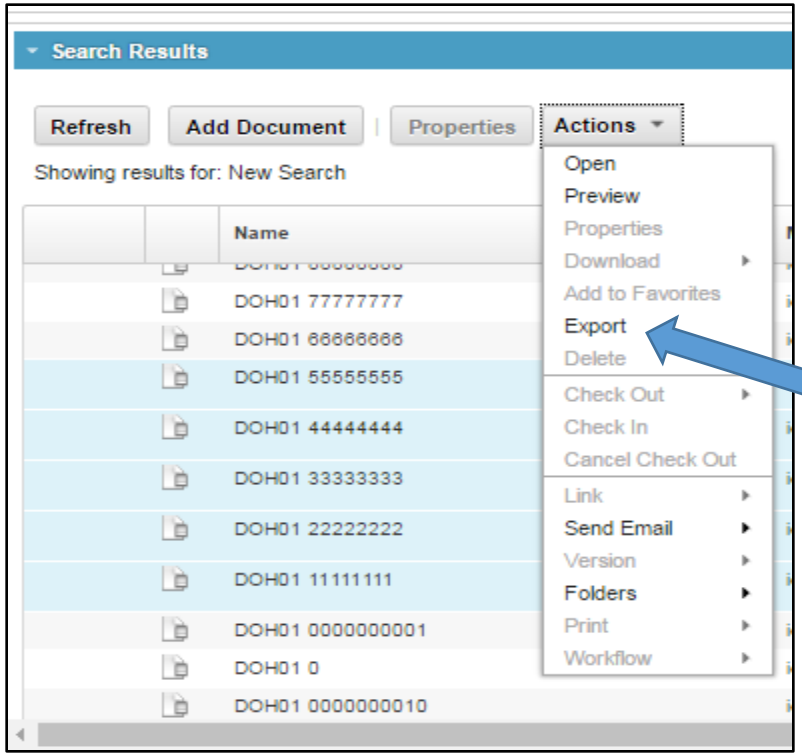
Exporting to MS Excel

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



Exporting to MS Excel (continued)

And then export:



This will send the selected items to an excel spreadsheet.