

How to search for documents from the Agency Desktop

This aid illustrates how to search for items within the Agency Desktop.

By clicking
on the
Search Icon



you
can conduct
searches to
find
documents
in the BSC
Document
repository.

Stored
searches
have been
created for
the items
that will be
searched
most
frequently.

Agency Search

The screenshot displays the 'Agency Search' interface within the 'BSC Workflow Agency Desktop'. At the top, the user is identified as 'DHS CCAReviewUser'. The interface includes a search bar with the placeholder text 'Name contains' and a '+ New Search' dropdown menu. Below the search bar, there are two main sections: 'Recent Searches' and 'All Searches'. The 'All Searches' section is currently selected and highlighted. It lists several search results: 'Credit Card Search', 'Card Renewals Acknowledgement Form', 'Credit Card Search', and 'Supporting Documents'. A red box labeled 'Search Icon' points to the magnifying glass icon in the top left corner of the search panel. Another red box labeled 'Stored Searches' points to the 'All Searches' folder icon. At the bottom of the interface, a status message reads: '2/20/2014, 1:42 AM - 5 process application spaces were found.'

Listed here you will find the search criteria that can be searched upon within the Credit Card Search.

Below you will find a listing of the Search Operators that can be changed to refine the search.

Search Criteria for Credit Cards

Credit Card Search

Search Criteria: Class: Credit Cards including subclasses Search in: BSC Search options: Released version Property options: Match all

Employee Id: ?	Starts With		
Business Unit: ?	Equals		
Document Type: ?	Equals		
Approver: ?	Starts With		
Date Received: ?	Equals	M/d/yyyy	
First Name: ?	Starts With		
Last Name: ?	Starts With		
Middle Initial: ?	Starts With		
Status: ?	Starts With		
Added On: ?	Equals	M/d/yyyy	

Search Reset Results Display Keep search criteria open

Search Operator Choices

- Starts With
- Starts With
- Ends With
- Like
- Not Like
- Equals
- Not Equal
- Less Than
- Less Than or Equal
- Greater Than
- Greater Than or Equal
- Include Any
- Exclude All
- Is Empty
- Is Not Empty

Drop Down choices

These Search screens show examples of searching for Work Items with the "Status" of New and Complete.

Searching for Work Items with Status of New

The screenshot shows the 'BSC Workflow Agency Desktop' interface. On the left, there is a search navigation pane with 'Recent Searches' including 'Credit Card Search', 'Card Renewals Acknowledgen', 'Supporting Documents', and 'Credit Card Search'. The main search area is titled 'Credit Card Search' and contains the following criteria:

Field	Operator	Value
Date Received	Equals	M/d/yyyy
First Name	Starts With	
Last Name	Starts With	
Middle Initial	Starts With	
Status	Starts With	New
Added On	Equals	M/d/yyyy

Buttons for 'Search', 'Reset', and 'Results Display' are visible. A status bar at the bottom indicates '2/12/2014, 10:17 PM - The search retrieved 200 items.'

Searching for Work Items with Status of Complete

The screenshot shows the 'BSC Workflow Agency Desktop' interface. On the left, there is a search navigation pane with 'Recent Searches' including 'Credit Card Search', 'Card Renewals Acknowledgen', 'Supporting Documents', and 'Credit Card Search'. The main search area is titled 'Credit Card Search' and contains the following criteria:

Field	Operator	Value
Date Received	Equals	M/d/yyyy
First Name	Starts With	
Last Name	Starts With	
Middle Initial	Starts With	
Status	Like	complete
Added On	Equals	M/d/yyyy

Buttons for 'Search', 'Reset', and 'Results Display' are visible. A status bar at the bottom indicates '2/12/2014, 10:31 PM - The search retrieved 18 items.'

After clicking on the Search button,

you will be presented with the results of the search.

Searching for Work Items with Status of New – Results

The screenshot shows the BSC Workflow Agency Desktop interface. The search criteria are set to 'Class: Credit Cards including subclasses' and 'Search in: BSC'. The search options are 'Released version'. The search results table is as follows:

First Name	Last Name	Status	Document Type
PAUL	MARQUARDT	New	Procurement Card Application
JAMES	JASEWICZ	New, Missing Approver Email	Procurement Card Application
JAMES	JASEWICZ	New	Procurement Card Application
DAVID	GAMBACORTA	New, Missing Employee Email, Missing Approver Email	Procurement Card Application

Searching for Work Items with Status of Complete – Results

The screenshot shows the BSC Workflow Agency Desktop interface. The search criteria are set to 'Class: Credit Cards including subclasses' and 'Search in: BSC'. The search options are 'Released version' and 'Property options'. The search results table is as follows:

Last Name	Status	Document Type	Agency
FUDD	Agency Complete	New Traveler / Travel Card Application	DMND01
PASQUINI	Agency Complete	New Traveler / Travel Card Application	DOH01
LEE	Agency Complete	New Traveler / Travel Card Application	CFS01
DENT	SFS Complete	New Traveler / Travel	DHR01

When you double click on the document

icon next to the object, you will be able to open and view the object.

Viewing an object from the results list

The screenshot shows the BSC Workflow Agency Desktop interface. The search criteria are: Class: Credit Cards including subclasses, Search in: BSC, Search options: Released version, Property options: Match all. The search results list contains five items, all with document icons. A context menu is open over the first item, and a document icon is highlighted. A properties panel is open on the right, showing details for the selected document.

Name	Employee Id	Business Unit
Procurement Card Application "N01400665	N01056508	DOH01
Procurement Card Change Request "N01518913	N01518913	DOH01
Procurement Card Change Request "N01518913	N01518913	DOH01
Procurement Card Change Request "N01518913	N01518913	DOH01
Procurement Card Change Request "N01518913	N01518913	DOH01

Properties:

Class:	Credit Cards
Document Title:	Procurement Card Application "N01400665
Business Unit:	DOH01
Date Received:	1/10/2014, 12:00 AM
Agency:	DOH01
Employee Id:	N01056508
Last Modified:	02/27/2014

Context Menu

Document Icon

You can also print or email the document using the context menu or from the Document Viewer.

Context Menu

The screenshot shows the BSC Workflow Agency Desktop interface. A search for 'Credit Card Search' has been performed, resulting in a table of document entries. A context menu is open over the third row of the table, highlighting various actions available for that document.

	Name	Employee Id	Business Unit	Last
	New Traveler / Travel Card Application' *5456412312	5456412312	DMN01	SAM
	New Traveler / Travel Card Application' *6545445646	6545445646	DMN01	Fudd
	New Traveler / Travel Card Application' *N01214498	N01214498	DMN01	KRUT
	New Traveler / Travel Card Application' *N01376176	N01376176	DMN01	KUNH
	New Traveler / Travel Card Application' *N01426551	N01426551	DMN01	HALE
	New Traveler / Travel Card Application' *N01426551	N01426551	DMN01	HALE
	Non-Employee Travel Card Authorization' *N01111464	N01111464	DMN01	BOG
	Non-Employee Travel Card Authorization' *N01111464	N01111464	DMN01	LISA
	Procurement Card Application' *4564123087	4564123087	DMN01	ELI
	Travel Procurement NET Card Acknowledgement Form' *N01622195	N01622195	DMN01	JUNE

The context menu is open over the row with Employee ID 'N01214498'. The menu items are: Open, Preview, Properties, Download, Add to Favorites, Export, Delete, Check Out, Check In, Cancel Check Out, Link, Send Email, Version, Folders, Print, and Workflow.

Properties Panel:

Class:	Credit Cards
Document Title:	New Traveler / Travel Card Application' *N01214498
Business Unit:	DMN01
Date Received:	2/12/2014, 12:00 AM
Agency:	DMN01
Employee Id:	N01214498
Last Name:	KRUTZ
First Name:	DONALD
Document Type:	New Traveler / Travel Card Application
Status:	New
Approver:	N01285673
Approver Email:	Thomas.halabuda.nfg@mail.mil
Employee Email:	donald.krutz@anfg.af.mil

BSC Workflow Desktop - Viewer

New Traveler / Travel Card Application "N01057944" x

Submit completed form with original signatures to:
NYS Office of General Services
BSC Finance-Credit Card Unit
50 Wolf Road, 3rd Floor
Albany, NY 12212
518-457-4271
BSC.CC.Applications@ogsr.ny.gov

NEW TRAVELER/TRAVEL CARD APPLICATION

Please Print or Type

Section 1 Employee Information			
First Name	MI	Last Name	Title/Department
Joseph	F	Pasquini	Health Program Administrator 3
Agency GLBU	Employee ID No. (can be found on pay stub)		SFS User ID
DOH01	N01057944		jfp09
Work Address (full mailing address)			
875 Central Avenue, Albany, NY 12206			
Official Station City			Last 4 digits of Social Security No.
Albany			6391
Email address		Work Phone No.	Require a Citibank Travel Credit Card?
jfp09@health.state.ny.us		(518) 402 - 1045	<input checked="" type="radio"/> Yes <input type="radio"/> No

Your use of a NYS Citibank Travel Card is subject to the following terms and conditions:

1. You are being entrusted with a valuable tool - a NYS Citibank Travel Card - which is to be used for business travel expenses. Because you will be making a financial commitment on behalf of the State, you must strive to obtain best value for the State by following established travel policies as appropriate.

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<p>Who should you call if you run into login issues or problems during processing tasks?</p>	<p>Call the BSC Tech Services Team at (518) 457-4272 to assist you if you experience issues when logging into or while using the application.</p> <p>You may e-mail the Tech Services Team at BSCSecurity@ogs.ny.gov</p>
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