

**Chapter 3**

**Documents**

**Chapter Topics**

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## Saving Documents Prior to Attaching

Although NYSTEP accepts attached documents from all software extensions, the Department of Civil Service can read documents only with the following software extensions: JPEG (\*.jpg), GIF (\*.gif), Microsoft Word (\*.doc), Rich Text Format (\*.rtf), Text (\*.txt), Adobe (\*.pdf), Microsoft Excel (\*.xls), and HTML (\*.htm, \*.html).

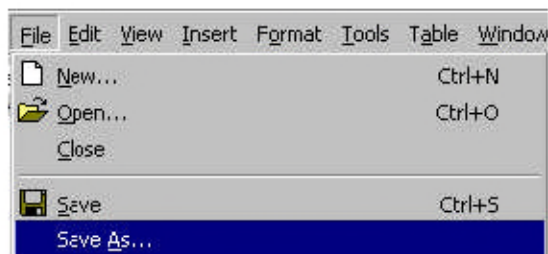
Therefore, if a document has been created in another format, please convert it to one of the acceptable formats before attaching it to a transaction.



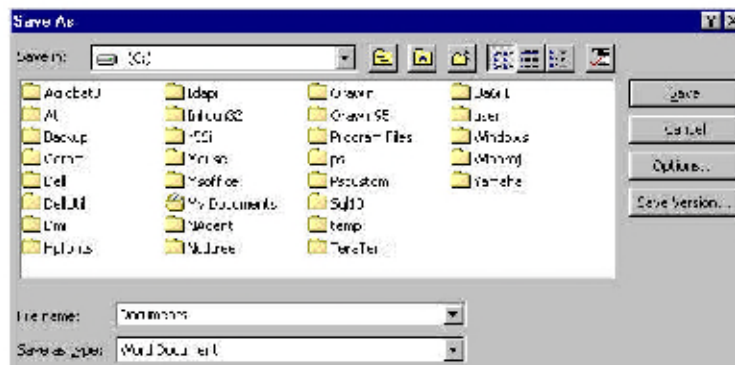
**NOTE:** WordPerfect files must be saved as an \*.rtf file, Visio as a \*.jpg file, and Bitmap as a \*.jpg file.


### Steps to convert a file

1. Open the document to be converted.
2. From the toolbar click **File, Save As**.



*A Save As dialog box will appear.*



3. In the **Save in** dropdown box, select the drive and folder to which the file should be saved.
4. Double click on the folder to which the file should be saved.
5. In the **File name** dropdown box, enter the name of the document to be saved.
6. In the **Save as type** dropdown box, click the  and select one of the accepted types of software extensions.
7. Click **Save**.



**NOTE:** This procedure will save the document with its new extension while keeping the document with the old extension.



## Grievance Document Attachment & Deletion

The directions below describe how to attach documents to grievance transactions. The following page is the third tab of the page group for all of these transactions.



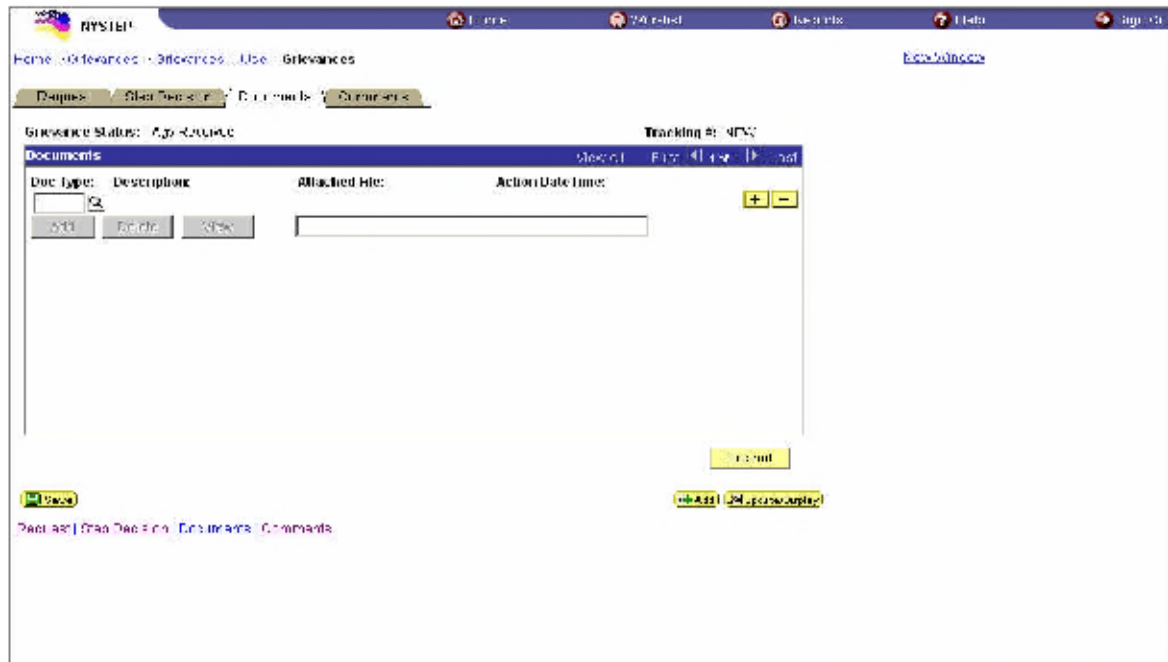
**REMINDER:** Before documents can be attached, they must be in an acceptable format as described earlier in this chapter.





### Access the Page

1. Click the **Documents** page tab for any of the transactions mentioned above.

### Document Page



***Field Descriptions***

<b>Field</b>	<b>Description</b>
<b>Grievance Status</b>	The status reflecting the most recent action on the grievance.
<b>Tracking #</b>	System generated number that will display upon saving or submitting.
<b>Doc Type</b>	Code for type of document being attached; i.e. AS2D, AUSG, etc.
<b>Description</b>	Type of document being attached, i.e. Agency Step 2 Decision, Union Statement/Grievance, etc.
 <b>Add New Doc</b>	Inserts blank rows for additional documents to be added.
 <b>Delete</b>	When clicked, selects document to be deleted and brings up a prompt asking whether you want to delete or cancel the deletion. Inactivated upon submission to NYSTEP.
<b>File Name</b>	The name of the file that is being attached.
<b>Action Date</b>	The date the documents were attached. This field will remain blank until the request has been submitted.
<b>View Documents</b>	Button that allows the documents that have been attached to be viewed (only after the transaction has been submitted).
<b>Submit</b>	Button that will sends the entire package to the next party for review, if necessary.




## Work with the Page



REMINDER: Use Tab where directed to. If the Enter key is used, it activates Save. If pressed during a transaction, the business rules are initiated and error messages may result from incomplete data.

### To Attach Documents:

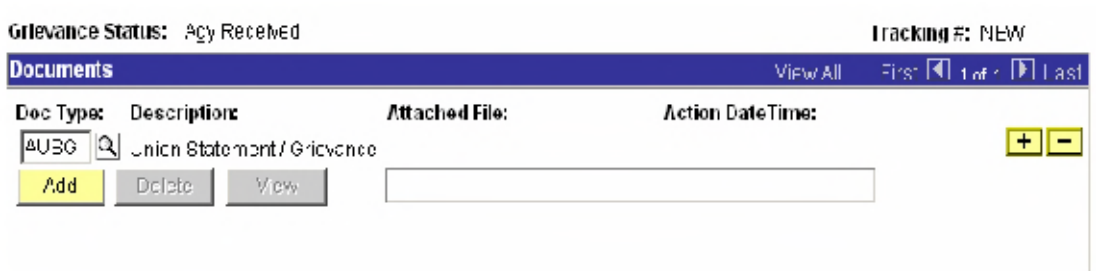
- In the **Doc. Type** field click  to select the appropriate document type.

**Search Results**

View All First 1-16 of 16 Last

TPM Doc Types	Description
<a href="#">AAFF</a>	<a href="#">Agency Affidavit</a>
<a href="#">AAINF</a>	<a href="#">Agcy Resp to C&amp;C Reg Addtl Info</a>
<a href="#">AAPPR</a>	<a href="#">Appeal Response Step 3</a>
<a href="#">ACDEC</a>	<a href="#">Court Decision</a>
<a href="#">ACDOC</a>	<a href="#">Court Document</a>
<a href="#">ADD</a>	<a href="#">Duties Description</a>
<a href="#">ADTRN</a>	<a href="#">OER Decision Transmittal</a>
<a href="#">AHN</a>	<a href="#">Hearing Notes Step 2</a>
<a href="#">AORG</a>	<a href="#">Organizational Chart</a>
<a href="#">APAY</a>	<a href="#">Extended OTWG Payment Letter</a>
<a href="#">APAY3</a>	<a href="#">Extended OTWG Payment OER Rqst</a>
<a href="#">ARRES</a>	<a href="#">Reconsideration Rsp Step 3 1/2</a>
<a href="#">AS2D</a>	<a href="#">Agency Step 2 Decision</a>
<a href="#">ASUPD</a>	<a href="#">Support Docs</a>
<a href="#">AUSG</a>	<a href="#">Union Statement / Grievance</a>
<a href="#">AUSUP</a>	<a href="#">Union Supplemental Document</a>

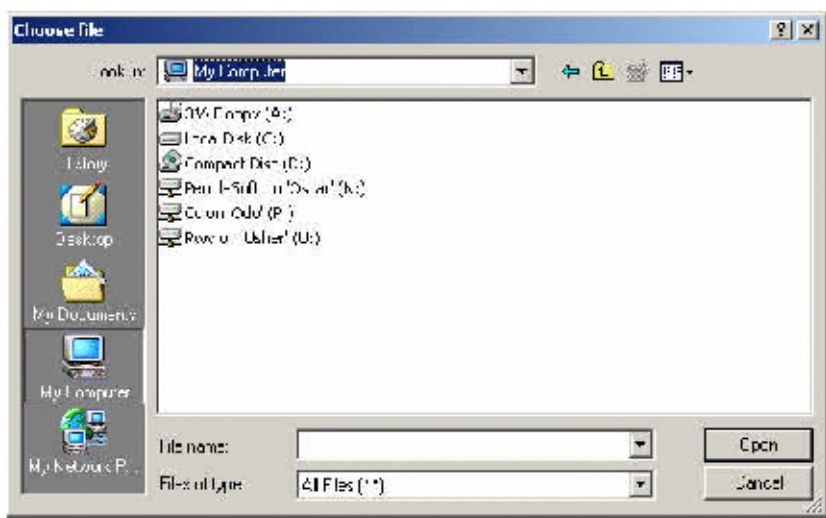
- Click **Add** to select the path where the document exists.



4. Click **Browse** to locate the document you wish to attach.



5. In **Look In**, select the drive where the document is located.





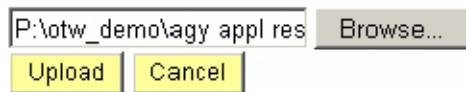
**For those accessing NYSTEP via the N-Fuse/Citrix connection:**

In **File Name**, key in [\\client](#) and press **Enter**. If a dialog box with several radio buttons appears, click on the one for “**Full Access**” to bring up your list of drives.

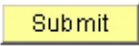

If you know the letter for the drive you wish to use, you may key it in directly. For example, if you want to use the U drive, key in [\\client\U](#) to access it directly.

6. Find the document/file name you wish to attach and click on it, and then click on **Open**.
7. Click on **Upload** to add the document. If you have selected the wrong document, click on **Cancel**.

[Home](#) > [Grievances](#) > [Grievances](#) > [Use](#) > [Grievances](#)



**NOTE:** To add additional documents, press the **Add** button and repeat the above steps.


8. When all desired documents have been added, press  to send the grievance on or  to attach without submitting.

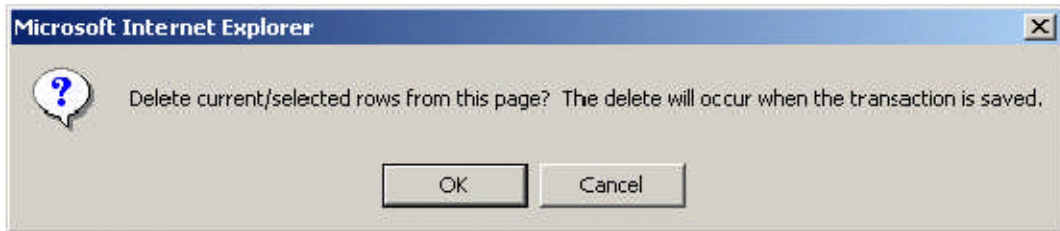
**To Delete Documents:**

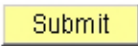



**NOTE:** Documents can only be deleted before the grievance is submitted.

9. Locate the document to be deleted.

10. Click in the  on the row with the document to be deleted.
11. A prompt appears: Delete current/selected rows from this page? The delete will occur when the transaction is saved.
12. Select **OK** to delete or **Cancel** to retain the attached document.



13. When all desired documents have been deleted, press  to send the grievance on or  to attach without submitting.



## Viewing Attached Documents



**REMINDER:** Agency documents can be viewed after the agency has saved or submitted the transaction. Certain documents attached by C&C or GOER can be viewed only after the transaction has either been returned for further information or a determination has been made.



### Access the Page

1. Click the **Documents** page tab for any transaction.



### Work with the Page

2. Click the  button.

*Depending on the type of document, the document will either open, i.e. \*.pdf documents, or bring up a File Download dialog box, i.e. \*.doc documents.*


3. If the Dialog box appears, click on the Open button.

*The document displays.*

4. If a second dialog box appears, click on the Open button.




**NOTE:** You may wish to click on the box next to **Always ask before opening this type of file** to turn this function off, particularly on the second dialog box.

5. When finished viewing the documents, press the  in the upper right hand corner of the document window to close the document. *Be careful not to close out of NYSTEP by clicking on the x in your browser/NYSTEP window.*



**NOTE:**

While viewing a document, the user may print it by pressing the  icon on the toolbar of the browser. The user may also have more than one document open at a time.