

Documents

Chapter Topics

Saving Documents Prior to Attaching..... 3-3

Document Attachment & Deletion 3-5

Submitting Transactions with Attachments..... 3-11

This page intentionally left blank.



Saving Documents Prior to Attaching

While the NYSTEP System accepts attached documents from all software extensions, the Department of Civil Service is only able to access documentation from 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).

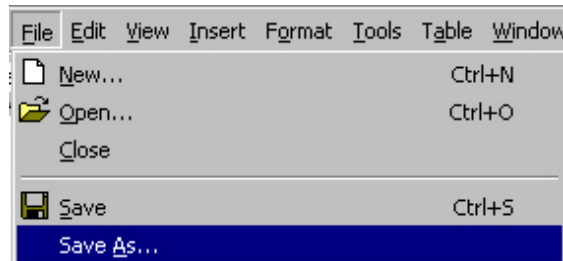
Therefore, if a document has been created in another format, please convert it to one of the acceptable formats before attaching it to a transaction.



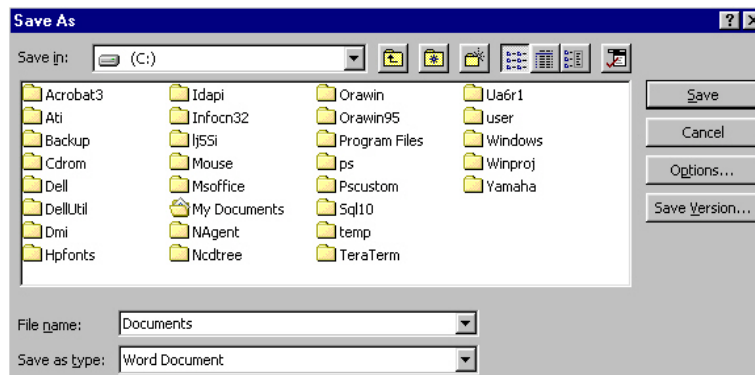
NOTE: WordPerfect files must be saved as an *.rtf file, Visio as a *.jpg file, and Bitmap as a *.jpg file.


Steps to convert a file

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



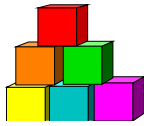
A Save As dialog box will appear.



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.



Document Attachment & Deletion

The directions below describe how to attach documents to any transaction. The **Documents** page is the second tab of a transaction request.



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






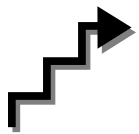
Access the Page

1. Click the **Documents** tab.

Document Page Field Descriptions

Field	Description
Agency	The Agency Code and name for the transaction.
Job Control #	System generated number that will display upon saving or submitting.

Field	Description
Doc Types	Code indicating type of document attached; i.e. ACL, CANAL, etc.
Description	Description of document attached, i.e. Agency Justification, etc.
Attached File/Applies to	File name of the attached document. Applies to is a free form field for brief additional comments regarding the document.
Action Date	The date the documents were attached. This field will remain blank until the request has been submitted.
Draft?	Once C&C attaches documents, the Draft box will be checked to insure that only internal C&C staff can view the document.
 (Restricted Options)	Click to unrestrict the document for others to view.
 (Insert Row)	Used for adding another document row to the transaction request.
 (Delete Row)	Used to completely remove a document row from a transaction request.
Add	Button that opens another page for browsing to the file name.
Delete	Button that will remove the current file name from the request.
View	Button that allows the documents that have been attached to be viewed.
Save	Saves the transaction without Submitting it to NYSTEP.




Work with the Page



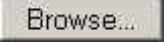

To Attach documents



NOTE: To prevent the premature viewing of certain documents used by C&C to make a determination, a process has been created that allows attaching a document and routing a request to other members of C&C while prohibiting that attachment from being seen by Agency, DOB or CSC personnel.

Two documents - the Analysis & Recommendation (CANAL) letter and C&C Supporting Documents (CSUPP) will always be blocked from view to parties outside of C&C.

1. To add C&C documents that relate to the transaction click the  icon.

2. In the **Doc Types** field, click the  to select the appropriate document type, or enter the appropriate code.
3. Click the  icon to select the path where the document exists.
4. Click the  button to find the document to be attached. Select the document and click **Open** or double click on the document.
5. Click the  button to attach the document to the page or click **Cancel** to return to the page without attaching the document.
6. Place the cursor in the empty text box to add any free form comments about the document you attached.




WARNING: To ensure security of documents prior to final C&C action, the **Draft Button** must be checked.

If the Draft Button is not selected (no check mark in the box), the documents attached will be available for viewing before C&C has made a final recommendation on the request, while the request is still under internal C&C review.

Therefore, to ensure security of the package, if the document to be attached should not be viewed externally until the transaction is finalized and submitted to DOB, be sure THE DRAFT BOX IS CHECKED.

Documents attached will become part of the overall transaction and will be routed together if the transaction is internally routed.



NOTE: To add additional documents, press the  pushbutton and repeat the above steps.

7. When all desired documents have been added, press **Save**.
8. To Route this transaction to another person in C&C for review, click the **CC/DOB Determination** page tab. In the **Role User** field, select the desired person and press the **Route It** button. The next user can delete or add documents; they cannot alter the already attached document. Documents may only be altered *prior* to attaching at the drive level.
9. If there is no routing required, when all documents have been added, and the recommendation and C&C determination is finalized and ready to be sent, click the **CC/DOB Determination** page tab and press **Submit**.

10. When submitting a transaction that contains draft documents, the system does not remove the draft flag from previously saved (but not submitted) requests.

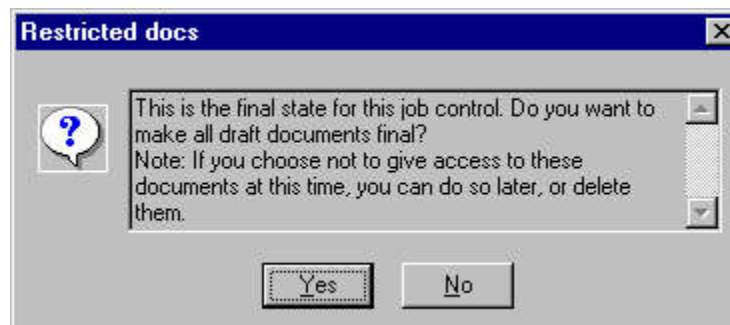
If a *required* document has already been attached, marked draft and saved, upon submitting the system will issue an error message indicating that the required attachment is missing. Locate the necessary attachment; remove the flag, and click **Submit** again. Or, attach a new document to meet the requirement and click **Submit**.

Sample Missing Document message



If *optional* documents are attached, upon submitting a message box will appear asking if the user would like to make all the document attachments available for viewing. Clicking **Yes** will clear the **Draft?** box and allow all documents permitted by security to be seen. Clicking **No** keeps the documents as draft.

Draft Documents Final? message





After a request has been submitted with draft documents attached, those documents can later be made available for viewing by accessing the transaction and un-checking the draft box.

To Replace Documents



NOTE: Should the wrong file or file type be attached to a transaction request, a document can be replaced prior to submitting the transaction.


1. Locate the document(s) to be replaced and click the  button.
2. The system will remove the file path and name from the page. The document type and any comments added will remain.
3. If necessary, change the document type and edit or remove any comments.
4. Click the  icon to select the path where the replacement document is located and follow the steps for attaching a document as outlined above.

To Delete Documents:

In the event that the documents attached are intended to serve only as internal justification for a recommendation and not for external viewing, the documents can be deleted by the user to whom the transaction has been routed. **The deletion of documents must occur prior to pressing the Submit button.**



NOTE: Documents can be deleted only up until the point the request has been submitted. Any Analyst who receives or works a transaction has the ability to delete documents. Documents may not be edited, altered or changed in any way once attached to the transaction.

1. Locate the document(s) to be deleted and click the  button.
2. The following message box will appear:



3. Clicking the **OK** button will delete the row immediately.



WARNING: The document row will be deleted immediately upon clicking OK. The delete will not wait until a Save or Submit action!

4. To Route this transaction to another person for review, click the **CC/DOB Determination** page tab. In the **Role User** field, select the desired person and press the **Route It** button.

5. If no further routing is required, and no other documents need to be deleted, click the **Submit** button.

Viewing Attached Documents

1. Click the **Documents** page tab for any transaction.
2. Click the **View** pushbutton underneath the document you wish to view. The document will open in another window appropriate to the type of transaction being viewed. (Word, Excel, etc.)
3. When finished viewing the documents, click **File, Close** to exit the document. *The system brings the user back to the **Documents** page.*



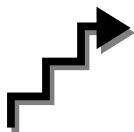
Submitting Transactions with Attachments

Finalizing a transaction after a C&C determination has been made will operate differently when documents are attached which are to become part of the final package and be viewable by external entities.



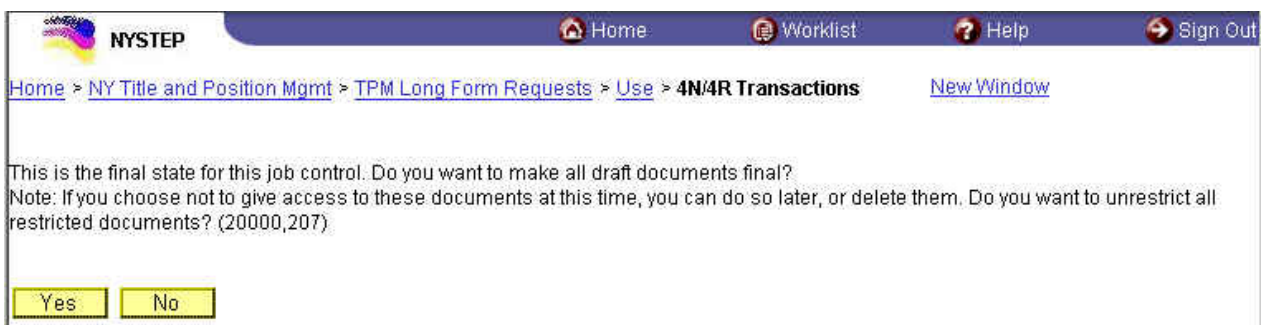
Access the Page

1. Click the **CC/DOB Determination** page tab.
2. Verify that the determination field contains the correct action (C&C Approved; C&C Disapproved; C&C Withdrawn, etc.).
3. Verify that any effective dates, expiration dates, and number of positions are correct.



Work with the Page

1. Click the **Submit** button.
A message appears:





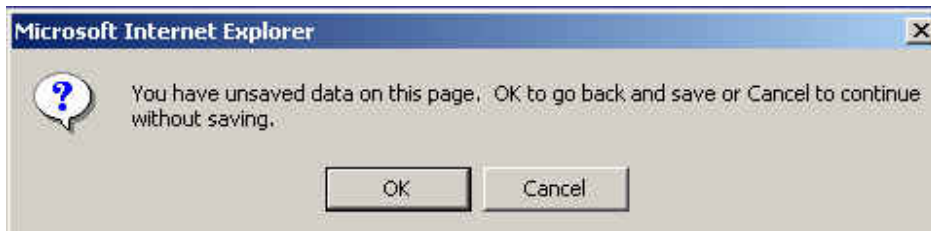
2. Click **“Yes”** if the transaction is complete and there are attached documents that should be viewable by agency and DOB staff. The Submit button will gray and the

transaction will be forwarded to DOB. The **Draft** button on the document page will disappear and the box will no longer have a checkmark in it.

3. Click “**No**” if the documents should not be visible to agency or DOB staff. The **Draft** button will appear with the checkmark indicating that the document is still secure from external viewing.



WARNING: In the event that the documents must be “unrestricted” (made visible to agency and DOB staff) at a later date after the transaction has updated NYSTEP, use Update/Display to recall the transaction. Click on the Document tab and uncheck the Draft box. After the checkmark is removed, press the  Save icon and the document will become visible to other entities. If the  Save icon is not pressed, a message will appear:



Click “**OK**” to save the change to the Draft box. (If “**Cancel**” is pressed, or if the page is exited without saving, the document will still be restricted and will not be visible to agency and DOB staff.)