U.S. Department of Education Office of Postsecondary Education E recognition System

e Recognition System Administrator's User Guide

Contents

1 Access and Login

The e-Recognition system allows Department administrators to maintain information needed to allow the agencies to submit their on-line reports and analysts to review them.

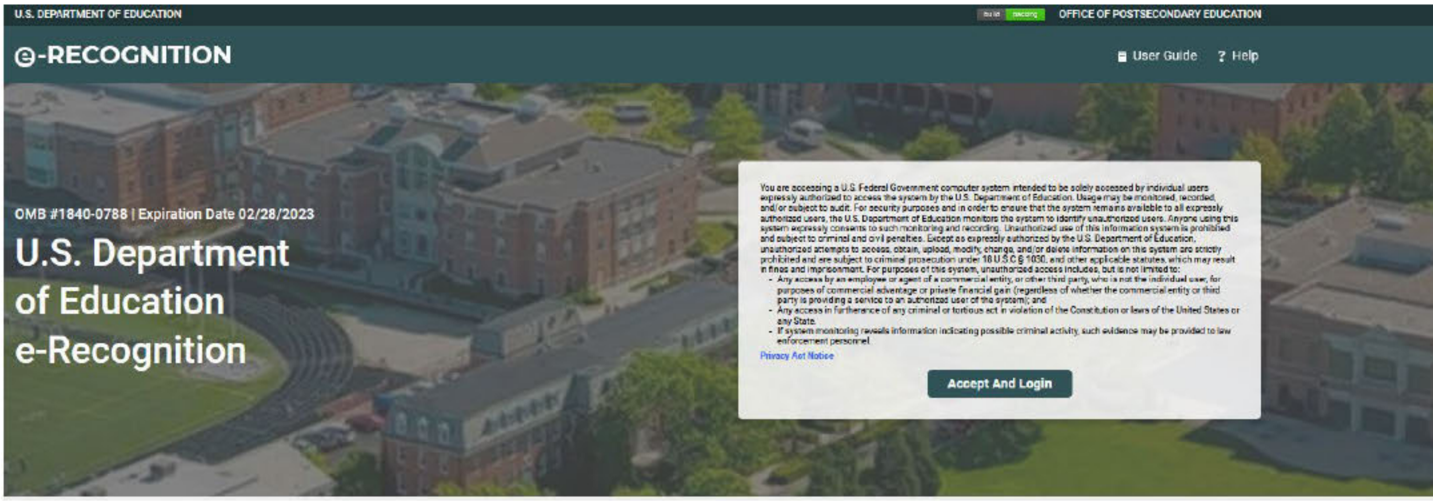
Administrators can perform the following tasks.

- Add and update agencies and countries
- Add and update meeting dates
- Assign, change, and remove meeting dates for agencies and countries
- Assign and update the agency report submission type
- Enter the agency's scope of recognition
- Upload historical documents
- Upload 3rd party comments documents and requests to make oral comments
- View agency reports
- Change Status agency reports or change the report status
- Assign analysts to agencies
- Add, update, and delete analyst, reviewer, and committee user accounts and assign roles
- Assign committee members to meeting dates
- Unlock user accounts and reset passwords
- Update the text of standard emails
- Update the text of the criteria displayed on the agency narrative screens
- Output agency or committee data for FOIA or other requests
- Add documents to the e-folder
- Edit documents in the e-folder
- Search documents and narratives in the e-folder
- Send a blast email to agencies or countries
- Update document types for the e-folder

The screens you will use to perform these tasks are explained in the following sections.

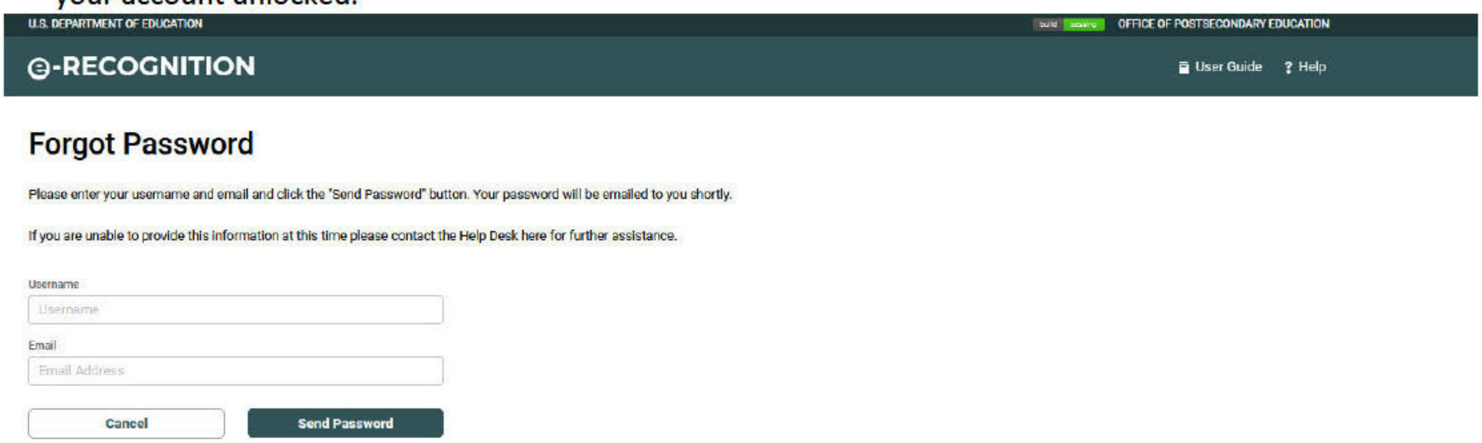
1.1 Accessing the System

To access the system, enter the URL https://surveys.ope.ed.gov/erecognition in the address box of the browser. The e-Recognition landing screen will display. Click the **Accept and Login** button after reading the Privacy Act Notice and Security Warning message. Enter your User ID and Password and click the **Log in** button to log in to the system. All login attempts are logged. If you have three unsuccessful login attempts, your account will be locked. You will then need to contact the Help Desk to have your account unlocked. A link to the *Contact the Help Desk* is located on the *Login* page.



1.2 Forgot Password

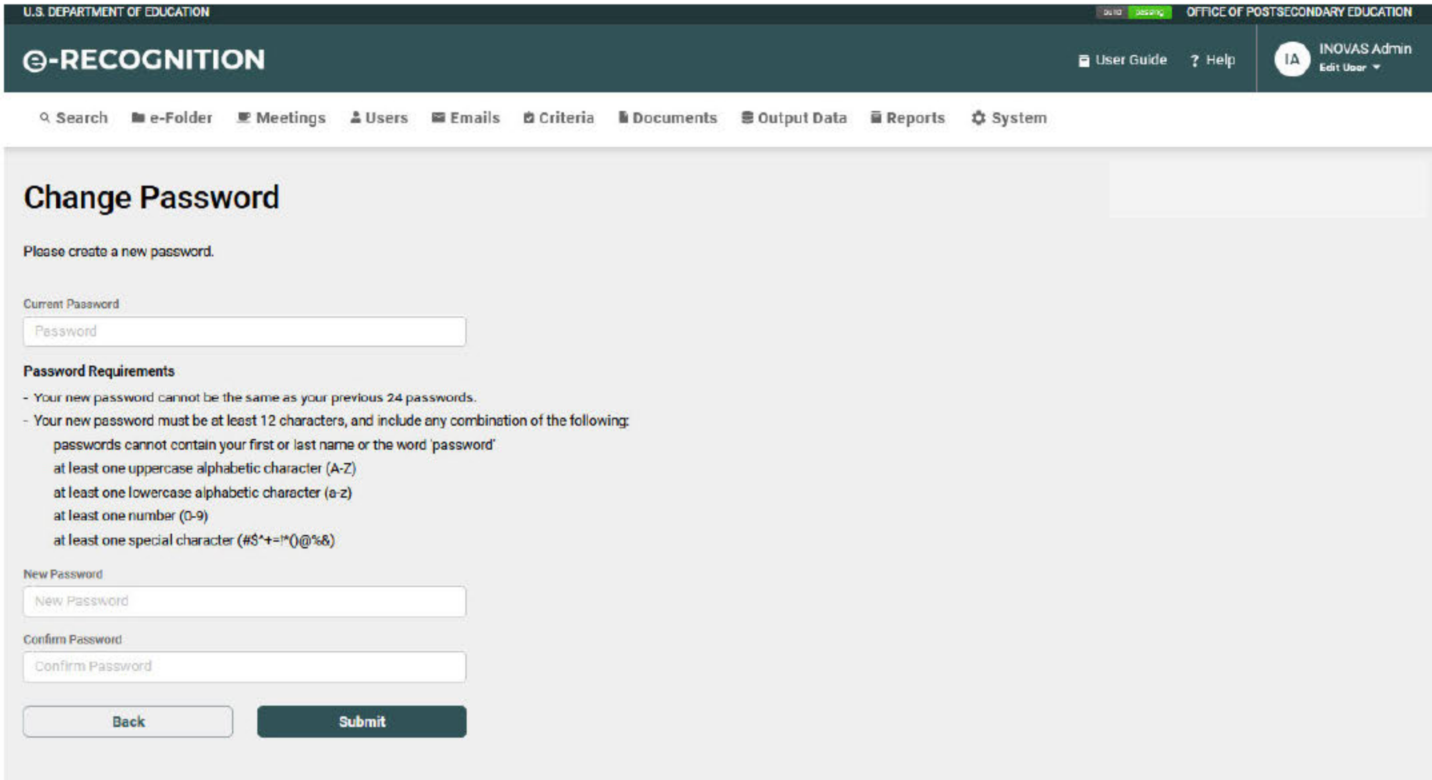
If you forget your password, you can click the 'Forgot Password?' link and enter your email. The system will confirm your identity and email your password to you. After three failed login attempts, you will be locked out of the system and will need to contact the Help Desk to have your account unlocked.



1.3 Change Password

You can change your password by clicking on the 'Password' link at the top of the screen You are required to change your password every 90 days. This screen will display after you login if your password has expired.

Enter your Current Password, New Password, and Verify New Password in the appropriate text boxes, then click the **Submit** button.

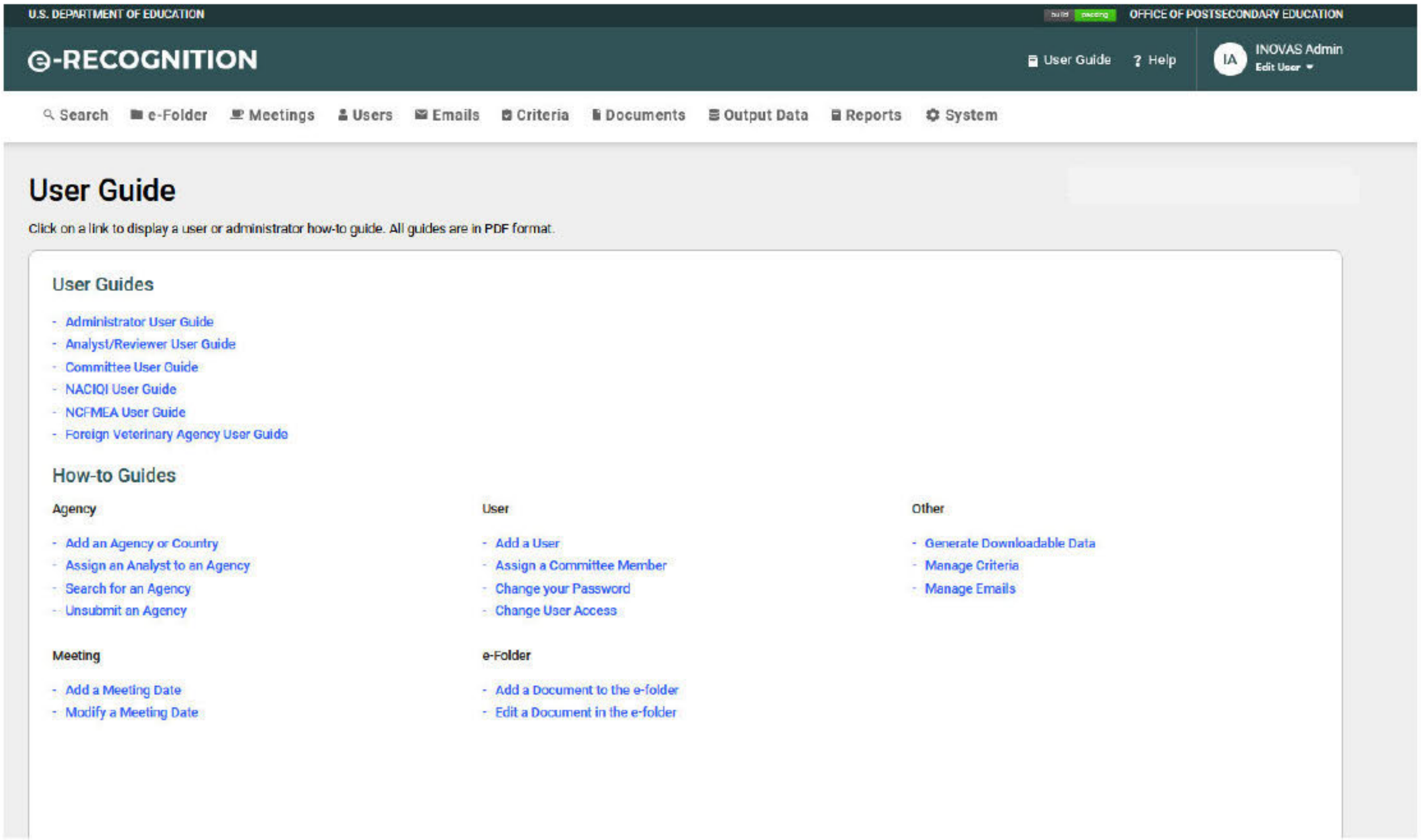


1.4 Help

A Help Desk is supported in conjunction with technical support for the e-Recognition website. The role of the Help Desk is to respond to technical questions about the website. Click the '? Help' link to contact the help desk.

1.5 User Guides

Click the 'User Guide' link in the toolbar to view the *User Guides* screen. Click on a link to display any of the guides.

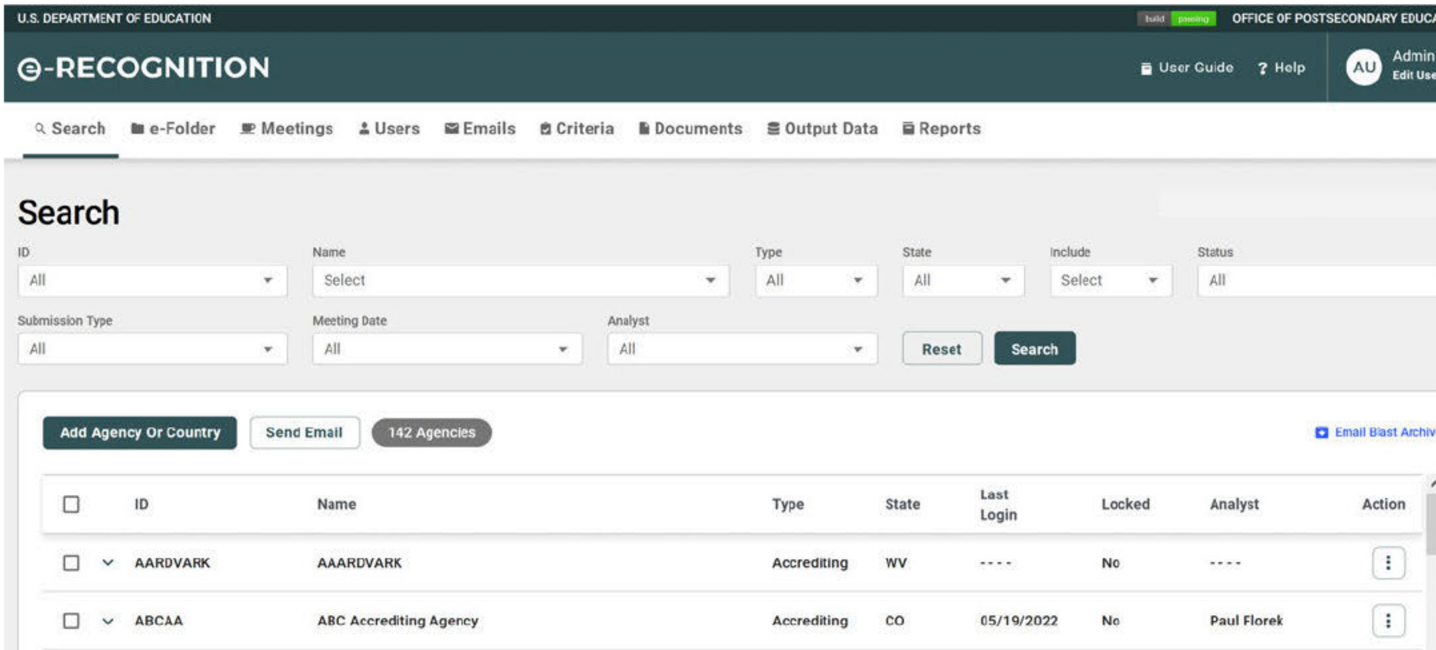


2 Agency and Country Maintenance

When an administrator logs in to the e-Recognition system, the *Administrator Search* screen will display. Most administrative functions related to agencies and countries can be done through this screen. Click the 'Admin Main' link in the top menu bar to return to this screen.

You can search for agency information by agency Login ID, name, type, state, submission status or type, meeting date, and assigned analyst. To include archived meeting dates in your search results, check the 'Include Archive' checkbox. To include deleted meetings, click the 'Include Deleted' checkbox.

After you enter your search criteria, click the **Search** button. Click on the **Reset** button to clear previously entered/selected search criteria.



The results of the search are displayed sorted by agency or country name under the search criteria. The following information is displayed for each one: login ID, agency name, agency type, state, last login date, and analyst assigned.

The types of Status are:

- N/A – Agency has not started their report
- Narrative In Process – Agency has logged in and started their report
- Narrative Submit (Draft) – Agency has submitted the report and the Analyst can review it
- Response In Process – The Analyst has completed their review and the reviewer has sent the agency an email notifying them that the draft analysis has been completed,
- Response Submit – Agency has resubmitted their response
- Final Review (Final) – The Analyst has completed their review and it is ready for the committee

For each agency, the following links are available:

- Update - Update the agency's address and administrator information.
- Analysis Information - Update analysis information, not specific to a meeting date, for the staff report.
- Assign - Assign the Analyst for the agency.
- Unlock - If the agency has been locked out of the e-recognition system (unsuccessful log in after 3 attempts), the 'Unlock' link displayed in the Locked Column will allow the admin to unlock the agency's account so that they can attempt to login again. The admin will need to notify the agency when their account has been unlocked.
- Reset – If the agency cannot recall their password, the admin can click on the 'Reset' link displayed in the Locked Column to reset the agency's password back to the default login. The agency will then be able to login and update their password. The admin will need to let the agency know when their password has been reset.

For each meeting date, the meeting date, submission status, latest submit date, and type of submission are listed.

For each agency meeting date, the following links are available:

- Assign Meeting Date – Assign the agency to a meeting date.
- Change Date – Change the meeting date assigned to the agency.
- View Data – View the agency's report.
- Change Status - Change the submission status for a report or delete the meeting date.
- Update [Type of Submission] – Change the type of report, the required criteria on a compliance report, or the outstanding issues for an NCFMEA update report.
- View [Historical Information] – View historical documents from the e-folder.
- Upload [3rd Party Comments] – Upload 3rd Party comments and enter requests for oral comments. If documents have been uploaded for the agency's meeting date, the documents uploaded can be displayed.

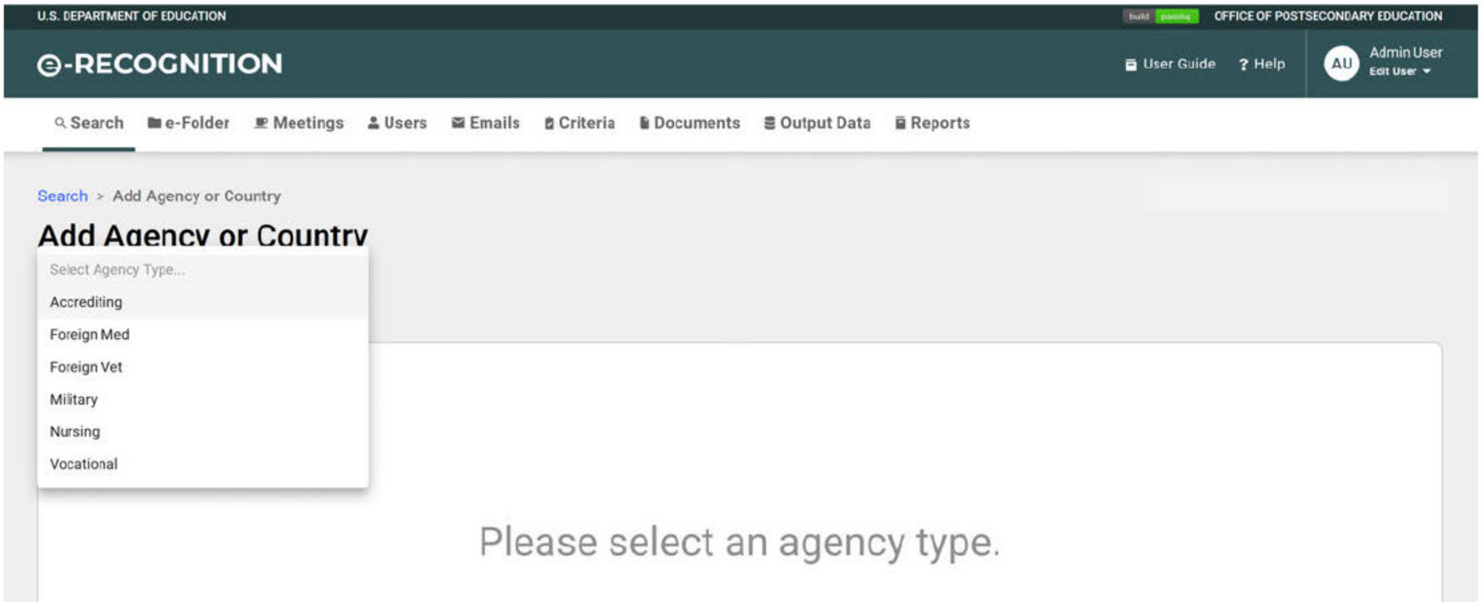
The screens to perform these functions are described in the following sections.

For archived and deleted meeting dates, no links to modify meeting date information will display. The 3rd Party Comments column will contain a 'View' link to allow you to display these documents.

2.1 Manage Agencies and Countries

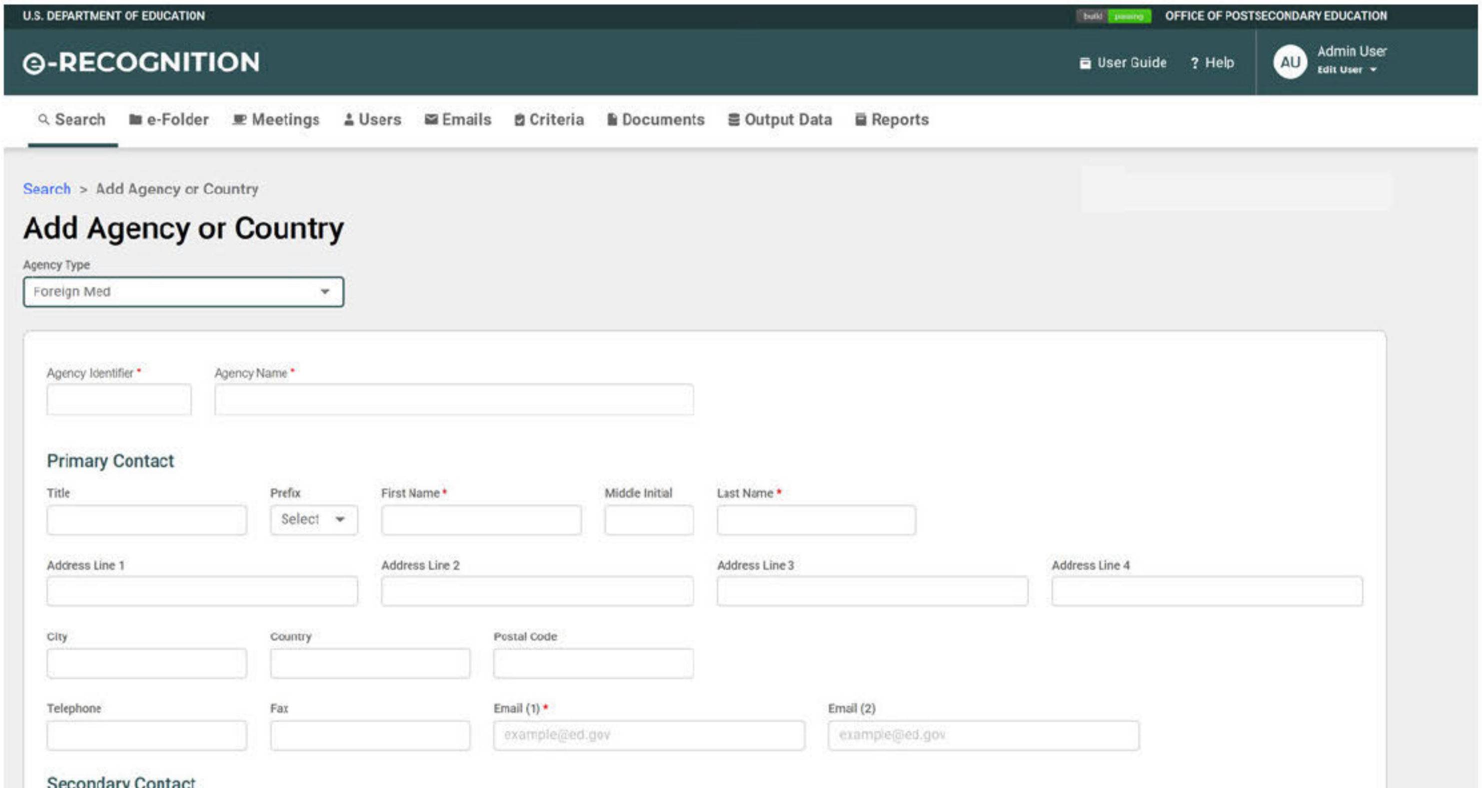
To add a new agency or country, click the **Add Agency or Country** button. To update the agency or country, click the 'Update' link under the Agency Name. The *Update Agency* screen will display.

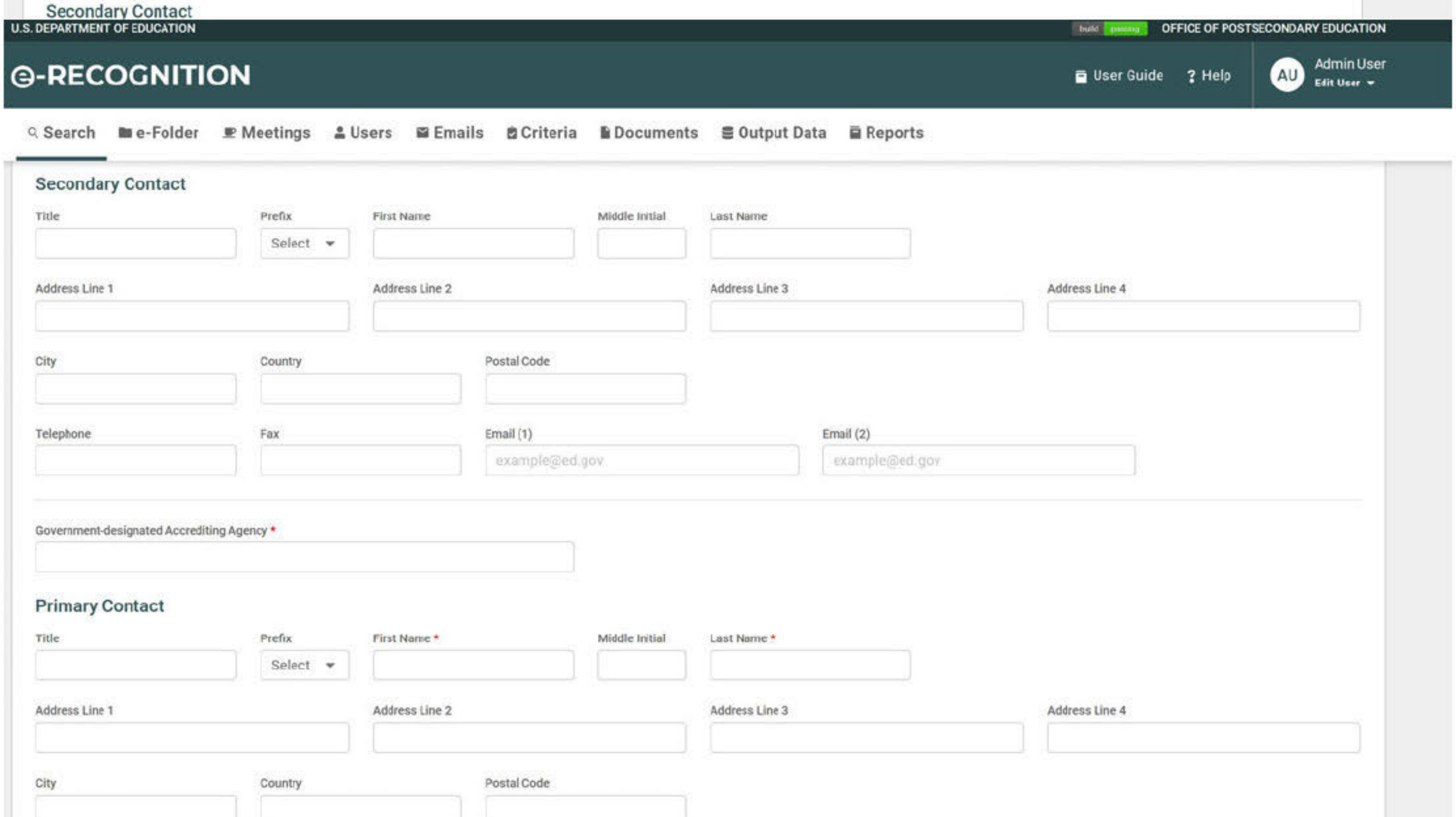
If you are adding an agency or country, you will first need to select the type from the dropdown and click the **Go** button.

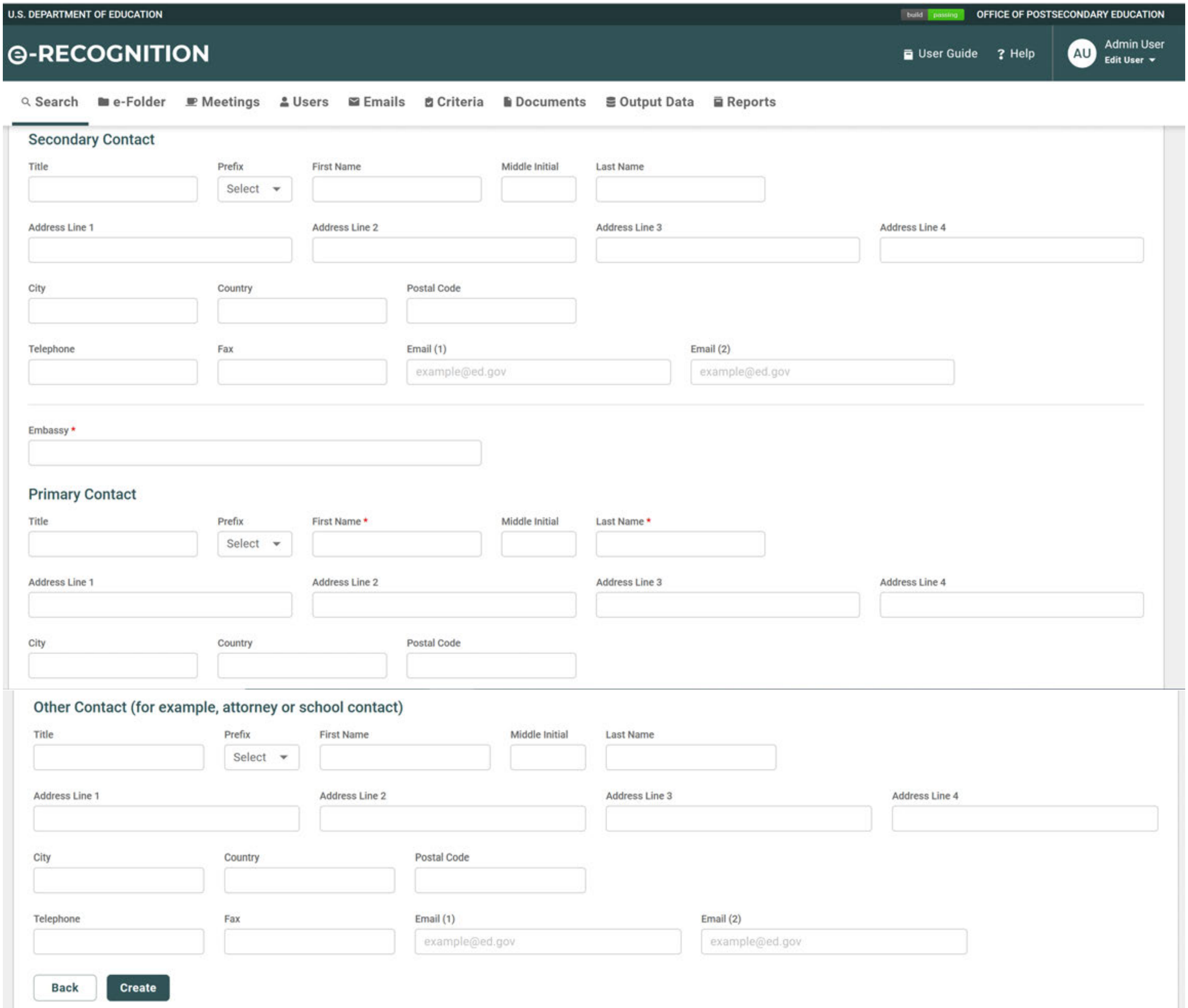


If you select 'Foreign Med' from the dropdown, the *Add Country* screen will display, otherwise the *Add Agency* screen will display fields to enter the agency administrator. Required fields are marked by a red asterisk. Enter your changes to the information and click the **Save** button.

Foreign Med Add Country screen

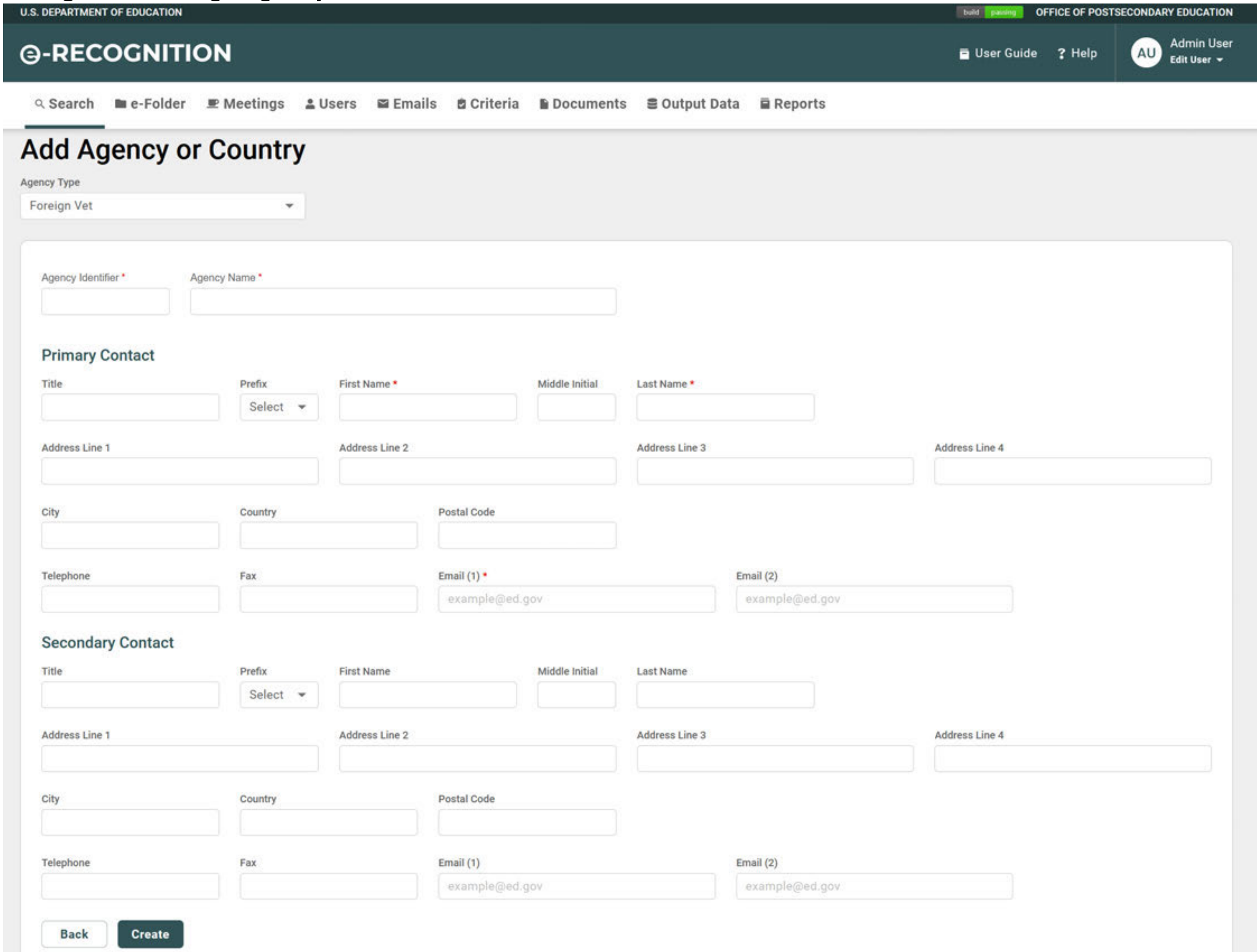




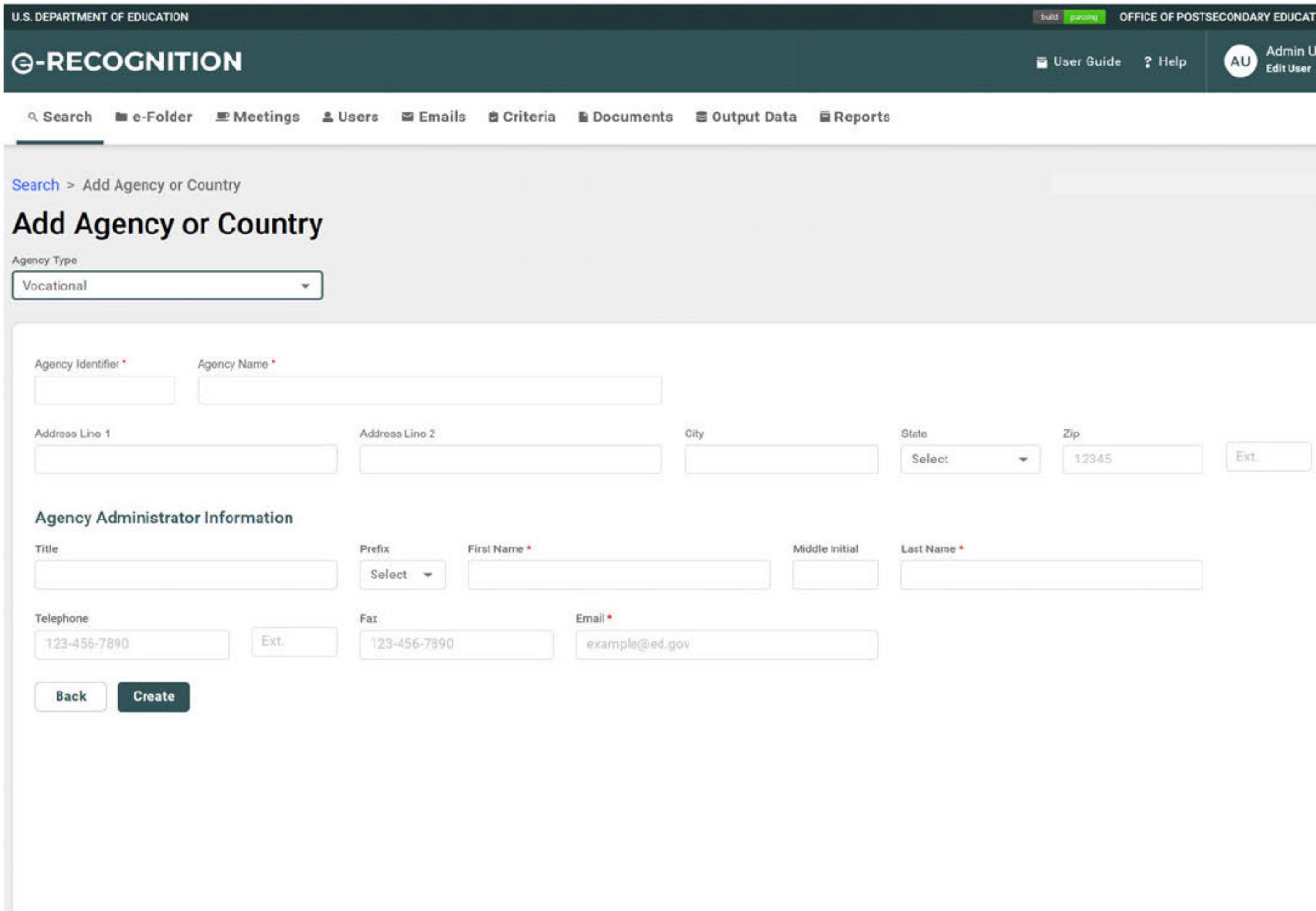

U.S. DEPARTMENT OF EDUCATION
build passing
OFFICE OF POSTSECONDARY EDUCATION
e-RECOGNITION
User Guide
? Help
AU
Admin User
Edit User
Search
e-Folder
Meetings
Users
Emails
Criteria
Documents
Output Data
Reports
Secondary Contact
Title
Prefix
Select
First Name
Middle Initial
Last Name
Address Line 1
Address Line 2
Address Line 3
Address Line 4
City
Country
Postal Code
Telephone
Fax
Email (1)
example@ed.gov
Email (2)
example@ed.gov
Embassy *
Primary Contact
Title
Prefix
Select
First Name *
Middle Initial
Last Name *
Address Line 1
Address Line 2
Address Line 3
Address Line 4
City
Country
Postal Code
Other Contact (for example, attorney or school contact)
Title
Prefix
Select
First Name
Middle Initial
Last Name
Address Line 1
Address Line 2
Address Line 3
Address Line 4
City
Country
Postal Code
Telephone
Fax
Email (1)
example@ed.gov
Email (2)
example@ed.gov
Back
Create

If you select ‘Foreign Vet’ from the dropdown, the *Add Agency* screen for Foreign Vet will display fields to enter the primary and secondary contact. Otherwise, the *Add Agency* screen will display fields to enter the agency administrator.

Foreign Vet Manage Agency screen

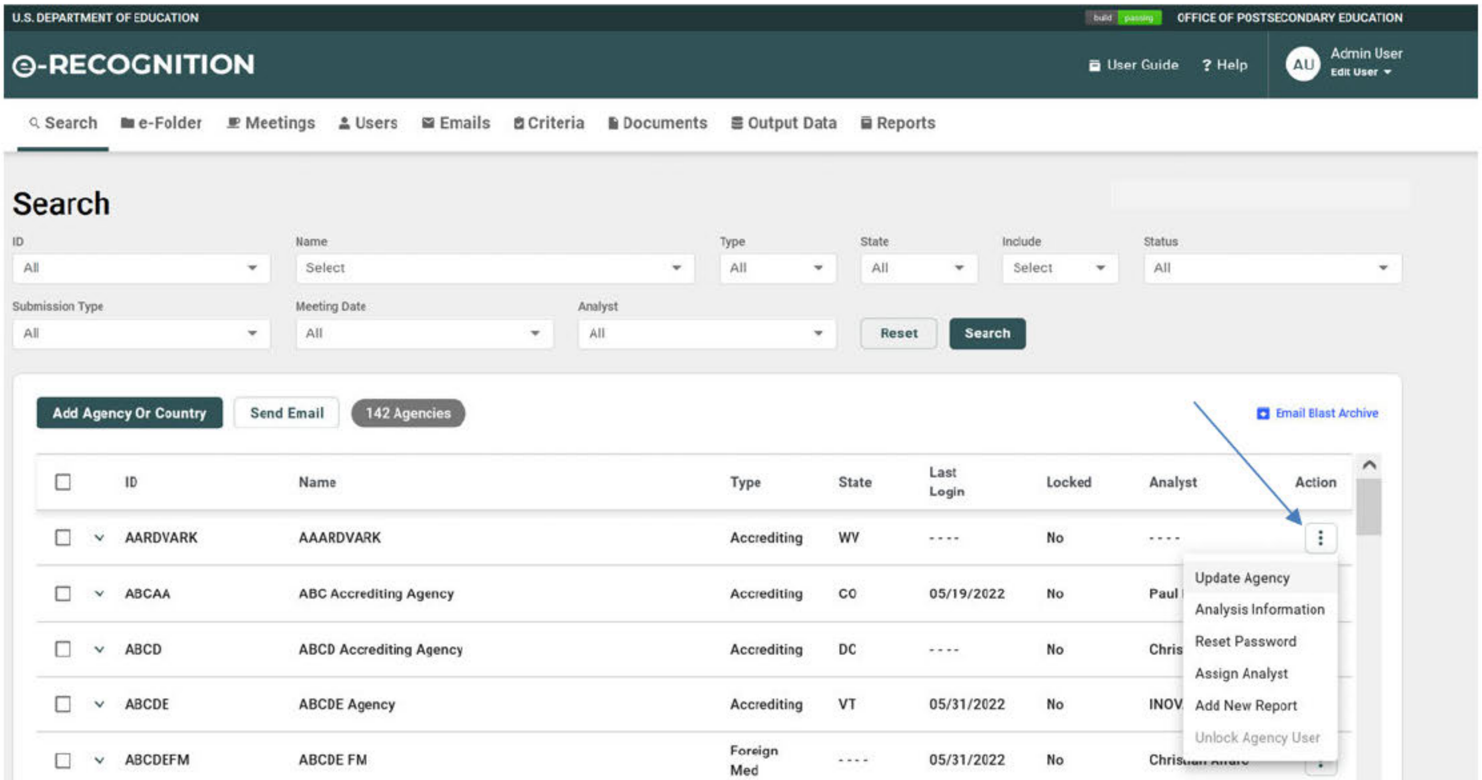


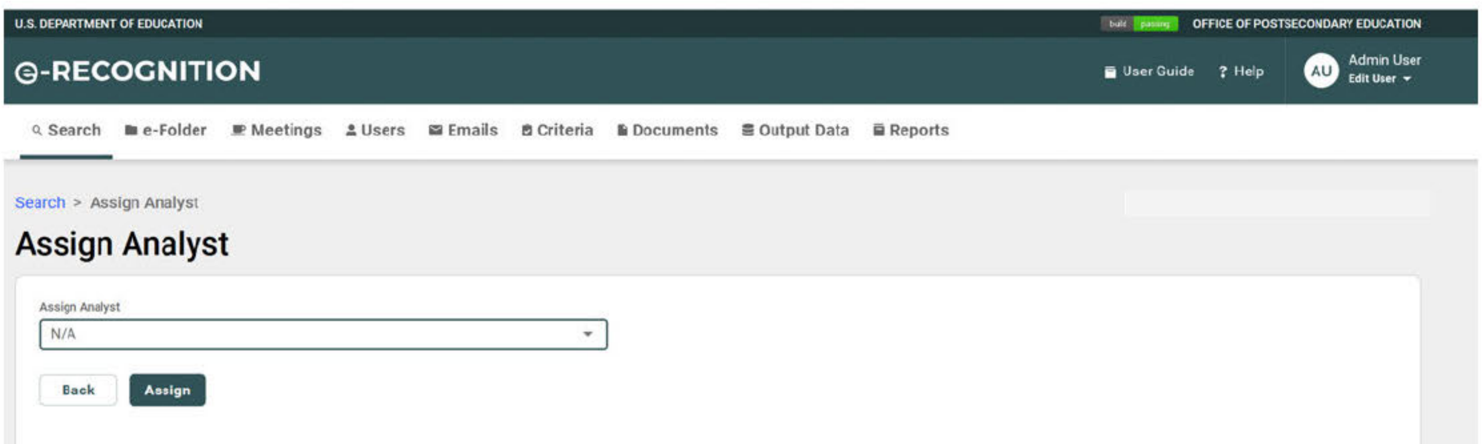
Accrediting, Vocational, Nursing or Military Degree-Granting Manage Agency screen



2.2 Assign Analyst

To assign an Analyst to an agency or country, click the 'Assign' link in the Action column. The *Assign Analyst* screen will display.

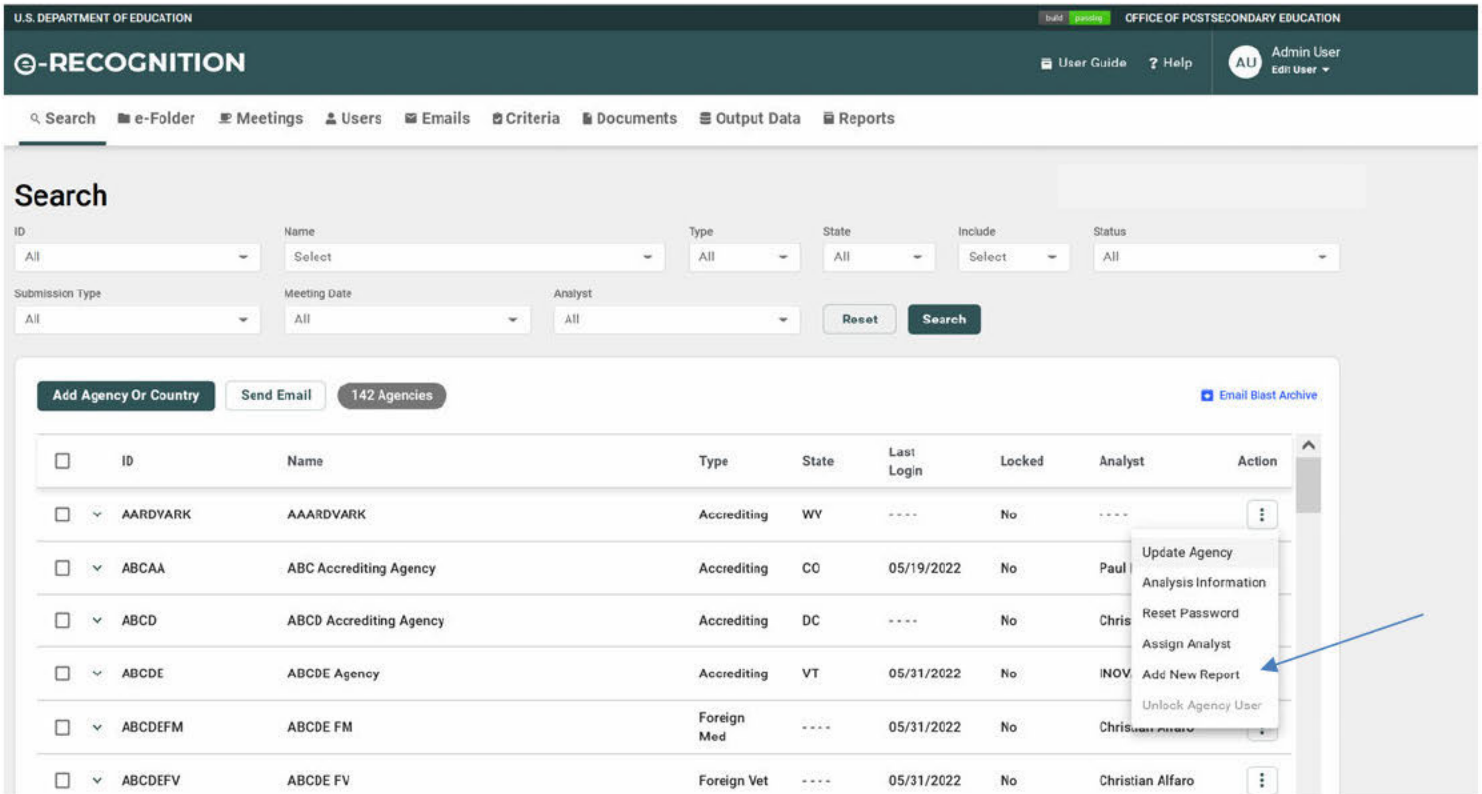


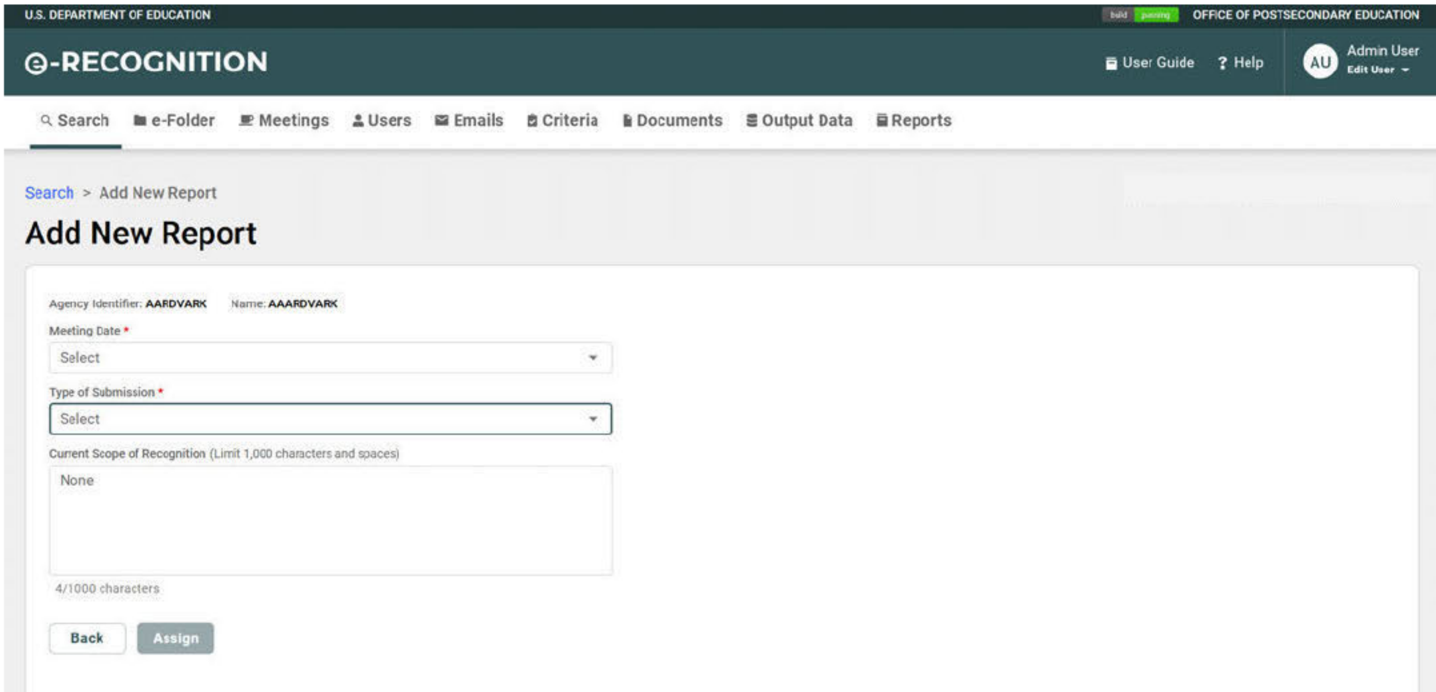


Select the Analyst from the dropdown and click the **Assign** button.

2.3 Assign Meeting Date

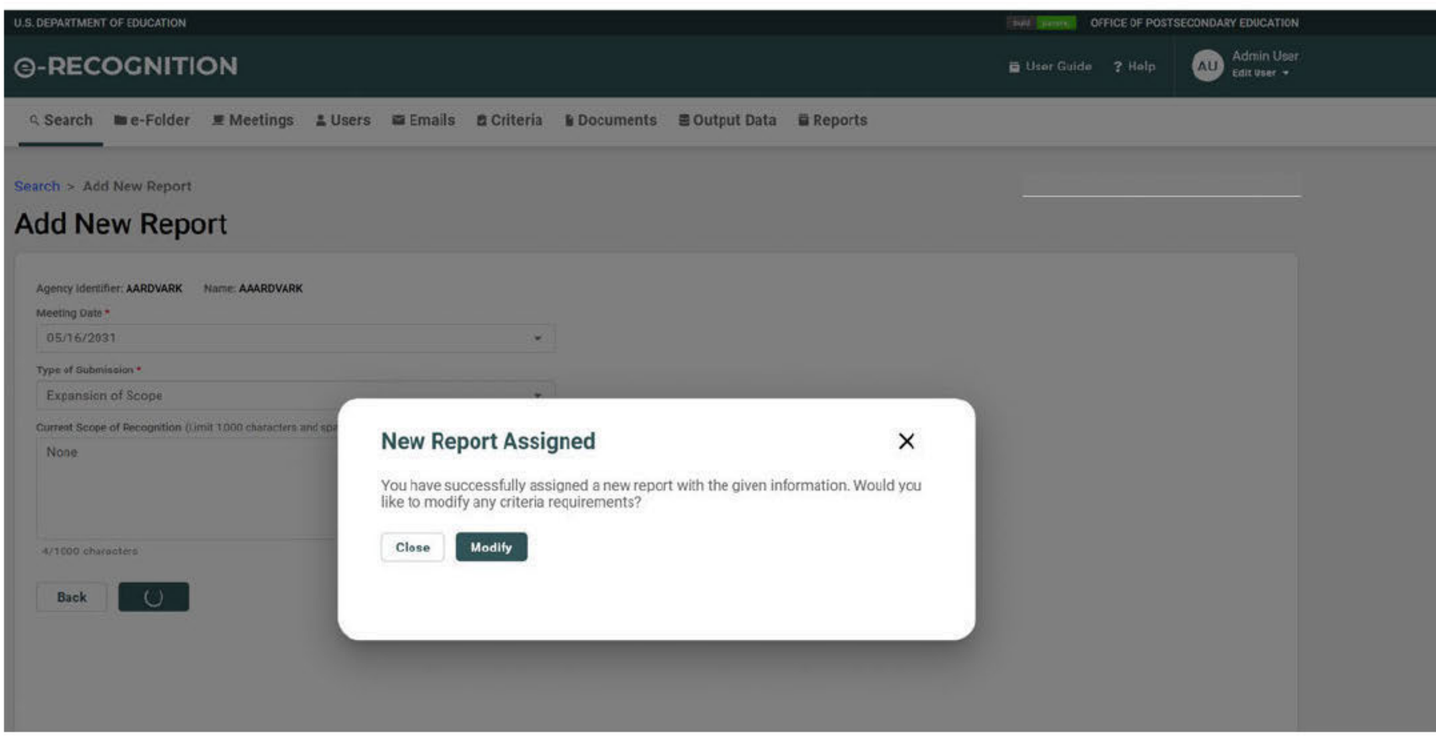
To assign a meeting date and submission type, click the 'Add New Report' link under the Action column heading. For agencies, the *Add New Report* screen will display.

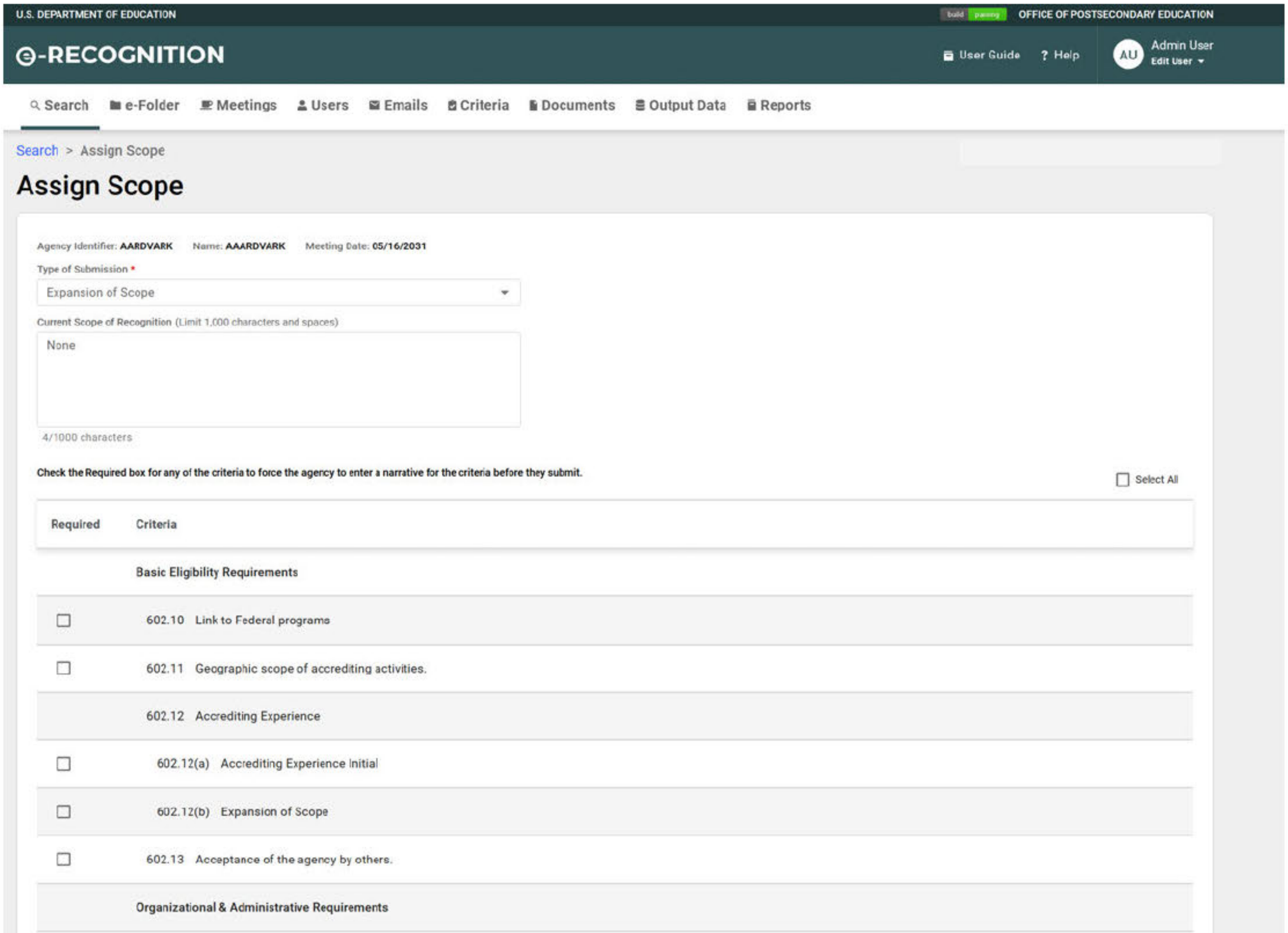

U.S. DEPARTMENT OF EDUCATION
OFFICE OF POSTSECONDARY EDUCATION
e-RECOGNITION
User Guide
? Help
AU
Admin User
Edit User
Search
e-Folder
Meetings
Users
Emails
Criteria
Documents
Output Data
Reports
Search
ID
Name
Type
State
Include
Status
Submission Type
Meeting Date
Analyst
Reset
Search
Add Agency Or Country
Send Email
142 Agencies
Email Blast Archive
ID
Name
Type
State
Last Login
Locked
Analyst
Action
AARDVARK
AAARDVARK
Accrediting
WV
No
ABCAA
ABC Accrediting Agency
Accrediting
CO
05/19/2022
No
ABCD
ABCD Accrediting Agency
Accrediting
DC
No
ABCDE
ABCDE Agency
Accrediting
VT
05/31/2022
No
ABCDEFM
ABCDE FM
Foreign Med
05/31/2022
No
ABCDEFV
ABCDE FV
Foreign Vet
05/31/2022
No
Christian Alfaro
Update Agency
Analysis Information
Reset Password
Assign Analyst
Add New Report
Unlock Agency User



Select the meeting date and type of submission from the dropdowns. You can also change the current scope of recognition, if necessary.

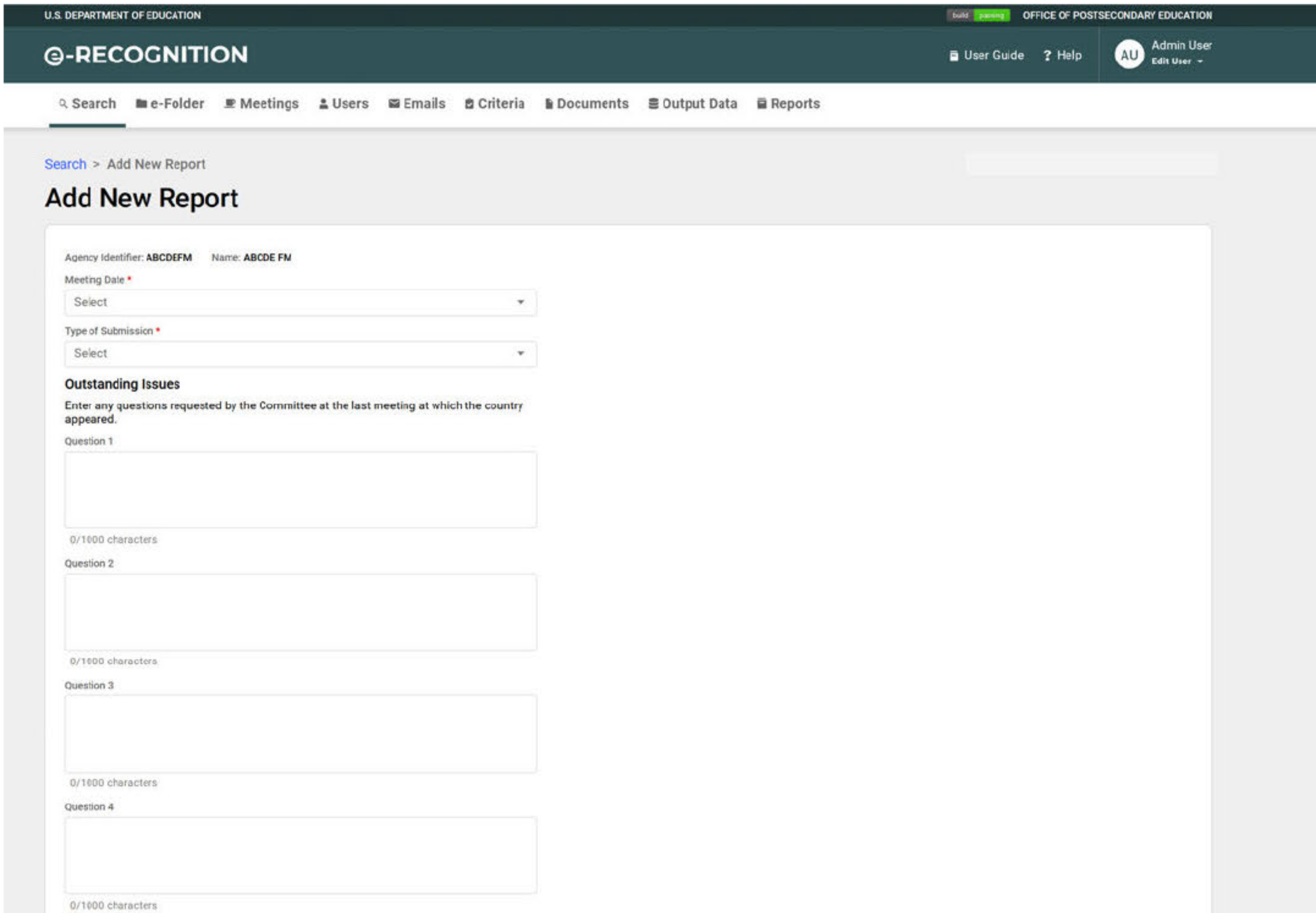
When you click assign, a popup asking if you would like to modify any criteria requirements will appear.



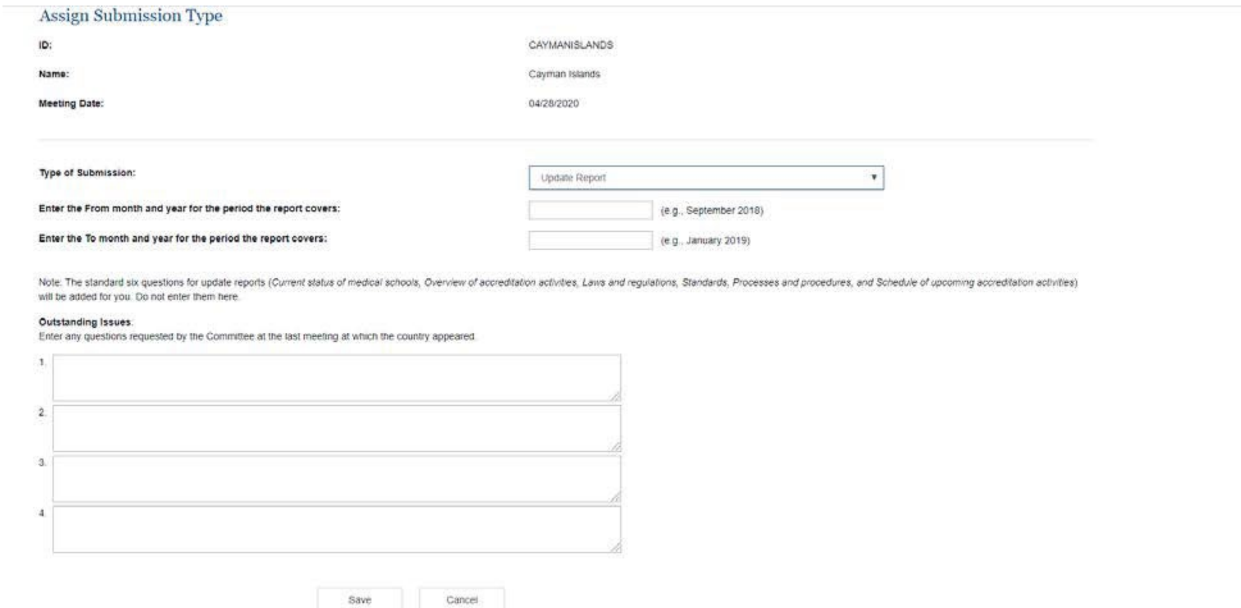


The agency will not be able to submit their report unless they have entered a narrative for all of the criteria for which you check 'Required.' Entering a narrative for the other criteria will be optional. Click the **Save** button after you have finished entering the information.

If you click the 'Assign Meeting Date' link for a country, the *Add New Report* screen will display.



Select the Meeting Date and Type of Submission from the dropdowns. If you enter an outstanding issue, the country will be required to respond to the issue before they submit their report. If you select 'Update Report' from the dropdown, the screen will redisplay with fields to let you enter the to and from dates for the period the report covers. There are six standard questions for foreign medical reports which will be entered for you. You don't need to add them here. If extra fields are needed, just hit save and more boxes will be added.

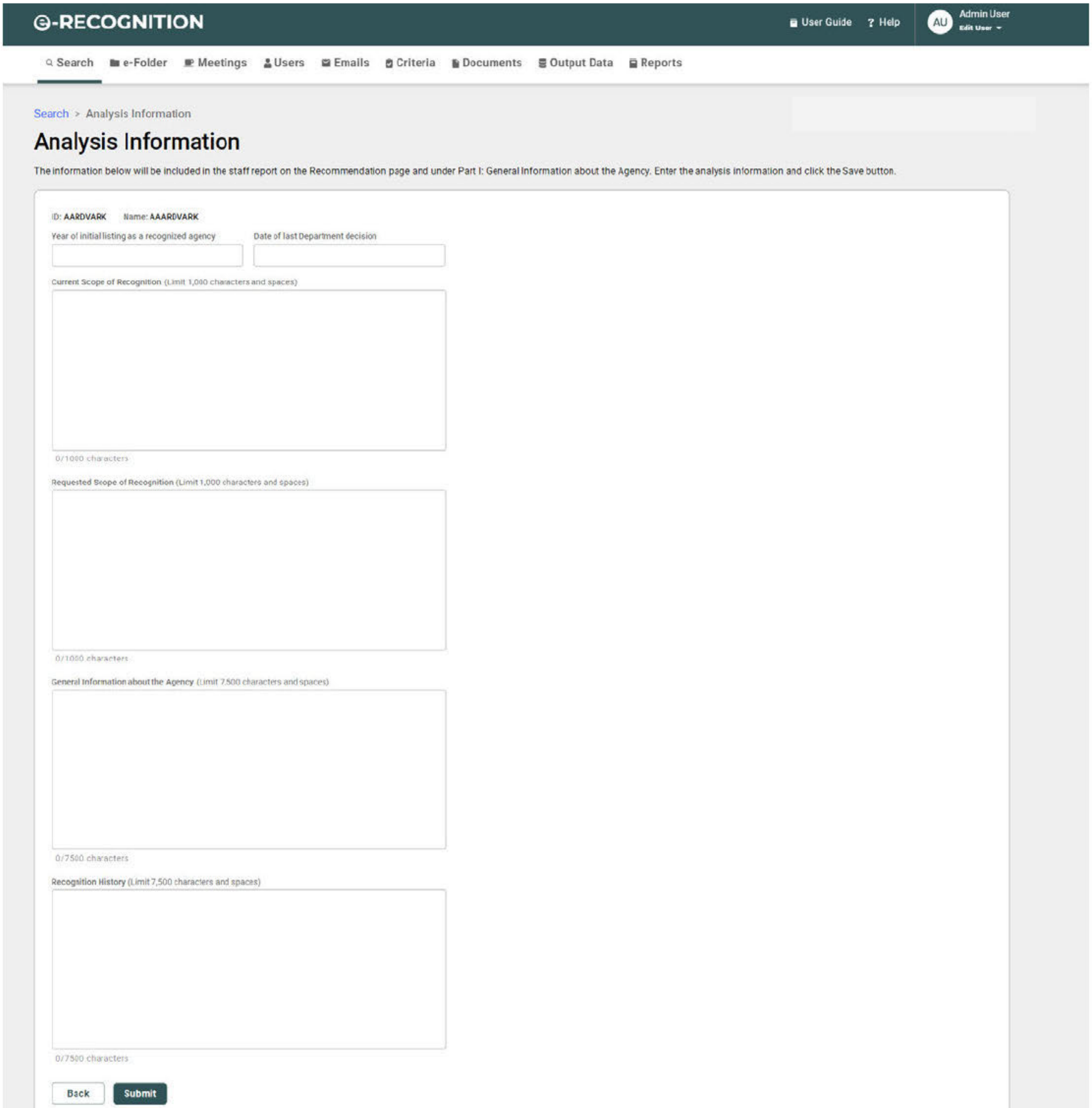


If you click the 'Assign Meeting Date' link for a foreign veterinary agency, the *Assign Meeting Date and Submission Type* screen will display with only the meeting date and meeting type dropdowns displayed. Select a value form both dropdowns and click the **Save** button.

2.4 Analysis Information

To update the Analysis information, click the 'Analysis Information' link under the Action column. This information is included on the staff report. Administrators can update the scope of recognition and other information which is not report-specific. Report-specific information is entered by the analyst.

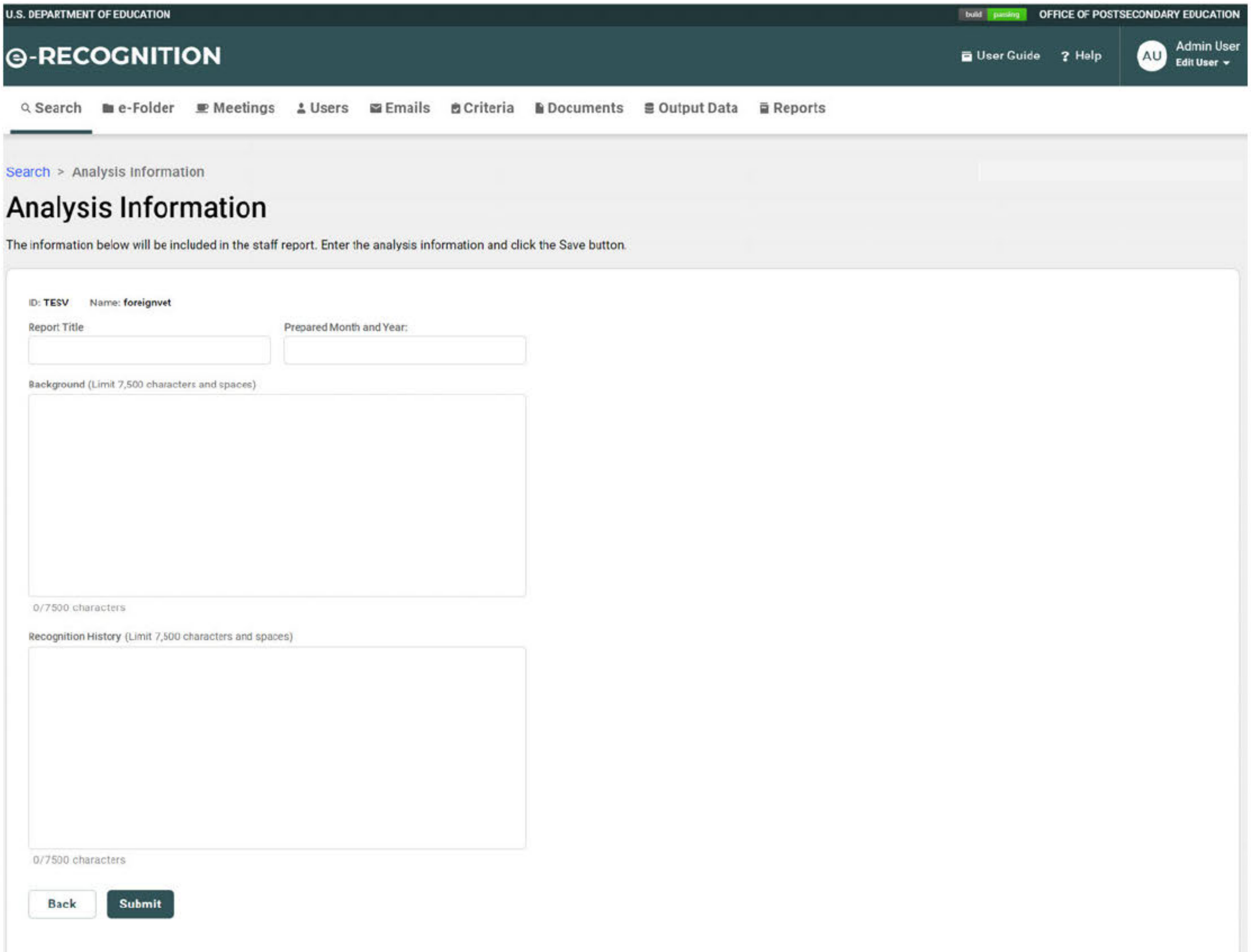
The *Analysis Information* screen displays as follows for agencies:



e-RECOGNITION
User Guide
? Help
AU
Admin User
Edit User
Search
e-Folder
Meetings
Users
Emails
Criteria
Documents
Output Data
Reports
Search > Analysis Information
Analysis Information
The information below will be included in the staff report on the Recommendation page and under Part I: General Information about the Agency. Enter the analysis information and click the Save button.
ID: AARDVARK
Name: AAARDVARK
Year of initial listing as a recognized agency
Date of last Department decision
Current Scope of Recognition (Limit 1,000 characters and spaces)
0/1000 characters
Requested Scope of Recognition (Limit 1,000 characters and spaces)
0/1000 characters
General Information about the Agency (Limit 7,500 characters and spaces)
0/7500 characters
Recognition History (Limit 7,500 characters and spaces)
0/7500 characters
Back
Submit

The current and requested scope of recognition do not display for nursing and vocational agencies.

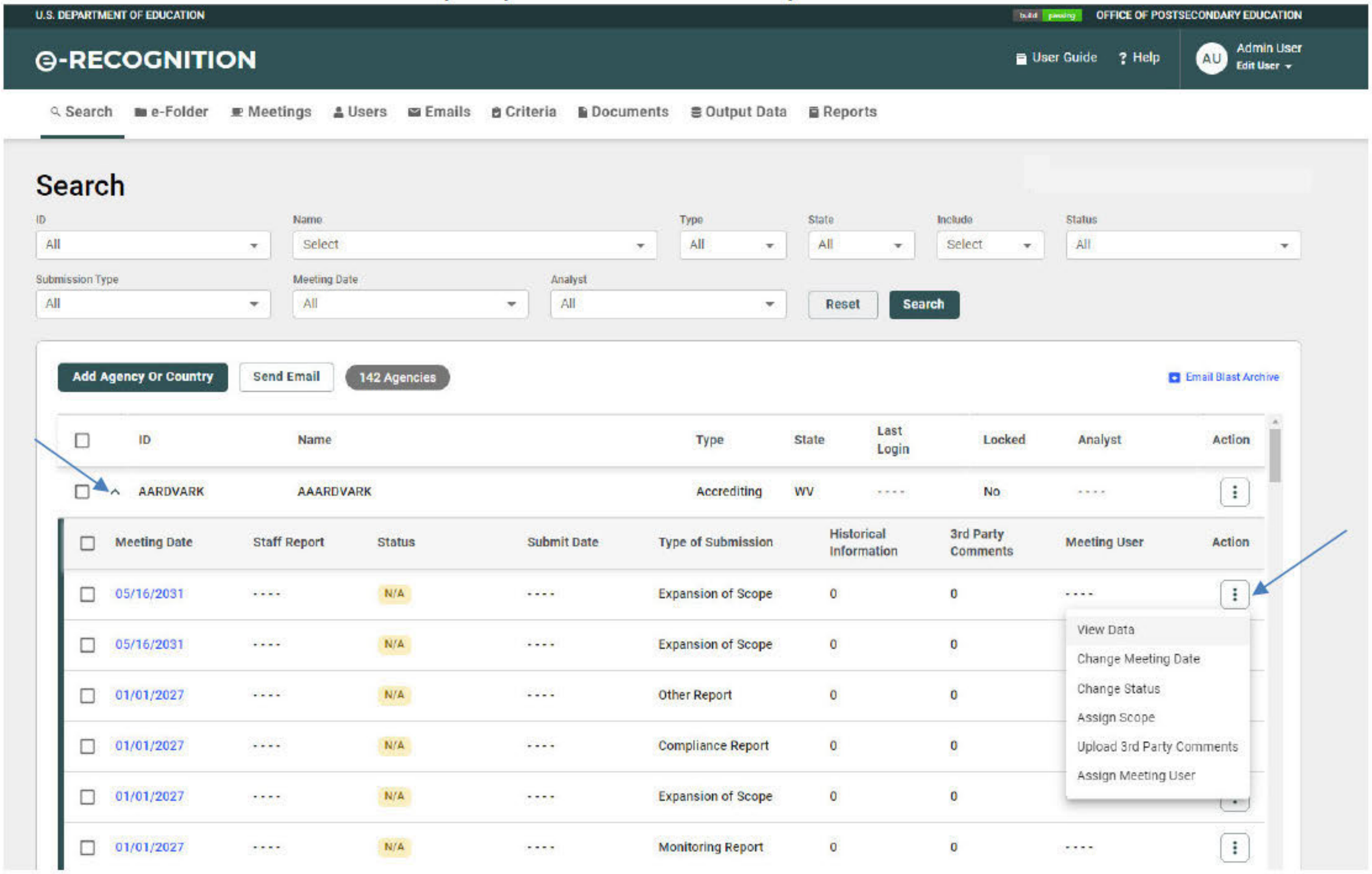
The *Analysis Information* screen displays as follows for countries and foreign veterinary agencies:



Enter the analysis information and click the **Submit** button. Spell character counter is available for the text fields. Click on the back button to return to the *Search* screen.

2.5 Change Meeting Date

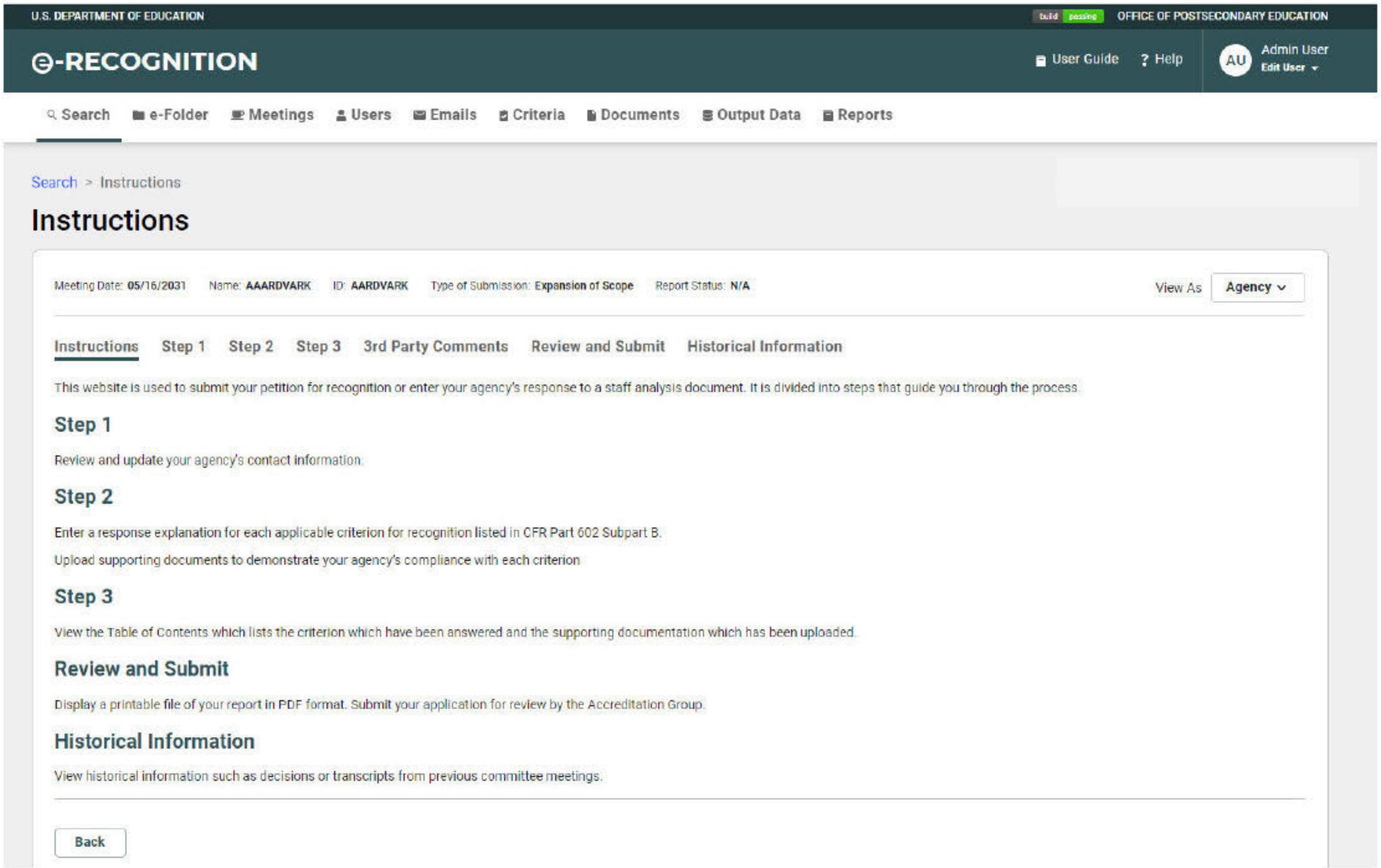
To change the agency or country's assigned meeting date, click the 'Change Meeting Date' link in the Action column for the report you would like to modify.



Select a meeting date and click the **Change** button to change the meeting date. Click Back to return to the *Admin Main* screen.

2.7 View Agency/Country Data

To display the report for an agency or country, click the 'View Data' link. The *Instructions* screen will display.



Click these links to display the report information:

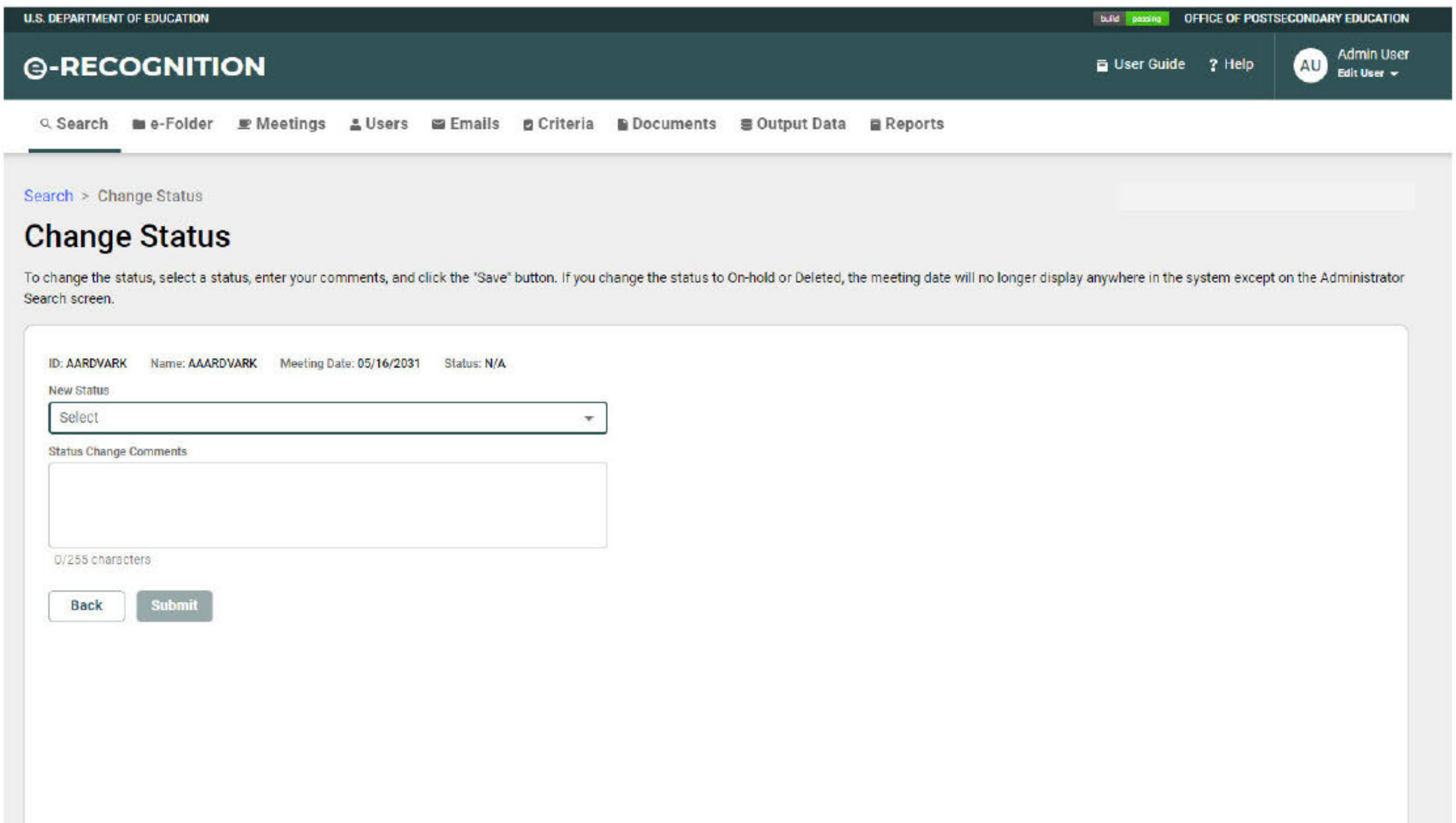
- Step 1 – View the address and contact.

- Step 2 – View the narratives or responses & supporting documents uploaded.
- Step 3 – View the table of contents.
- 3rd Part Comments
- Review and Submit
- Historical Information

Click Search to return to the *Administrator Search* screen.

2.8 Change Status

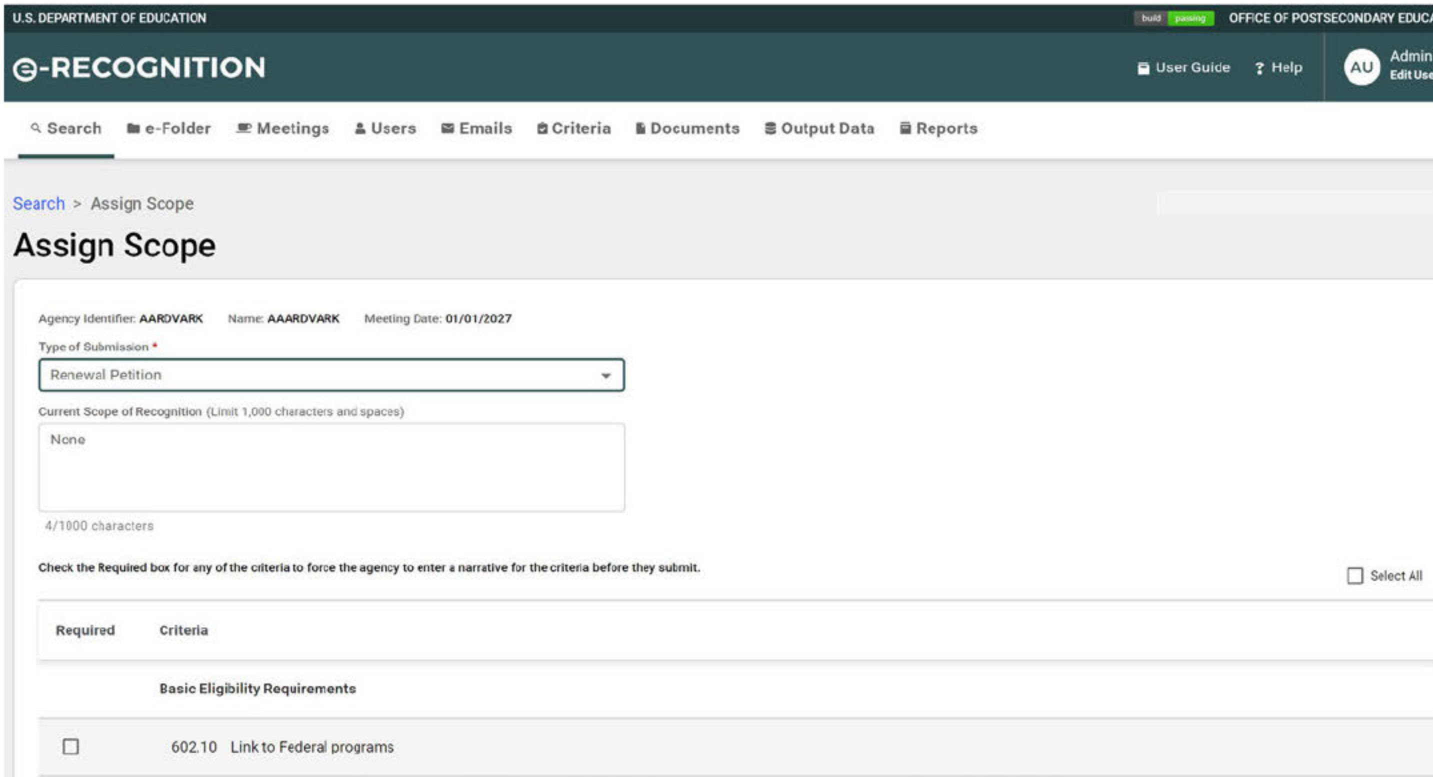
Click 'Change Status' under the Action column to change the status of the desired report.



The New Status dropdown will only include appropriate statuses. (e.g., A 'Final Review' status will not be included unless the agency was previously placed in Final Review status by the reviewer.) Select the new status, enter a comment to explain why you are changing the status, and click the **Save** button.

2.9 Change Submission Type

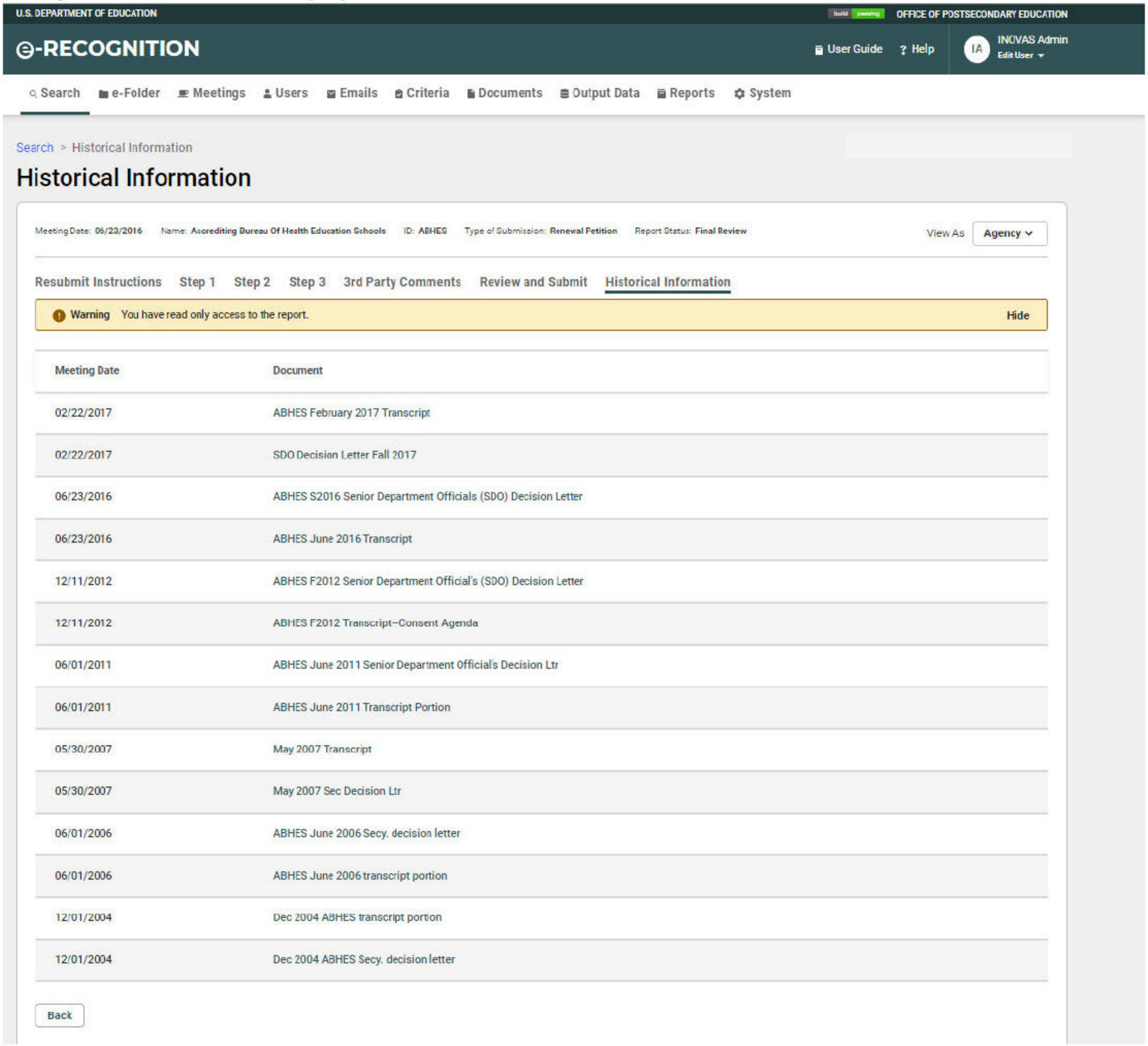
To change the report submission type, click the 'Assign Scope' link in the Action column of the desired report. The *Assign Scope* screen will display.



Select the type of submission from the dropdown and enter any necessary changes to the current scope of recognition. If the type of submission is 'Expansion of Scope,' 'Compliance Report,' or 'Other Report,' you can check the criteria for which the agency is required to enter a narrative. Click the **Assign** button to save your changes.

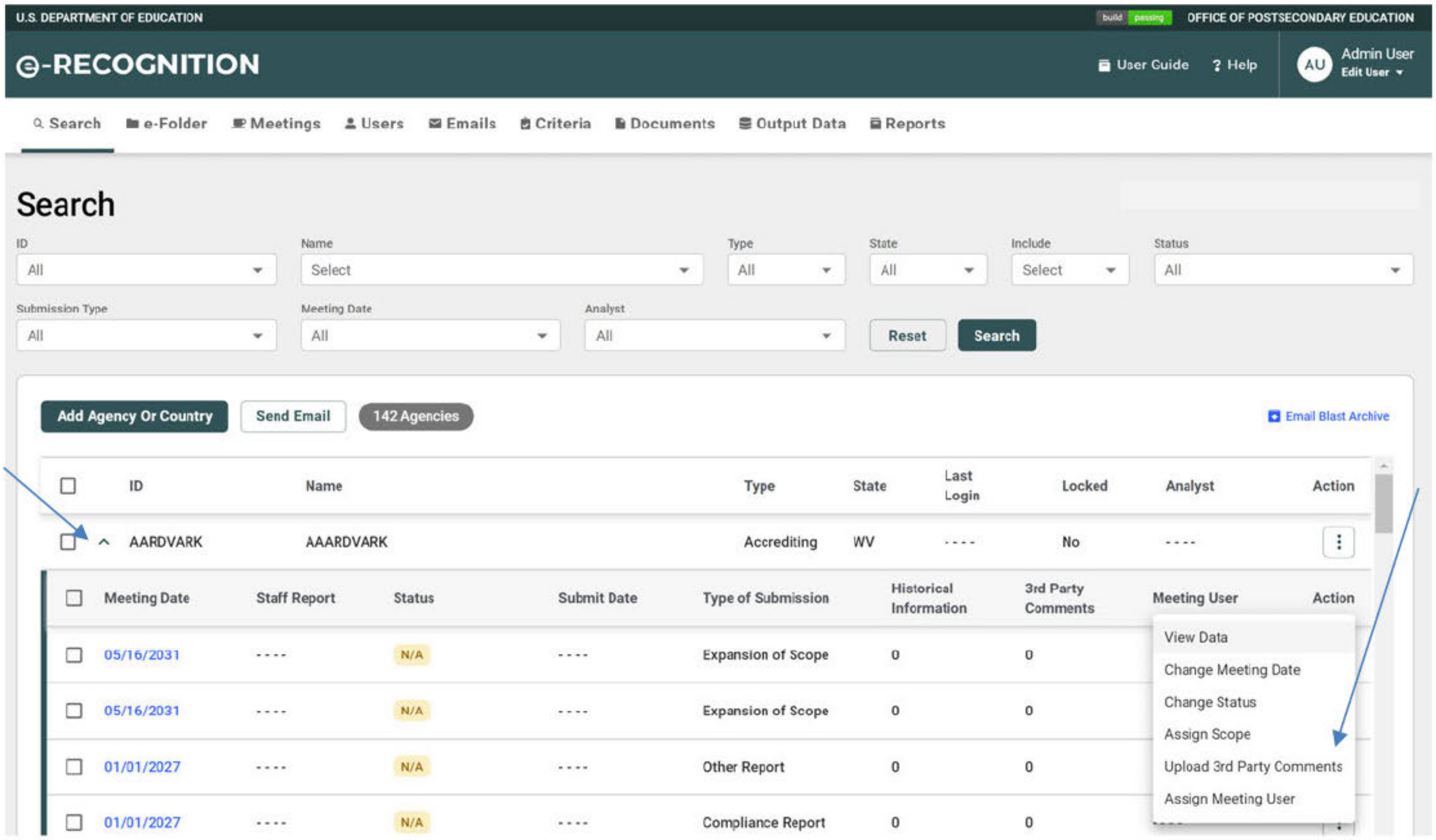
2.10 View Historical Documents

To view historical documents for the agency or country, click the 'View' link in the Historical Information tab under View Data in the Action column for the desired report. The *Historical Information* screen will display. Click on a link to view a document.



2.11 3rd Party Comments

To upload 3rd party comments, click the 'Upload 3rd party comments' link in the Action menu that corrisponds to the meeting date. The *3rd Party Comments* screen will display. Files uploaded on this screen are available for the agency to view and comment on.


U.S. DEPARTMENT OF EDUCATION
OFFICE OF POSTSECONDARY EDUCATION
e-RECOGNITION
User Guide
? Help
AU
Admin User
Edit User
Search
e-Folder
Meetings
Users
Emails
Criteria
Documents
Output Data
Reports
Search
ID
All
Name
Select
Type
All
State
All
Include
Select
Status
All
Submission Type
All
Meeting Date
All
Analyst
All
Reset
Search
Add Agency Or Country
Send Email
142 Agencies
Email Blast Archive
ID
Name
Type
State
Last Login
Locked
Analyst
Action
AARDVARK
AAARDVARK
Accrediting
WV
No
Meeting Date
Staff Report
Status
Submit Date
Type of Submission
Historical Information
3rd Party Comments
Meeting User
Action
05/16/2031
N/A
Expansion of Scope
0
0
05/16/2031
N/A
Expansion of Scope
0
0
01/01/2027
N/A
Other Report
0
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Compliance Report
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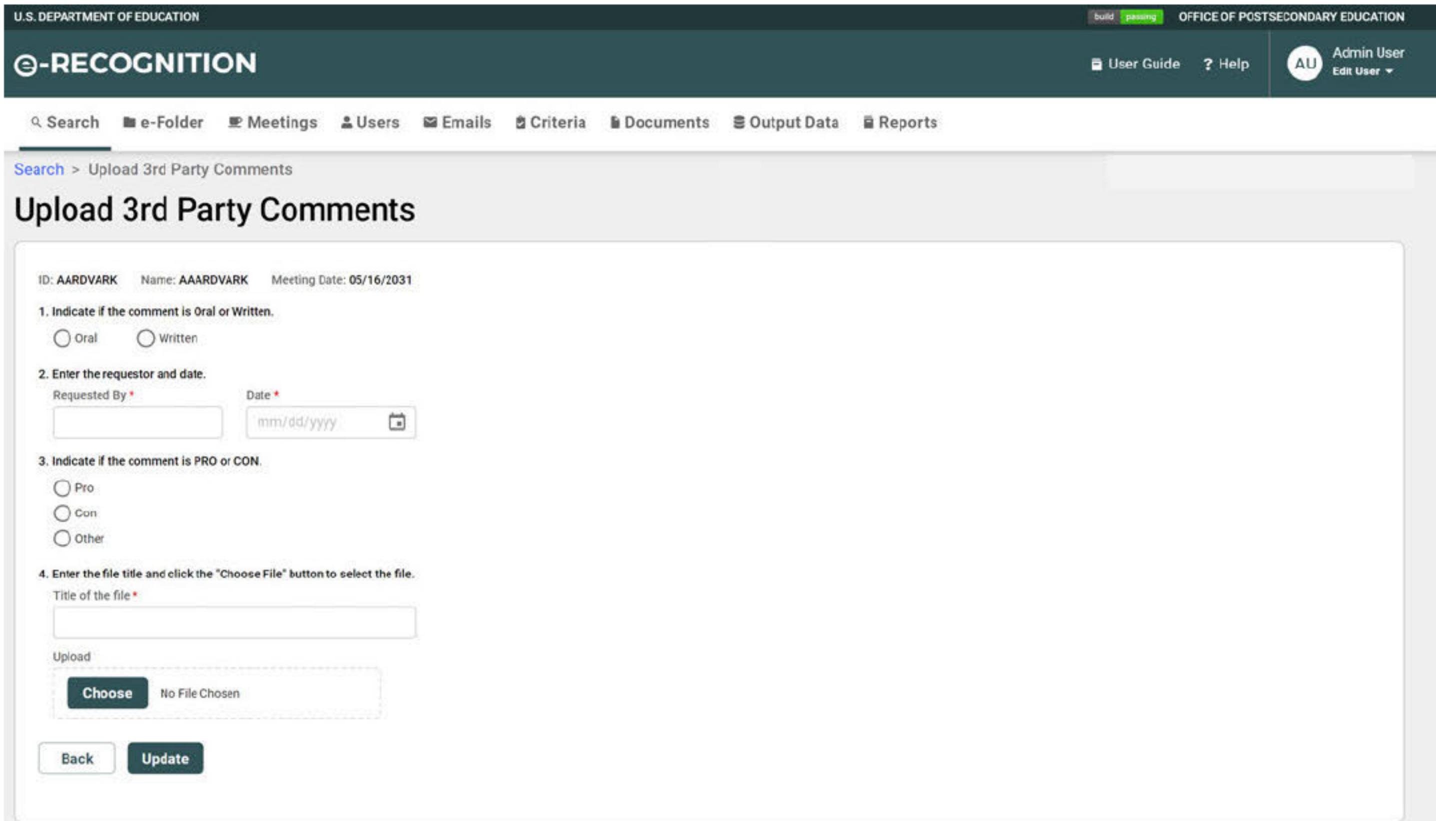
View Data
Change Meeting Date
Change Status
Assign Scope
Upload 3rd Party Comments
Assign Meeting User



Select the appropriate responses to questions 1 through 3. Enter the title of the file and click the **Choose** button to locate the file you wish to upload on your desktop. Click the **Update** button to upload the screen. The document will be added to the e-folder when it is saved.

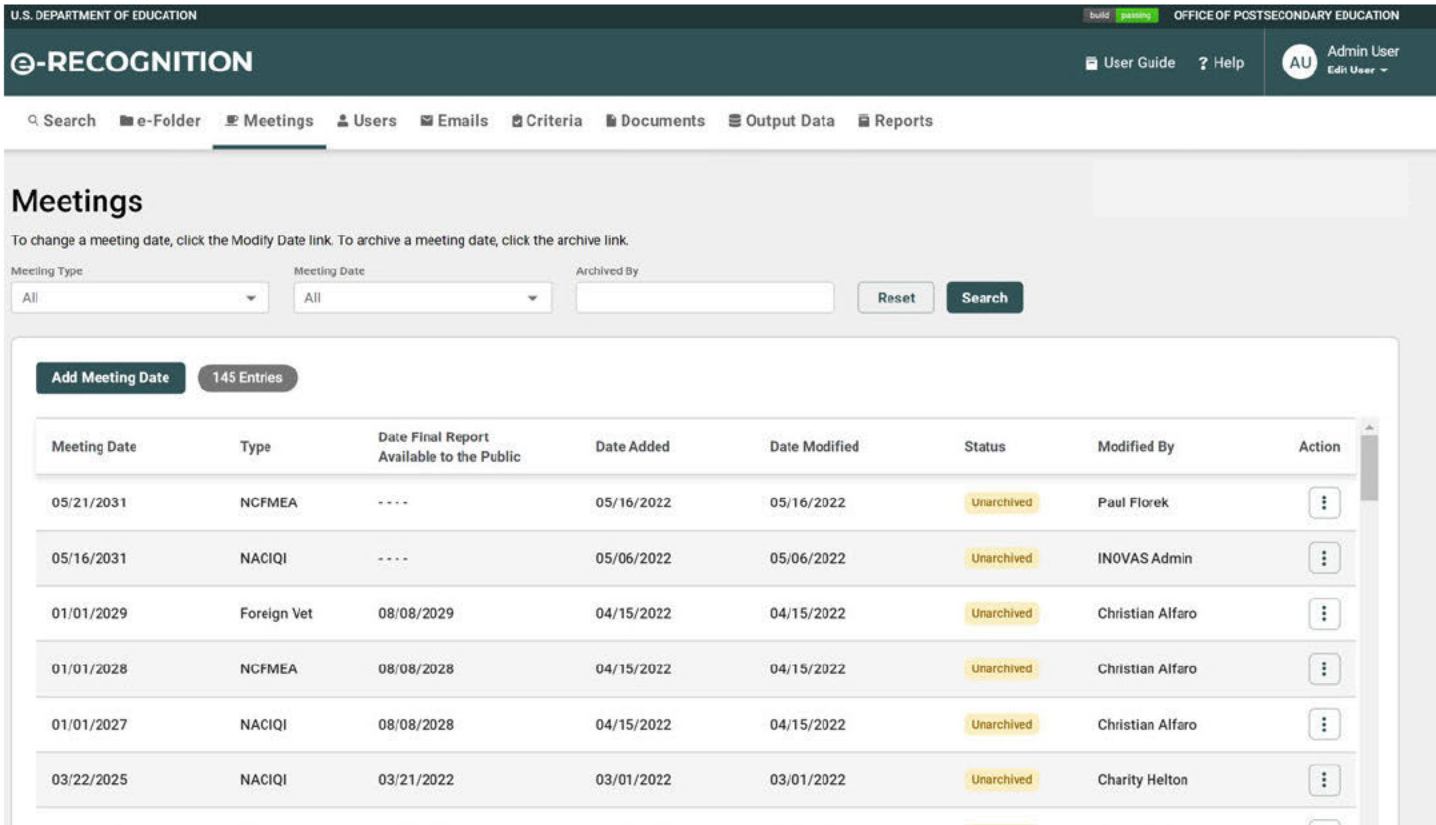
The uploaded files are shown on the screen. Click the 'file name' link to view a file. To hide a file, click the corresponding **Hide** button is found under the action menu. The document will be hiden from the e-folder also.

3 Meeting Date and User Functions

This section describes functions which are performed by administrators to maintain users, meeting dates, and criteria.

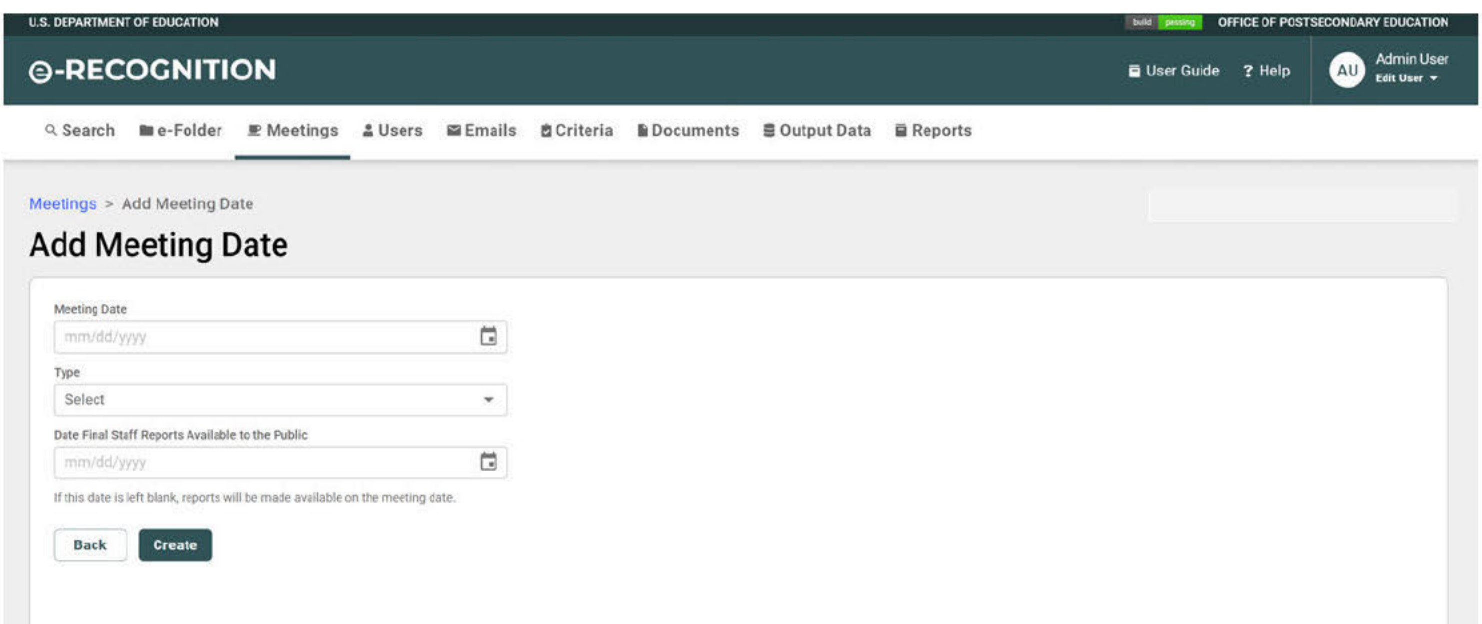
3.1 Manage Meeting Dates

To add or update a meeting date, click the 'Meetings' link at the top of the screen. The *Meetings* screen will display with a list of meeting dates. You can add, change, or archive a meeting date through this screen. However, meetings are automatically archived 90 days after the meeting date. If it has been less than a year since the meeting date, an 'Unarchive' link will display to allow the meeting to be unarchived. Click the link to unarchive the meeting. The user ID and date the meeting was archived will display on the screen. When you are ready to re-archive the meeting, click the 'Archive' link under the Action column.



3.1.1 Add Meeting Date

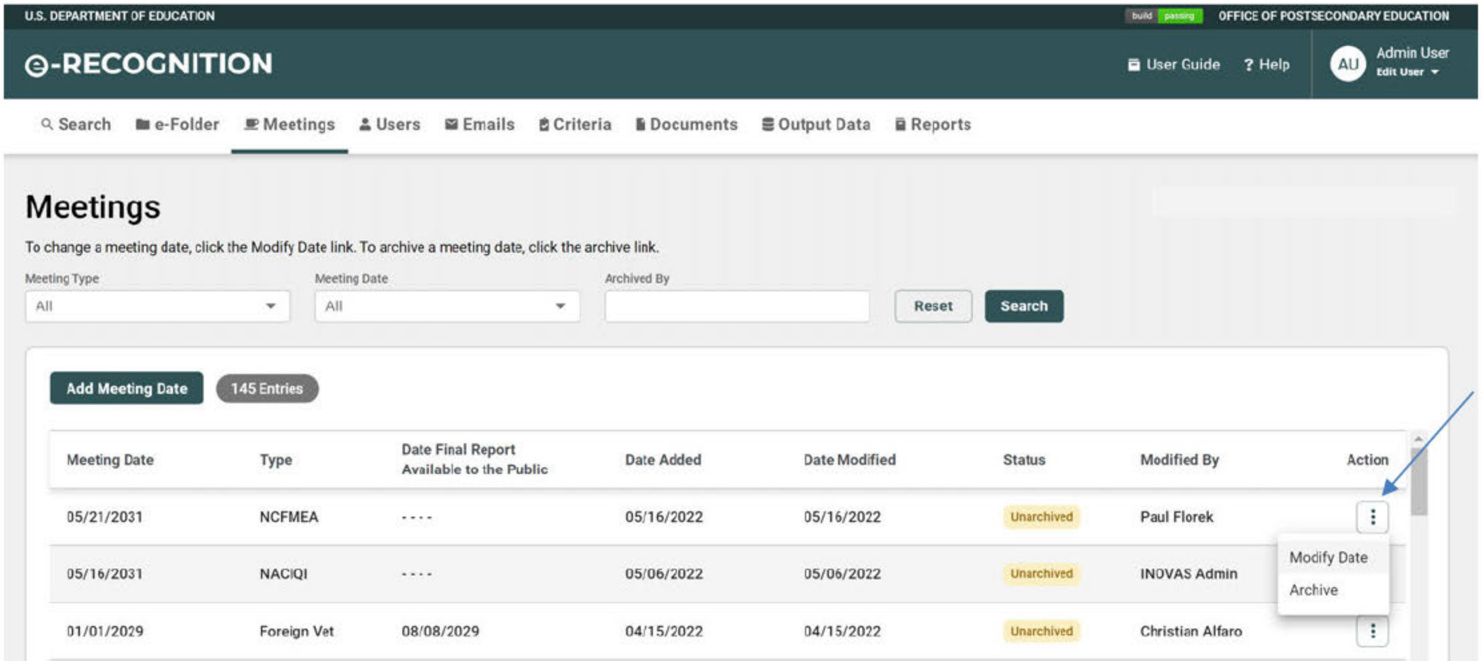
Click the **Add Meeting Date** button to add a new meeting date. The following screen will display:



Enter the meeting date and select the meeting type (Foreign Vet, NACIQI, Degree Granting, or NCFMEA). To make the final staff reports available to the public before the meeting date, enter a date in the ‘Date Final Staff Reports Available to the Public’ field. Click the **Create** button. The new meeting date will be shown on the *Manage Meeting Dates* screen.

3.1.2 Modify Meeting Date

To change a meeting date, click the 'Modify Date' link in that row. The *Modify Meeting Date* screen will display.



Change the information and click the **Modify Date** button.

3.2 Manage Users

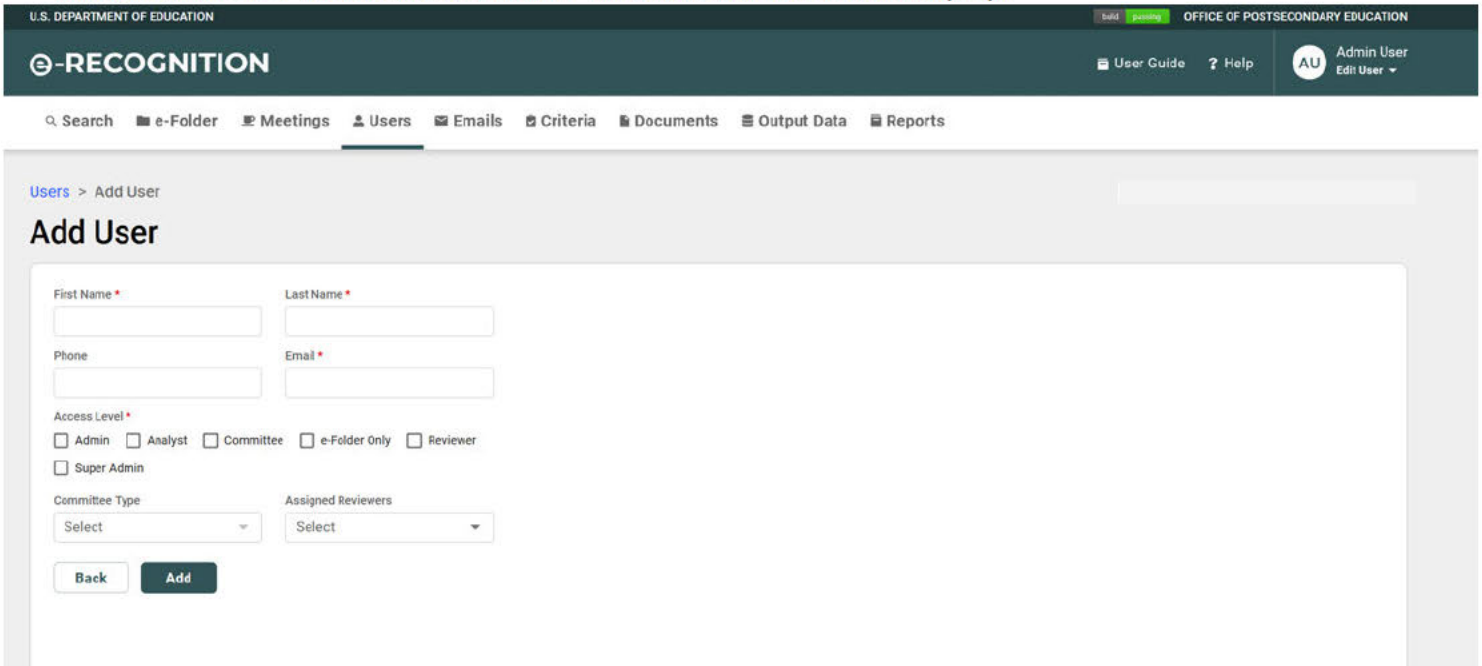
To view or update users, click the 'Users' link at the top of the screen. The *User* screen will display with a list of users. You can add, edit, or delete users through this screen. You can also assign committee members.

The following functions are available on this screen:

- Click a column heading to resort the users.
- Click the **Add User** button to add a new user.
- Click the **Assign Committee Members** button to assign committee members to a meeting.
- Click the 'Edit' link to update user information.
- Click the 'Delete' link to remove a user account. Click OK on the pop-up which displays to delete the user account.

3.2.1 Add User

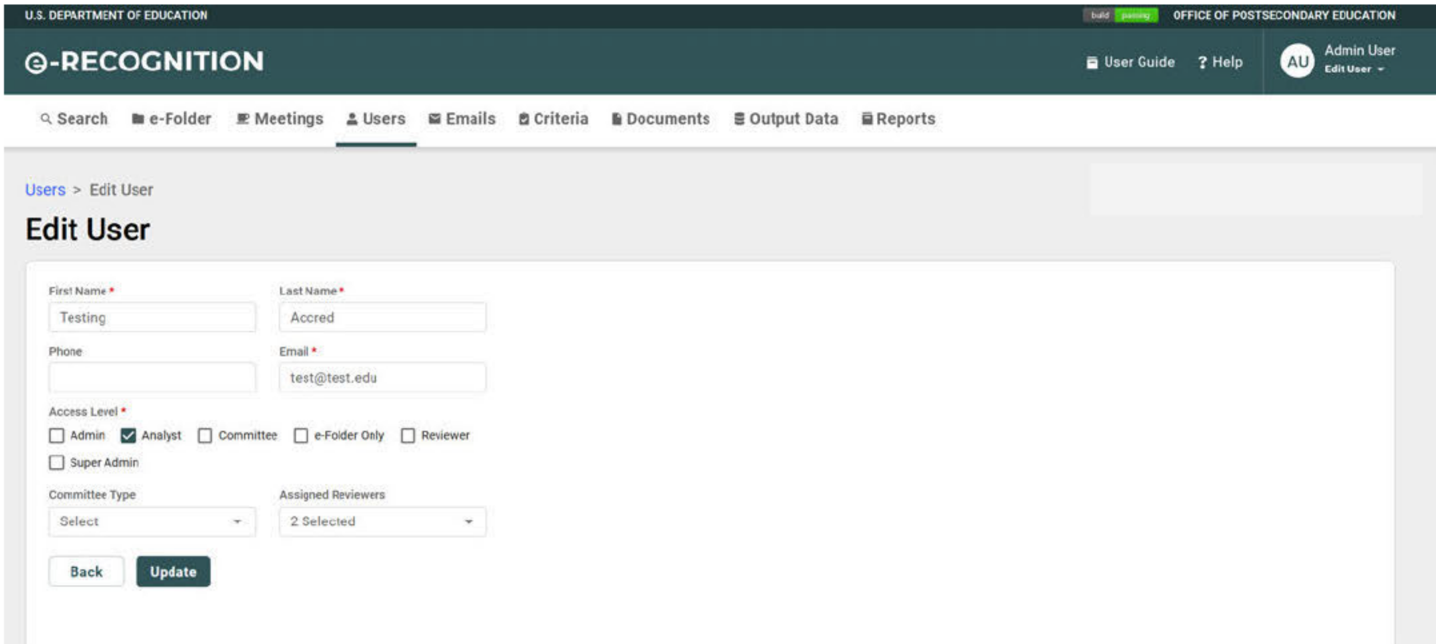
Click the **Add User** button to add a user. *The Add User* screen will display.



Required fields are marked by a red asterisk. Enter the user information and select the appropriate user access level from the radio button menu. If the user is a committee member, select the type of committee. If the user is an analyst, click the reviewer names in the list. Click the **Save** button to add the user. When a user account is added, the username and password are set to the first and last name. When the user logs in the first time, they will be required to change their password.

3.2.2 Edit User

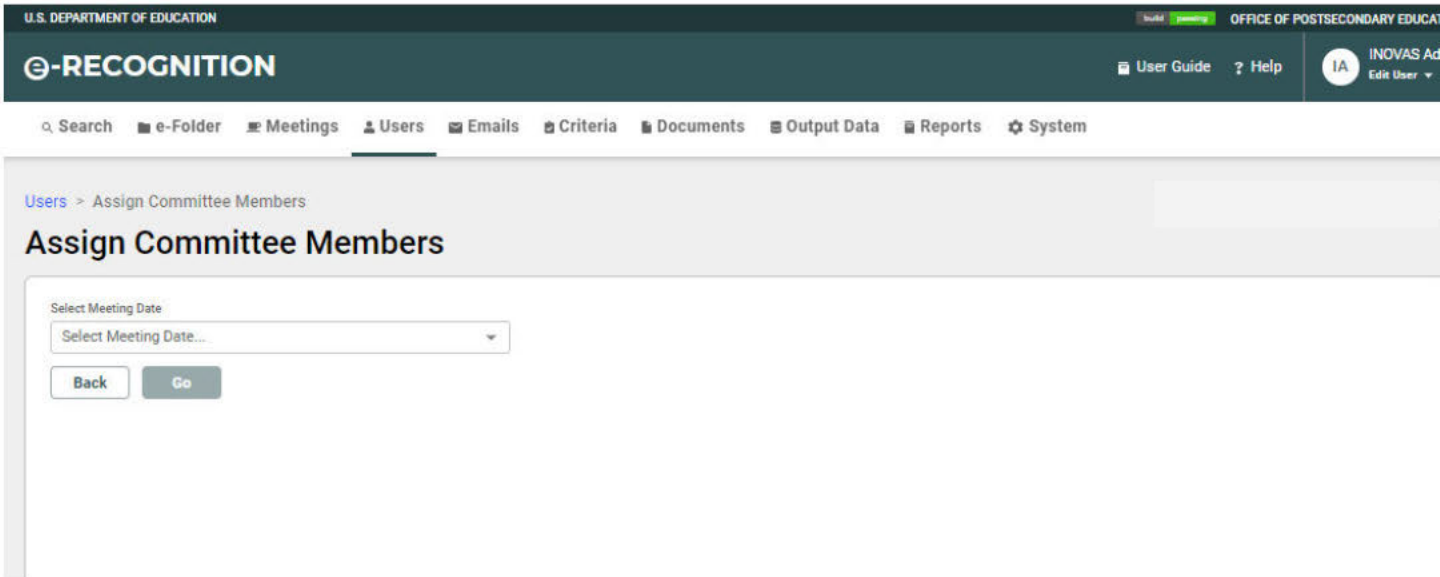
Click the 'Edit' link from the Action menu to edit a user's information. The *Edit* screen will display with the user's information.



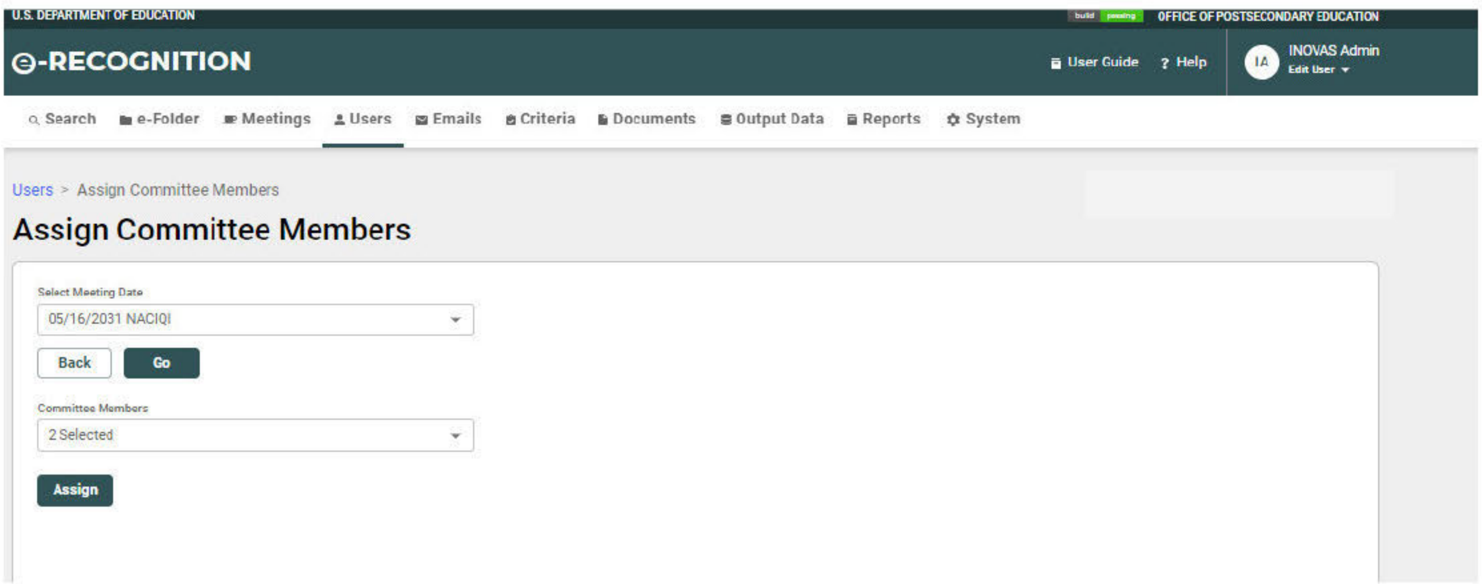
Enter your changes to the user information and select the appropriate access level from the radio button menu to assign the level of access. If the user is an analyst, check the box next to the reviewer names in the Assigned Reviewer list. Click the **Save** button to save your changes

3.2.3 Assign Committee Members

Click the **Assign Committee Members** button to assign committee members for a meeting.



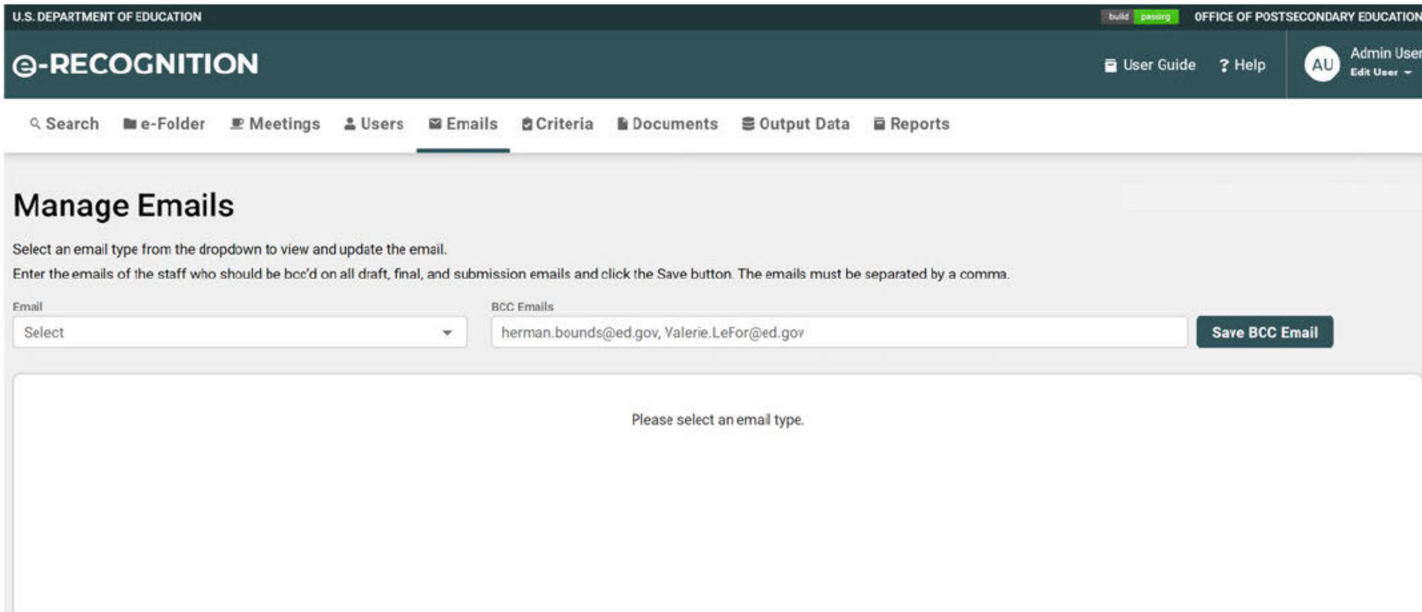
To assign committee members to a meeting date, select a meeting date from the dropdown and click the **Go** button. The list of committee members for that meeting type will display.



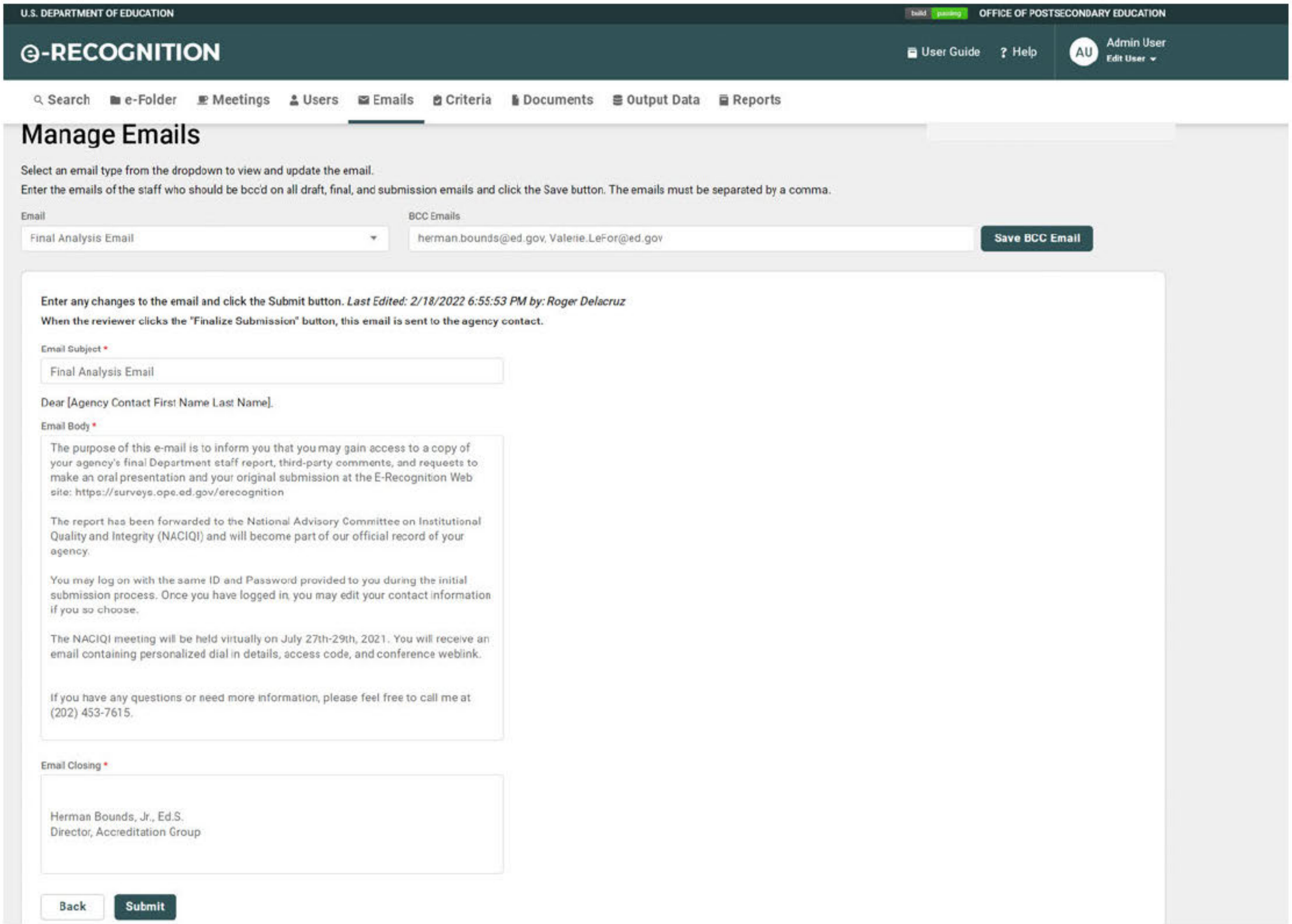
Any members already assigned to that meeting are highlighted and checked. Check the names of the committee members to select or unselect them. Click the **Assign** button to save the changes.

3.3 Manage Emails

To view or update the text of emails sent from the e-Recognition system, click the 'Email' link at the top of the screen. The *Manage Emails* screen will display. You can update the text of the emails which are sent when the reviewer sets the agency/country to resubmit or final review status.



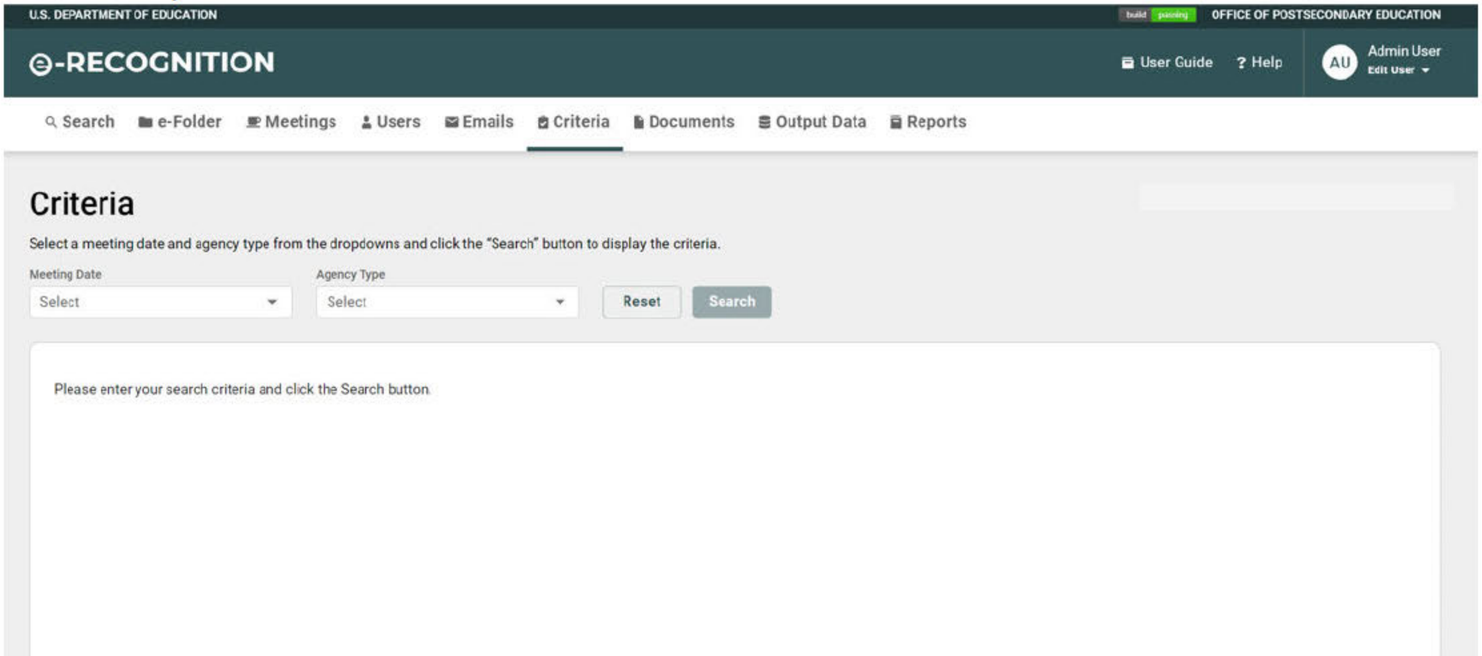
To update or preview the emails, select the email type from the dropdown. The email selected will display.



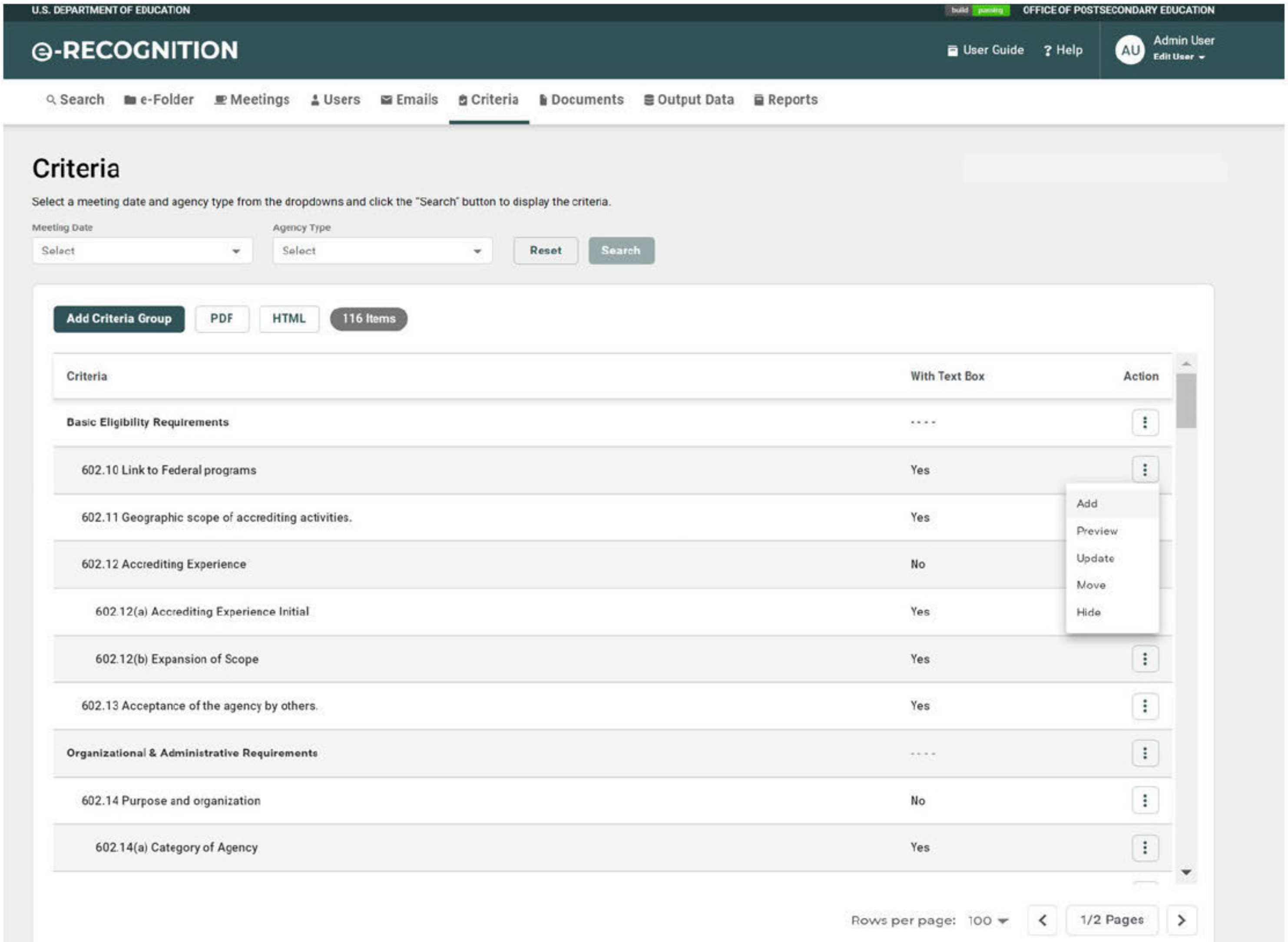
Enter your changes to the existing text and click the **Submit** button.

3.4 Manage Criteria

To view or update the text of the criteria, click the 'Criteria' link at the top of the screen. The *Criteria* screen will display. Through this screen, you can update the text for the agency criteria and the questions for the countries.



Select a Meeting Date and Agency Type from the dropdown to view the list of criteria.

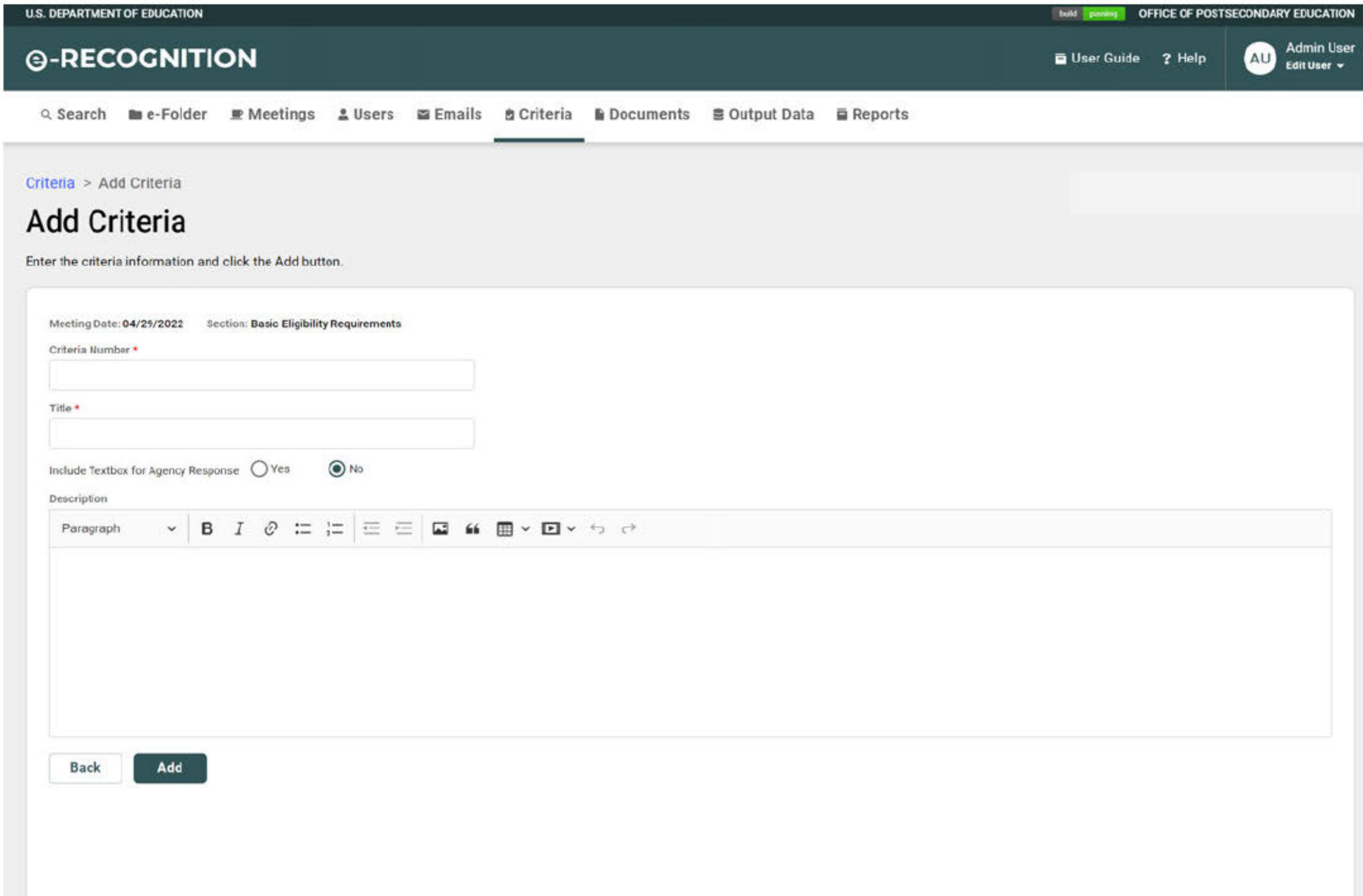


There are five different links for each criterion:

- **Add** - Criteria.
- **Update** - Update the criteria.
- **Hide** - Hide a criteria. Click 'Hide' on the confirmation pop-up to Hide the criteria. Any sub-criteria will be hidden also.
- **Preview** - View the criteria as the agency will see it. (This link is not available for sub-criteria.)
- **Move** – Move criteria to a different section.

3.4.1 Add Criteria

Click the 'Add' link to add a new criterion.

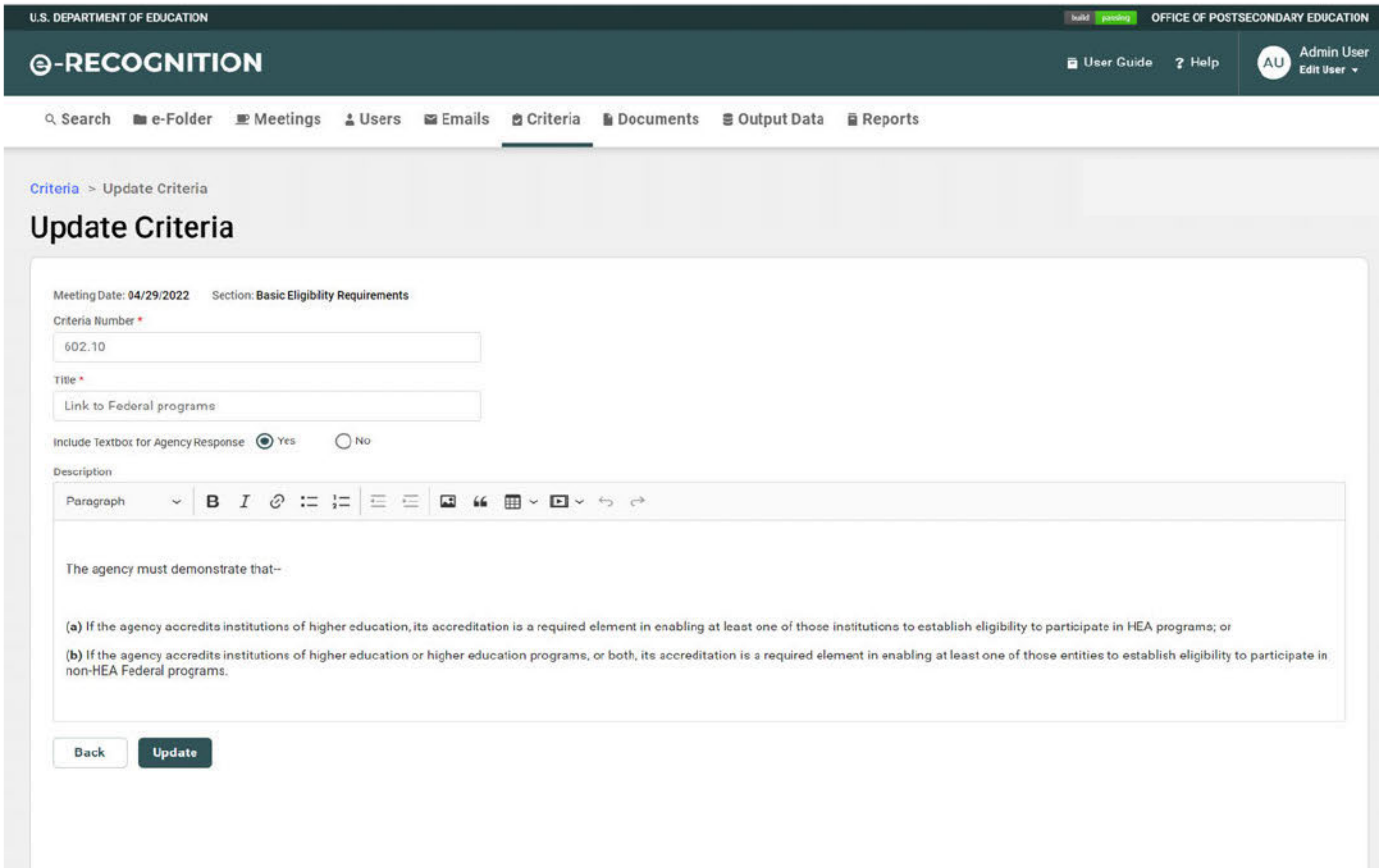


Enter the criteria number and the title. The criteria number must be **less** than 7 digits or it will register as a sub-criteria and will not be included on the Agency view as a requirement. Sub-criteria has to be associated with a main criteria in order for it to be included in the Agency view. The Criteria title has no character limitations and can be named as desired. Indicate if a textbox should be included for an agency response. If the "Include Textbox for Agency Response" is not checked, the criteria will not show up on the agency view. Enter your text into the textbox. Click the **Save** button to save the new criteria.

Click on the 'Add' link under the main criteria in order to add a sub-criteria. Enter the sub-criteria number and title. The sub-criteria number must be **more** than 7 digits or it will register as a main-criteria. Indicate if a textbox should be included for an agency response. If the "Include Textbox for Agency Response" is not checked, the criteria will not show up on the agency view. Enter your text into the textbox. Click the **Save** button to save the new criteria.

3.4.2 Update Criteria

Click the 'Update' link to edit an existing criterion.



Enter any changes to the criteria number and the title. Enter your text into the textbox. Click the **Save** button to save your changes.

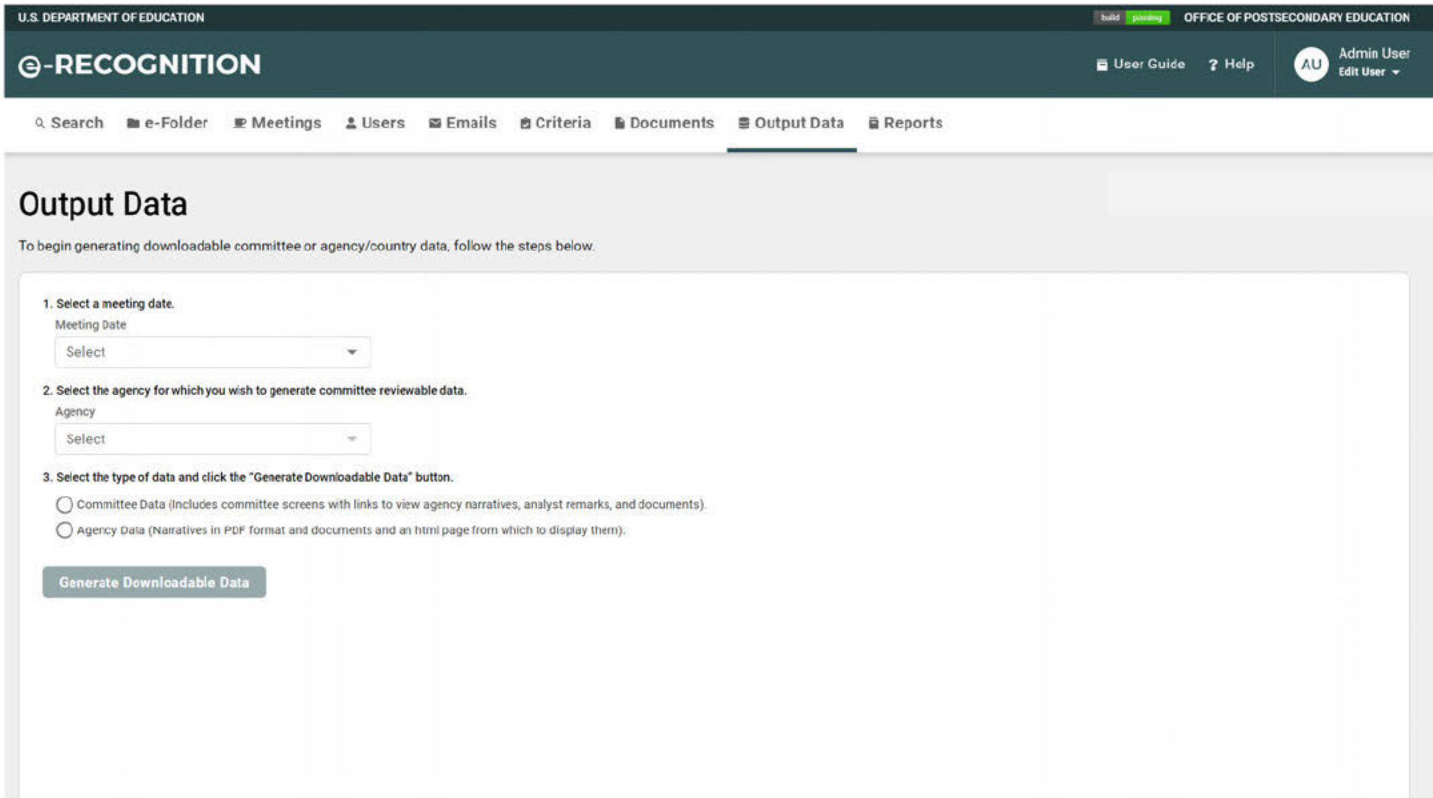
3.4.3 Preview

Click the 'Preview' link view the criteria as the agency will see it.

3.5 Output Data

You can generate downloadable committee or agency data by clicking on the 'Output Data' link. A zip file containing the agency data will be produced.

Select a meeting date from the dropdown, select the agency for which you wish to review data for, select the type of data and click the **Generate Downloadable Data** button. The meeting date dropdown will display both current and archived meeting dates. The screen will redisplay with a dropdown containing the agencies or countries for the meeting.



- If you select committee date, the zip file will contain all of the committee screens, the documents uploaded by the agency, and both the staff report and the agency report. Analyst remarks are included.

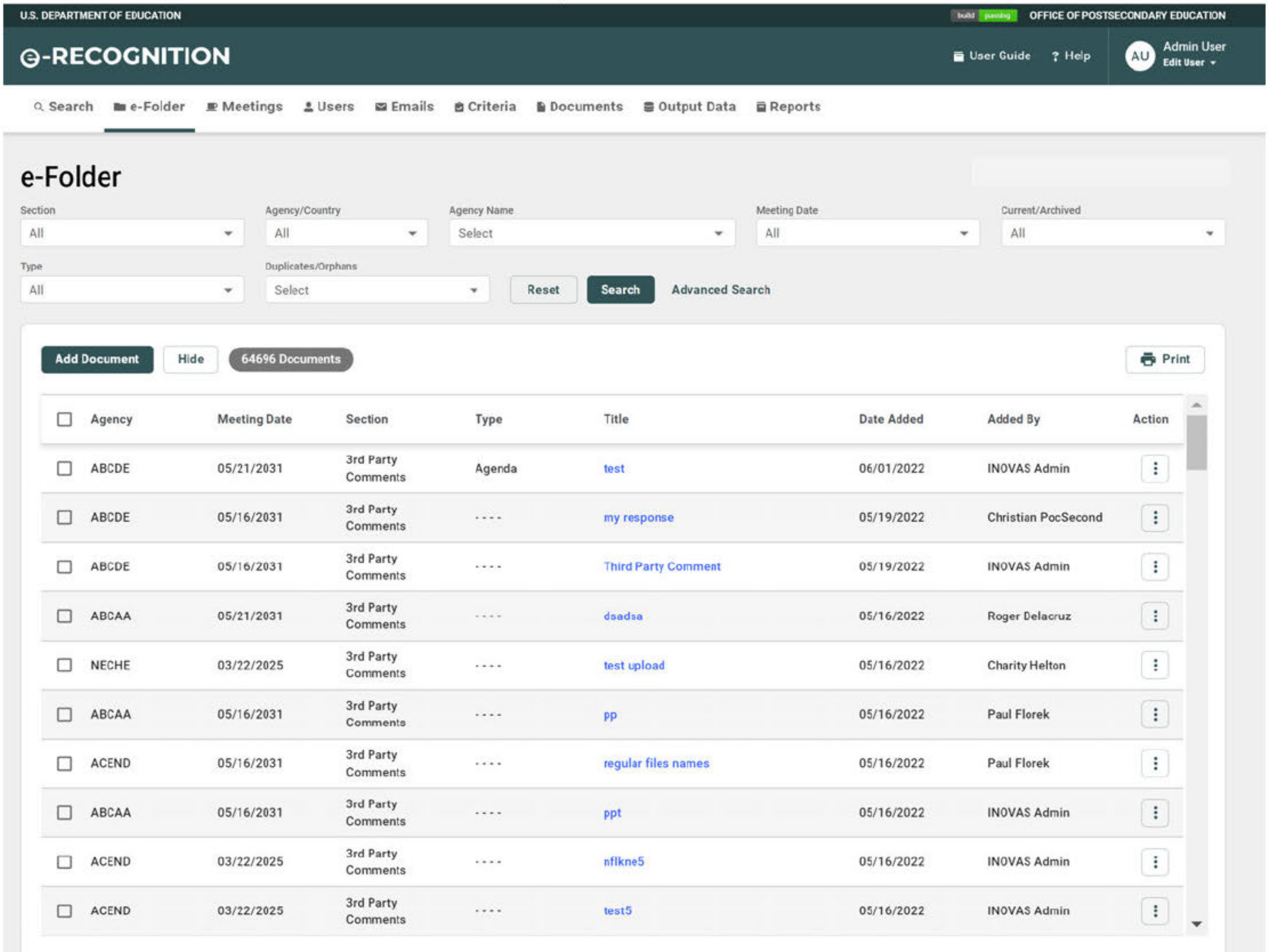
- If you select agency or country data, the zip file will contain the agency report in PDF format. It will also contain all of the documents uploaded by the agency with an HTML page from which to display them.

4 e-Folder and Blast Emails

This section describes *e-Folder and blast email* screens used by the administrator.

4.1 e-Folder

The e-Folder contains all of the documents added to the system by agencies, countries, analysts, or administrators. You can view the documents from this screen. To access *the e-Folder* screen, click the 'e-Folder' link at the top of the screen.

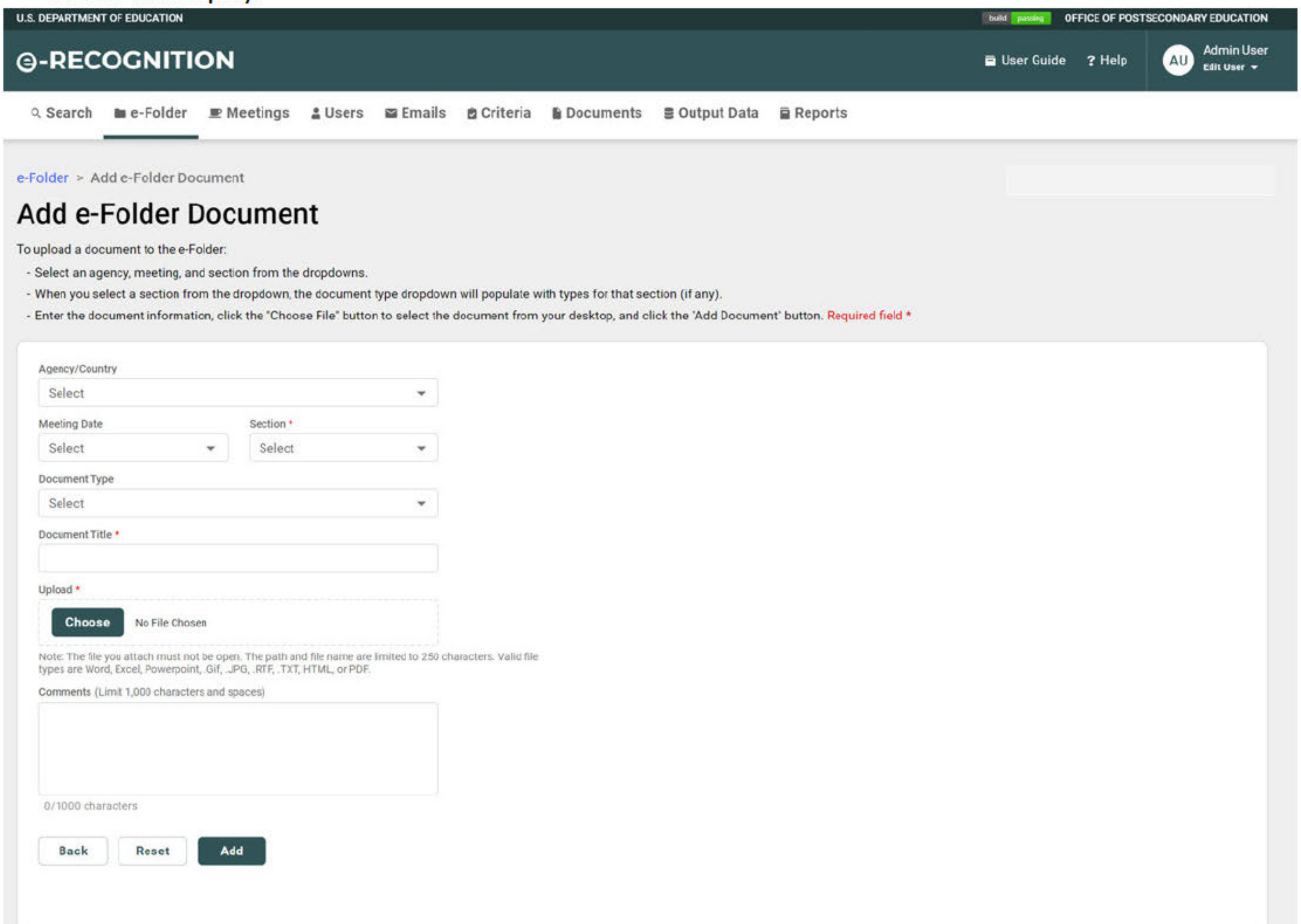


- Click the document title to view the document.
- By default, all documents for current meetings are displayed.
- To filter the list of documents displayed, select a value from the Section, Agency Type, Agency Name, Meeting Date, or Current/Archived, Type, Duplicate/Orphans dropdowns and click the **Search** button.
- To view documents for a single section, click the section tab in the section bar.
- To resort the documents, click a column header.
- To view the next page of documents, click the 'Next' link.

- To view the previous page of documents, click the 'Prev' link.
- You can add, edit, or search documents in the e-folder. These functions are explained in the following sections.

4.2 Add a Document to the e-Folder

From the *e-Folder* screen, you can add documents to the e-folder. Administrators can add historical documents, 3rd party comments, correspondence, and other documents from this screen. To add a document to the e-Folder, click on the 'e-Folder' link at the top of the screen. On the *e-Folder* screen, click on the 'Add Document' link. The Add a Document to the *e-Folder* screen will display.



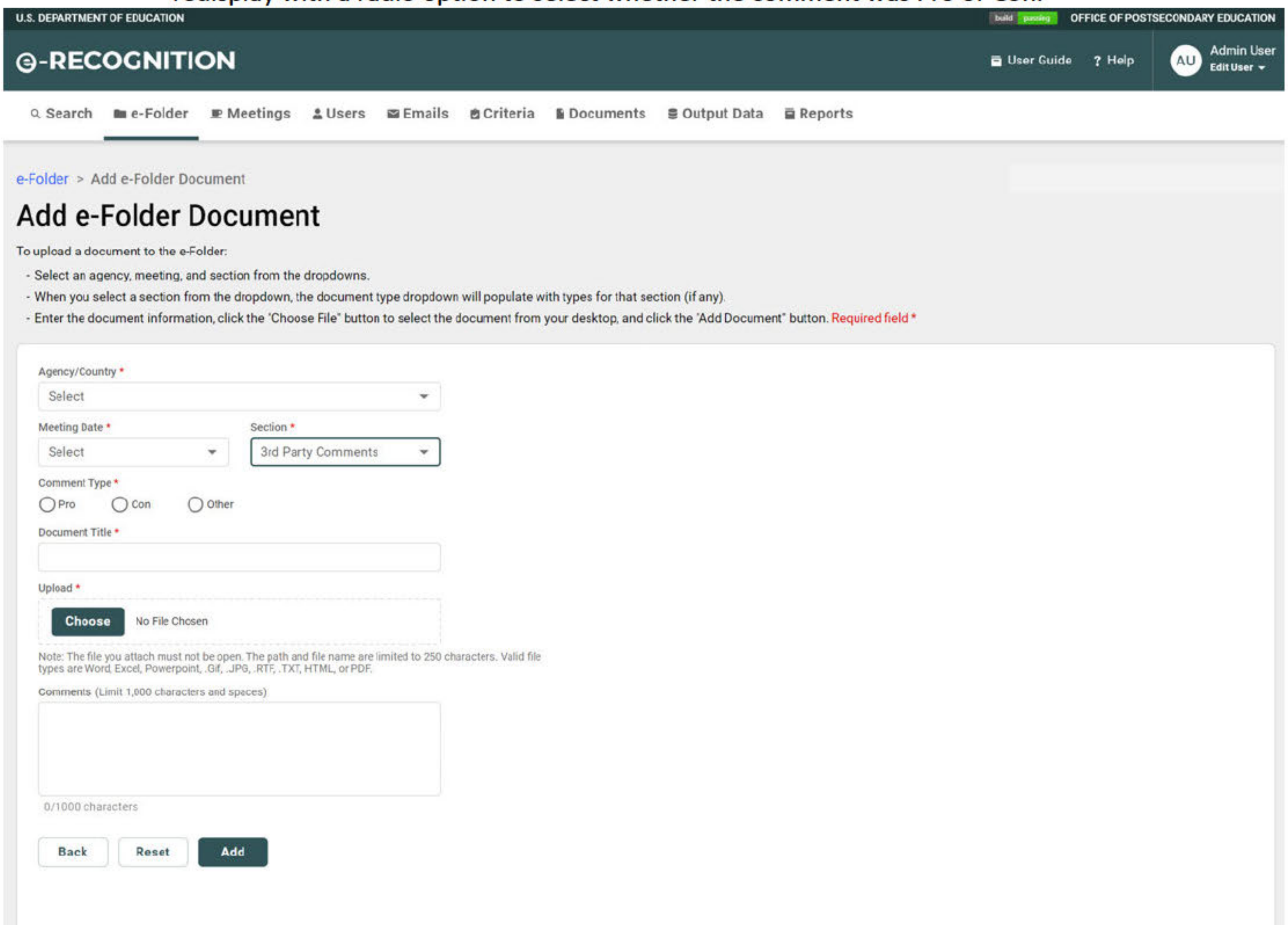
Historical and 3rd Party Comment documents added on this screen will also display for agencies, analysts, and committee members.

To add a Document:

- If the document is for an agency, select it from the Agency dropdown.
- The screen will redisplay with the Meeting Date dropdown populated with that

agency's meeting dates. If the document is for a specific meeting date, select it from the dropdown.

- Select the section from the dropdown.
- If you select Section - Correspondence or Section - Other from the dropdown, the screen will redisplay with the Document Type dropdown populated with document types for that section.
- If you select Section – 3rd Party Comments from the dropdown, the screen will redisplay with a radio option to select whether the comment was Pro or Con.



- Enter a title for the document.
- Click the **Choose File** button and select the document from your desktop.
- You may enter additional information about the document in the comments box.
- Click the **Add** button.
- The *e-Folder* screen will redisplay with a message that your document has been saved.
- The document you added will be the first one displayed on the *e-Folder* screen. It will take a couple of minutes for the document to get uploaded to the TRIM records management system. After that, a link will display on the document's title. Click the

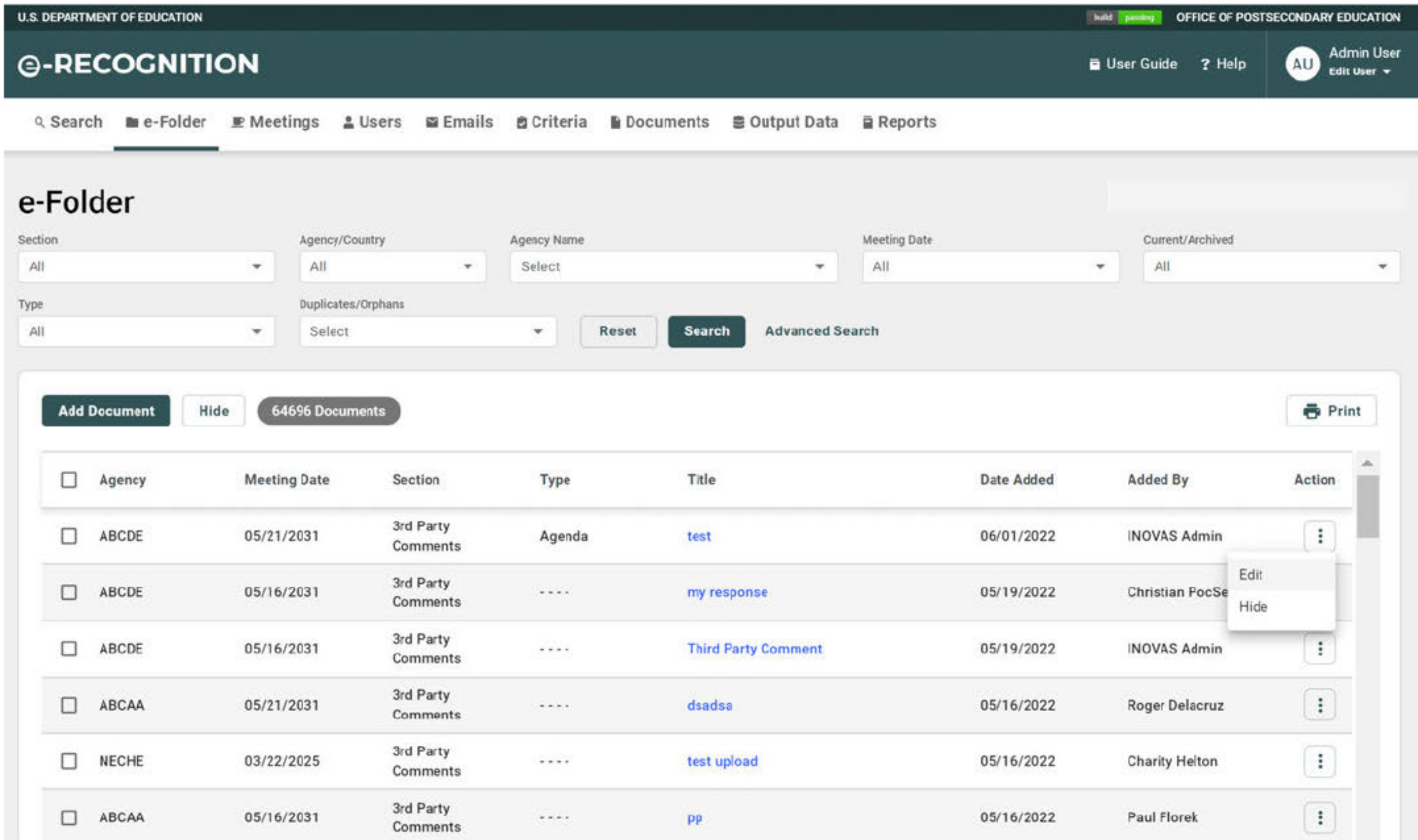
link to display the document.

4.3 Edit an e-Folder Document

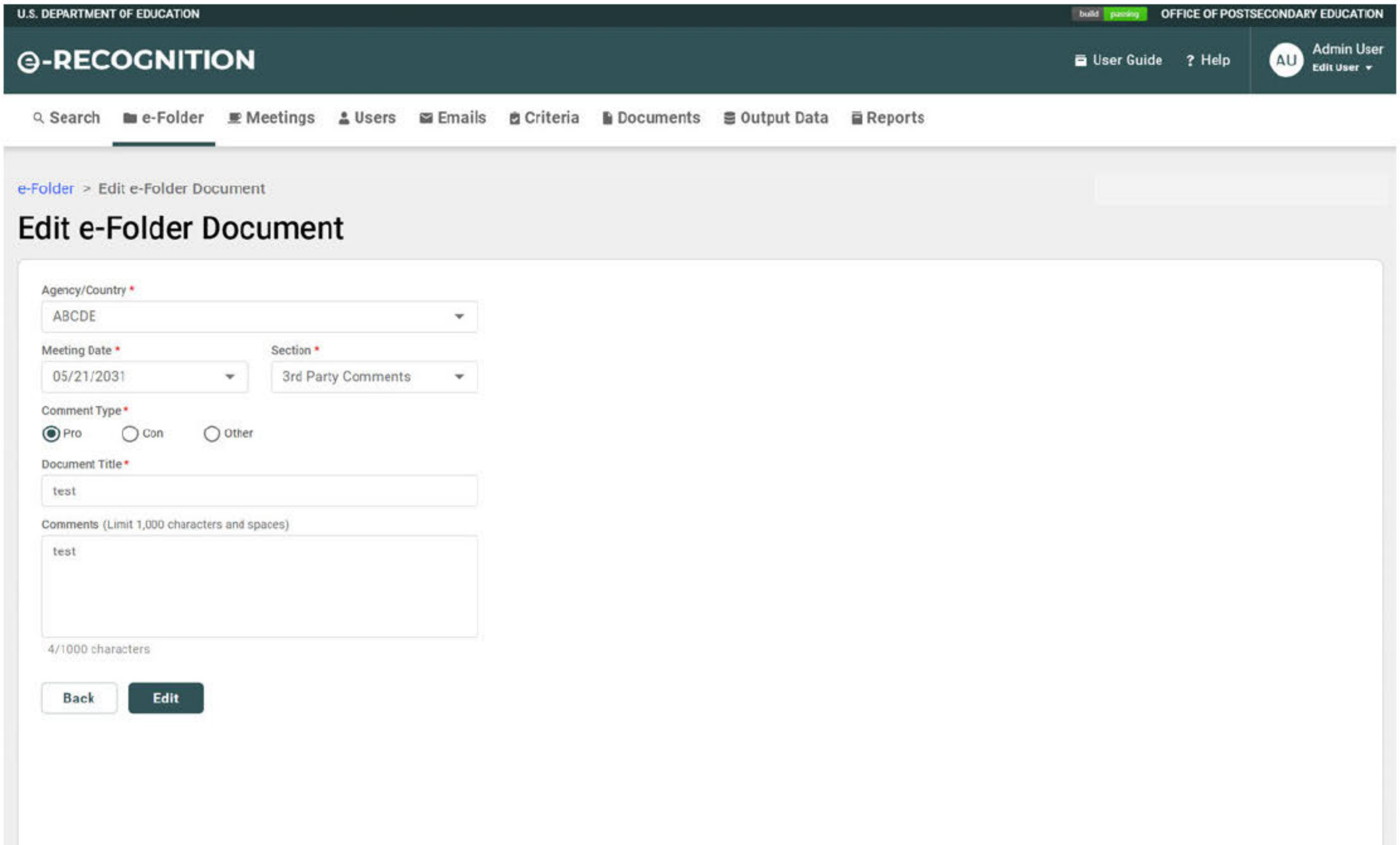
The information (meta data) about documents in the e-folder can be updated by the administrator. Only documents which are added by administrators can be updated, documents added by agencies (Section 1) and analysts (Section 2 and Section 3) cannot be edited.

You cannot update the document itself. The admin can update the Agency associated to the document, the meeting date, document type, document title and also add comments. If the wrong document was added or if you have an updated version of the document, you will need to delete the document and then add the new one.

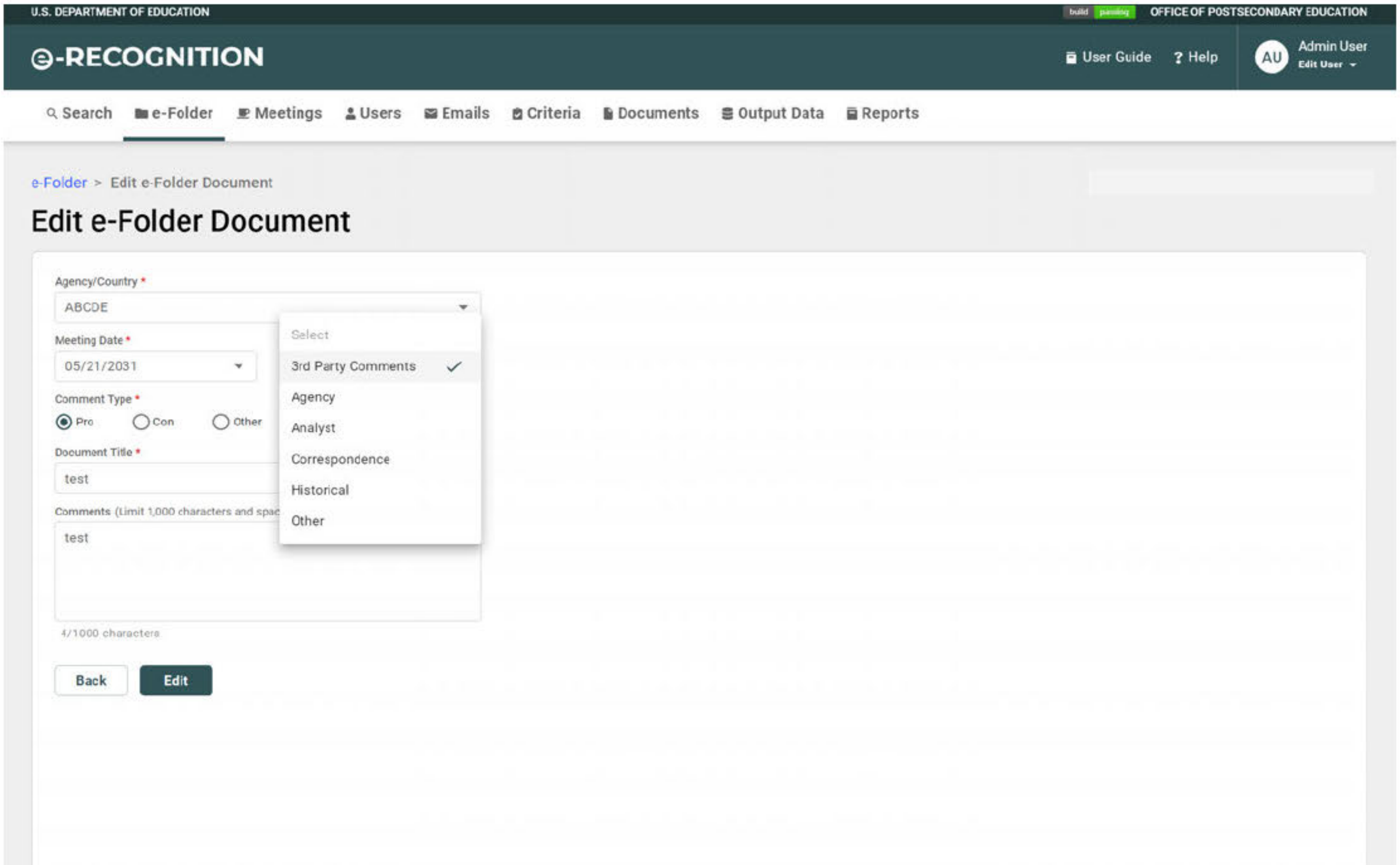
To edit a document, click on the ‘e-Folder’ link at the top of the screen. When the *e-Folder* screen displays, click the ‘Edit’ link for the document you wish to update.



The *e-Folder Edit* screen displays.



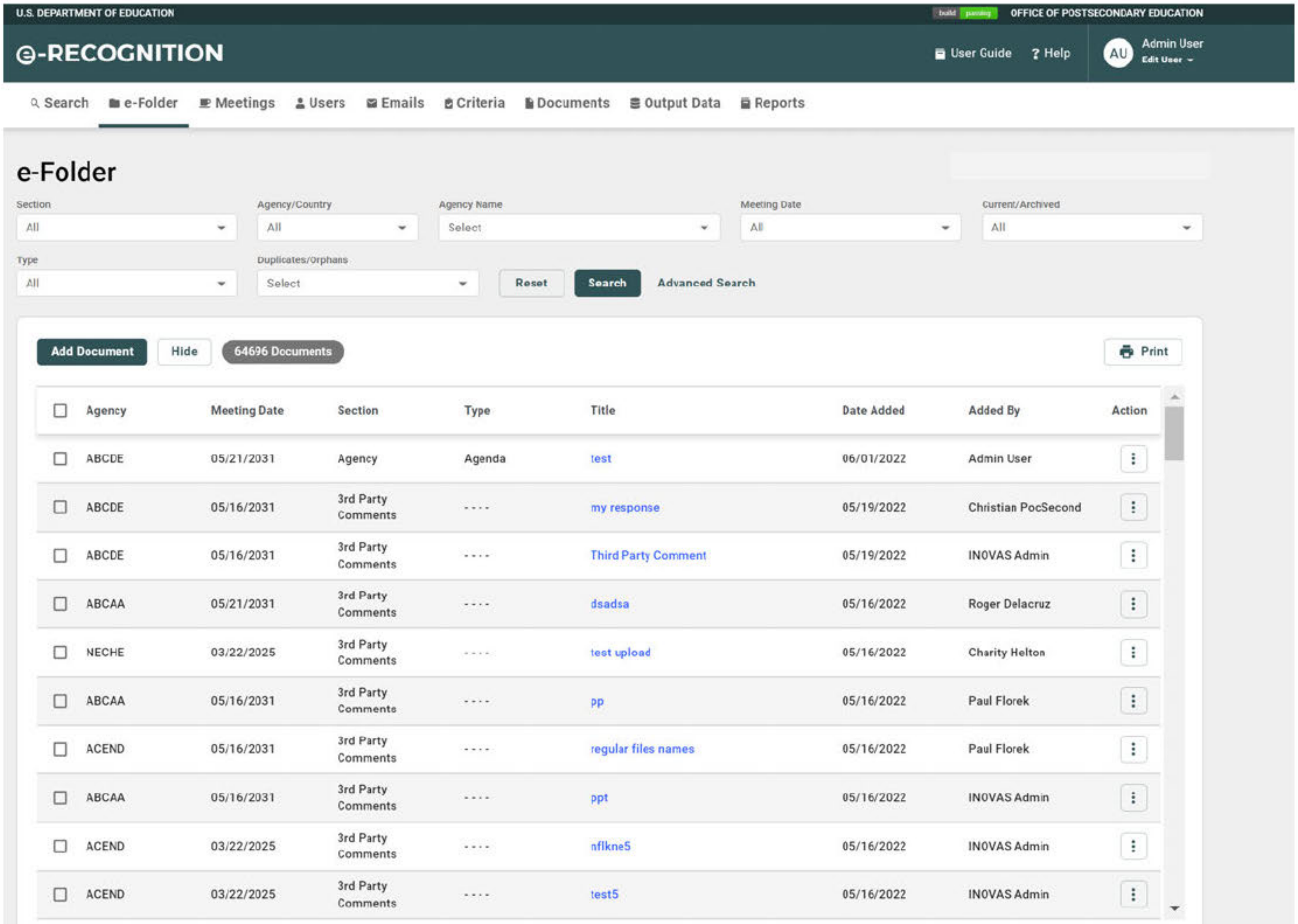
- Enter your changes to the document information.
- If you select a different agency from the dropdown, the meeting date dropdown will populate with meeting dates for that agency.
- You can only update the section or document type for documents in Section – Correspondence and Section – Other.
- If you change the section, the screen will redisplay with the Document Type dropdown populated with document types for that section.



- Click the **Edit** button.
- The *e-Folder* screen will display with a message that the document has been updated.

4.4 Search the e-Folder

To search documents, click on the ‘e-Folder’ link on the top of the screen. When the *e-Folder* screen displays, click the ‘e-Folder Search’ link in the upper left corner. The *Search e-Folder* screen will display.



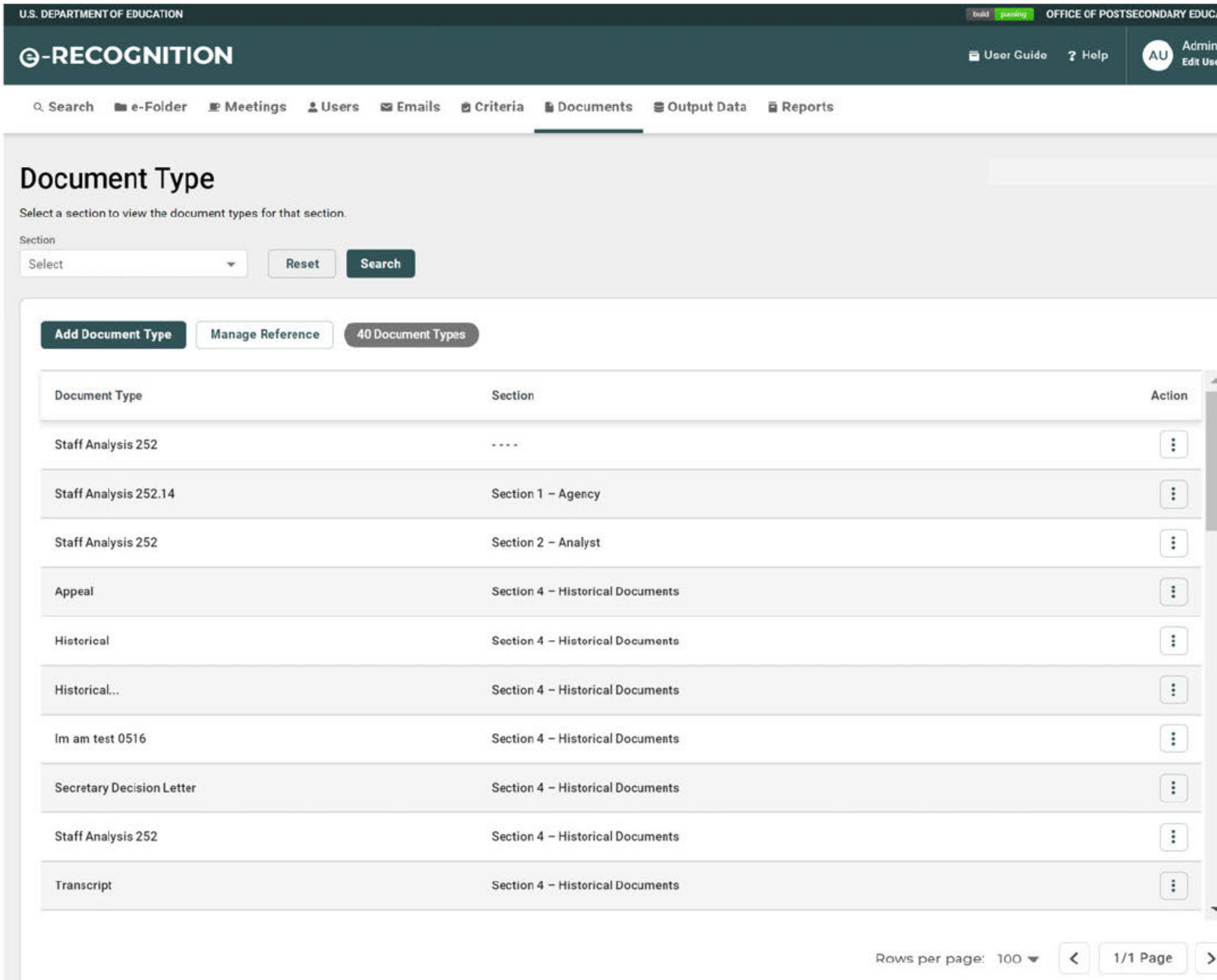
To search for documents in the e-folder:

- Enter your search criteria.
- By default, only Current meetings will be searched. To search archived meetings, select archived from the Archived/Current Meetings dropdown.
- If you select an agency from the dropdown, the meeting date dropdown will populate with meeting dates for that agency.
- To search document titles or comments, enter the word or words you wish to search for in the Search For text field. By default, the document or narrative must contain all of the words you enter. If you want to search for any of the words or an exact phrase, select that option from the dropdown.

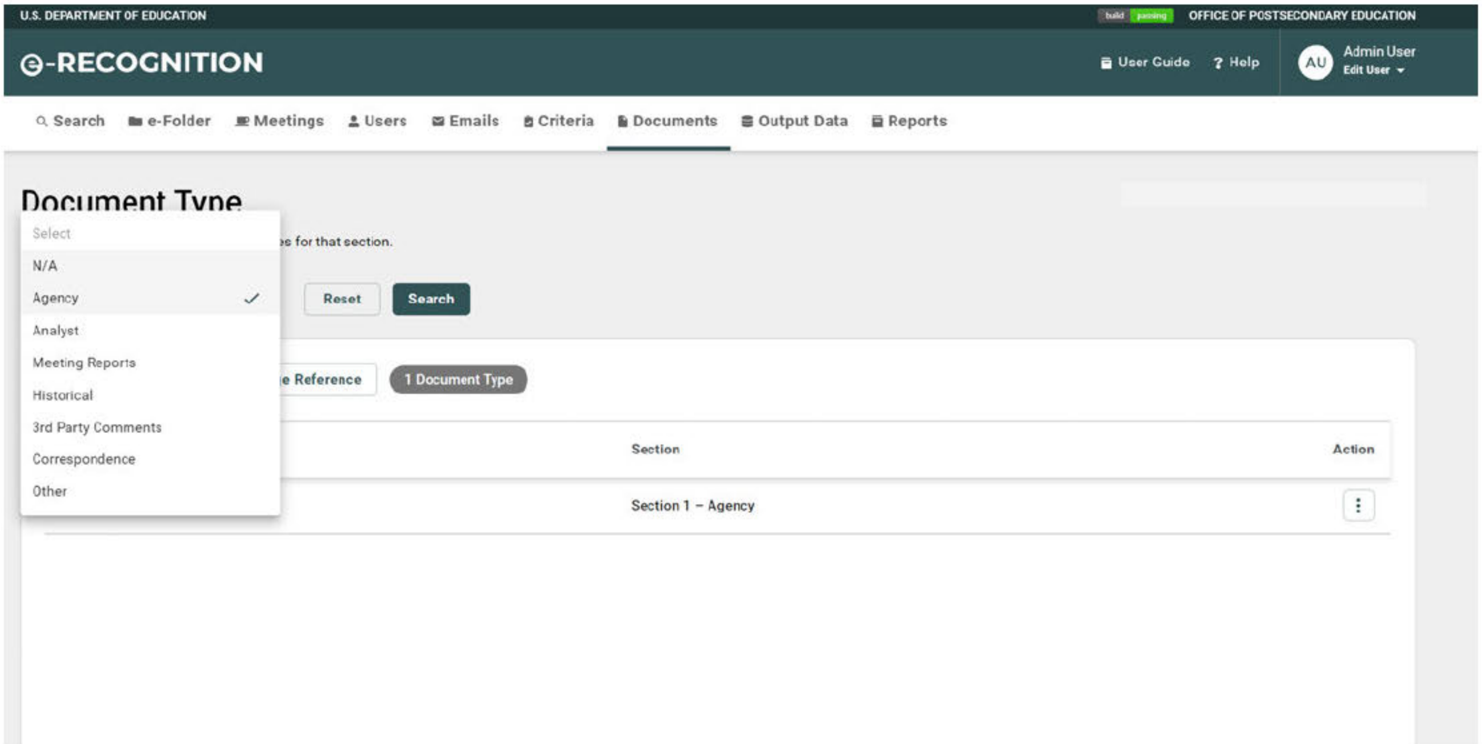
- Click the **Search** button.
- The *e-Folder Search Results* screen will display with a list of the documents that match your search criteria.
- Your search criteria will be displayed at the top of the screen.
- Select a value from the dropdowns and click the **Search** button to filter the search results by meeting date or section.
- Click the document title to display the document.
- Click on a column heading to sort the results by that column.
- Click the ‘Next Page’ link to display the next 100 documents which met your search criteria.
- Click the ‘Prev Page’ link to display the previous 100 documents which met your search criteria.
- Click the ‘New Search’ link to return to the main *Search e-Folder* screen to start a new search.

4.5 Manage Document Types

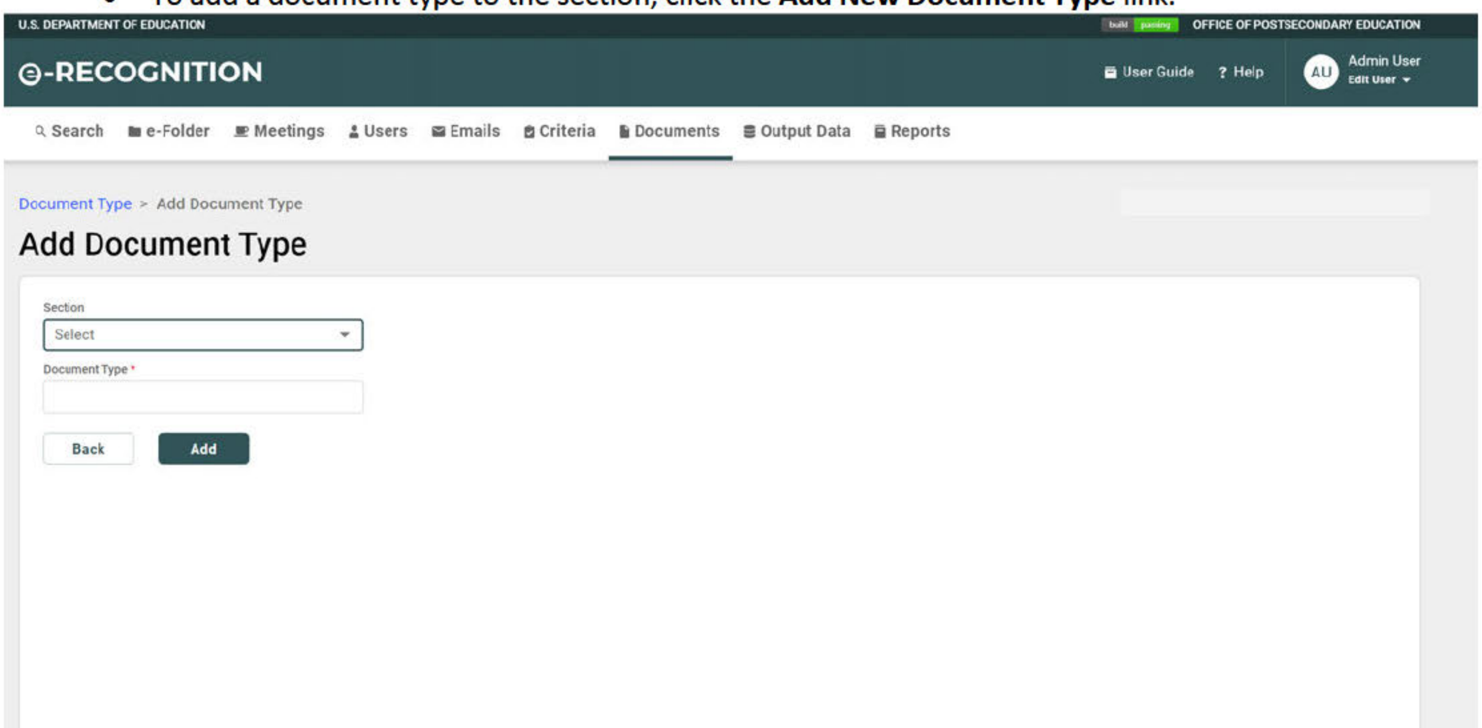
To update the document types used in the e-folder, click the 'Document' link at the top of the screen. The *Manage Document Type* screen will display. Through this screen, you can add and update document types and edit the Reference Tables.



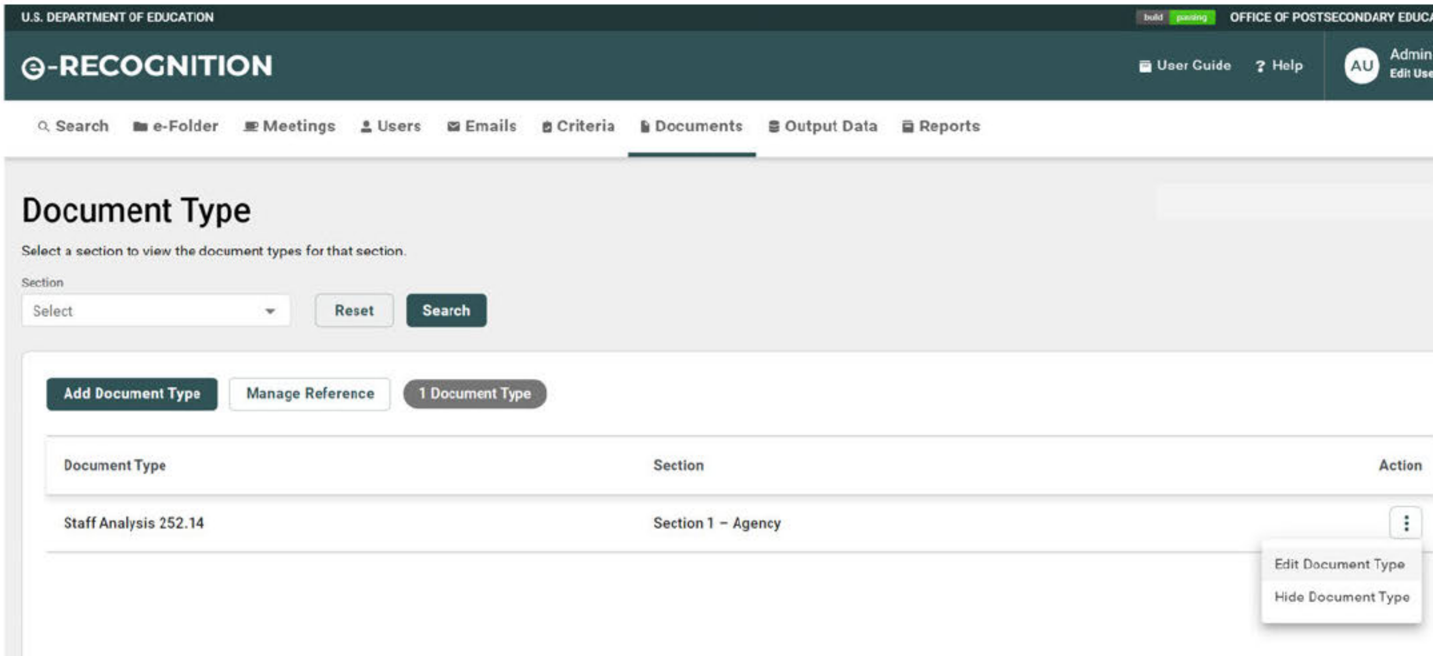
- To view the document types for a section, select the section from the dropdown.



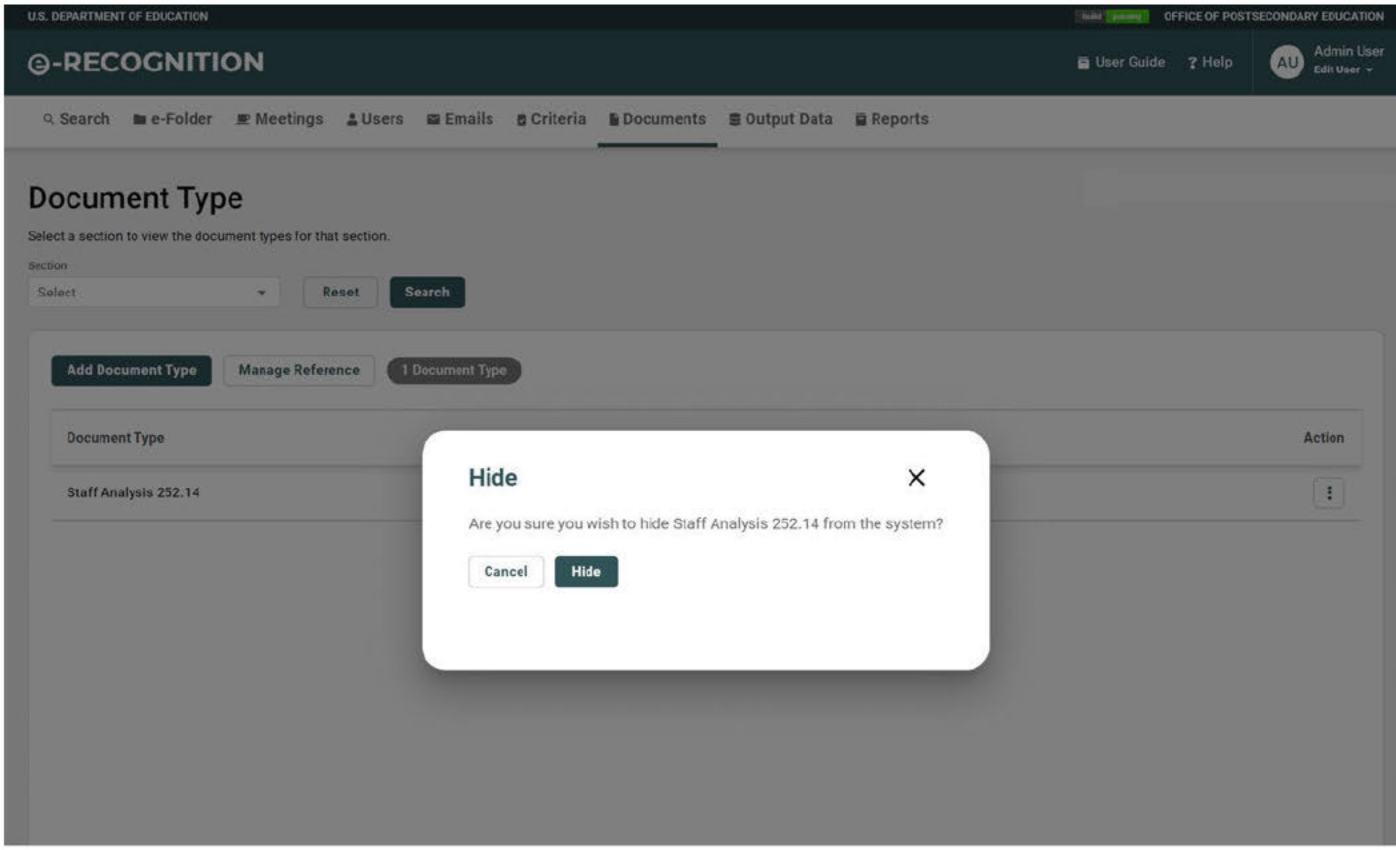
- To add a document type to the section, click the **Add New Document Type** link.



- The *Add Document Type* screen displays.
- Enter the document type and click the **Add** button.
- To Edit a document type, click the 'Edit' link under the Action menu next to that type.

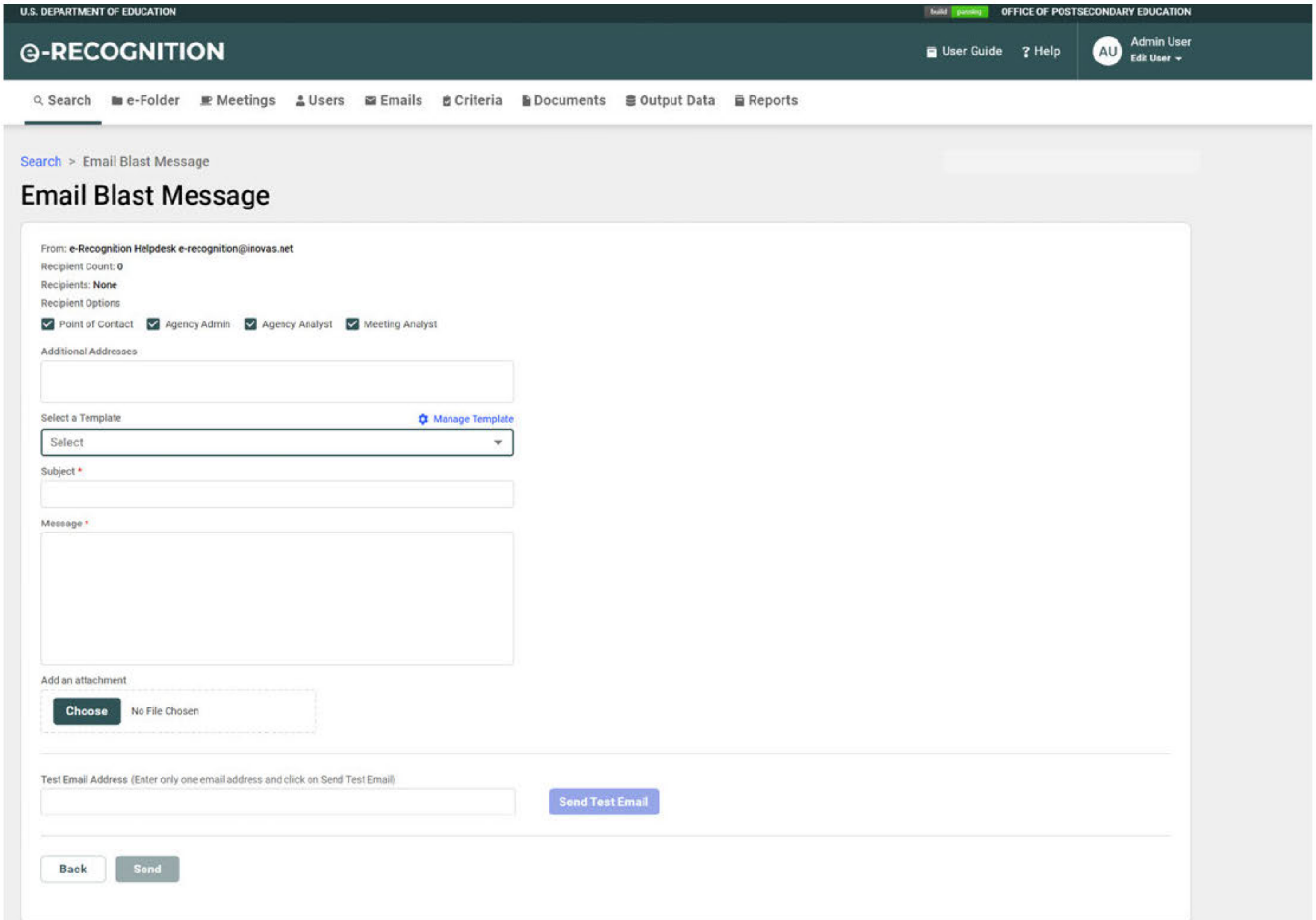


- The *Update Document Type* screen displays.
- Enter the changes to the document type and click the **Save** button.
- To Hide a document type, click the 'Hide' link under the Action menu for that document. Click 'OK' on the confirmation pop- up to hide the type.



4.6 Blast Email

The *Blast Email* screen allows you to send an email to one or more agencies or countries. To send a blast email, click the 'Send Email to Agencies or Countries' link on upper right corner of the *Administrator Search* screen. The *Blast Email Search* screen displays.



- Select a value from the Type, Name, Meeting Date, and/or State dropdown.
- Click the **Search** button.
- The *Blast Email Search Results* screen displays with a list of agencies that met your search criteria.

- The *Blast Email Search Results* screen displays with a list of agencies that met your search criteria.
- If you want to send the email to all of the agencies listed, click the **All** button otherwise, click the checkbox for the agencies to whom you'd like to send the email.
- Click the **Select Recipients and Continue** button.
- The *Send Email* screen will display.

- The email will be sent from the ASL Helpdesk email address.
- A separate copy of the email and attachments will be saved to the e-Folder for each agency or country.
- If you would like others to receive a copy of the email, enter the email address in the Additional Recipients field.
- Enter the subject and message.
- If you would like to attach a file, click the **Choose File** button and select it from your desktop. You can attach up to three files.
- If you would like to preview the email, enter an email address in to the Send Test Email text box and click the **Send Test Email** button. A copy of the email will be sent so that you are able to preview it prior to sending to the actual desired recipients.
- Click the **Send Email** button.
- You will receive a copy of the email.