

## Electronic Document Storage (EDS) Overview

The Electronic Document Storage (EDS) functionality in WF1 allows users with appropriate privileges the ability to:

- Add a document to EDS
- View documents added to EDS
- Edit tags and comments on documents
- Delete documents from EDS
- Copy a document between program sequences for the same person in the person record
- Copy a document between program sequences to a 2<sup>nd</sup> person with a matching MAXIS case number within a person record
- Move a document between program sequences for the same person in the person record
- Copy a document to another person from EDS Document Copy or Move
- Move a document to another person from EDS Document Copy or Move
- Copy a document between program sequences for the same person from EDS Document Copy or Move
- Move a document between program sequences for the same person from EDS Document Copy or Move
- Submit requests to configure the hierarchical (organizational) structure of EDS

### Add a Document to Workforce One

Users with the appropriate privileges can upload a document at any point in the case management process by selecting the “Add Document” link from the left navigation menu. Inside the Add Document window, select the applicable **Program Sequence** to associate with the document, the applicable **EDS Document Types** to relate to the document with similar characteristics, and then select “**Choose File**” to select a file for uploading.

Document Add

Program Seq Adult Seq 1 (Enrolled)

\*EDS Document Type None Selected

\*Select a File Choose File No file chosen

Next Cancel

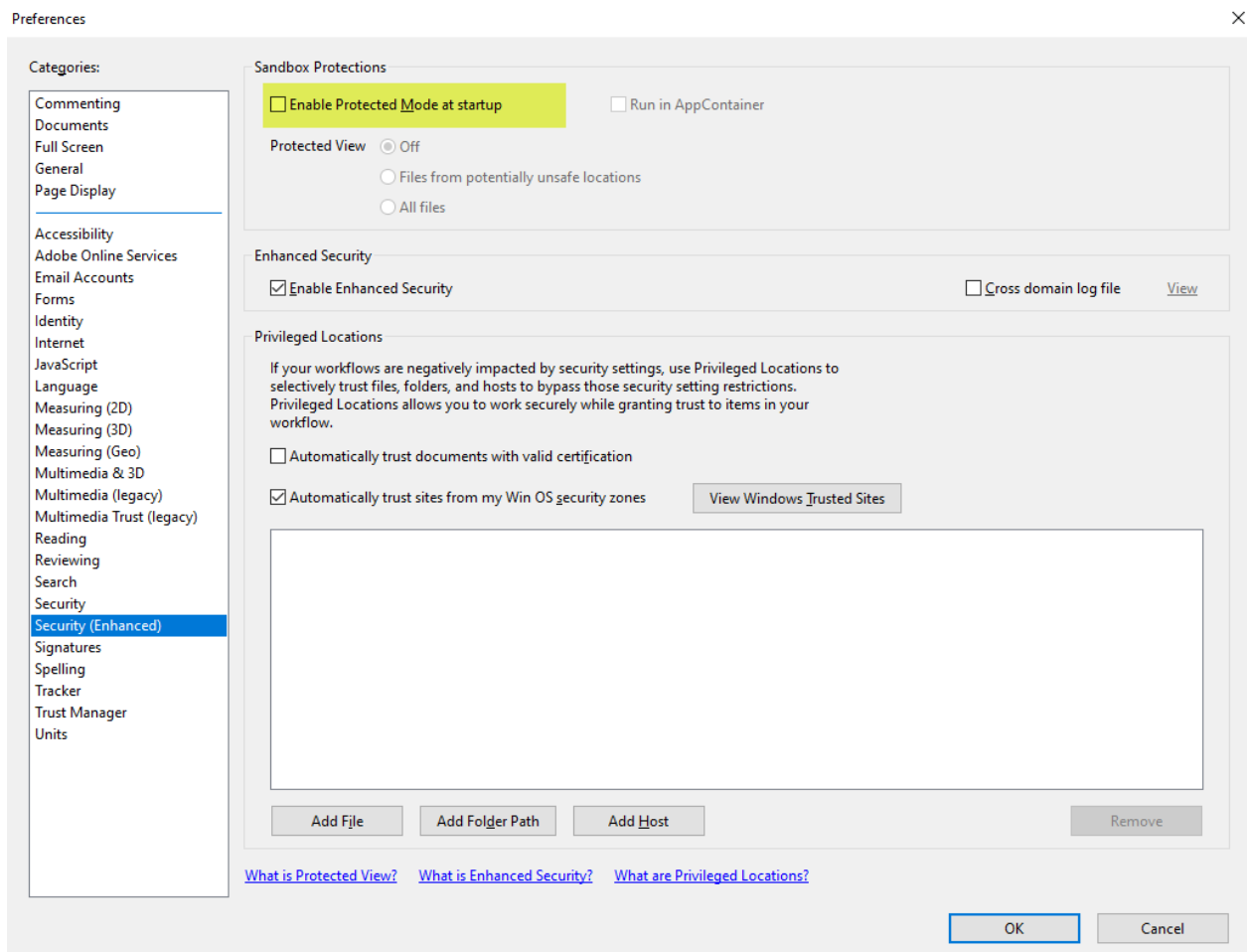
Select “Next” to view the additional required and optional fields for you to complete called “tags.”

## Drag a Document to Workforce One

Additionally, users can add a document by dragging it from an email or their desktop to WF1.

Start by verifying the Preference settings for a PDF document.

1. Open a PDF document
2. Select Edit from the top menu
3. Select Preferences
4. Select Security (Enhanced)
5. Verify the “Enable Protected Mode at startup” box is unchecked
6. Select OK



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Go to WF1. Select the “Add Document” link from the left navigation menu. Inside the Add Document window, select the applicable **Program Sequence** to associate with the document, and the applicable **EDS Document Types** to relate to the document with similar characteristics.

From an email or desktop, select the document and drag it to the window. Drop it on or near the Choose File button.

### Document Add

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**Program Seq** Adult Seq 1 (Enrolled)

**\*EDS Document Type** None Selected

**\*Select a File**  No file chosen

The name of the document will display next to the “Choose File” button.

Select “Next” to view the additional required and optional fields for you to complete called “tags.”

Tags allow users to find documents via search. Some tags will have default values assigned to them and some will require their values to be in a specific format such as a date, a number, or a currency value. You can also enter comments and a case note via the Document Add page.

### Document Add

**Program Seq** SSU Seq 1 (Accepted for Svcs)  
**\*EDS Document Type** SSU - Medical  
**Selected File** update\_3.jpg

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**\*Agency** State Services for the Blind  
**\*Staff Associated** None Selected  
**\*Document Name** None Selected  
**User Defined Document Name**   
**Folder** None Selected  
**\*Privacy Level** None Selected  
**Can Share with Person** Yes  
**Received Date**   
**Document Date**   
**Signed Date**   
**Expiration Date**   
**Reason for Collecting** None Selected  
[Select/Deselect](#)  
**User Defined Date 1**   
**User Defined Date 2**   
**User Defined Tag 1**   
**User Defined Tag 2**

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Agency, Staff Associated, Document Name, and Privacy Level fields must be entered prior to uploading the document into EDS.

- The **Staff Associated** dropdown options are listed based on the active staff associated with the Agency related to the logged in user.

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- The **Document Name** is the pre-defined title of the document in EDS. It is associated to only one document type. The user can specify a user-defined document name to handle situations where a custom value is desired.
- The **User Defined Document Name** field is used to enter a custom value for the document name.
- The **Folder** field provides additional groupings of documents for retrieval. Documents can be assigned to only one folder.
- The **Privacy Level** field determines if the document is available for users under the appropriate umbrella rules to view, or if it is only available to the currently assigned staff or users with the privacy privileges. Users with the appropriate privileges can set the indicator when adding the document.
- **Can Share With Person** will indicate whether a document can or cannot be shared with a user. This just serves as a reminder to the user if they open the document and the person happens to be sitting next to him or her.
- **Received Date** indicates when the document was received by the agency.
- **Document Date** is available if a user would like to store a date that appears on the document that isn't one of the other dates.
- **Signed Date** is the date the document was signed.
- **Expiration Date** is the expiration date of the document.
- **The Reasons for Collecting** field gives the user a dropdown, multi-select list of reasons the document was collected.
- **User Defined Date** fields are dates that providers collect that are not captured elsewhere in WF1.
- **User Defined Tag** fields further identifies a document and are used by the direction of each agency.
- The **School** field identifies the school, college, or university associated with the document.
- The **Comments** field communicates any additional information on the document. The comments are saved directly on the Document Tags and Comments page and are viewed by anyone who has the appropriate privileges.
- The **Case Note** and **Case Note Category** documents client-specific information related to the document that are not formally captured elsewhere in WF1. This should be used to provide additional context, but not to indicate that a user uploaded a document as WF1 already keeps track of that. Notes entered in this textbox are saved to the person's Case Note Summary.

Once you have completed the required tag fields, you must select the Upload button. You will receive confirmation that the document was uploaded to EDS through a message stating, "Document saved."

NOTE: If you receive an error message stating that the document is too large, you will need to scan the document again, using different scanner settings. Verify that the settings you are using to scan the document are not in color. Some scanners are set to automatically detect the presence of color and will create color documents that may be too large to upload. To ensure that your documents are smaller, use the black and white setting. Using the gray scale setting may also create a larger file.

## View Documents Added to Workforce One

### Document Summary

The documents added to Workforce One can be viewed within the person record under the Document Summary. The Document Summary allows users with the appropriate privileges to edit document tags, add comments to documents, delete documents from EDS, create a copy of a document, and move the document to another program sequence. Users with the appropriate privileges may access the Document Summary by navigating to a person's record and selecting the Document Summary link in the left navigation menu.

**WORKFORCE ONE**

Home Search My Tasks Recent Work Manage Case Manage Program Reports Ref

**General**

**At-A-Glance**

Person At-A-Glance

**Able H Johnson**  
Birth Date 11/11/1967

**Name and Mailing Address**  
Able H Johnson  
166 Igloo Ave South  
Burnsville MN 55306

**Phone** | Ext. | Phone Type | TTY | Video  
[612-565-7852](tel:612-565-7852) | Cell | No | No

**Birth Date** 11/11/1967

**Primary E-mail**

**Secondary E-mail**

**Record ID** 201764748 **Last 4 SSN** 4929

Program	Status	Application Date	Accepted for Service Date	Exit Date
VRS Seq 2	Accepted for Services	12/05/2016	12/07/2016	
VRS Seq 1	Exited	04/03/2013	04/11/2013	12/12/2013

**EDS**

Add Document

**Document Summary**

The Document Summary will display all the documents related to each program sequence in panels. If the program is E&T, the panel ordering is by application date descending, program ascending. If the program is SSB or VRS, the panel ordering is by program case ID descending. Each panel displays the program name, sequence number, case status, and the columns for document name: user defined document name (with link to download document); EDS document type; uploaded date; format (of the document); comments added (yes or no); and actions (tags and comments, copy, move, and delete).

**WORKFORCE ONE**

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports References ▶ Resources ▶ Help

**General**

- At-A-Glance
- Contact
- Tickler
- Demographics
- Student
- Work Preferences
- MN Works Resume

**Case Note**

- Add Case Note
- Case Note Quick
- Case Note Search

**Cases**

- Program/New App
- Eligibility/Accepted
- Activity
- Plan
- Credential
- Reporting Collection

**Document Summary**

Able H Johnson Record ID 201764748  
 Birth Date 11/11/1967

▼ Show Filter Criteria

▼ Hide VRS Seq 2 - Accepted for Services

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Format	Comments Added	Action
Credential Certificate 12122016	VRS - Education and Training	04/25/2017 12:17:27 PM		No	Tags and Comments Copy Move Delete
AT Documentation AT Document 04242017	VRS - Assistive Technology	04/24/2017 02:07:05 PM		No	Tags and Comments Copy Move Delete

▼ Show VRS Seq 1 - Exited

## Edit Tags and Comments on Documents

From the Document Summary page, select the **Tags and Comments** link to review the tags and comments associated with the document in EDS.

**WORKFORCE ONE**

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- MN Works Resume

**Case Note**

- Add Case Note
- Case Note Quick
- Case Note Search

**Cases**

- Program/New App
- Eligibility/Accepted
- Activity

**Document Summary**

Able H Johnson Record ID 201764748  
 Birth Date 11/11/1967

▼ Show Filter Criteria

▼ Hide VRS Seq 2 - Accepted for Services

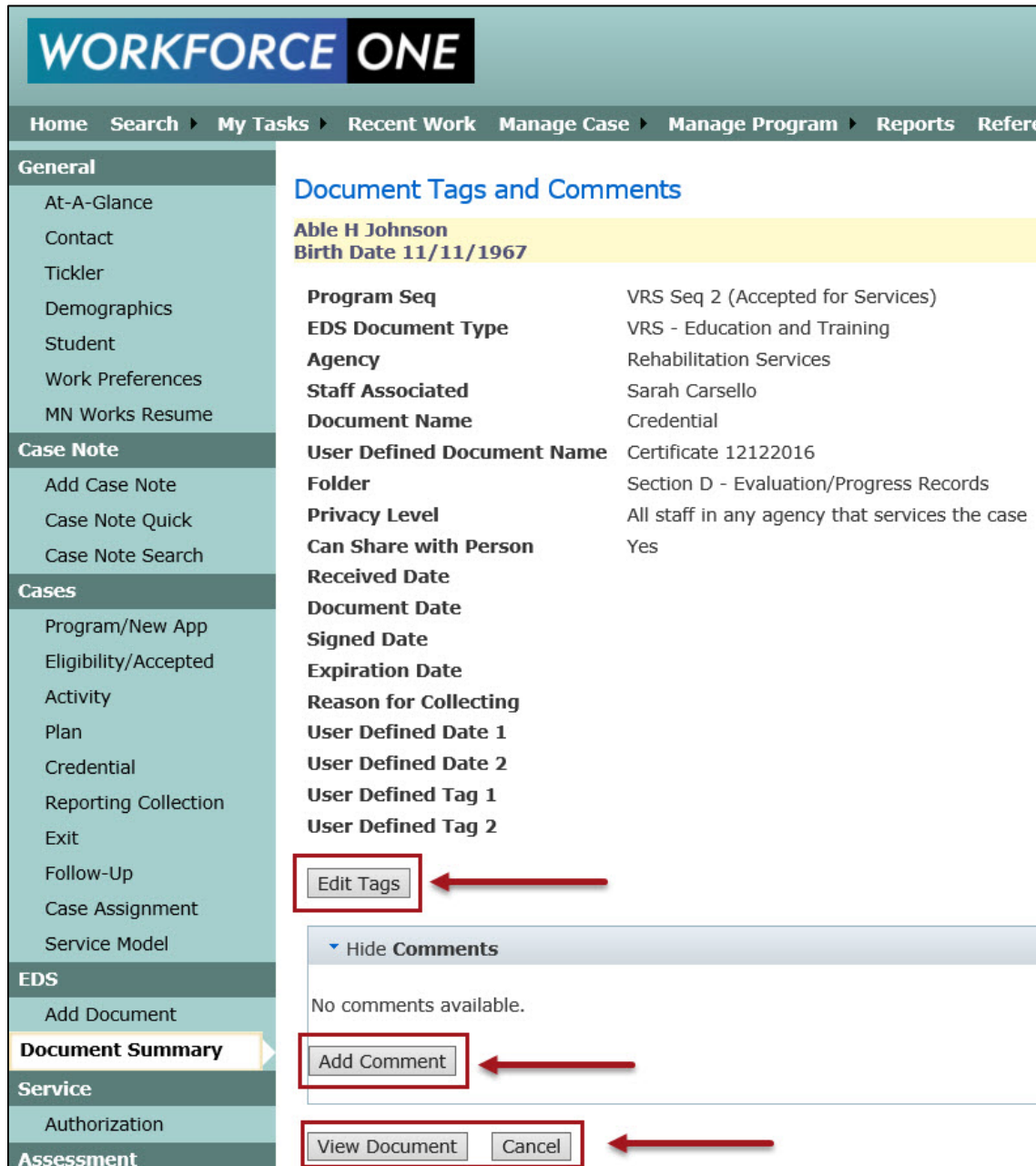
Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Format	Comments Added	Action
Credential Certificate 12122016	VRS - Education and Training	04/25/2017 12:17:27 PM		No	Tags and Comments Copy Move Delete
AT Documentation AT Document 04242017	VRS - Assistive Technology	04/24/2017 02:07:05 PM		No	Tags and Comments Copy Move Delete



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On the Document Tags and Comments page, select the “Edit Tags” button to update, add, or change the tags related to the document. You can also add additional Comments by selecting the “Add Comments” button. You can download and view the document from this page by selecting the “View Document” button. To return to the Document Summary page, select the “Cancel” button.



**WORKFORCE ONE**

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports Refere

**General**

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**Case Note**

- Add Case Note
- Case Note Quick
- Case Note Search

**Cases**

- Program/New App
- Eligibility/Accepted
- Activity
- Plan
- Credential
- Reporting Collection
- Exit
- Follow-Up
- Case Assignment
- Service Model

**EDS**

- Add Document

**Document Summary**

**Service**

- Authorization

**Assessment**

## Document Tags and Comments

**Able H Johnson**  
Birth Date 11/11/1967

<b>Program Seq</b>	VRS Seq 2 (Accepted for Services)
<b>EDS Document Type</b>	VRS - Education and Training
<b>Agency</b>	Rehabilitation Services
<b>Staff Associated</b>	Sarah Carsello
<b>Document Name</b>	Credential
<b>User Defined Document Name</b>	Certificate 12122016
<b>Folder</b>	Section D - Evaluation/Progress Records
<b>Privacy Level</b>	All staff in any agency that services the case
<b>Can Share with Person</b>	Yes
<b>Received Date</b>	
<b>Document Date</b>	
<b>Signed Date</b>	
<b>Expiration Date</b>	
<b>Reason for Collecting</b>	
<b>User Defined Date 1</b>	
<b>User Defined Date 2</b>	
<b>User Defined Tag 1</b>	
<b>User Defined Tag 2</b>	

Hide Comments

No comments available.

## Delete Documents from EDS

Users with the appropriate privileges can delete documents from EDS on the Document Summary page. Locate a document you want to delete on the Document Summary page and select the **Delete** link. A dialog box will appear notifying you that this action will permanently remove the document and the



action cannot be undone. You will also be required to list the reason why you are deleting the document. Enter your reason in the textbox provided and select the Yes button. (If you decide not to delete the file, select the No button to end the delete process.) Once you select “Yes”, a message will display “EDS document deleted” confirming the document has been deleted.

This action will permanently remove this document and cannot be undone. If you need to preserve this document to use elsewhere, then you may need to save the document before completing this action. Are you sure you want to permanently delete this document?

**\*If Yes, what is the reason?**

Spell Check

## Copy using Person Record in Document Summary

### Document Summary: Copy to a Different Program Sequence

Users with the appropriate privileges may copy documents from one program sequence to another program sequence within the same person record. To copy a document, navigate to the “Document Summary” link in the left navigation menu while in the person’s record. Locate the document you want to copy and select the **Copy** link in the **Action** column.

## WORKFORCE ONE

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports References ▶ Resources ▶ Help

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- MN Works Resume

**Case Note**

- Add Case Note
- Case Note Quick
- Case Note Search

**Cases**

- Program/New App

### Document Summary

**Able H Johnson** Record ID 201764748  
Birth Date 11/11/1967

▼ Show Filter Criteria

▼ Hide VRS Seq 2 - Accepted for Services

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Format	Comments Added	Action
AT Documentation AT Document 04242017	VRS - Assistive Technology	04/24/2017 02:07:05 PM		No	Tags and Comments <b>Copy</b> Move Delete

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The Document Copy page will display with labels or the following required fields to be completed: EDS Document Type with which you want to associate the document; Document Name related to the Document Type; and the Folder related Document Type. If the document will be copied to a program sequence that is the same as the current document, once you select the program sequence in the dropdown the default EDS Document Type/Document Name/Folder will auto-populate to the same as the copied document. Select the “Copy” button to complete the document copy process. You will receive confirmation that the document was copied through a message stating, “Document copied.”

**WORKFORCE ONE**

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports References ▶ Resources ▶ Help

**General**

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- Student
- Work Preferences
- MN Works Resume

**Case Note**

- Add Case Note
- Case Note Quick
- Case Note Search

**Cases**

### Document Copy

**Heer A Aaes** Record ID 201324487  
Birth Date 10/31/1974

**Source Person Name** Heer A Aaes  
**Source Program Seq** VRS Seq 5  
**Source Document Name** Court Document, Order, or Record

**\*Target Program Seq** Heer A Aaes, VRS Seq 4 (Exited) ▼  
**\*EDS Document Type** VRS - Court and Legal ▼  
**\*Document Name** Court Document, Order, or Record ▼  
**\*Folder** Section F - Correspondence ▼

Copy Cancel

You may confirm the document copied by opening the target program sequence panel that the document was copied to in the Document Summary.

**WORKFORCE ONE**

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports References ▶ Resources ▶ Hel

**General**

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- Contact
- Tickler
- Demographics
- Student
- Work Preferences
- MN Works Resume

**Case Note**

- Add Case Note
- Case Note Quick
- Case Note Search

**Cases**

- Program/New App
- Eligibility/Accepted
- Activity
- Plan
- Credential
- Reporting Collection
- Exit
- Follow-Up
- Case Assignment

**Document Summary**

Heer A Aaes Record ID 201324487  
 Birth Date 10/31/1974

▼ Show Filter Criteria

▼ Hide VRS Seq 5 - Accepted for Services

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Format	Comments Added	Action
Court Document	VRS - Court and Legal	04/26/2017 12:00:46 PM		No	Tags and Comments Copy Move Delete

▼ Hide VRS Seq 4 - Exited

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Format	Comments Added	Action
Court Document	VRS - Court and Legal	04/26/2017 12:54:19 PM		No	Tags and Comments Copy Move Delete

## Document Summary: Copy to a Different Person with a Matching MAXIS Case Number

Users with the appropriate privileges may copy documents from one program sequence to another person's record if they have matching MAXIS Case Numbers (2<sup>nd</sup> parent). To copy a document, navigate inside the person record to the "Document Summary" link in the left navigation menu. Locate the document you want to copy and select the "Copy" link in the Action column.

The Document Copy page will display the following required fields to be completed: EDS Document Type you want to associate the document with; Document Name related to the Document Type; and the Folder related Document Type. The Target Program Seq dropdown menu will display Program Sequence names for the current person record and the 2<sup>nd</sup> parent person with the matching MAXIS Case Number that you can choose from for your document copy. Once you make the rest of your field selections, you will be required to complete the Reason for Copy field with a statement for your reason for copying the document. Select the "Copy" button to complete the document copy process. You will receive confirmation that the document was copied through a message stating, "Document copied."

**WORKFORCE ONE**

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports References ▶ Resources ▶ H

**General**

- At-A-Glance
- Contact
- Tickler
- Demographics
- MN Works Resume

**Case Note**

- Add Case Note
- Case Note Quick
- Case Note Search

**Cases**

- Program/New App
- Eligibility/Enrollment
- Activity
- TAA
- Plan
- Credential
- Reporting Collection
- Youth Goals

**Document Copy**

**Kali A Allison**  
Birth Date 01/01/1991

Record ID 101857384  
MAXIS Case 36282073

Source Person Name: Kali A Allison  
Source Program Seq: MFIP Seq 2  
Source Document Name: Rights and Responsibilities Rights 04262017

\*Target Program Seq  
\*EDS Document Type  
\*Document Name  
\*Folder

\*Reason for Copy

None Selected  
Arnold S Allison, MFIP Seq 3 (Enrolled)  
Kali A Allison, MFIP Seq 2 (Enrolled)  
Arnold S Allison, MFIP Seq 2 (Exited)  
Kali A Allison, MFIP Seq 1 (Closed from App)  
Kali A Allison, MFIP Seq 1 (Closed from App)  
Arnold S Allison, MFIP Seq 1 (Closed from App)

Spell Check

Copy Cancel

You may confirm the document copied by opening the 2<sup>nd</sup> parent's Document Summary.

## Move using Person Record in Document Summary

### Document Summary: Move to a Different Program Sequence

Users with the appropriate privileges may move documents from one program sequence to another program sequence in a person's record. Users with add/update privileges for EDS can only move documents within seven days of when they were added. Users with manage privileges for EDS can move documents at any time. A word of caution: users are not allowed to move files that are attached to payments or authorizations.

To move a document, navigate inside the person record to the "Document Summary" link in the left navigation menu. Locate the document you want to copy and select the **Move** link in the **Action** column.

**Document Summary**  
Able H Johnson Record ID 201764748  
Birth Date 11/11/1967

Show Filter Criteria

Hide VRS Seq 2 - Accepted for Services

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Format	Comments Added	Action
AT Documentation AT Document 04242017	VRS - Assistive Technology	04/24/2017 02:07:05 PM		No	Tags and Comments Copy Move Delete

The Document Move page will display with labels or the following required fields to be completed: Target Program Seq to move the file; EDS Document Type with which you want to associate the document; Document Name related to the Document Type; and the Folder related Document Type. If the document is going to be moved to a program sequence that is the same as the current document, the default EDS Document Type/Document Name/Folder will be the same as the copied document. You will be required to enter the reason why you are moving this document in the **Reason for Move** field. Select the “Move” button to complete the document move process. You will receive confirmation that the document moved through a message stating, “Document moved.”

## EDS Document Copy to a Different Program Sequence

### EDS Document Copy or Move

Users with the appropriate privileges may access the EDS Document Copy or Move page by navigating to Manage Case and selecting “EDS Document Move/Copy” in the top navigation menu:

WORKFORCE ONE

Logged in as: scarsello - VRS: COFFR-wide: DEED - RS (53)  
Switch Profile Change Password My Preferences

Home Search My Tasks Recent Work **Manage Case** Manage Program Reports References Resources Help

EDS Document Move/Copy  
Case Merge  
Priority for Service Category  
Mass Case Reassign  
SSN Update

Dashboard

My Info

44 Tickler(s) past due  
No Ticklers due today  
No Appointments today

Previous successful login was at 04/13/2017 02:53 PM

©2017 MN DEED Build 2017.04.14-0 01.1

The EDS Document Move/Copy link directs users to the EDS Document Copy or Move page. This page allows users to populate the source and target record IDs for the transfer of documents. With the appropriate privileges and program sequence case assignments, you can transfer documents between program sequences for **one person** or transfer documents from **person to person**.



**WORKFORCE ONE**

Home Search ▶ My Tasks ▶ Recent Work Manage Case

### EDS Document Copy or Move

\*Source Record ID

\*Target Record ID

Next

- Enter the Record ID of the person from which you want to copy or move a document into the “Source Record ID”.
- Enter the Record ID of the person (same or different person) into which you want to copy or move the document into the “Target Record ID”.
- Select the “Next” button.

A new page will display the person record ID(s) names of both the Source Record ID and the Target Record ID along with the available program sequences. If the person's records have multiple program sequences, a dropdown will appear so that you can choose the proper program sequence to which you want to transfer documents.

**WORKFORCE ONE**

Home Search ▶ My Tasks ▶ Recent Work Manage Case

### EDS Document Copy or Move

Source Record ID Wil S Fee, Record ID 201665014

\*Source Program Seq

Target Record ID Monty Burns, Record ID 202004880

\*Target Program Seq

Next Change Record ID

- On this page, select the correct “Source Program Sequence” that the document resides in for the source record ID and the “Target Program Sequence” into which you want to move or copy the document.
- Select the “Next” button.

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It is important to be aware that you can only move documents from the same programs; you are not able to move to different programs. Example: You cannot move a document from a person record WDU program sequence to a person record SSU program sequence.

The next page will display the documents available in the source program sequence that can be transferred to the target program sequence. You have the option to copy or move each individual document.

**WORKFORCE ONE** Logged in as: scarsello - SSB: COFFR-wide:  
Switch Profile Change Password

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports References ▶ Resource

### EDS Document Copy or Move

**Source Record ID** Monty Burns, Record ID 202004880  
**Source Program Seq** SSU Seq 1 (Accepted for Svcs)  
**Target Record ID** Wil S Fee, Record ID 201665014  
**Target Program Seq** SSU Seq 1 (Accepted for Svcs)

Change Record ID

Document Name: User Defined Document Name	EDS Document Type	Folder	Uploaded Date	Action
General Release of Info Release File 02122017	SSU - Consent, Release of Information	Correspondence	04/17/2017 01:01:02 PM	Copy Move

## EDS Document Copy or Move: To Copy a Document from Person to Person

- Note: VRS does not allow staff to copy documents from person to person.
- When you select the “Copy” link inside the Action column, you will be prompted with a message that requires you to enter your reason for copying this document. Enter your reason and then select the “OK” button.

**Text Entry**

Enter the reason for copying this document.

**Reason**

Spell Check

OK Cancel

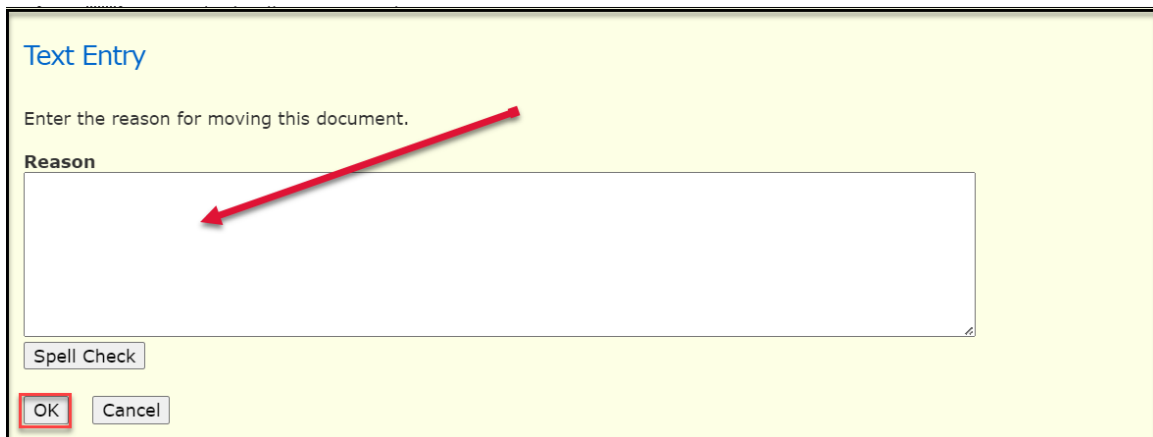
- You will see a message “Document copied” confirming the document was copied. The document information will remain on the screen because the original document still sits inside the source



record ID program sequence. You can move the document at this point, change the record ID, or leave the page.

## EDS Document Copy or Move: To Move a Document from Person to Person

- Note: You will not be allowed to move documents that are attached to an authorization or a payment.
- When you select the “Move” link inside the Action column, you will be prompted with a message that requires you to enter your reason for moving this document. Enter your reason and then select the “OK” button.



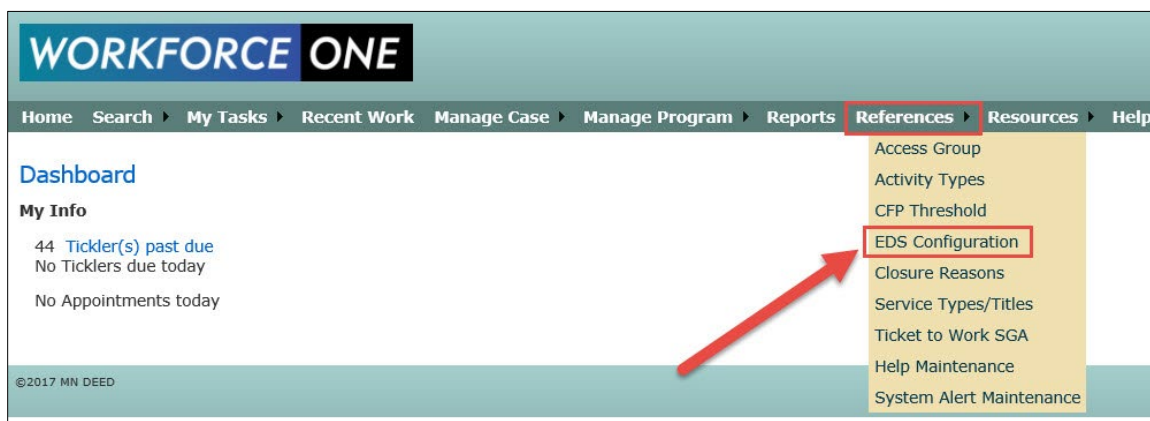
- You will see a message “Document moved” confirming the document was moved. The remaining documents in the program sequence will display on the page or a message will display “No documents found for this program sequence.”

## EDS Configuration Summary

EDS Configuration Summary is where users go to view the configuration settings for EDS in WF1, also known as taxonomy. Taxonomy allows the classification of information to make it easier to find later.

### Program Document Groups

Users with the appropriate privileges may access the EDS Configuration Summary page by navigating to “References” in the top navigation menu and selecting “EDS Configuration”:



The EDS Configuration link directs users to the EDS Configuration Summary page:

EDS Document Type	Document Name	Tags
Adult - Appeals and Complaints	Equal Opportunity (EO) Complaint	Can Share with Person; Document Date; Document Name; Expiration Date; Folder; Privacy Level; Reason for Collecting; Received Date; Signed Date; User Defined Date 1; User Defined Date 2; User Defined Tag 1; User Defined Tag 2
Adult - Assessments	Career Assessment Interest Assessment or Inventory Reading, Math Assessment Skills Assessment or Inventory	Can Share with Person; Document Date; Document Name; Expiration Date; Folder; Privacy Level; Reason for Collecting; Received Date; Signed Date; User Defined Date 1; User Defined Date 2; User Defined Tag 1; User Defined Tag 2
Adult - Consent, Release of Information	Consent for Release or Exchange of Information Consent to Share Wage and Employment Information Equal Opportunity (EO), How We Use Your Personal Information	Can Share with Person; Document Date; Document Name; Expiration Date; Folder; Privacy Level; Reason for Collecting; Received Date; Signed Date; User Defined Date 1; User Defined Date 2; User Defined Tag 1; User Defined Tag 2

- The EDS Configuration Summary page displays the EDS Document Configuration for each program including all the EDS document types, document names, and folders available.
- If there are no panels to display, a message will display “No document groups found.”
- You may refine results by selecting specific values from the EDS Document Types dropdown menu or by selecting the Select/Deselect link under the dropdown menu. You may additionally refine results by entering a complete document name in the Document Name field. Return results by selecting the “Filter Results” button.

**EDS Configuration Summary**

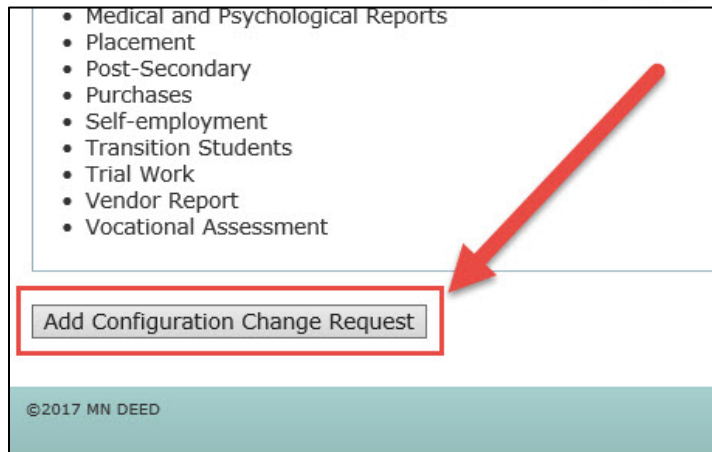
**EDS Document Type** All Values [Select/Deselect](#)

**Document Name**

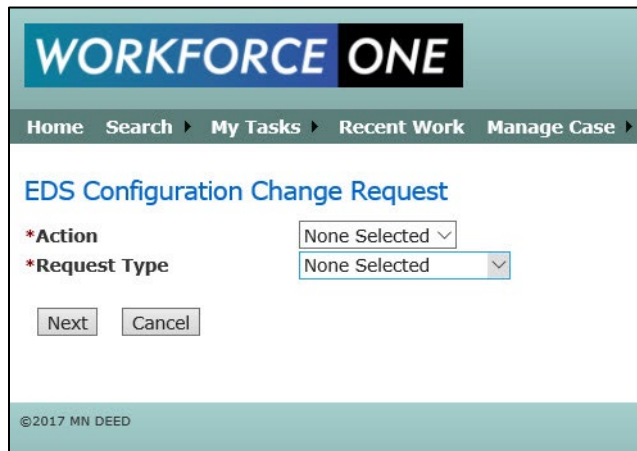
- Once you choose to “Filter Results”, only the programs that match the criteria will display panels open with EDS document types, document names, tags, and folders. All other panels will display closed. If you open a closed panel, a message will display “No results found.”
- Clear your search results by selecting the “Clear Filter” button.

## Add Configuration Change Request

Users can submit a request to change an aspect of the EDS configuration, or taxonomy after he/she has viewed how the documents are organized in his/her program. The change request process starts through the Add Configuration Change Request button located at the bottom of the EDS Configuration Summary page.



A page will display the changes you can request. You can request to add, remove, or rename an EDS document type, document name, folder, or search tag. It is very important to complete each field on the EDS Configuration Change Request completely and thoughtfully because the requests are evaluated by the WF1 Team and then by the program administrators prior to being implemented in the EDS Configuration. If your request is similar to a value that exists in the configuration already for another program and is approved by the program administrators, it will be added using the language in the existing value.



## Add/Remove/Rename Document Name Example

- To **Add a Document Name** to the EDS Configuration, select "Add" from the Action dropdown and then select "Document Name" from the Request Type dropdown.
- To **Remove a Document Name** from the EDS Configuration, select "Remove" from the Action dropdown and then select "Document Name" from the Request Type dropdown.
- To **Rename a Document Name** to the EDS Configuration, select "Rename" from the Action dropdown and then select "Document Name" from the Request Type dropdown.

Select the "Next" button.

A page will appear requesting you to populate any or all these fields: EDS Document Type, New Document Name, Rename Document Name, and Reason for Change.

**EDS Configuration Change Request**

\*Action: Rename  
\*Request Type: Document Name

Change Request Type

\*EDS Document Type: None Selected  
\*Document Name: Select EDS Document Type  
\*Rename Document Name:  
\*Reason for Change:

Spell Check

Save Cancel

The “EDS Document” type field will auto-fill with the current available EDS Document Types in the EDS Configuration. The “New Document Name” field will appear blank, allowing you to fill the field in with any text you want for your new document name. When you are renaming or removing a Document Name, the “Document Name” field will populate with related Document Name options that you can select once you populate the “EDS Document Type” field. The “Rename Document Name” field will appear blank, allowing you to fill the field in with any text you want for your renamed document name. The “Reason for Change” field is a textbox that requires you to justify your request.

Select the “Save” button to submit the EDS Change Request to the WF1 Team for review. Select the “Cancel” button to end the request and send you back to the EDS Configuration Summary page.

Note: Requesting to add, rename, or remove an EDS document type, folder, or search tag works like the document name example above.