

## AEFIS Reference: Manage a Self-Study

**Purpose:** To understand how to participate in a Self-Study

**Requirements:**

- Permission as Self Study Section Editor or Chair

**Content:**

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### Log into AEFIS

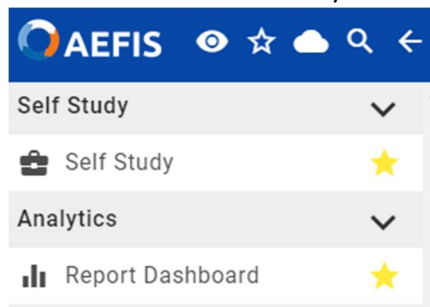
Log into AEFIS at <https://rochester.aefis.net>

### Find your Self Study

Click on the three lines, or “hamburger” button, in the upper left-hand corner next to the home icon and words AEFIS Dashboard.



Find and click on “Self Study” in the menu.

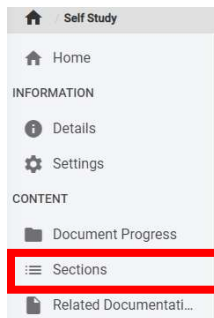


All studies that you have access to should be listed here. Choose your self-study and click the Manage button to the right.

Owner	Name	Academic Year	Accreditor	Moderator	Complete Date	Status	Actions
		2018			2023-11-15	In Progress	<a href="#">Manage</a>

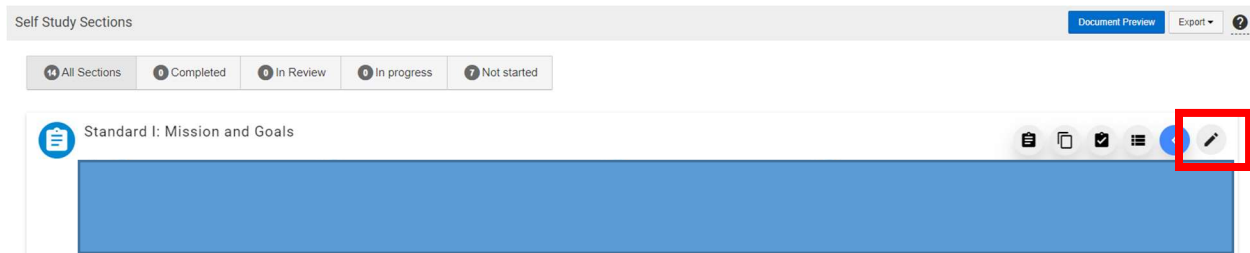
## Reviewing the Sections of a Self Study

Click on the **Sections** item in the left-hand menu.



All of the sections associated with your self-study have been created as individual sections that can be assigned and edited separately. You may have been given permissions to all or some of these sections.

To edit the text in any section, click the “pencil” icon. If you do not see a pencil, you do not have permission to edit.



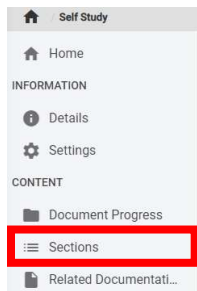
A full text editor will appear here with the existing text entered.



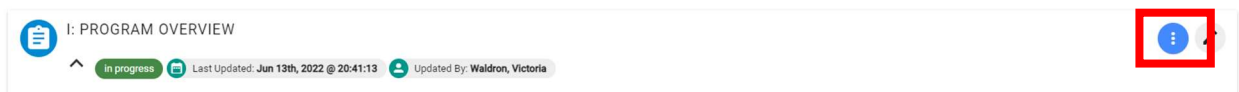
Note: To learn more about the editor, see [Contributing to a Self-Study](#).

## Assigning a Section (Applies Only to Self Study Chair)

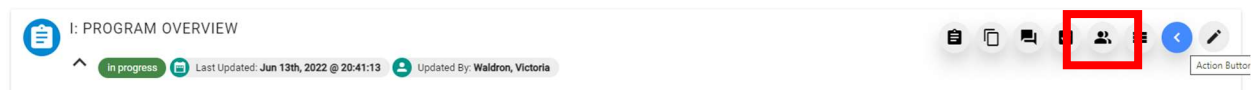
In the Self Study's left-hand menu, go to the "sections" option.



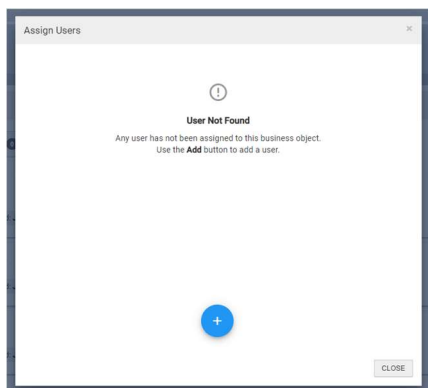
Once in the Self Study section view, find the three dots, in a blue circle to the left of the pencil icon, and click on it.



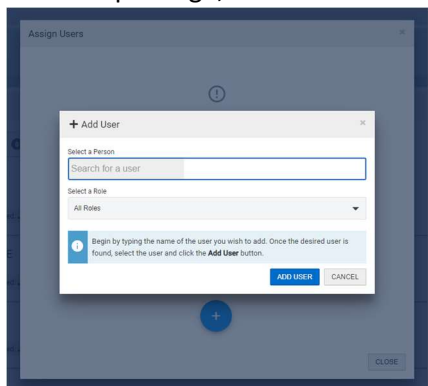
Then click on the icon with people on it. If you hover over it, "assign users" will pop up.



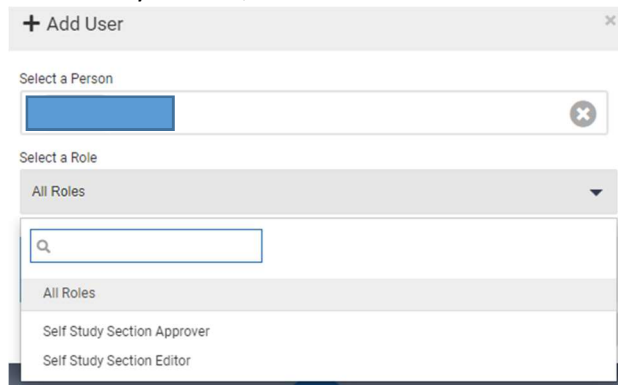
A new window labeled "Assign Users" will open.



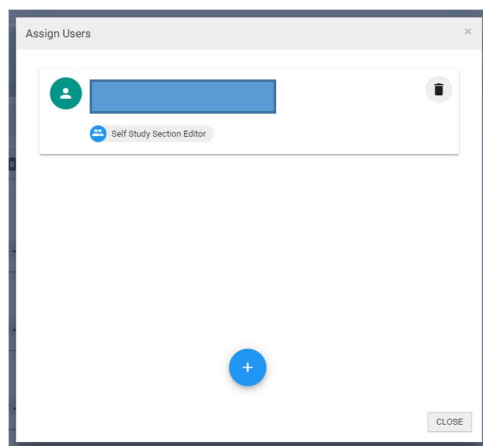
Click the plus sign, in the blue circle in the box, and then start typing a name.



Wait for the system to autofill with the names of users and choose the appropriate user from the list. Additionally, you must choose a role for the user. The system will not let you add them without doing this. Once you have, click the “Add User” button.



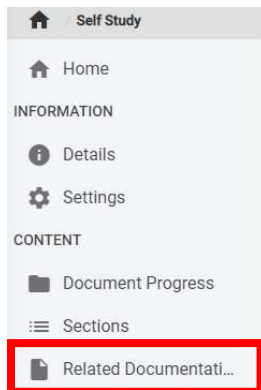
The screen will look like this.



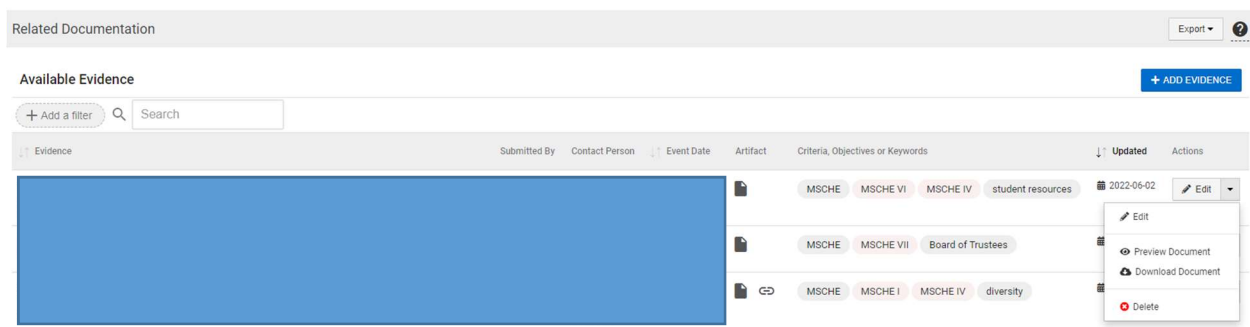
**Note:** If the user you want to assign to this self-study does not appear, please contact AEFIS support. Not all staff are automatically given accounts and must be added separately.

## Viewing Related Documentation (Applies Only to Self Study Chair)

Click on the **Related Documentation** item on the left-hand menu.



All evidence from the Evidence Bank that is tagged to your Accreditor will appear here. From the pull-down to the right of the evidence, you can **Preview** the evidence.



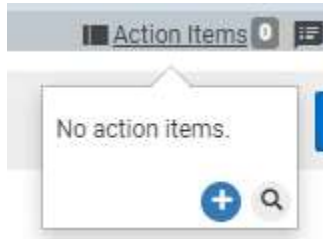
## Assigning Actions

Tasks can be assigned to people associated with your self-study through the **Action Items** area.

Documents that are not part of the public evidence bank can be added to your self-study.



Click on **Action Items** in the menu and then click the + sign.



Add a **Task Title**, **Deadline**, and **Details**. Click in **the Person to assign this task** box and start typing a name. Users in the system will populate, choose the person to assign the task, and then click Save.

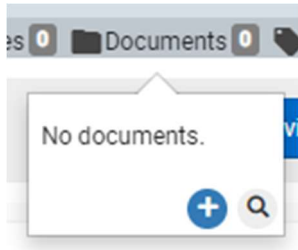
A screenshot of the 'Add Task' form. It has a title bar with '+ Add Task' and a close button. The form contains three main sections: 'Task Title' with a text input field containing 'Enter a Task Title.', 'Task Deadline' with a date input field, and 'Task Details' with a large text area. Below these is a section for 'Person to assign this task' with a search input field containing 'Type a name to search for a user'. At the bottom, there is a toggle switch for 'I have completed this task.' and two buttons: 'SAVE' and 'CANCEL'.

## Attaching Documents

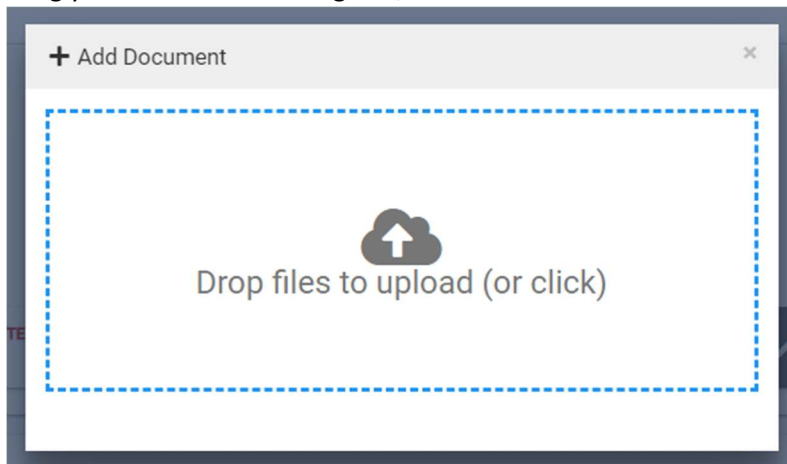
Documents that are not part of the public evidence bank can be added to your self-study.



Click on **Documents** in the menu and then click the + sign.



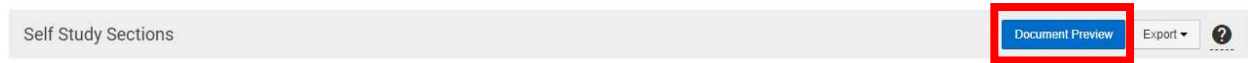
Drag your file into the dialog box, or click in the box to browse for the file.





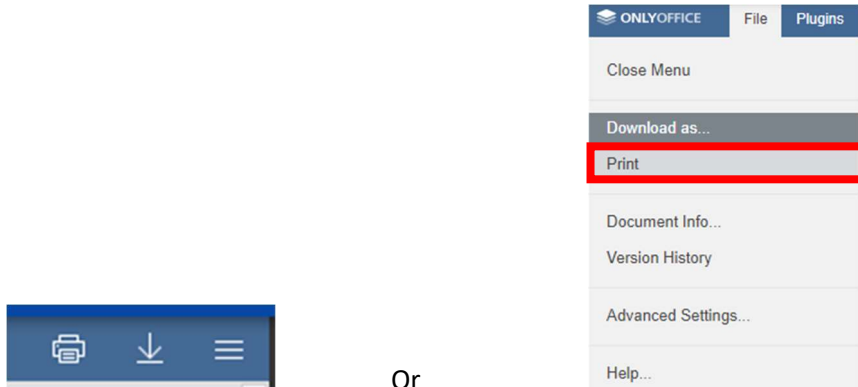
## Preview and Print/Download the Document

From the **Sections** area, click on the Document Preview button.



From here you can review the document in its entirety.

Click on the Printer icon, or “print” under the File tab, to print a copy of the entire document.



The arrow pointed down (next to the printer icon) or “Download as...” section will allow you to save a digital version of the document. The document can be saved as a Word (DOCX or DOTX), PDF (PDF/A), ODT, TXT, RTF, or HTML.



Click EXIT when finished.

