

PROJECT SUNLIGHT

User Manual Meeting Search Application

January 2025

Table of Contents

	<u>Topic</u>	<u>Page Number</u>
1.	Getting to Public Search	3
2.	Links in Header	4
3.	Resources	5
4.	Searching Meetings	6
5.	Search Results	7
6.	Hide/Unhide Search Criteria	8
7.	View Meeting Details	9

Getting to the Public Search Page

To visit the Project Sunlight Meeting Search Application, type <https://projectsunlight.ny.gov/public> in your browser's address bar. You will be redirected to the Meeting Search application page (Picture 1). This is where you select Criteria to search for meetings in the Project Sunlight database.

Picture 1

The screenshot shows the Project Sunlight Meeting Search Application interface. At the top, there is a blue navigation bar with the Project Sunlight logo and links for Search Meeting, Resources, Open NY, and Contact. Below the navigation bar, the main content area features a search form. The form is titled "Welcome - Project Sunlight" and "Search Meeting". It includes an instruction: "Please search meeting by any of the below criteria." The search criteria are organized into several rows, each with a label and a corresponding input field or dropdown menu:

- Date of Appearance Start Date:
- Date of Appearance End Date:
- Client Company:
- Client Attendee (Last Name):
- Government Agency:
- Gov Attendee (Last Name):
- Representative Company:
- Representative Attendee (Last Name):
- Nature of Meeting:

A blue "Search" button is located at the bottom of the search form. The interface is clean and professional, with a light blue background and white form elements.

Links in Header

There are links in the blue bar for more information (See Picture 2). The link for 'Project Sunlight' and 'Search Meeting' will bring you back to the main page. The 'Resources' link will bring you to resources for Project Sunlight (Picture 3). 'Open NY' link will open the "New York State Open NY" web site. The 'Contact' link will display the contact email for Project Sunlight: Contact@ProjectSunlight.ny.gov. When clicked, it will open the link in an Email Editor of your choice.

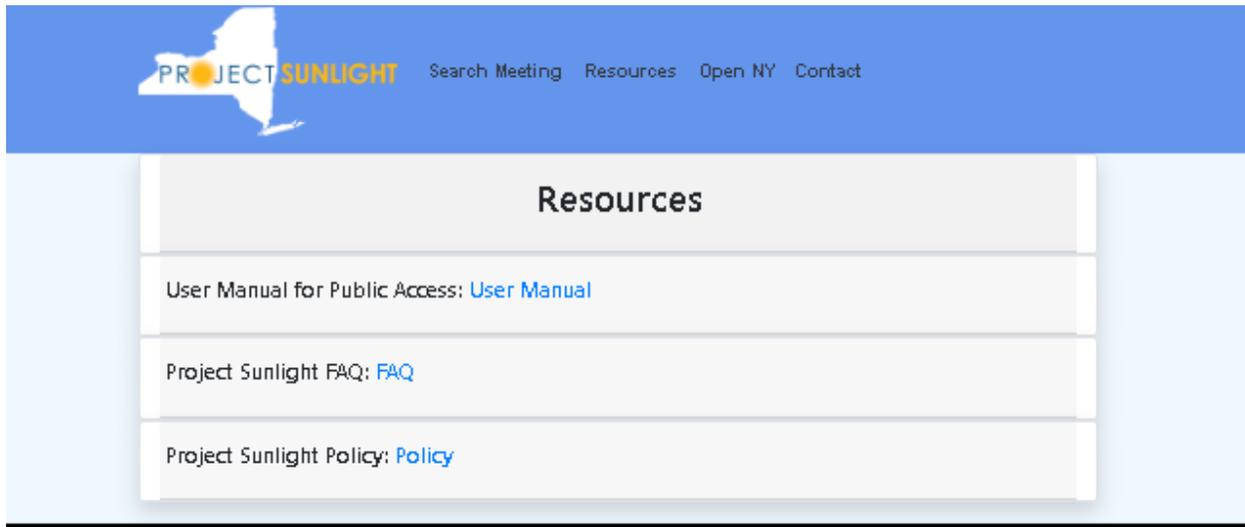
Picture 2



Resources

The 'Resources' link will bring you to a page with multiple links on them. The links will open in a new browser tab. One of the links is to the 'User Manual'. There is a link that will open a 'Frequently Asked Questions (FAQ)' page for Project Sunlight. The last link is information about the 'Project Sunlight Policy'.

Picture 3



Searching Meetings

To Search a meeting a user needs to first enter search criteria. For the 'Date of Appearances' field, a calendar will pop up to help select a 'Start Date' and 'End Date'. There are drop down lists for the user to select an 'Agency' and for the 'Nature of Meeting'. The other criteria are text boxes the user will type into. A user can select as many different criteria for the search as they like but must enter at least one. Once the criteria have been selected, press the 'Search' button and the results will appear below.

Picture 4

The screenshot shows the Project Sunlight search interface. At the top is a blue navigation bar with the Project Sunlight logo and links for Search Meeting, Resources, Open NY, and Contact. Below this is a grey header with a gear icon, the text 'Welcome - Project Sunlight', and a lightbulb icon. A large grey button labeled 'Search Meeting' with a magnifying glass icon is centered below. An instruction box states: 'Instruction: Please search meeting by any of the below criteria.' The search form contains several fields: 'Date of Appearance Start Date' and 'Date of Appearance End Date' (text boxes); 'Client Company' and 'Client Attendee (Last Name)' (text boxes); 'Government Agency' (dropdown menu with '--Select Agency--') and 'Gov Attendee (Last Name)' (text box); 'Representative Company' and 'Representative Attendee (Last Name)' (text boxes); and 'Nature of Meeting' (dropdown menu with '--Select Meeting Nature--'). A blue 'Search' button is located at the bottom of the form. Below the search form is a grey bar with a double-headed vertical arrow icon.

Search Results

After selecting search criteria and pressing the 'Search' button, the results of the search will appear at the bottom of the page (Picture 5). The user can choose how many records to display on this page by changing the amount in the 'Show entries' Drop Down list. The 'Search' textbox on the right will allow you to further search the filtered list. As the user types, the table will filter the display for all meetings that have a match for what is in the 'Search' textbox. There are buttons that can be clicked to extract the data. The 'Export as Excel' and 'Export as PDF' buttons will create a file in your downloads folder of all the meeting details in this Search results. At the bottom of the screen, you will see the total number of meetings in the filtered table. The user can click on the field headings to sort by that field. If the field is clicked more than once, the table will change between Ascending or Descending for that column. By clicking on 'View' (eye icon), the user can see more details about the meeting.

Picture 5

The screenshot shows a search results interface. At the top, there is a 'Show 10 entries' dropdown menu, two buttons for 'Export as Excel' (green) and 'Export as PDF' (red), and a search input field. Below this is a table with the following data:

Meeting ID	Agency Name	Meeting Date	Building	Street	City	State	Zip Code	Action
23419	General Services, Office of	01/05/2018	38th Floor Corning Tower	Empire State Plaza	Albany	NY	12242	
23442	General Services, Office of	01/10/2018	38th Floor Corning Tower	Empire State Plaza	Albany	NY	12242	

At the bottom of the table, it says 'Showing 1 to 2 of 2 entries'. To the right of this, there are 'Previous', '1', and 'Next' buttons for pagination.

Hide/Unhide Search Criteria

Between the Search Criteria and the Search Results, there is a button with a double arrow on the top and bottom (Picture 6). This button will allow the user to expand and collapse the Search Criteria.

Picture 6



View Meeting Details

To view the details for a meeting in the list, the user will click on the 'View' (eye icon) button on the right side of the meeting information in the search results. The page in Picture 7 will appear. The meeting details are broken down into six different sections. Each section is a tab on top of the page that will allow the user to see the details about that section for the selected meeting. At the bottom of the page there are three buttons. The 'Back' button will take the user back to the 'Meetings' list. The 'Export as Excel' and 'Export as PDF' buttons will create a file in your downloads folder of the details for this specific Meeting.

Picture 7

The screenshot shows a web interface for viewing meeting details. At the top, there is a header "View Meeting (Meeting #: 23419)". Below the header is a navigation bar with six tabs: "Meeting Location", "Appearance Data", "Agency Participants", "Clients and Customers - Companies", and "Clients and Customers - Individuals". The "Meeting Location" tab is currently selected. Below the tabs, there is a sub-section titled "Outside representatives of a Client or Customer". The main content area displays the following details for the meeting location:

- Meeting Location** (tab title)
- Date of Appearance:** 01/05/2018
- Building:** 38th Floor Corning Tower
- Street:** Empire State Plaza
- City:** Albany
- State:** NY
- Zip Code:** 12242

At the bottom of the page, there are three buttons: "Back", "Export to Excel", and "Export to PDF".