

ATIPXpress



OPEXUS

Collaboration Admin Manual

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AX 11.5.0 Collaboration Admin Manual

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Contents

| | | |
|-------|--------------------------------------|----|
| 1 | Introduction | 5 |
| 1.1 | In This Manual | 5 |
| 1.2 | Accessing Portal Administration..... | 5 |
| 2 | General Administration | 7 |
| 2.1 | General | 7 |
| 2.1.1 | General Tab | 8 |
| 2.1.2 | Header and Footer Configuration..... | 9 |
| 2.1.3 | Allowed File Formats | 10 |
| 2.1.4 | Login Logo | 11 |
| 2.1.5 | Help Links | 12 |
| 2.1.6 | Technical Support..... | 14 |
| 2.1.7 | System Notice..... | 15 |
| 2.2 | Application Template | 16 |
| 2.2.1 | About Application Templates | 17 |
| 2.2.2 | Editing Application Templates..... | 18 |
| 3 | User Management | 19 |
| 4 | Security Management | 21 |
| 5 | Email Template | 25 |
| 5.1 | Email Template Configuration..... | 25 |
| 5.2 | Edit an Email Template | 28 |
| 6 | Email Log(s)..... | 31 |
| 6.1 | Accessing the Email Log | 31 |
| 6.2 | Search and Filter Emails | 32 |
| 6.3 | Email Log Actions..... | 33 |
| 7 | Audit Log(s)..... | 35 |
| 7.1 | Session Audit Log..... | 36 |



7.2 User Action Audit Log 37



1 Introduction

Welcome to the Collaboration Portal Administration Manual. This manual provides easy reference information to help Collaboration Portal Administrators utilize the system features to best suit your organization's needs.

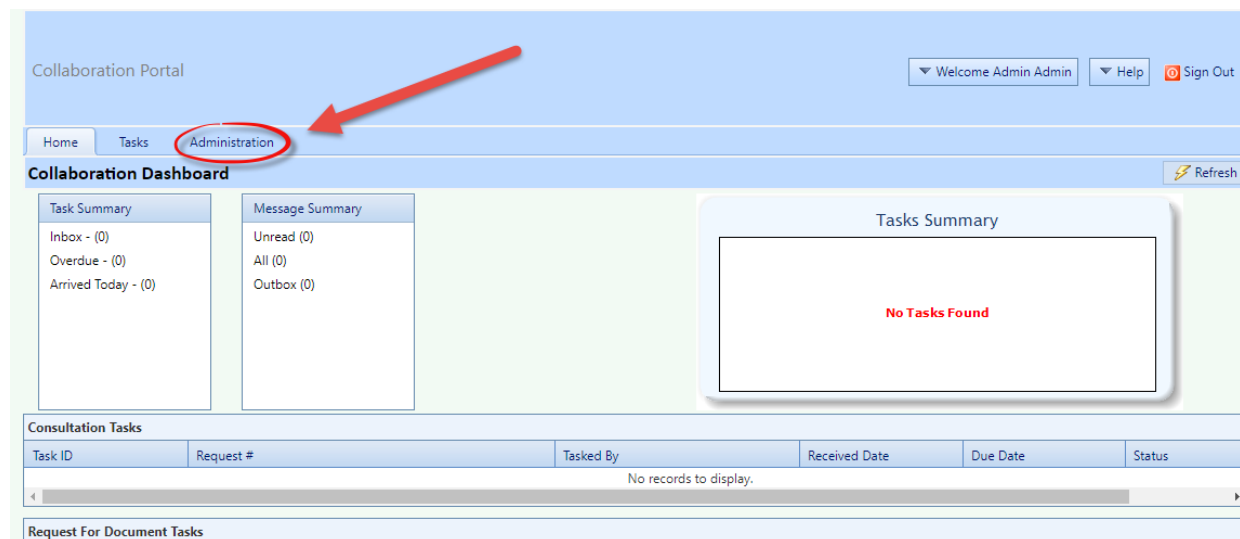
1.1 In This Manual

In this manual we'll discuss the following topics:

- General Administration: *General* portal configuration, and managing the portal UI through the *Application Template*
- User Management: Manage Portal users
- Security Management: Configure the Portal security options
- Email Template: View and edit system email templates
- Email Logs: Manage the system email logs
- Audit Logs: System actions are tracked in the audit log

1.2 Accessing Portal Administration

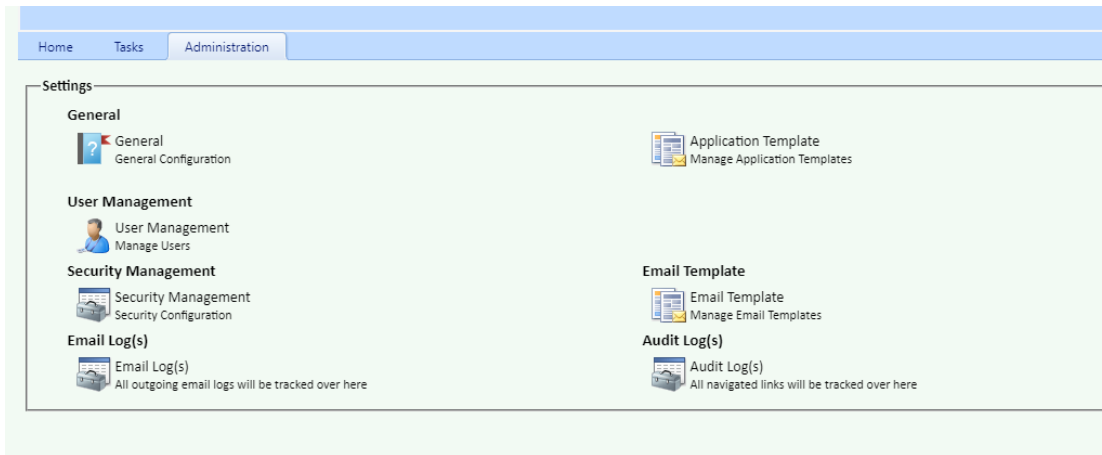
Portal users with Administrator access have an additional *Administration* tab available from the portal Home Screen. Click the **Administration** tab to access the system *Settings* screen.



The *Administration* tab is shown below. Select an option to view those configuration settings.



Introduction



Each topic is covered in a separate section of this manual. See the following sections for details on each configuration page.

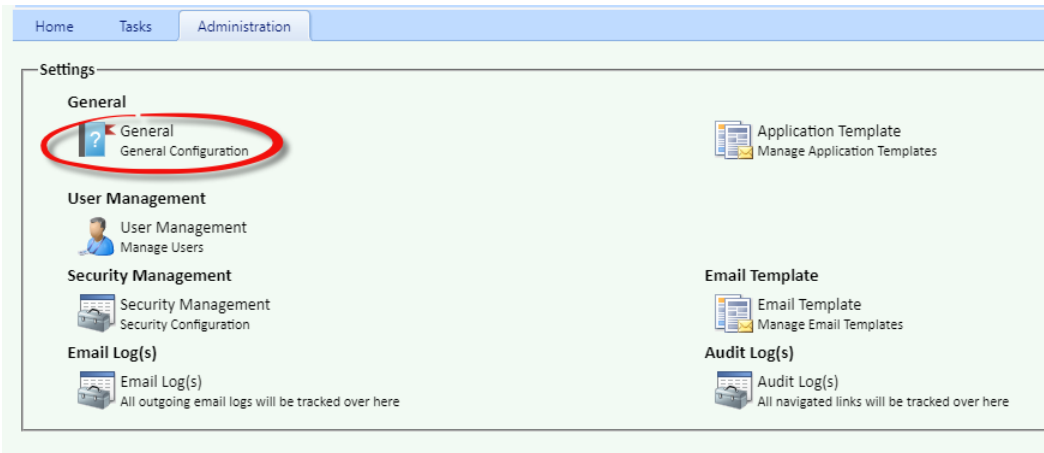


2 General Administration

General settings include the *General Configuration* and options for managing the *Application Template*.

2.1 General

To access the *General* settings page, navigate to the **Administration** tab, then click **General**:



General Configuration is divided into six *Tabs*. Select a **(A) Tab** to view the **(B) Configuration** options (*General* is shown in this example). Each tab is described in the following subsections.

A screenshot of the 'General' configuration page. A red box labeled 'A' highlights the tab bar at the top, which includes 'General', 'Header and Footer Configuration', 'Allowed File Formats', 'Login Logo', 'Help Links', 'Technical Support', and 'System Notice'. A red circle labeled 'B' highlights the 'General' tab. The 'General' tab content includes sections for 'Enterprise Details' (with fields for Enterprise Name, Contact Name, Contact Email, Phone Number, and Fax), 'Locations' (with fields for Correspondence, Documents, and Temp), and 'Mail Server Address' (with fields for SMTP Mail Server, Port, and a checkbox for Use SMTP SSL).

2.1.1 General Tab

To access *General* configuration (Enterprise Details, Locations, Mail Server Address, General Settings Information, and Document Management Settings), click the **Administration** tab, then click **General**. The *General* tab displays as shown below:

The screenshot shows the 'General' configuration window. It has a top navigation bar with tabs: General, Header and Footer Configuration, Allowed File Formats, Login Logo, Help Links, Technical Support, and System Notice. The 'General' tab is active. Below the navigation bar, there are several sections, each with a red callout letter:

- A** points to the 'Enterprise Details' section, which includes fields for Enterprise Name* (OPEXUS), Contact Name* (Ambica Mekala), Contact Email* (ambica.mekala@opexustech), Phone Number, and Fax.
- B** points to the 'Locations' section, which includes fields for Correspondence* (C:\Collab\AF\XWCORL\), Documents* (C:\Collab\AF\XWDOCS\), and Temp* (C:\AF\XWTEMP\).
- C** points to the 'Mail Server Address' section, which includes fields for SMTP Mail Server* (192.168.0.25), Port* (25), and a checkbox for 'Use SMTP SSL'.
- D** points to the 'General Settings Information' section, which includes fields for Application URL* (https://192.168.3.104/collaboration), Application Title* (Collaboration Portal), and Application Email* (ambica.mekala@opexustech.com).
- E** points to the 'Document Management Settings' section, which includes a checkbox for 'Enable Document Management'.

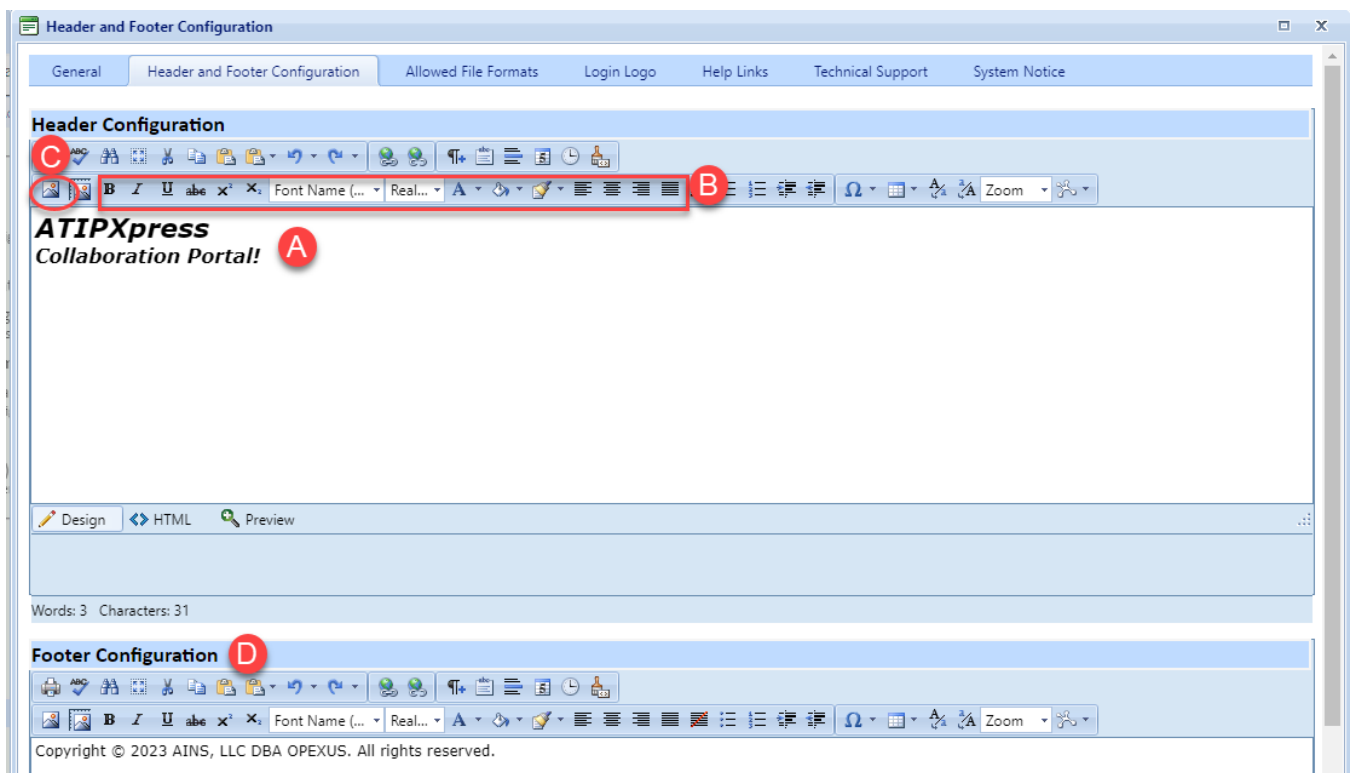
The fields are described in the following table. Click **Save** to save any changes on this tab.

| Ref | Title | Description |
|-----|------------------------------|--|
| A | Enterprise Details | Configure the Enterprise details, including the <i>Enterprise Name</i> , <i>Contact Name</i> , and <i>Contact Email</i> information. |
| B | Locations | Configure a disk location for storing and retrieving <i>Correspondence</i> , <i>Documents</i> , and <i>Temp</i> files. |
| C | Mail Server Address | Provide the <i>SMTP Mail Server</i> address, and the <i>Port</i> number for your email server. |
| D | General Settings Information | Configure the <i>Application URL</i> and <i>Application Title</i> as needed for your organization. |

| Ref | Title | Description |
|-----|------------------------------|---------------------------------------|
| E | Document Management Settings | Enable Document Management for users. |

2.1.2 Header and Footer Configuration

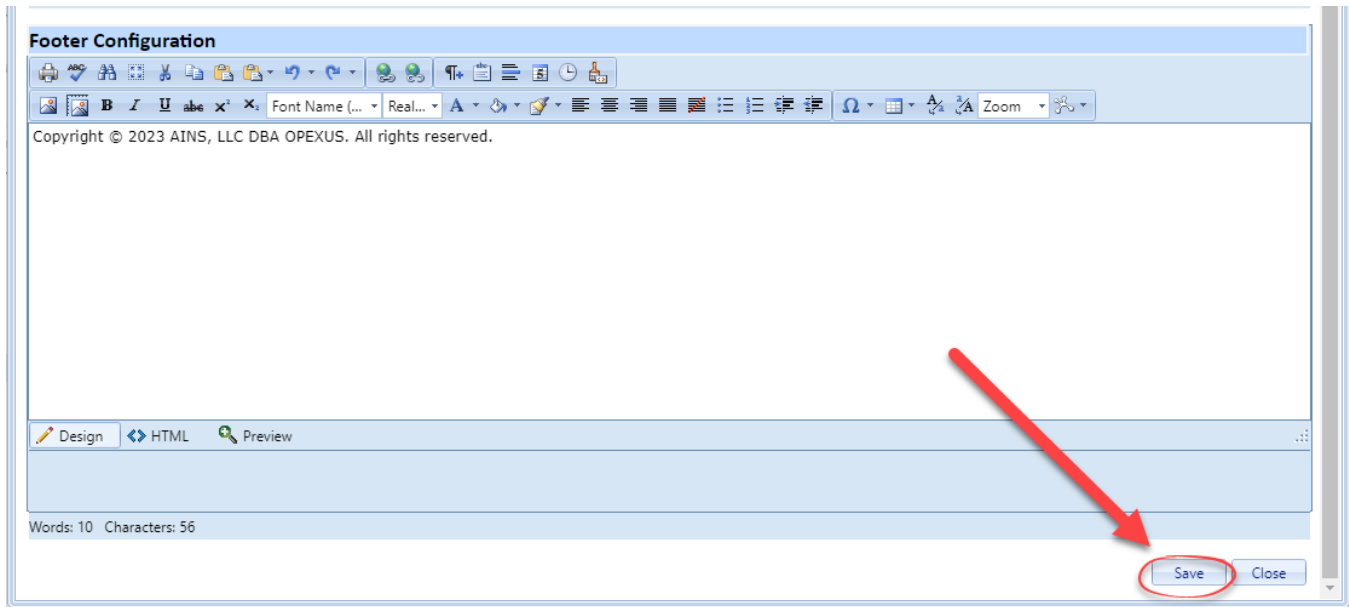
To access *Header and Footer Configuration*, navigate to **Administration > General**, then select the **Header and Footer Configuration** tab. The *Header Configuration* displays as shown below:



Edit the text to display in the application *Header* in the (A) *Header Configuration* field. You can format the text using the (B) *Text Controls*. Alternatively, use the (C) *Image* button to add a custom image for the header.

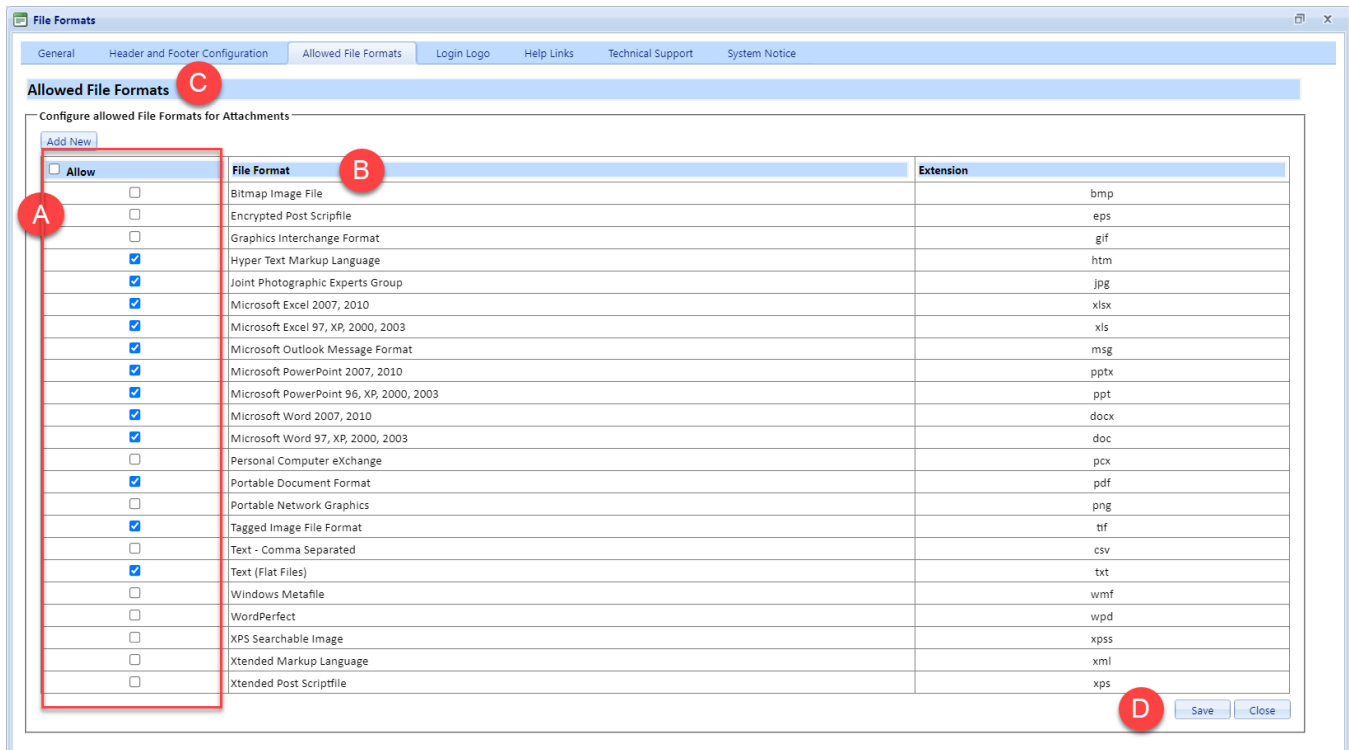
Scroll down to view the (D) **Footer Configuration**. Configure the footer as needed using the same options available in the *Header Configuration* above. Click **Save** to save any changes on this tab.

General Administration



2.1.3 Allowed File Formats

You can configure which file types are allowed as attachments in the Collaboration Portal. To access *Allowed File Formats* configuration, navigate to **Administration > General**, then select the **Allowed File Formats** tab. The *Allowed File Formats* screen displays as shown below:



Select the (A) checkboxes beside the (B) File Formats you'd like to allow in the collaboration portal (click the **Allow** checkbox to select **All** formats). There is also the option to (C) **Add New** file formats if needed. Click (D) **Save** to save any changes to the selections on this page.

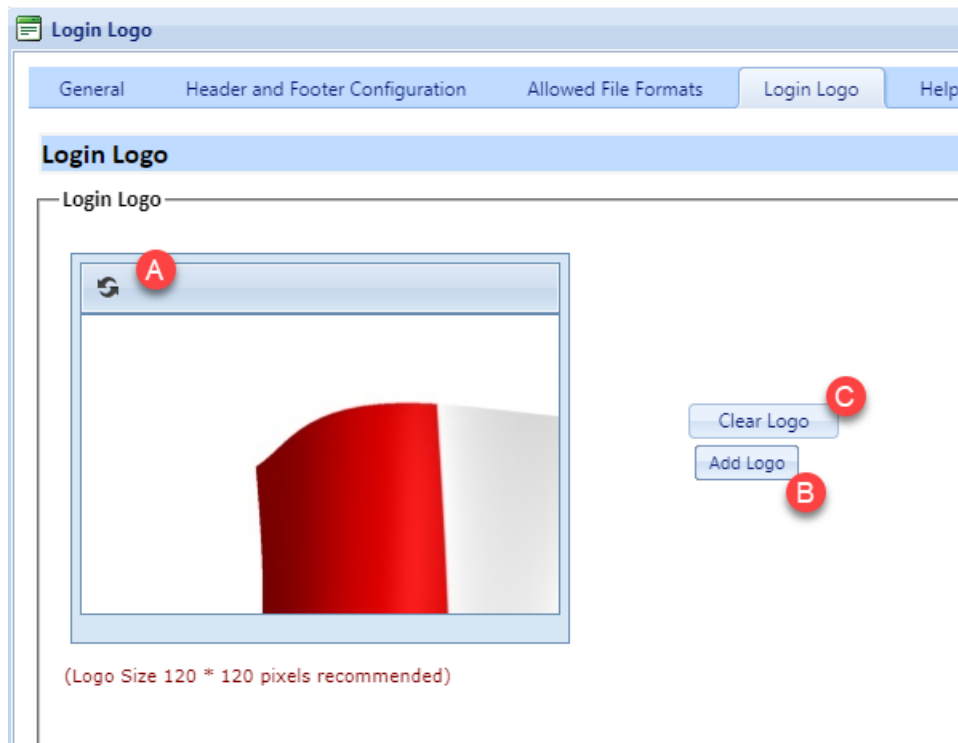
If you click **Add New** to a new allowed format, fields appear for capturing the details as shown below:



Enter a (A) File Format name and the file (B) Extension, then click (C) **Save** to save the new format.

2.1.4 Login Logo

You can configure the logo that appears on the Collaboration Portal login screen. To view or edit the *Login Logo*, navigate to **Administration > General**, then click the **Login Logo** tab. The *Login Logo* screen appears as shown below:



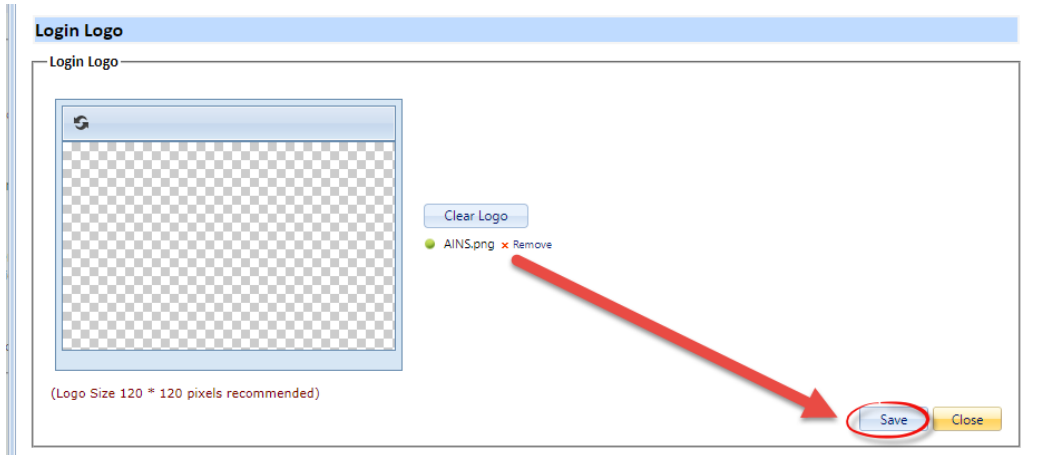
The current logo, if any, appears in the (A) image grid. There are also options to (B) **Add Logo** and (C) **Clear Logo** to clear the current logo.



To add a logo or switch the current logo, click **Add Logo**. An explorer window appears. Locate the logo file and click **Open** to add it. Only .png, .jpg, and .gif files are accepted for logo images.

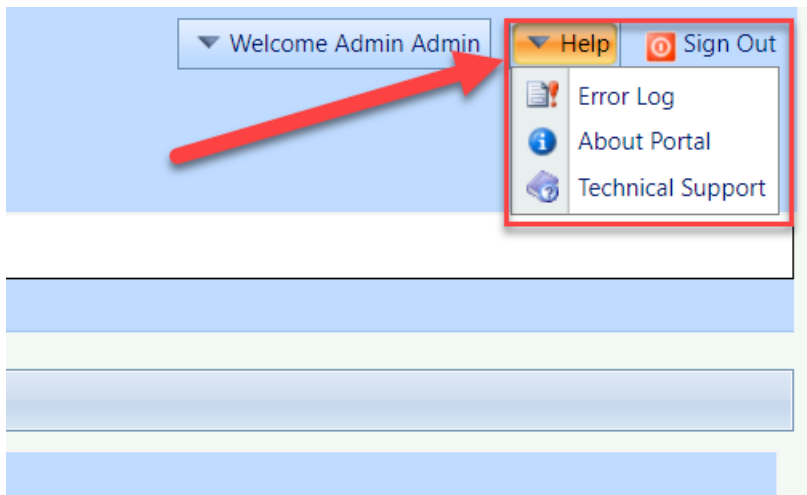
(!!) Note: Recommended logo dimensions are 120 x 120.

The *Login Logo* screen refreshes with the logo file name present. Click **Save** to save the logo:



2.1.5 Help Links

Help Links configuration allows you to add custom links under the *Help* menu in the Collaboration Portal:



To configure *Help Links*, navigate to **Administration > General** then click the **Help Links** tab. A sample tab is shown below:



Existing *Help Links* (if any) are included in the (A) *Help Links* list. There are also options to (B) **Add New** help links, (C) **Edit** an existing link, or (D) **Delete** a link.

To add a new help link:

1. Click **Add New**. Fields appear to capture the new help link.

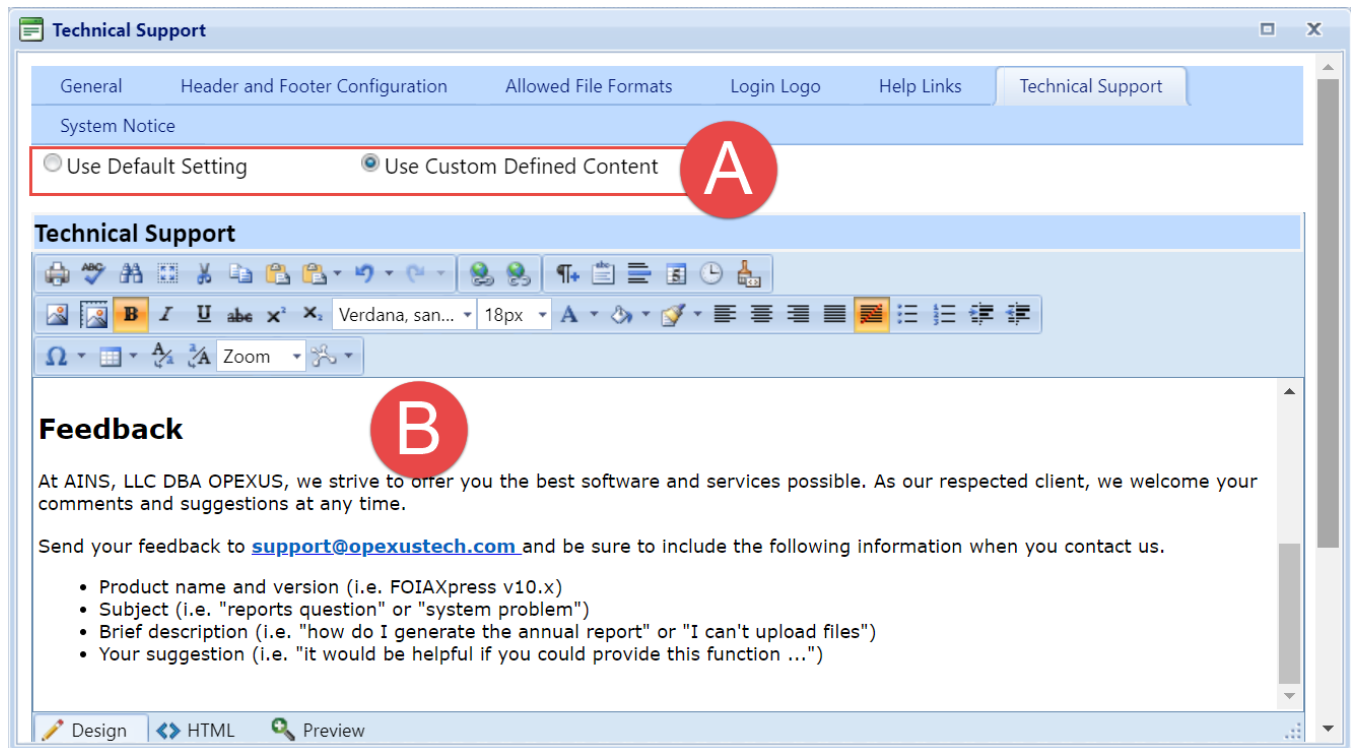
2. Provide the *Display Name* for the link, as it will appear in the *Help* menu.
3. Select whether the Help Link is a **URL** or **Attachment**.
4. If you selected **URL** in step 3, provide the help link URL in the *URL* field.
5. If you selected **Attachment** in step 3, click **Add** in the *Attachment* field to add the attachment.

6. When you've configured the new help link, click **Save** to add it to the list.

2.1.6 Technical Support

The Technical Support configuration allows administrators to customize the text that appears when users visit the Technical Support page (**Help > Technical Support**).

First, use the (A) Settings selections to determine if you'd like to use the default technical support information (pointing users to contact OPEXUS Support). If not, you have the option to use custom technical support details. To customize the Technical Support page, select the **Use Custom Defined Content** radio button. After selecting this button, the (B) Rich Text Editor becomes available, allowing you to edit the technical support details.



To retain any changes made to this screen, scroll to the bottom of the window, and click **Save**:



General Administration

- Product name and version (i.e. FOIApress v10.x)
- Subject (i.e. "reports question" or "system problem")
- Brief description (i.e. "how do I generate the annual report" or "I can't upload files")
- Your suggestion (i.e. "It would be helpful if you could provide this function ...")

Design HTML Preview

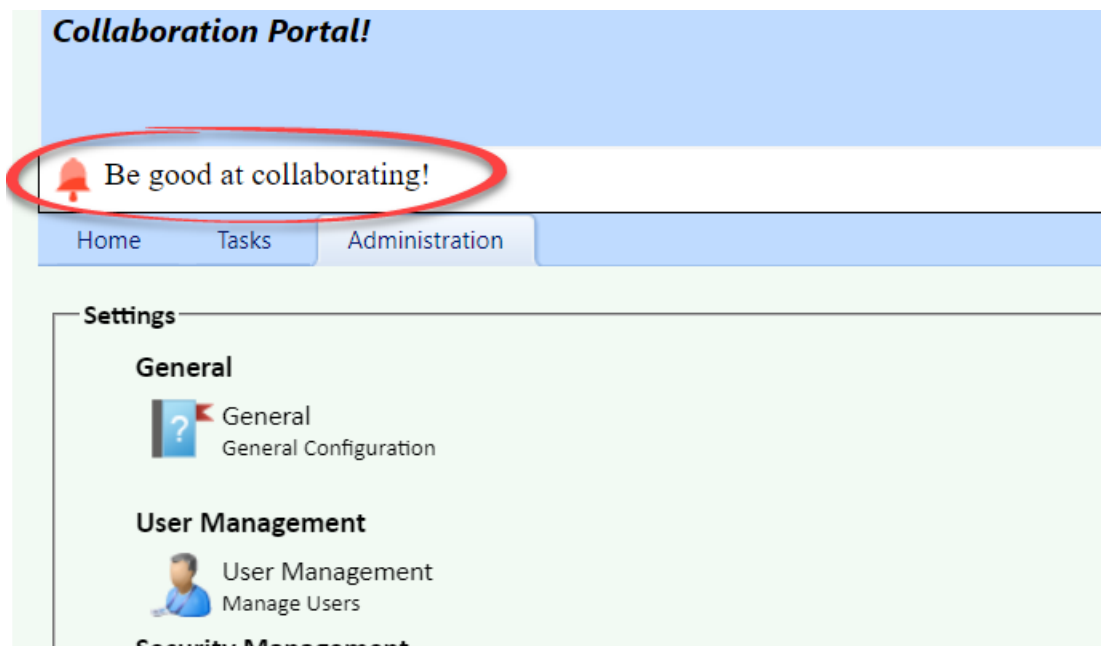
Words: 164 Characters: 1049

Save Close

2.1.7 System Notice

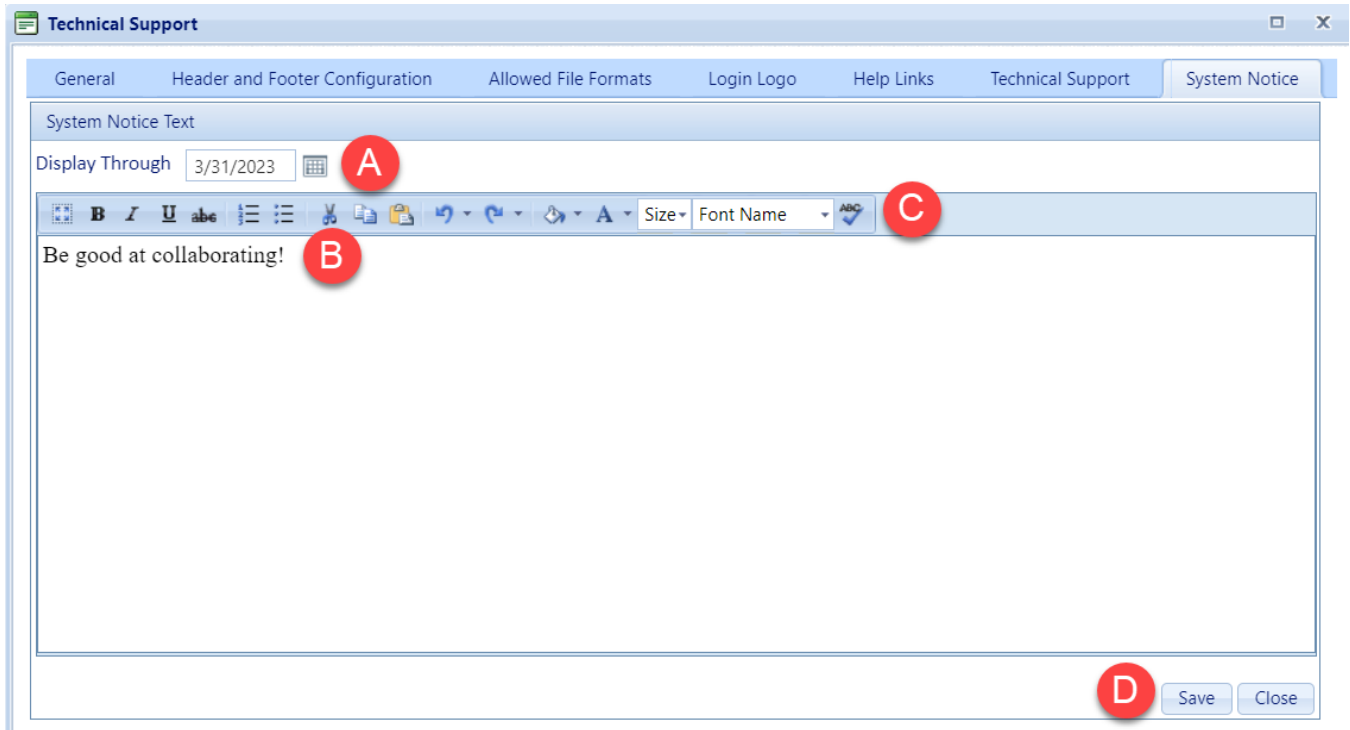
System Notice allows you to set a custom system-wide notification. It is typically used to alert users to planned outages or other updates.

The notice displays as a static bar on the dashboard, as pictured below:



To configure a *System Notice*, navigate to **Administration > General** then click the **System Notice** tab.



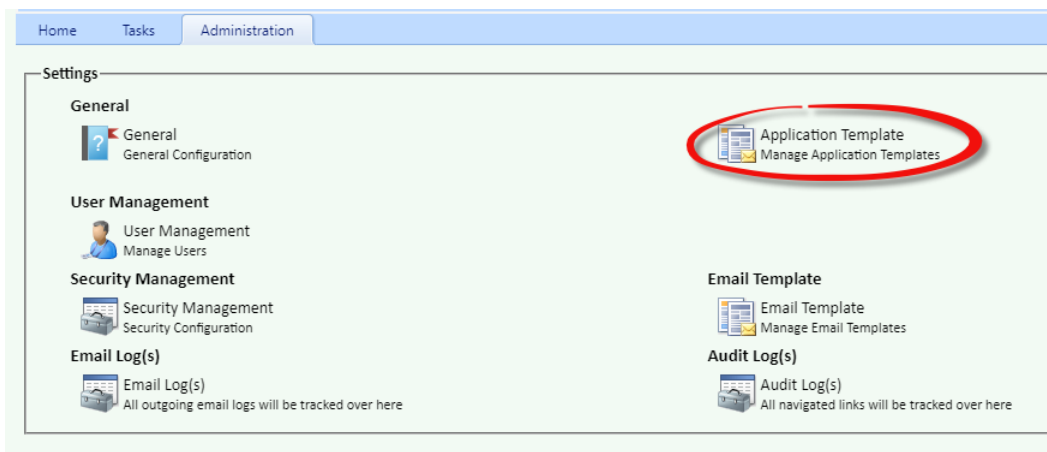


First, set the (A) **Display Through** date. Input the text in the (B) **System Notice Text** field, then edit the text using the (C) **text controls**. Click (D) **Save** to set the notice.

2.2 Application Template

The Collaboration Portal contains preexisting application templates that you can manage and customize. These templates can then be used to communicate specific types of information.

To access the *Application Template* settings page, navigate to the **Administration** tab, then click **Application Template**:




The *Application Template* screen is shown below:



| Home | Tasks | Administration |
|--|--------------------------|----------------|
| Edit Application Template Back | | |
| Application Templates | | |
| Name | Subject | Created Date |
| Submit Instructions | Submit Instructions | 03/03/2023 |
| Disclaimer Configuration | Disclaimer Configuration | 03/03/2023 |
| Consultation Instructions | Rfd Instructions | 03/03/2023 |
| Rfd Instructions | Rfd Instructions | 03/03/2023 |
| Page: 1 of 1 Go Page size: 4 Change Item 1 to 4 of 4 | | |

2.2.1 About Application Templates

The Application Template options are described in the following table:

| Name | Description |
|----------------------------------|---|
| Submit Instructions | Set custom instructions for submitting documents via the Collaboration Portal. |
| Disclaimer Configuration | <p>Configure the disclaimer that displays on the Collaboration Portal login screen.</p> <p>(!!) Note: Disclaimer Configuration provides options to display the disclaimer either Above or Below the login window.</p>  |
| Consultation Instructions | Set custom instructions for the collaborator to view when they receive a Consultation Task. |
| Rfd Instructions | Set custom instructions for the collaborator to view when they receive a Request for Documents Task. |

2.2.2 Editing Application Templates

To edit an application template, navigate to **Administration > Application Templates**. Next, select a **Template** from the *Application Templates* list and click **Edit Application Template** to view and edit the *Application Template* details, as shown in the following example:

Application Template - Submit Instructions

— Edit Application Template —

Application Template

Instruction Subject

Instruction Body

Design HTML Preview

Words: 0 Characters: 0

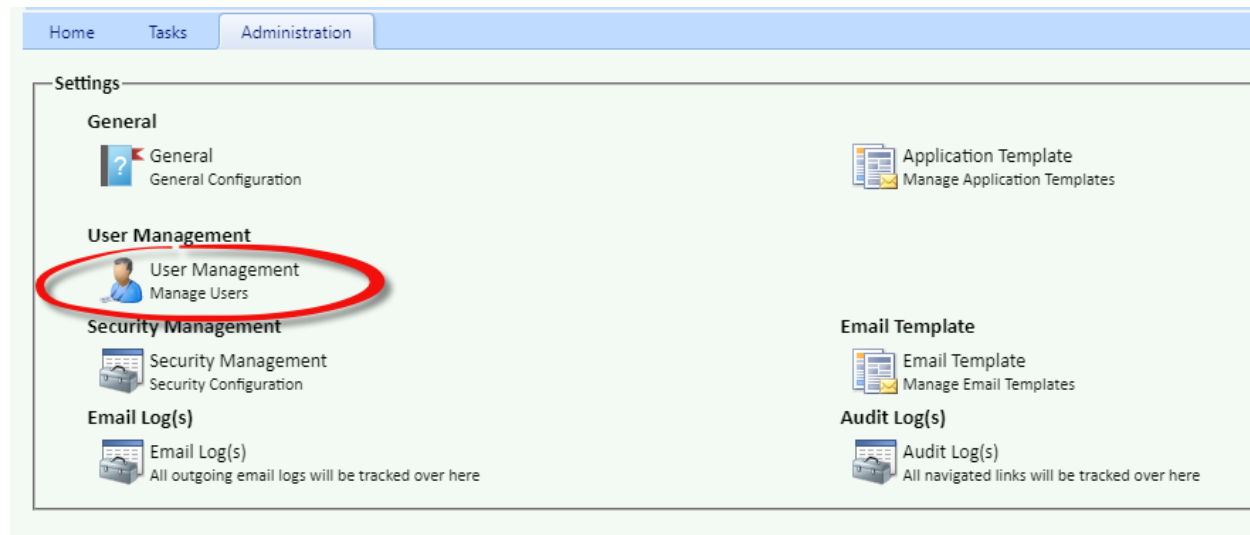
Save Close

The *Instruction Subject* field can be edited if needed. Use the *Instruction Body* field to provide instructions on the stated *Instruction Subject*. You can also use the text editing tools to format the instructions to your specifications.

When you've configured the application template as needed, click **Save** to save the template.

3 User Management

User Management configuration allows you to view and edit personal information for portal users. To access User Management, navigate to **Administration > User Management**:



The Users screen appears as shown below with all portal users listed.

A screenshot of the 'Users' screen in the application. At the top, there are tabs for 'Home', 'Tasks', and 'Administration'. Below the tabs, there's a bar with 'Edit User' and 'Back' buttons. The main content area is titled 'Users' and contains a table with the following columns: 'Last Name', 'First Name', 'Login', 'Active', 'Login Status', and 'Created Date'. The table lists seven users: Admin, Lindsay, test, lge, Winstead, Smith, and Gatewood. At the bottom of the table, there's a pagination bar showing 'Page: 1 of 1', 'Go', 'Page size: 7', 'Change', and 'Item 1 to 7 of 7'.

| Last Name | First Name | Login | Active | Login Status | Created Date |
|-----------|------------|----------------|--------|---------------|--------------|
| Admin | Admin | Admin | Yes | Not Logged In | 03/18/2020 |
| Lindsay | Emily | elindsay@ai... | Yes | Not Logged In | 04/28/2020 |
| test | test | bgarver@ain... | Yes | Not Logged In | 05/05/2020 |
| lge | Caroline | cige@ains.c... | Yes | Not Logged In | 05/15/2020 |
| Winstead | David | wdwinstead... | Yes | Not Logged In | 05/15/2020 |
| Smith | Denise | dsmith@tva... | Yes | Not Logged In | 06/02/2020 |
| Gatewood | John | jgatewood@... | Yes | Not Logged In | 06/08/2020 |

Select a **User** from the list then click **Edit User** to view and edit the user's details:



User Management

The screenshot shows a web application window titled "John Gatewood" with a close button (X) in the top right corner. The window is divided into two main sections: "Personal Information" and "Login Information".

Personal Information:

- Prefix: (dropdown menu)
- First Name*: John
- Middle Name: Penelope
- Last Name*: Gatewood
- Suffix: (dropdown menu)
- Code*: JG
- E-Mail*: jgatewood@ains.com
- Phone Number: 415-433-6622
- Job Title: Bagel Slicer
- Location: The Bagel Room
- Govt Level: GS-69
- Supervisor: My Wife
- Time Zone*: (UTC-05:00) Eastern Time (US & Cana...)
- Language: English

Login Information:

- Program Office: Normalville Office
- Login*: jgatewood@ains.com

Below the "Login Information" section, there are two checkboxes:

- Locked: ☐
- Active: ☒

At the bottom right of the form, there are two buttons: "Save" and "Close".

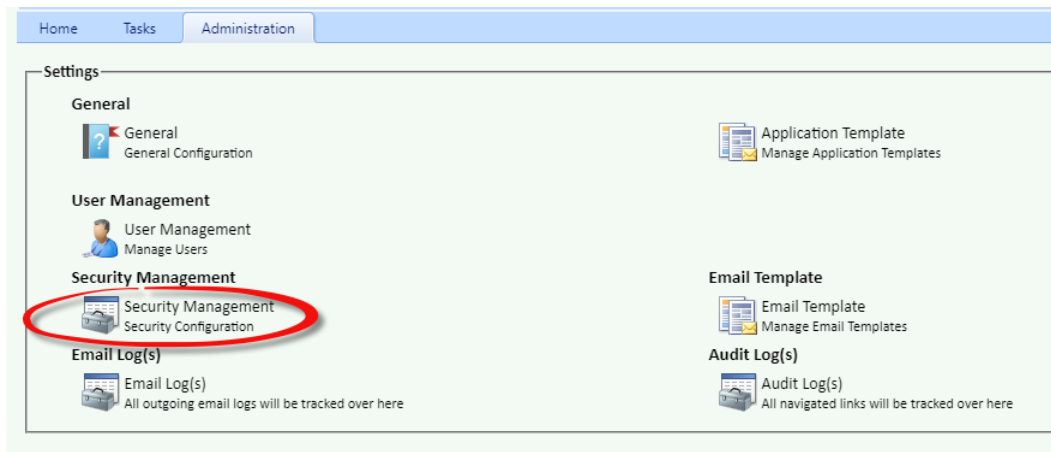
Note: * Fields are mandatory

In addition to editing the personal details, you can mark the user as **Locked** and **Active**. If you make any changes, click **Save** to save these changes.



4 Security Management

Security Management allows administrators to manage the system security settings. To access *Security Management*, navigate to **Administration > Security Management**:



The *Security Configuration* screen is shown below:



Security Management

The screenshot shows a 'Security Configuration' window with the following settings:

| Setting | Value | Description |
|---|-------------------------------------|-------------------------------|
| Default values | <input checked="" type="checkbox"/> | |
| Passwords never expire | <input type="checkbox"/> | |
| Passwords are valid for* | 90 | days |
| Remind user* | 5 | days before password expires |
| Do not allow reuse of last* | 12 | passwords (including current) |
| Password can contain up to* | 2 | repeating character(s) |
| Minimum password length* | 8 | characters |
| Password must contain at least* | 2 | uppercase letter(s) |
| Password must contain at least* | 2 | lowercase letter(s) |
| Password must contain at least* | 2 | special character(s) |
| Password must contain at least* | 2 | numeric character(s) |
| Require Temporary Password Update after Login | <input checked="" type="checkbox"/> | |
| Login fails after* | 5 | invalid login attempts |
| User Account Inactivation | <input checked="" type="checkbox"/> | |
| Inactive user account after* | 30 | days of inactivity |
| Session time-out after* | 20 | minutes |
| Alert user before Session expires for* | 5 | minutes |
| OTP notification type | None | |
| OTP expires in | 5 | minutes |

Buttons: Save, Cancel

Use these fields to configure the security settings, as described below. Click **Save** to retain any changes made to the security settings.

| Field | Description |
|---------------------------------------|--|
| Default values | Select this checkbox to apply the default system values for all <i>Security Configuration</i> screens. |
| Passwords never expire | Select this checkbox to prevent user passwords from ever expiring. |
| Passwords are valid for X Days | Enter the number of days a user's password is valid before expiration. |



| Field | Description |
|---|---|
| Remind user X days before password expires | Enter the number of days before the user's password expires that they should be reminded to reset their password. |
| Do not allow reuse of last X passwords (including current) | Enter a number of previous passwords to disallow reuse of when changing a password. |
| Passwords can contain up to X repeating characters | Enter the maximum number of repeating characters allowable in user passwords. |
| Minimum password length X characters | Enter the minimum length required for user passwords in characters. |
| Password must contain at least X uppercase letters | Enter the minimum number or uppercase characters required in the password. |
| Password must contain at least X lowercase letters | Enter the minimum number or lowercase characters required in the password. |
| Password must contain at least X special characters | Enter the minimum number or special characters required in the password. |
| Password must contain at least X numeric characters | Enter the minimum number or numeric characters required in the password. |
| Require Temporary Password Update after login | Select this checkbox to require any user logging in with a temporary password to update their password after login. |



| Field | Description |
|---|--|
| Login fails after X invalid login attempts | Enter the maximum number of tries a user is allowed to attempt to log in unsuccessfully before that user account is locked. |
| User Account Inactivation | Checked to denote an inactive user. |
| Inactivate user account after X days of inactivity | Enter the number of days a user account is inactive before it is formally inactivated in the system. |
| Session time-out after X minutes | Enter in minutes the length of time a user can be inactive in their current session before the session times out and the user is logged out. |
| Alert user before Session expires for X minutes | Enter in minutes how long before the session auto-terminates the user is alerted that the session will be terminated. |
| OTP notification type | Select a notification type from the drop-down menu |
| OTP expires in X minutes | Enter the number of minutes the OTP will be active before expiration. |

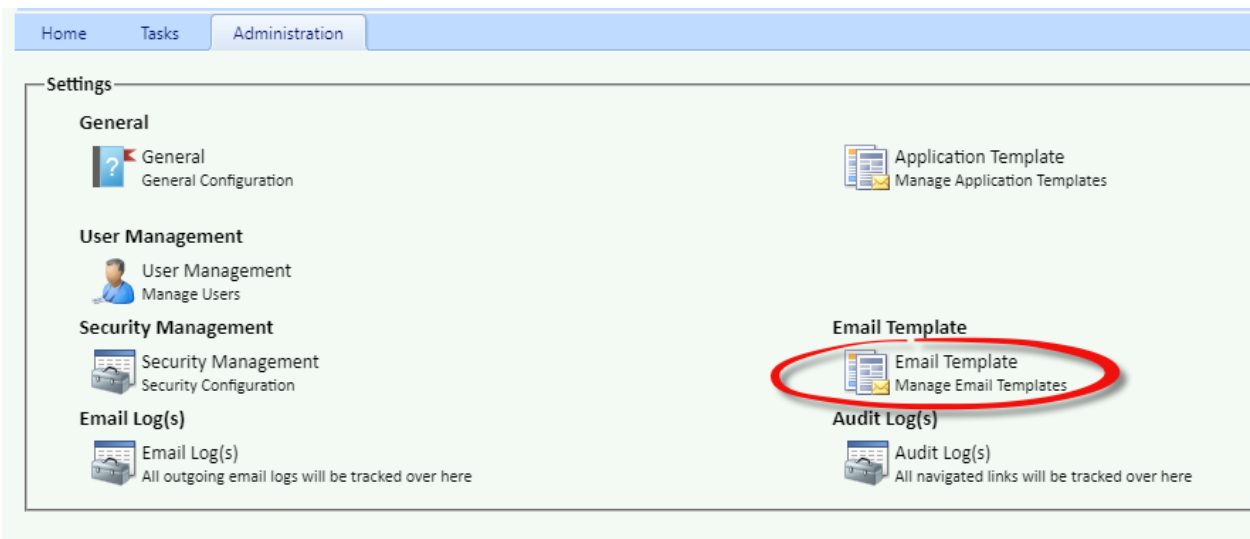


5 Email Template

The Collaboration Portal includes several built-in email templates to alert users when certain events occur in the system. This section includes information on accessing these templates, brief descriptions of the available templates, and steps to edit these templates to better suit your organization’s needs.

5.1 Email Template Configuration

To access *Email Template* configuration, navigate to **Administration > Email Template**:





The *Email Templates* list appears as shown below. These templates are described in the following table.



Email Template

[Home](#)
[Tasks](#)
[Administration](#)

 Edit Template |
  Back

Email Templates

| Name | Subject | Created Date |
|---|---|--------------|
| Program Office Notification of Portal User ID | [APPLICATION_TITLE] Login Information | 03/03/2023 |
| Password Information | [APPLICATION_TITLE] Password Information | 03/03/2023 |
| Forgot Password | [APPLICATION_TITLE] Password Information | 03/03/2023 |
| Forgot Password Identification Code Notificati... | [APPLICATION_TITLE] Identification Code | 03/03/2023 |
| Consultation Assignment Notification | [APPLICATION_TITLE] Consultation Assignmen... | 03/03/2023 |
| Request for Documents Assignment Notificati... | [APPLICATION_TITLE] Request for Documents ... | 03/03/2023 |
| Request Message Notification | [APPLICATION_TITLE] Request Message Notifi... | 03/03/2023 |
| Deactivation Reason | [APPLICATION_TITLE] Deactivation Reason | 03/03/2023 |
| Completed Task Notification | Completed [TASK_TYPE] Task Notification - Re... | 03/03/2023 |
| Message Notification To FX | Message Notification For Request# [REQUEST... | 03/03/2023 |
| Message Notification To Portal | Message Notification For Request# [REQUEST... | 03/03/2023 |
| Receipt Confirmed | Receipt Confirmed For [TASK_TYPE] - [ITEM_ID... | 03/03/2023 |
| OTP Notification | [APPLICATION_TITLE] One Time Passcode | 03/03/2023 |
| Request for Documents Task Deletion | Request #[REQUEST_ID] Collaboration Portal T... | 03/03/2023 |
| Consultation Task Deletion | Request #[REQUEST_ID] Collaboration Portal T... | 03/03/2023 |

1

Page: 1 of 1 [Go](#)

Page size: 15 [Change](#)

Item 1 to 15 of 15

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| Template | Description |
|--|---|
| Program Office Notification of Portal User ID | Notification sent to the Program Office contact when an account is created for that office; includes the user login ID |
| Password Information | Notification sent to the Program Office contact when an account is created for that office; includes the login password |
| Forgot Password | When a portal user forgets their password, this notification is sent with a temporary password |



Email Template

| Template | Description |
|---|--|
| Forgot Password Identification Code Notification | A security token provided with a Forgot Password request. The code is only valid during the current session. |
| Consultation Assignment Notification | Notification sent to the Program Office contact when a consultation assignment is sent to the portal. |
| Request for Documents Assignment Notification | Notification sent to the Program Office contact when a request for documents assignment is sent to the portal. |
| Request Message Notification | Notification sent relating to request messages. |
| Deactivated Reason | When a user account is deactivated, this message is sent to their email stating the reason for the deactivation. |
| Completed Task Notification | Notification sent when a task is completed in the portal. |
| Message Notification to FX | Notification sent to FX when a message is logged on a request. |
| Message Notification to Portal | Message sent to portal user email when a message is sent to the portal from ATIPXpress. |
| Receipt Confirmed | Notification sent to the originating office when a request is received in the portal. |
| OTP Notification | Notification sent when a user requests a one-time passcode. |



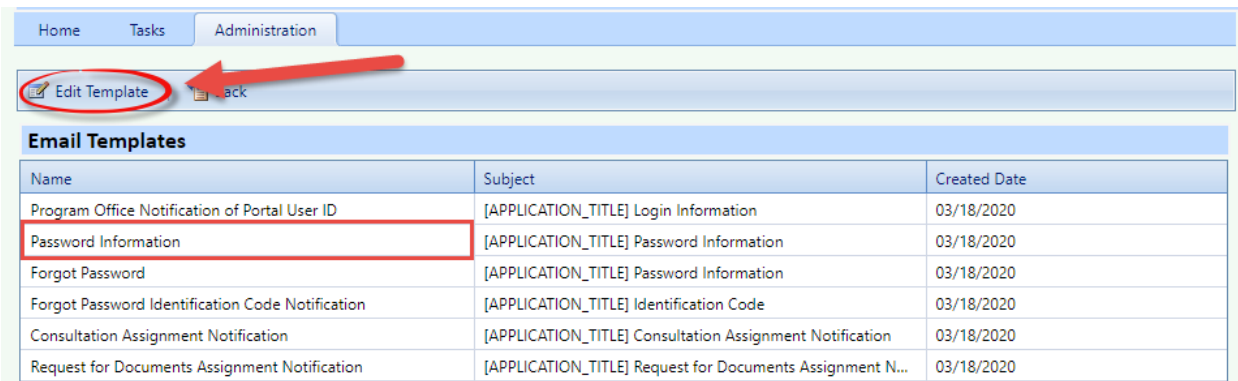
| Template | Description |
|--|---|
| Request for Documents Task Deletion | Message sent to user when a document is removed from their assigned Rfd Tasks. |
| Consultation Task Deletion | Message sent to user when a document is removed from their assigned Consultation Tasks. |

Follow the steps in the *Edit an Email Template* section to customize the templates for your organization's use.

5.2 Edit an Email Template

To edit an existing Email Template:

1. Navigate to **Administration > Email Template**.
2. Select an existing **Email Template**, then click **Edit Template**:



3. The template appears as shown in the following example.



Email Template

Email Template - Password Information

—Edit Email Template—

Email Template* Password Information [Insert Fields](#)

Email Subject* [APPLICATION_TITLE] Password Information

Email Body

Dear [FIRST_NAME] [LAST_NAME],

An account has been created in the [APPLICATION_TITLE] for [PROGRAM_OFFICE].The user id was issued and sent in a separate notification to the email address provided.

Temporary Password: [USER_PASSWORD]

Please check your email for the user id notification and return to [APPLICATION_URL] to login to the portal. Be sure to update your temporary password to protect your account details.

Thank You,
[ENTERPRISE_NAME]

Design HTML Preview

Words: 64 Characters: 421

Save Close

4. Edit the template as needed using the editing tools available. These mirror the template editing tools available in ATIPXpress. Refer to the ATIPXpress User Manual content on Email Templates for details:

Email Body

Dear [FIRST_NAME] [LAST_NAME],

An account has been created in the [APPLICATION_TITLE] for [PROGRAM_OFFICE].The user id was issued and sent in a separate notification to the email address provided.

Temporary Password: [USER_PASSWORD]

Please check your email for the user id notification and return to [APPLICATION_URL] to login to the portal. Be sure to update your temporary password to protect your account details.

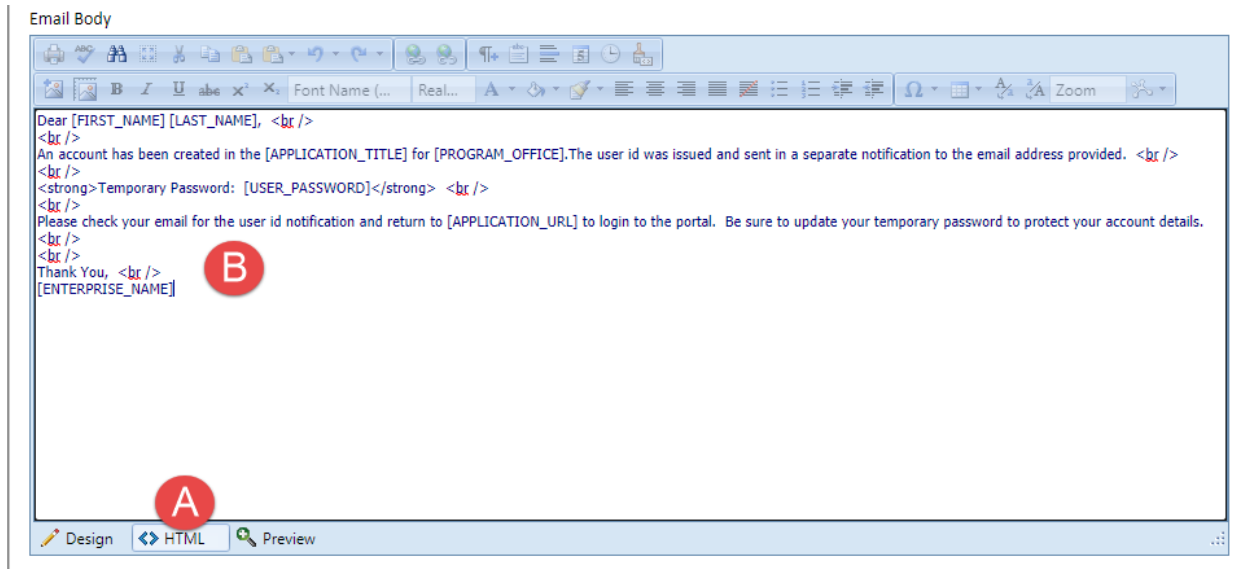
Thank You,
[ENTERPRISE_NAME]

Design HTML Preview

5. There are also options to view this template in the **HTML** editor view. Click (A) HTML to view the email in (B) HTM:



Email Template



6. Click **Save** to save any changes made to the template.

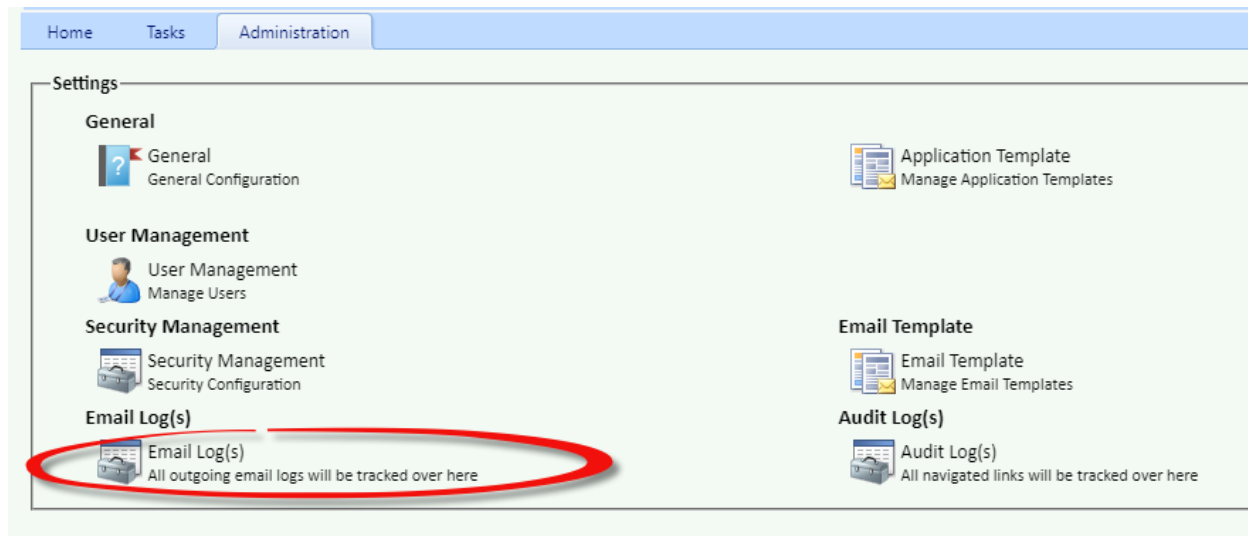


6 Email Log(s)

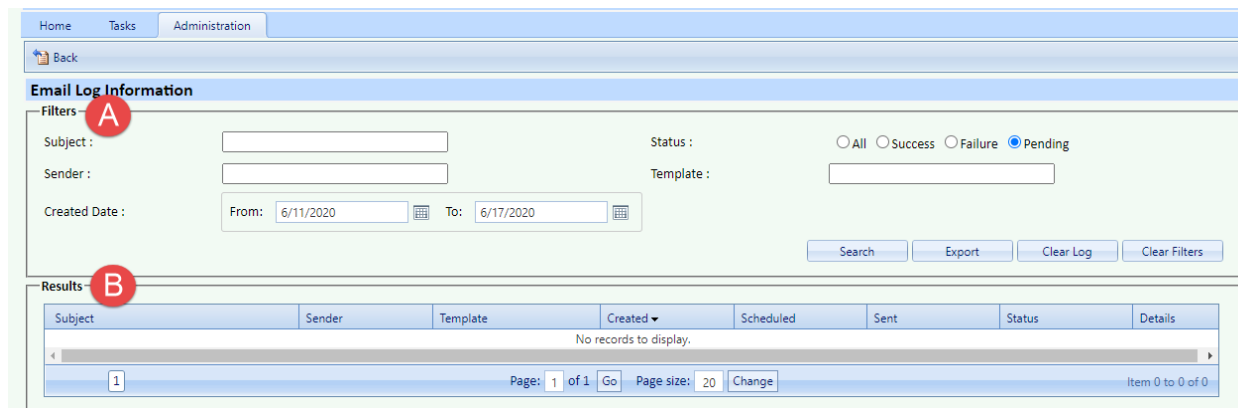
You can use the *Email Log(s)* to monitor email activity in the Collaboration Portal. Use search and filtering options to locate specific messages or a range of messages.

6.1 Accessing the Email Log

To access *Email Log(s)*, navigate to **Administration > Email Log(s)**:



The *Email Log Information* screen appears as shown below. Use the (A) *Filters* to locate messages, which display in the (B) *Results* list:



6.2 Search and Filter Emails

Use the *Filter* options to locate messages using the various message attributes, such as *Status* or *Created Date*. The *Filters* fields are shown below and described in the following table.

Email Log Information

Filters

Subject :

Sender :

Created Date : From: To:

Status : ☒ All ☐ Success ☐ Failure ☐ Pending

Template :

| Field | Description |
|---------------------|--|
| Subject | Text appearing in the <i>Subject</i> line of the message. |
| Sender | Email address of the message <i>Sender</i> . |
| Created Date | Use the <i>From</i> and <i>To</i> fields to select a date range when the message was created. |
| Status | Select the message <i>Status</i> . Options are All , Success , Failure and Pending . |
| Template | Enter the <i>Template Name</i> in this field to locate messages using that template. |

Click **Search** to locate results matching the filters. Sample search results are shown below:



Email Log (s)

Home Tasks Administration

Back

Email Log Information

Filters

Subject :

Sender :

Created Date : From: 4/5/2020 To: 6/17/2020

Status : ☒ All ☐ Success ☐ Failure ☐ Pending

Template :

Search Export Clear Log Clear Filters

Results

| Subject | Sender | Template | Created | Scheduled | Sent | Status | Details |
|--|--------------------|-----------------------------|------------|------------|------------|---------|---------|
| Completed Consultation Task Notification ... | jgatewood@ains.com | Completed Task Notification | 06/09/2020 | 06/09/2020 | 06/09/2020 | Success | |
| Completed Consultation Task Notification ... | jgatewood@ains.com | Completed Task Notification | 06/09/2020 | 06/09/2020 | 06/09/2020 | Success | |
| Completed Request for Documents Task N... | jgatewood@ains.com | Completed Task Notification | 06/09/2020 | 06/09/2020 | 06/09/2020 | Success | |
| Completed Request for Documents Task N... | cige@ains.com | Completed Task Notification | 05/29/2020 | 05/29/2020 | 05/29/2020 | Success | |
| Completed Request for Documents Task N... | cige@ains.com | Completed Task Notification | 05/29/2020 | 05/29/2020 | 05/29/2020 | Success | |
| Completed Request for Documents Task N... | cige@ains.com | Completed Task Notification | 05/29/2020 | 05/29/2020 | 05/29/2020 | Success | |
| Completed Request for Documents Task N... | cige@ains.com | Completed Task Notification | 05/29/2020 | 05/29/2020 | 05/29/2020 | Success | |
| Completed Request for Documents Task N... | cige@ains.com | Completed Task Notification | 05/29/2020 | 05/29/2020 | 05/29/2020 | Success | |
| Completed Request for Documents Task N... | elindsay@ains.com | Completed Task Notification | 05/22/2020 | 05/22/2020 | | Failure | |

Page: 1 of 1 Go Page size: 9 Change Item 1 to 9 of 9

See the next section to view actions you can take on the *Email Log*.

6.3 Email Log Actions

The following *Actions* are available on the *Email Log*:

Home Tasks Administration

Back

Email Log Information

Filters

Subject :

Sender :

Created Date : From: 4/5/2020 To: 6/17/2020

Status : ☒ All ☐ Success ☐ Failure ☐ Pending

Template :

Search Export Clear Log Clear Filters

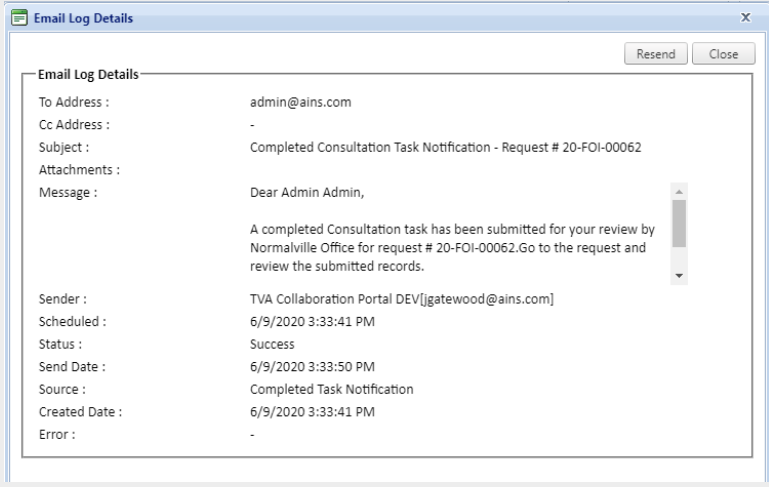
Results

| Subject | Sender | Template | Created | Scheduled | Sent | Status | Details |
|----------------------------------|-----------------|-----------------------|------------|------------|------------|---------|----------|
| Completed Consultation Task N... | jgatewood@ai... | Completed Task Not... | 06/09/2020 | 06/09/2020 | 06/09/2020 | Success | A |
| Completed Consultation Task N... | jgatewood@ai... | Completed Task Not... | 06/09/2020 | 06/09/2020 | 06/09/2020 | Success | |

B **C** **D**



Email Log (s)

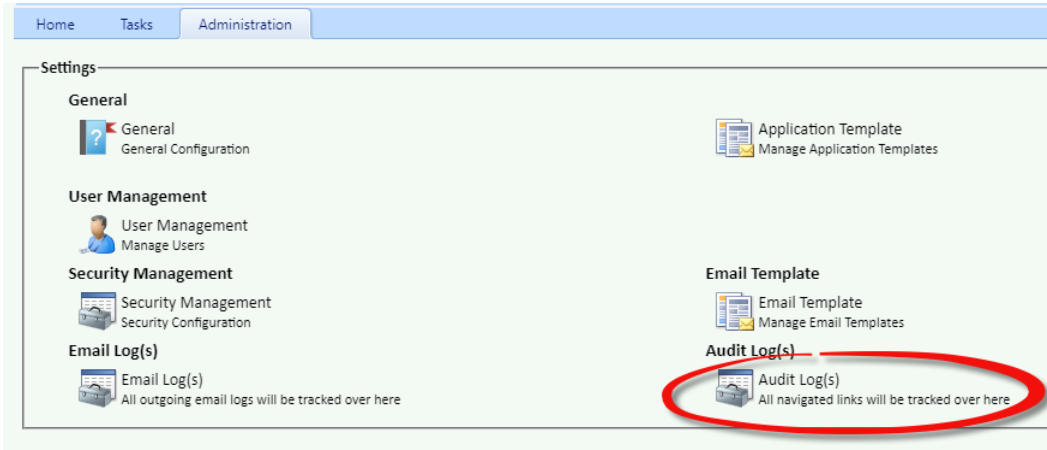
| Ref | Action | Description |
|-----|---------------|---|
| A | Details | <p>Click to view the message Details. There is also an option to Resend the message in the Details window:</p>  <p>The screenshot shows a window titled 'Email Log Details' with a 'Resend' button and a 'Close' button. The window displays the following information:</p> <ul style="list-style-type: none"> To Address : admin@ains.com Cc Address : - Subject : Completed Consultation Task Notification - Request # 20-FOI-00062 Attachments : Message : Dear Admin Admin, A completed Consultation task has been submitted for your review by Normalville Office for request # 20-FOI-00062.Go to the request and review the submitted records. Sender : TVA Collaboration Portal DEV[jigatewood@ains.com] Scheduled : 6/9/2020 3:33:41 PM Status : Success Send Date : 6/9/2020 3:33:50 PM Source : Completed Task Notification Created Date : 6/9/2020 3:33:41 PM Error : - |
| B | Export | Export the results list. |
| C | Clear Log | Click to clear all entries in the Emails Log. |
| D | Clear Filters | Click to clear any data entered in the <i>Filters</i> fields. |



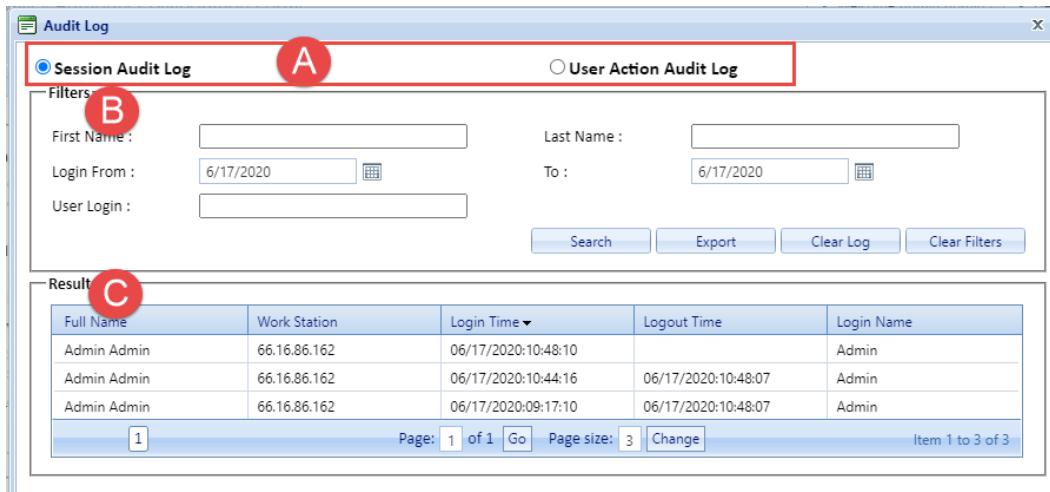
7 Audit Log(s)

The *Audit Log(s)* configuration allows you to view logs of both *Sessions* (instances when users accessed the system) as well as individual *User Action Audit Logs*, with a log of all user actions in the system.

To access the *Audit Log(s)*, navigate to **Administration > Audit Log(s)**:



The *Audit Log(s)* screen appears as shown below:



| Ref | Element | Description |
|-----|---------------|--|
| A | Log Selection | Select between Session Audit Log and User Action Audit Log |



| Ref | Element | Description |
|----------|---------|---|
| B | Filters | <p>Use the <i>Filters</i> to locate a specific <i>Session</i> or <i>User Action</i>. Click Search to display matching results in the <i>Results</i> list.</p> <p>There are also options to Export the results list, Clear Log to clear the log contents, and Clear Filters to clear data entered in the search fields</p> |
| C | Results | All matching audit results display in the <i>Results</i> list |

The following sections detail the *Session Audit Log* and *User Action Audit Log*.

7.1 Session Audit Log

The session audit log logs all user sessions, including the IP of the workstation where the portal was accessed and the access times.

To view the *Session Audit Log*, navigate to **Administration > Audit Log(s)**. The *Audit Log* screen appears with **Session Audit Log** selected by default.

Audit Log

☒ **Session Audit Log** ☐ User Action Audit Log

Filters

First Name : Last Name :

Login From :

To :

User Login :

Results

| Full Name | Work Station | Login Time ▼ | Logout Time | Login Name |
|-------------|--------------|---------------------|---------------------|------------|
| Admin Admin | 66.16.86.162 | 06/15/2020:03:23:24 | | Admin |
| Admin Admin | 66.16.86.162 | 06/15/2020:03:18:18 | 06/15/2020:03:23:18 | Admin |
| Admin Admin | 66.16.86.162 | 06/15/2020:02:43:29 | 06/15/2020:03:23:18 | Admin |

Use the *Filters* to search for users using the *First Name*, *Last Name*, *Login From* dates, or *User Login*, then click **Search** to display matching results. The *Results* list appears as shown below:



Audit Log(s)

| Results | | | | |
|--|-----------------------|---------------------------------|----------------------|---------------------|
| Full Name A | Work Station B | Login Time C | Logout Time D | Login Name E |
| Admin Admin | 66.16.86.162 | 06/17/2020:10:48:10 | | Admin |
| Admin Admin | 66.16.86.162 | 06/17/2020:10:44:16 | 06/17/2020:10:48:07 | Admin |
| Admin Admin | 66.16.86.162 | 06/17/2020:10:09:17:10 F | 06/17/2020:10:48:07 | Admin |
| Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3 | | | | |

| Ref | Field | Description |
|----------|--------------|--|
| A | Full Name | Full name of the user account attached to this session. |
| B | Work Station | IP of the workstation that accessed the portal. |
| C | Login Time | Time and date the session began. |
| D | Logout Time | Time and date the session was terminated. |
| E | Login Name | Login name attached to the session. |
| F | Navigation | Use the <i>Page</i> options to view additional pages or change the number of entries displayed per page. |

7.2 User Action Audit Log

The session audit log logs all user sessions, including the IP of the workstation where the portal was accessed, and the access times.

To view the *Session Audit Log*, navigate to **Administration > Audit Log(s)**. The *Audit Log* screen appears with **User Action Audit Log** selected by default.



Audit Log(s)

The screenshot shows the 'Audit Log' window with the 'User Action Audit Log' tab selected. The 'Filters' section includes fields for 'Action Type' (set to 'All'), 'First Name', 'Last Name', 'Action From' (6/17/2020), 'To' (6/17/2020), and 'User Login'. Below these are buttons for 'Search', 'Export', 'Clear Log', and 'Clear Filters'. The 'Results' section displays a table with two rows of data, both showing 'Admin Admin' logging in. The table has columns: 'Action Performed By', 'Action Type', 'Action Performed', 'Time of Action', and 'Program Office'. At the bottom of the results, there is a pagination bar showing 'Page: 1 of 1', 'Go', 'Page size: 2', 'Change', and 'Item 1 to 2 of 2'.

Use the *Filters* to search for users using the *Action Type*, *First Name*, *Last Name*, *Login From* dates, or *User Login*, then click **Search** to display matching results. The *Results* list appears as shown below:

This is an annotated version of the 'Results' table from the previous screenshot. Red circles with letters A through F point to specific elements: A points to the 'Action Performed By' column header, B points to the 'Action Type' column header, C points to the 'Action Performed' column header, D points to the 'Time of Action' column header, E points to the 'Program Office' column header, and F points to the 'Action Performed' cell in the second row of data.

| Action Performed By | Action Type | Action Performed | Time of Action | Program Office |
|---------------------|----------------|-----------------------------------|---------------------|----------------|
| Admin Admin | User Logged In | User Admin logged into the system | 06/17/2020:10:48:10 | |
| Admin Admin | User Logged In | User Admin logged into the system | 06/17/2020:09:17:10 | |

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

| Ref | Field | Description |
|-----|---------------------|--|
| A | Action Performed By | Full name of the user account attached to this action. |
| B | Action Type | Type of action logged in the portal. |
| C | Action Performed | Description of specific user action. |
| D | Time of Action | Time the action was taken in the system. |



Audit Log(s)

| Ref | Field | Description |
|-----|----------------|--|
| E | Program Office | Program office associated with the user action. |
| F | Navigation | Use the <i>Page</i> options to view additional pages or change the number of entries displayed per page. |

