ATIPXpress

OPEXUS

Collaboration Admin Manual

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AX 11.7.0 Collaboration Admin Manual

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Contents

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.

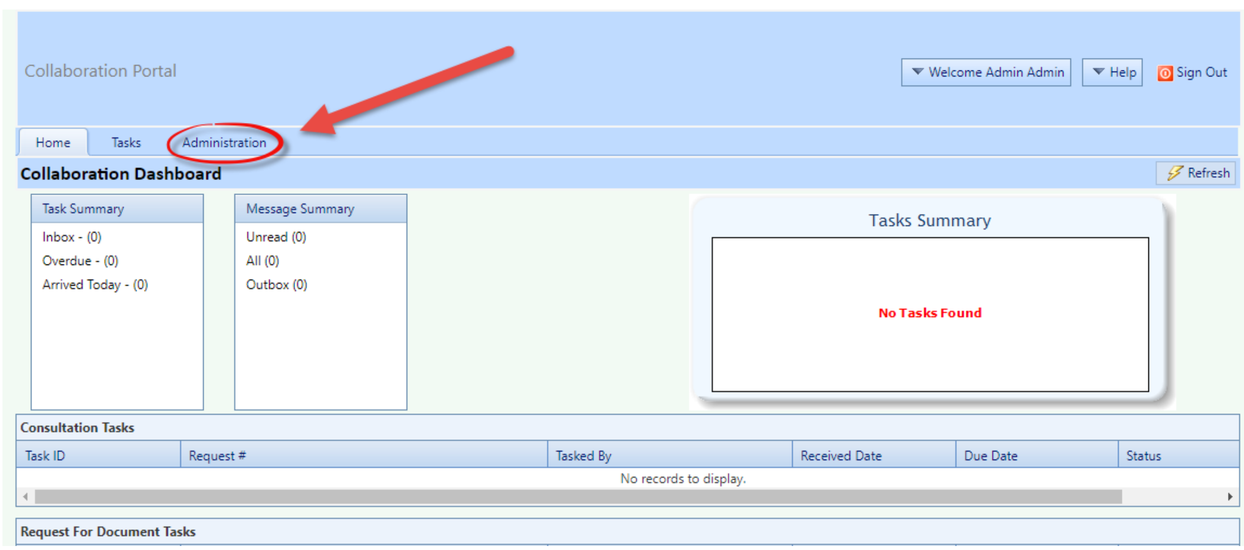
1.1 In This Manual

In this manual we'll discuss the following topics:

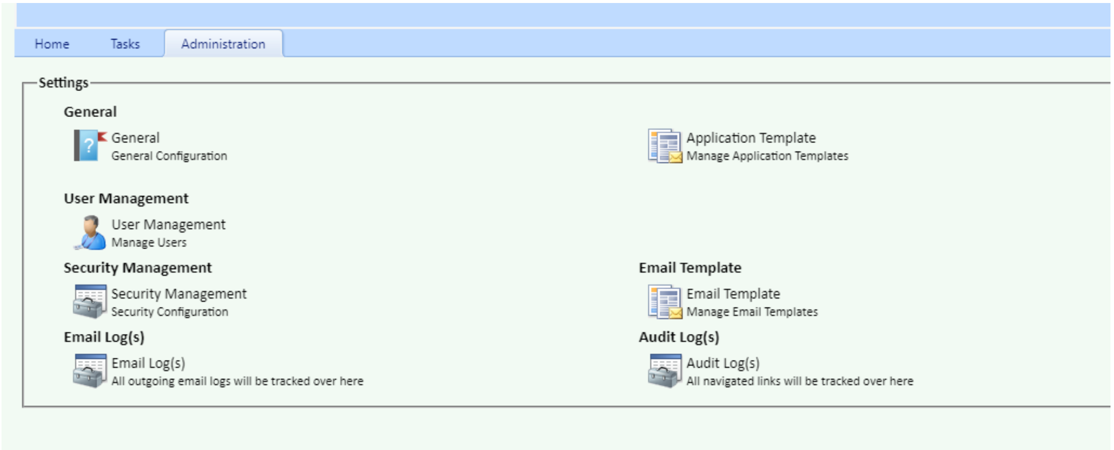
- General Administration: *General* portal configuration, and managing the portal UI through the *Application Template*
- User Management: Manage Portal users
- Security Management: Configure the Portal security options
- Email Template: View and edit system email templates
- Email Logs: Manage the system 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.



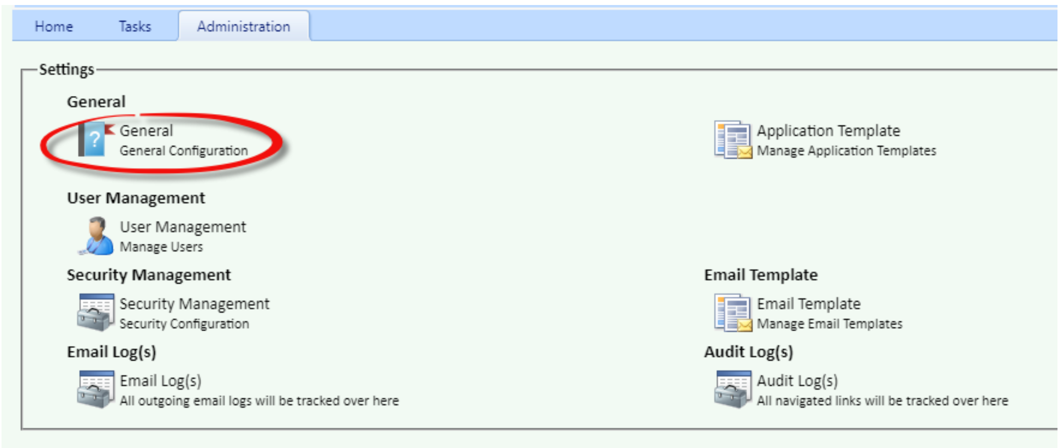
Each topic is covered in a separate section of this manual. See the following sections for details on each configuration page.

2 General Administration

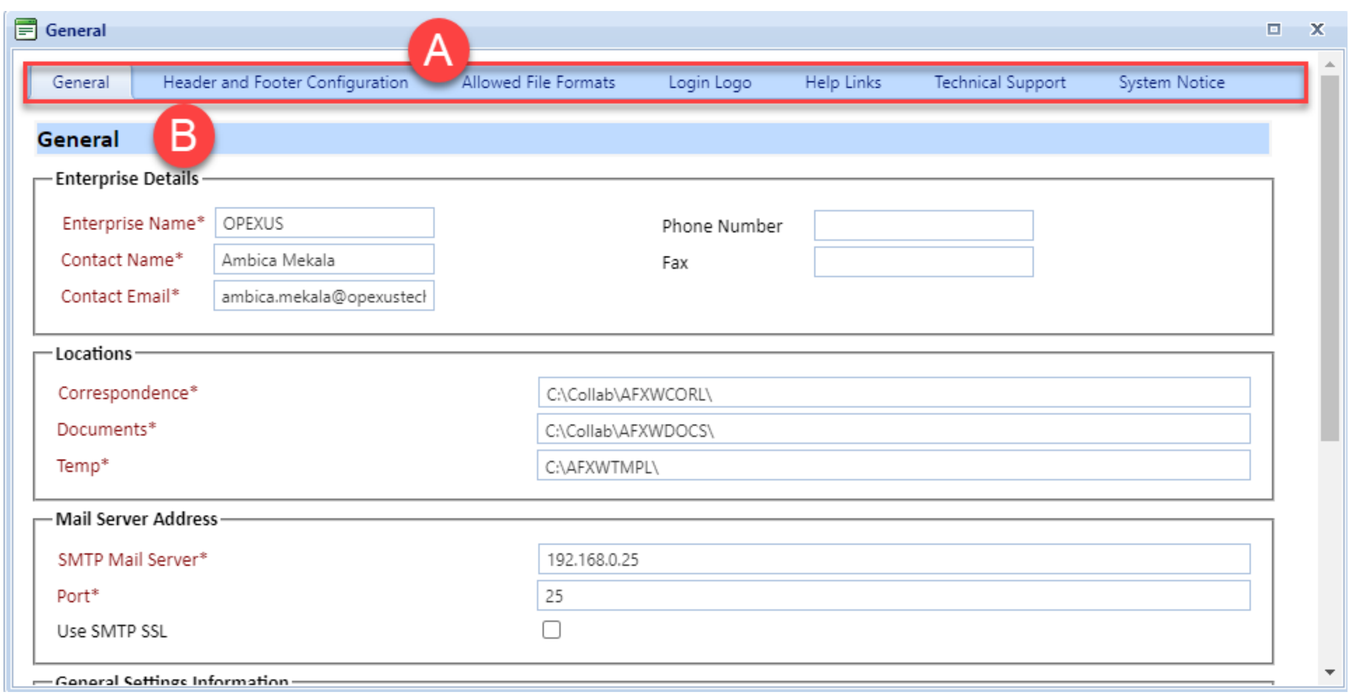
General settings include the *General Configuration* and options for managing the *Application Template*.

2.1 General

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

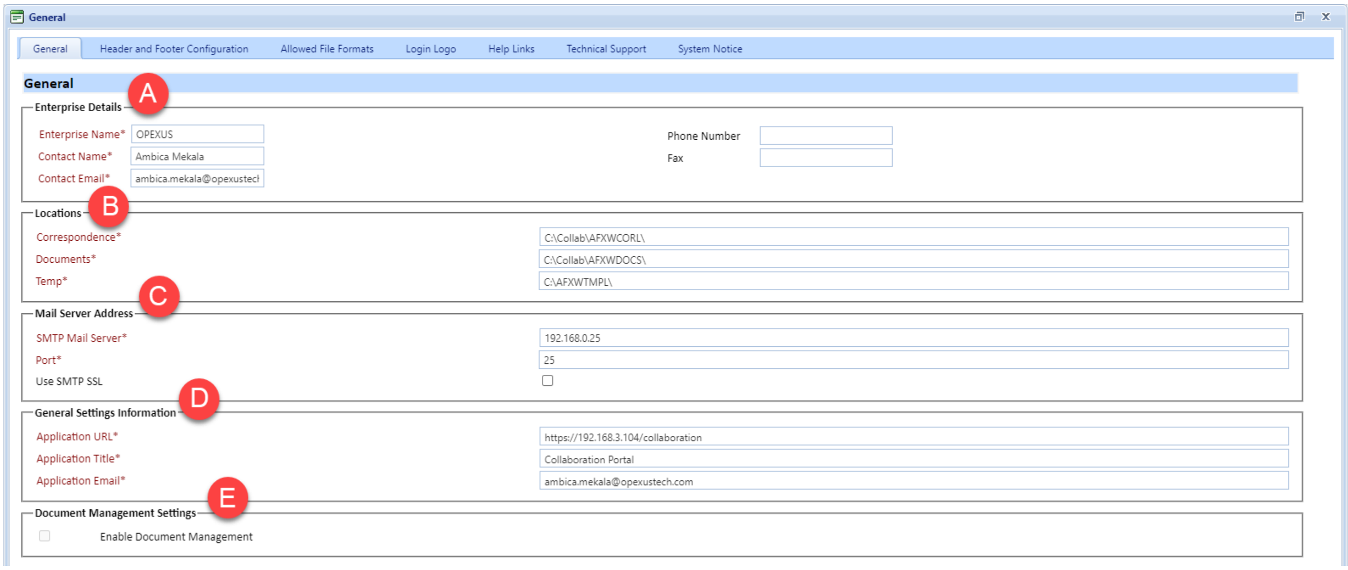


General Configuration is divided into six *Tabs*. Select a (**A**) **Tab** to view the (**B**) Configuration options (*General* is shown in this example). Each tab is described in the following subsections.



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:



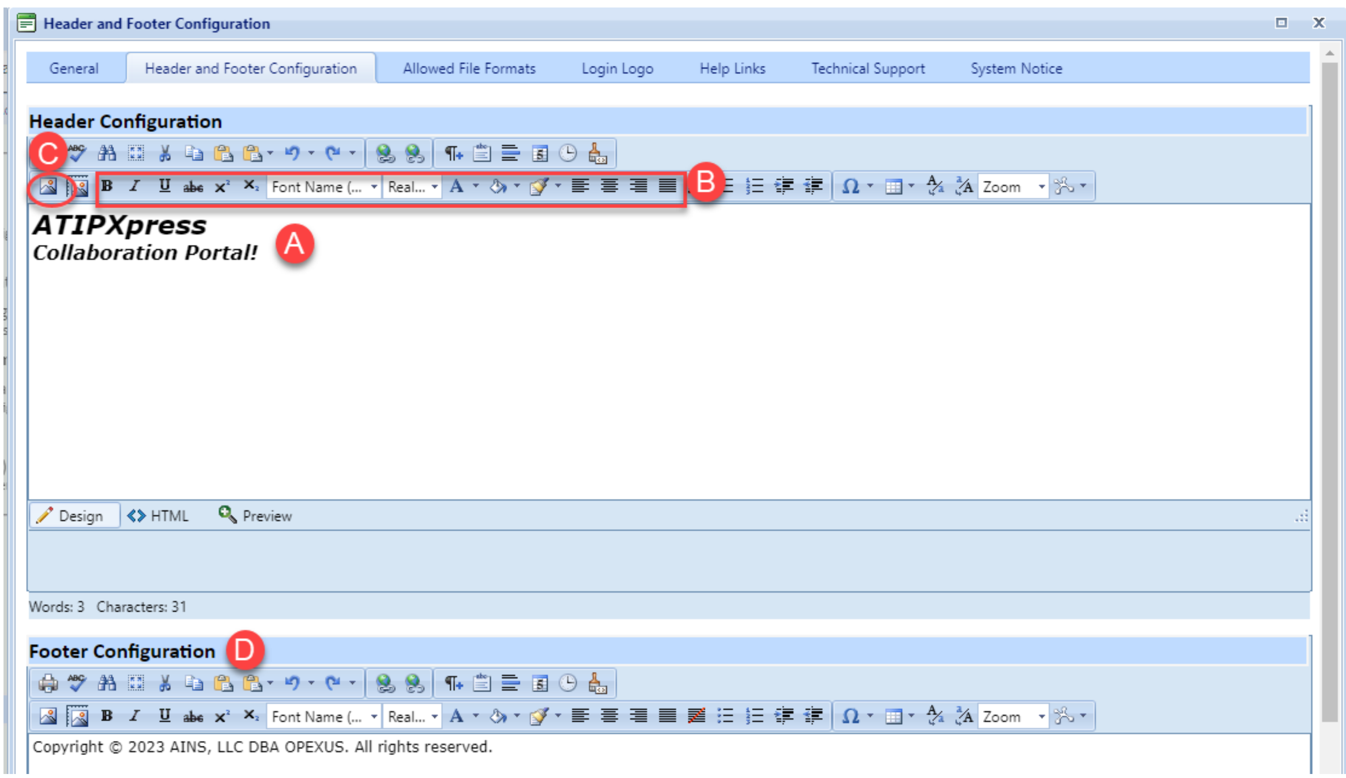
The fields are described in the following table. Click **Save** to save any changes on this tab.

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

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

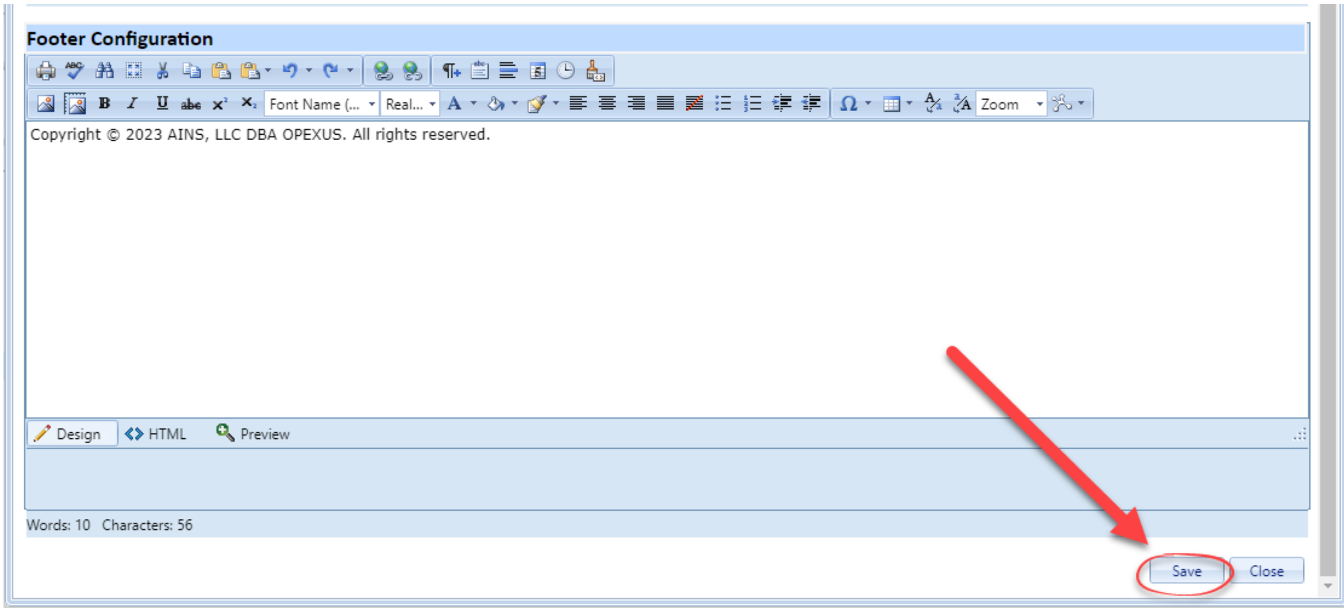
2.1.2 Header and Footer Configuration

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:



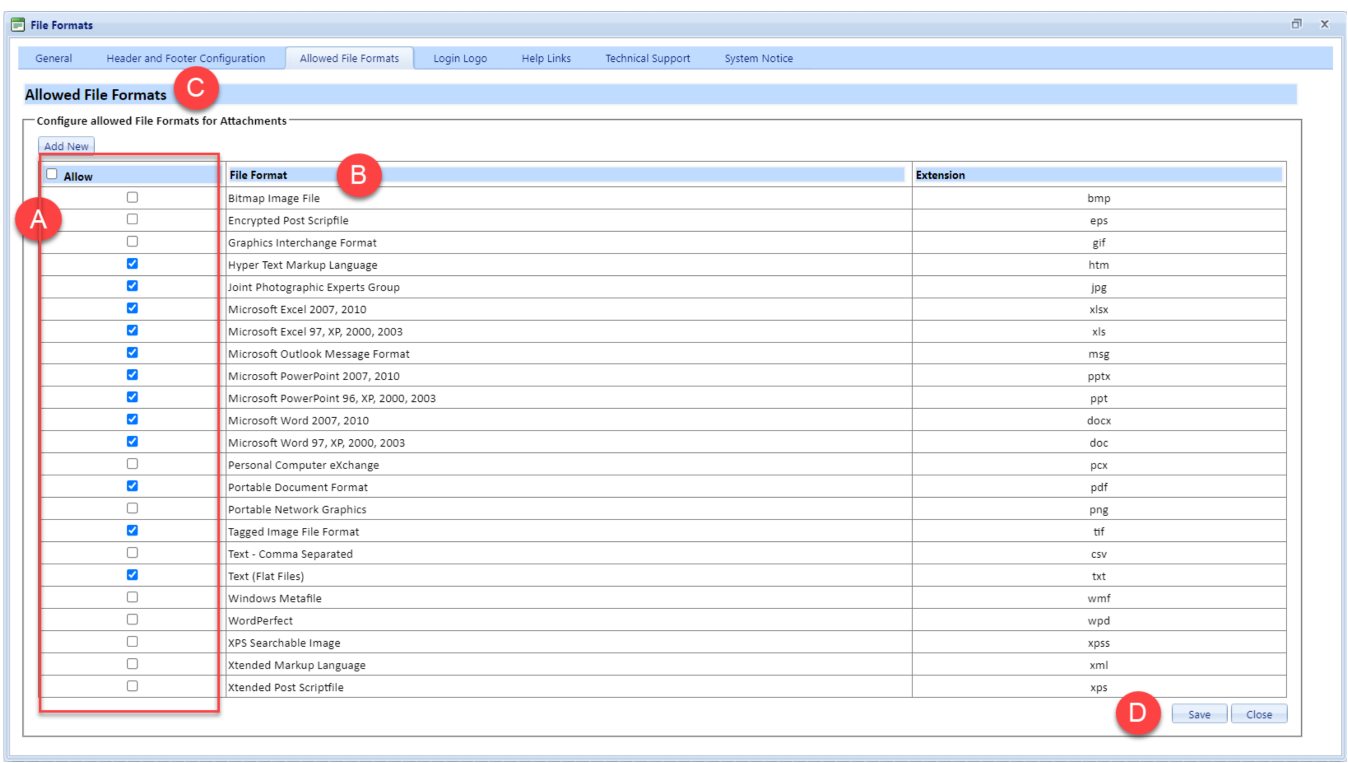
Edit the text to display in the application *Header* in the (**A**) *Header Configuration* field. You can format the text using the (**B**) *Text Controls*. Alternatively, use the (**C**) **Image** button to add a custom image for the header.

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.



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:



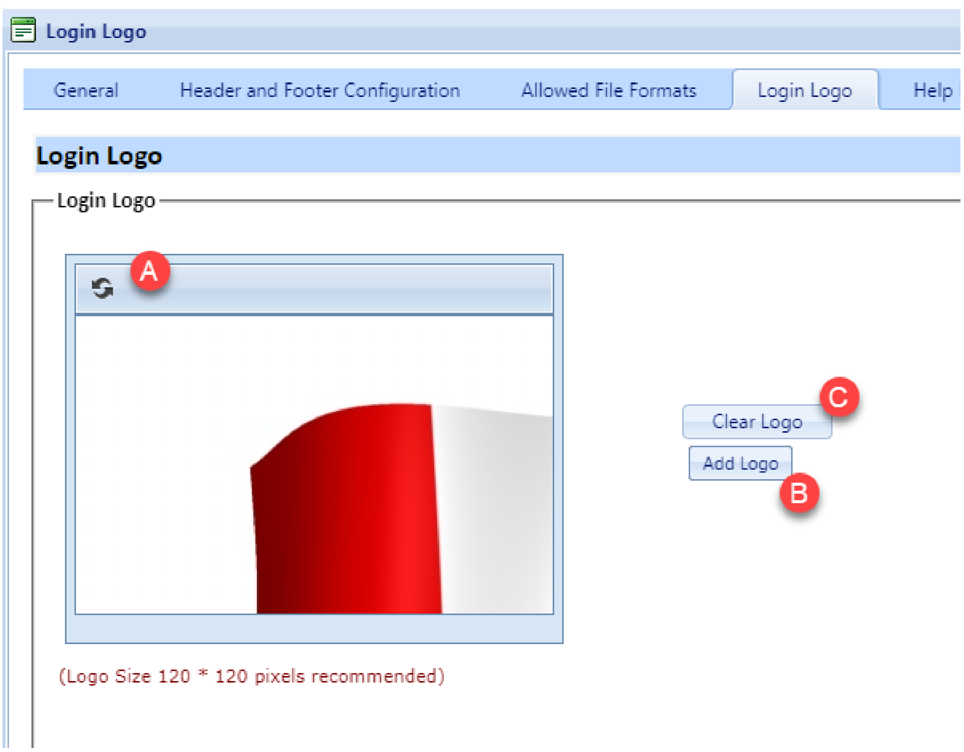
Select the (**A**) *checkboxes* beside the (**B**) *File Formats* you'd like to allow in the collaboration portal (click the **Allow** checkbox to select **All** formats). There is also the option to (**C**) **Add New** file formats if needed. Click (**D**) **Save** to save any changes to the selections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

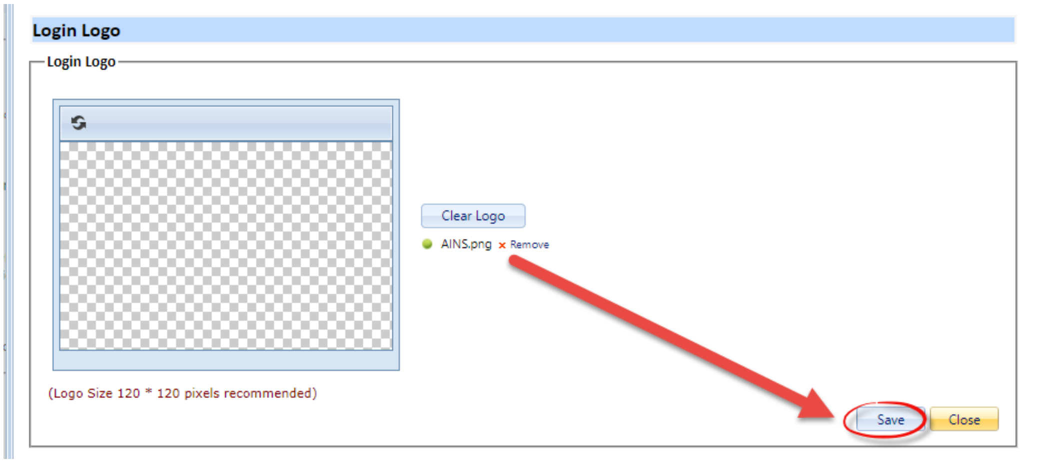


The current logo, if any, appears in the **(A) image grid**. There are also options to (**B**) **Add Logo** and (**C**) **Clear Logo** to clear the current logo.

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.

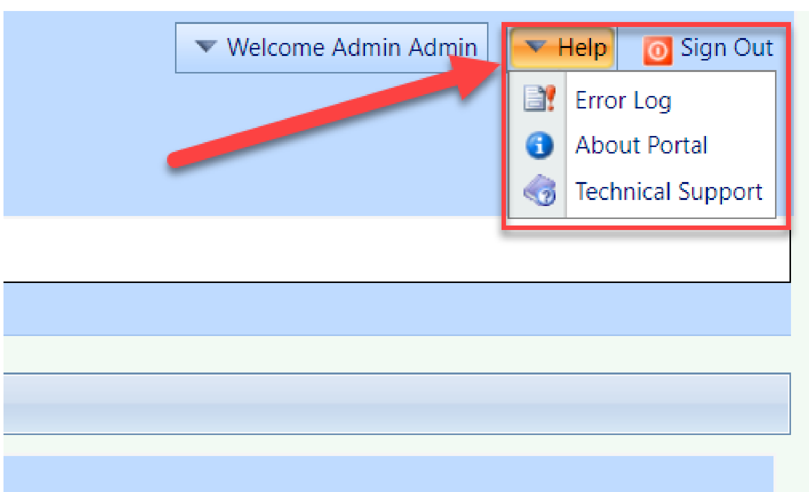
(!!) Note: Recommended logo dimensions are 120 x 120.

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

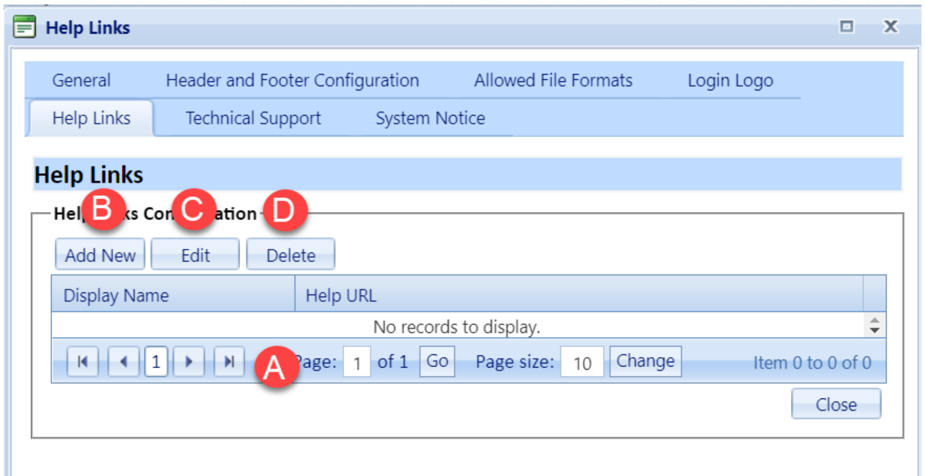


2.1.5 Help Links

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



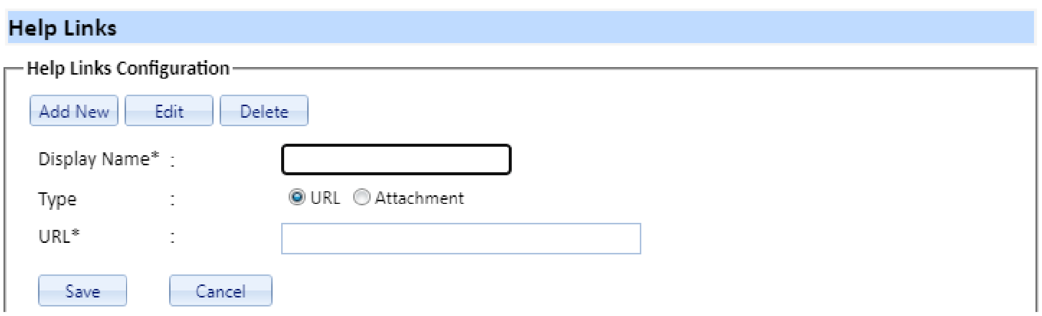
To configure *Help Links*, navigate to **Administration > General** then click the **Help Links** tab. A sample tab is shown below:



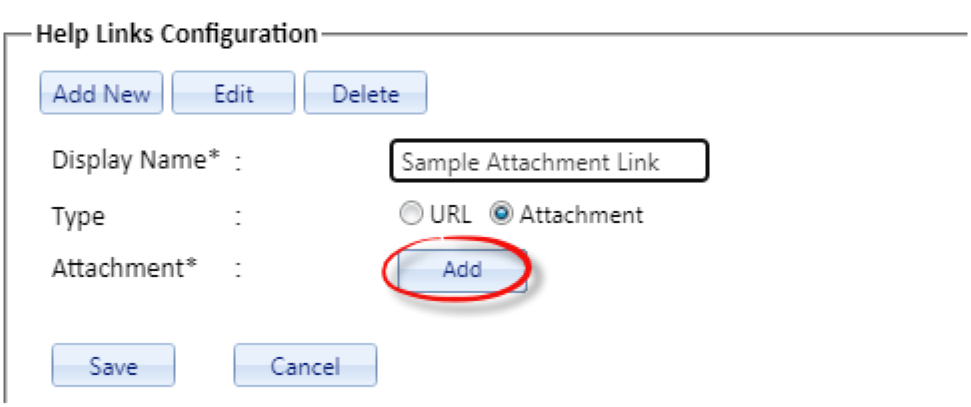
Existing *Help Links* (if any) are included in the (**A**) *Help Links* list. There are also options to (**B**) **Add New** help links, (**C**) **Edit** an existing link, or (**D**) **Delete** a link.

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.

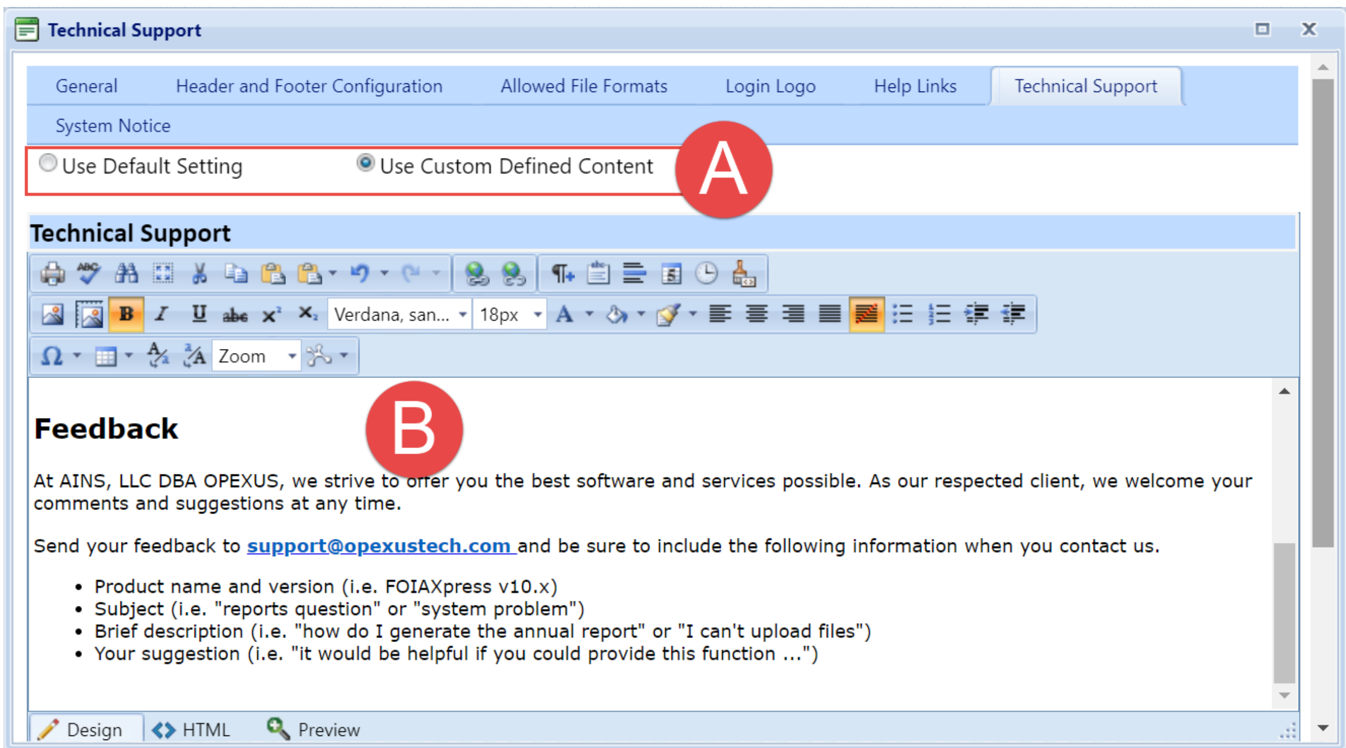


6. When you've configured the new help link, click **Save** to add it to the list.

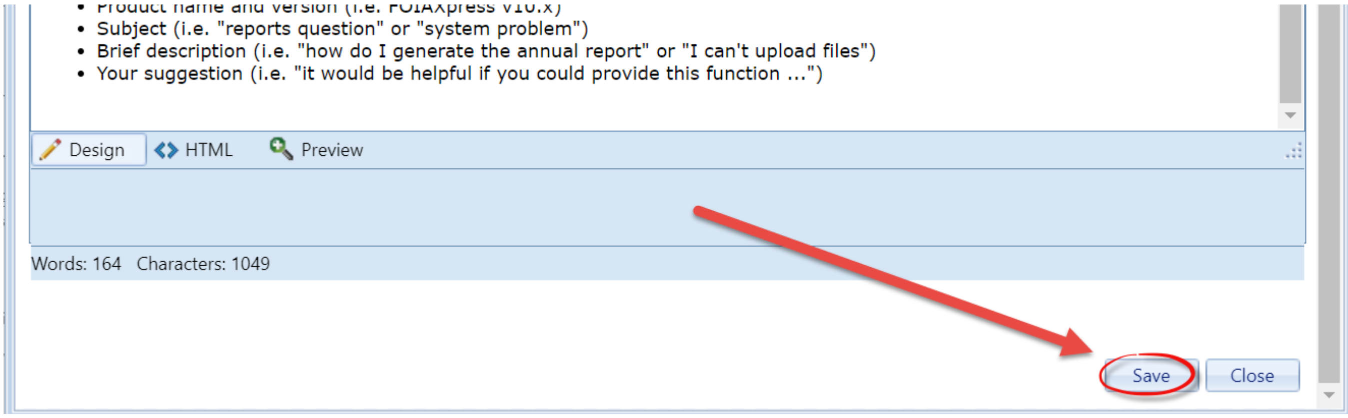
2.1.6 Technical Support

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.



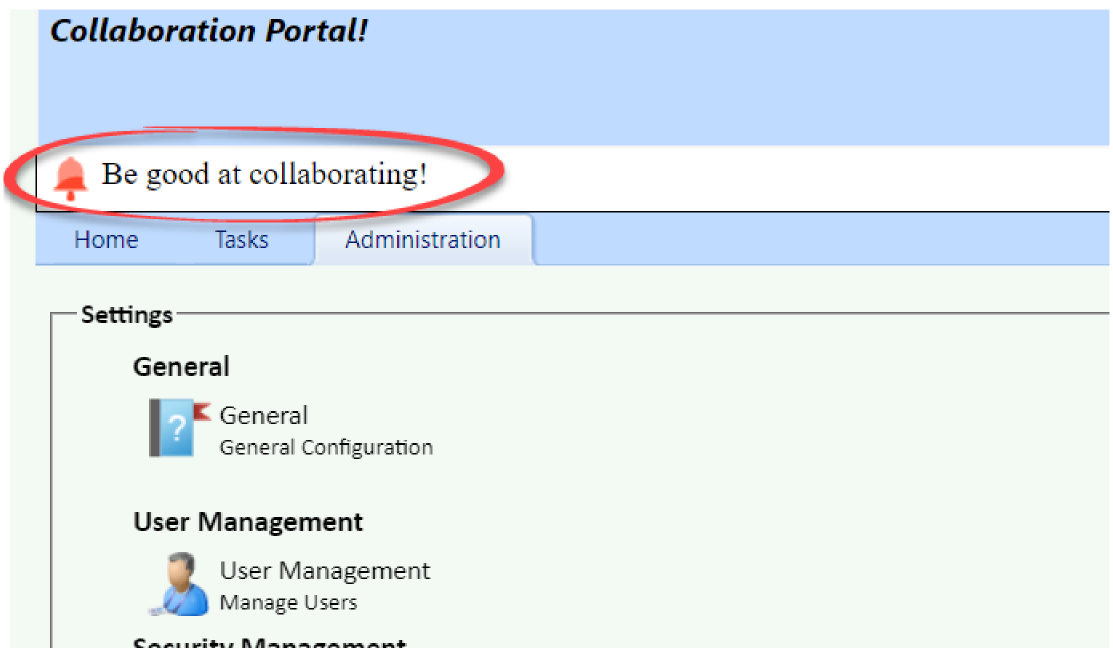
To retain any changes made to this screen, scroll to the bottom of the window, and click **Save**:



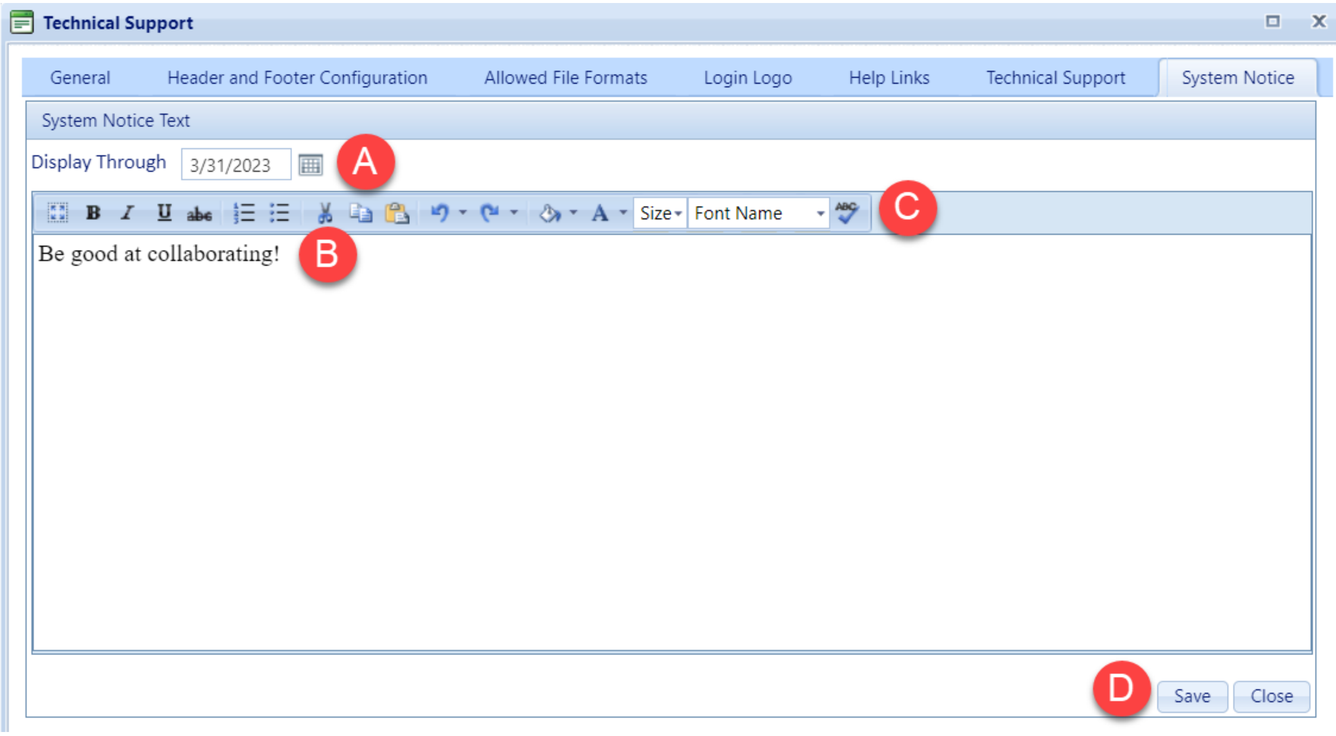
2.1.7 System Notice

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.

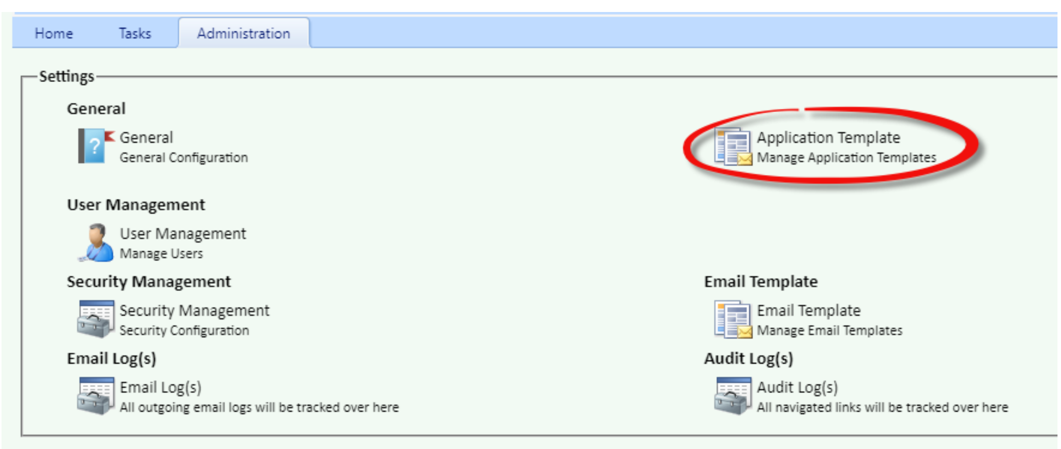


First, set the **(A) Display Through** date. Input the text in the **(B) System Notice Text** field, then edit the text using the **(C) text controls**. Click **(D) Save** to set the notice.

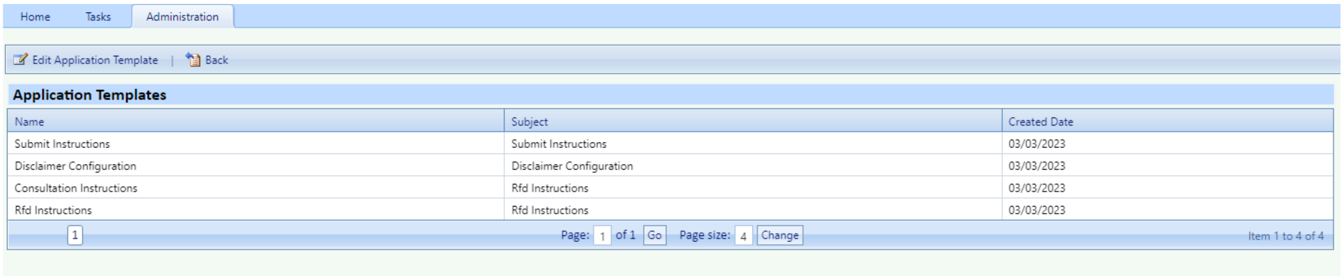
2.2 Application Template

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**:

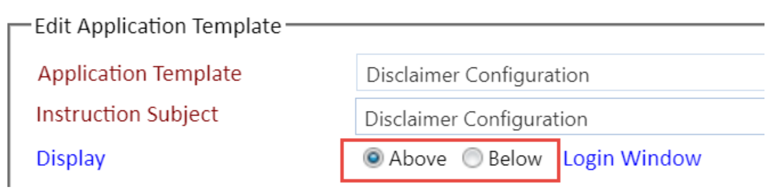


The *Application Template* screen is shown below:



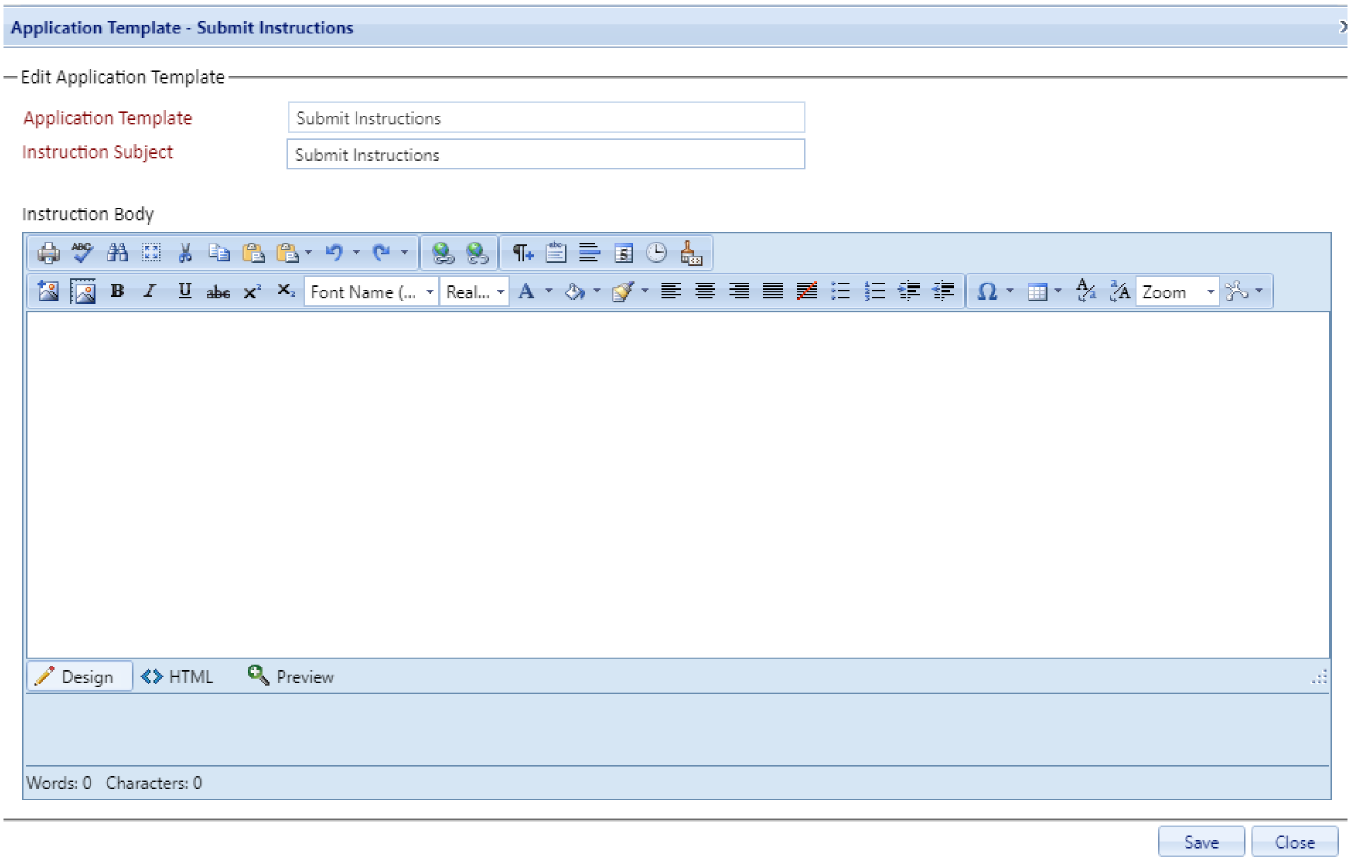
2.2.1 About Application Templates

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	Configure the disclaimer that displays on the Collaboration Portal login screen. **(!!) Note: Disclaimer Configuration provides options to display the disclaimer either Above or Below the login window.** 
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:

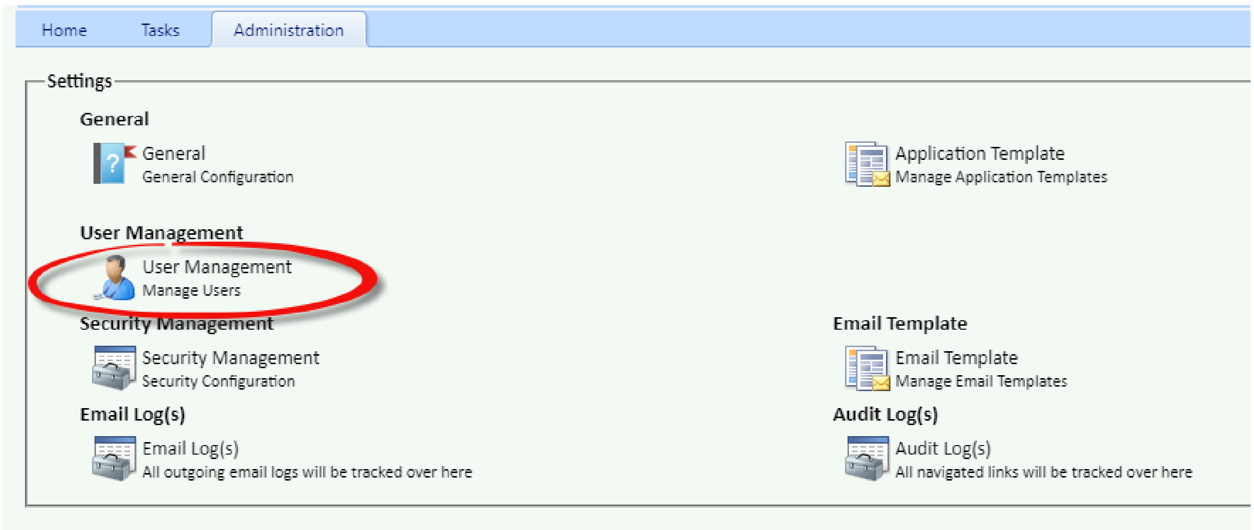


The *Instruction Subject* field can be edited if needed. Use the *Instruction Body* field to provide instructions on the stated *Instruction Subject*. You can also use the text editing tools to format the instructions to your specifications.

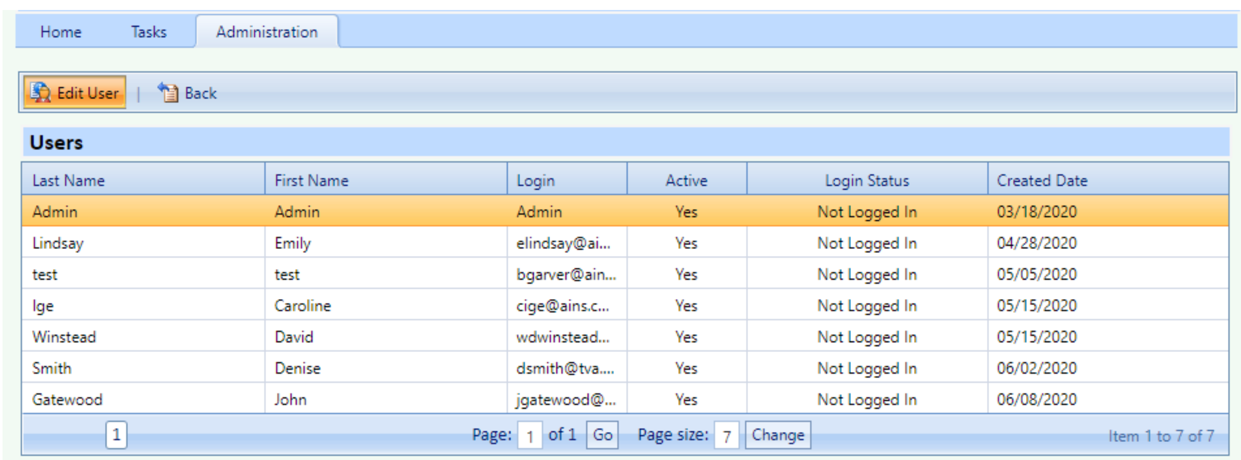
When you've configured the application template as needed, click **Save** to save the template.

3 User Management

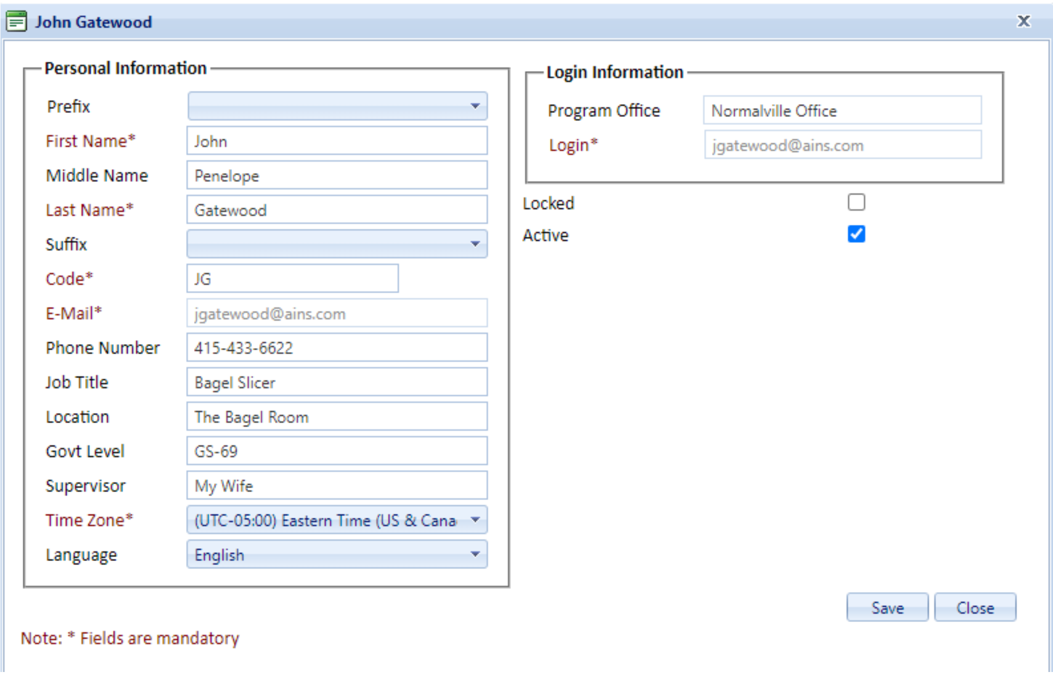
User Management configuration allows you to view and edit personal information for portal users. To access User Management, navigate to **Administration > User Management**:



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



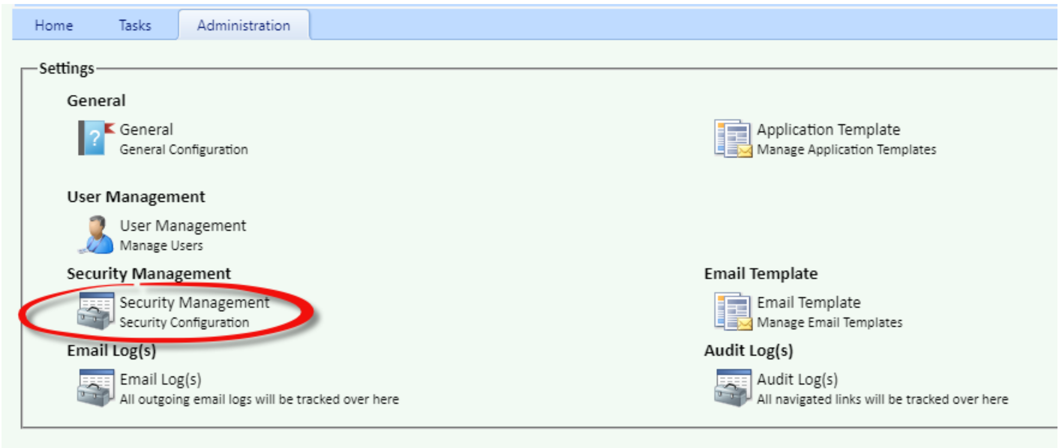
Select a **User** from the list then click **Edit User** to view and edit the user's details:



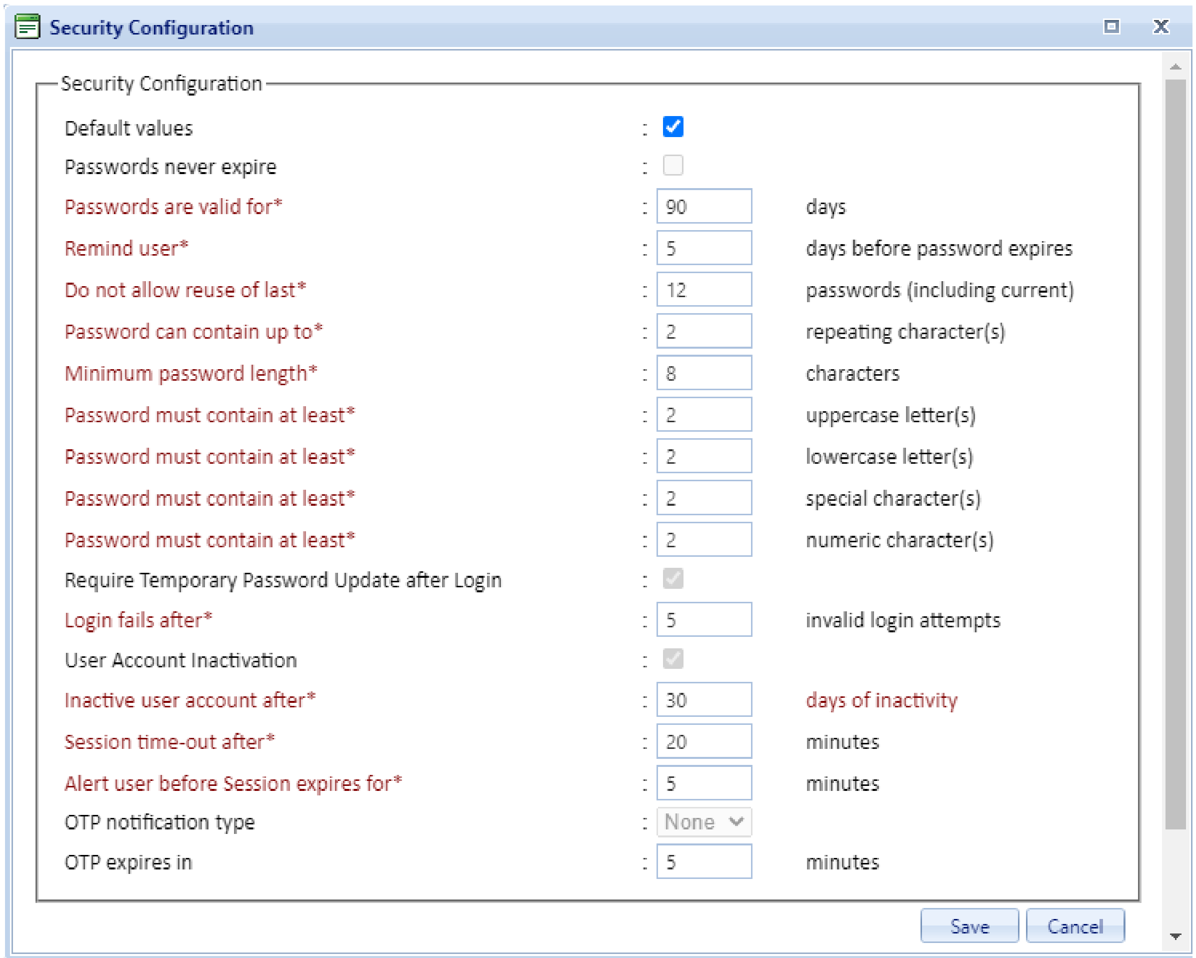
In addition to editing the personal details, you can mark the user as **Locked** and **Active**. If you make any changes, click **Save** to save these changes.

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:



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 *Security Configuration* 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.

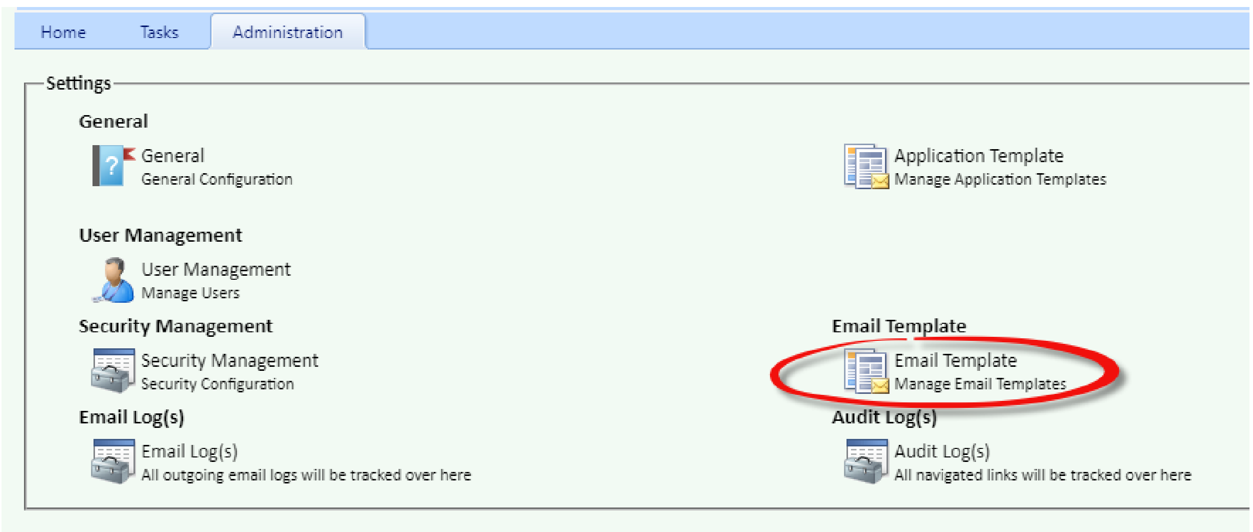
Field	Description
Login fails after X invalid login attempts	Enter the maximum number of tries a user is allowed to attempt to log in unsuccessfully before that user account is locked.
User Account Inactivation	Checked to denote an inactive user.
Inactivate user account after X days of inactivity	Enter 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.

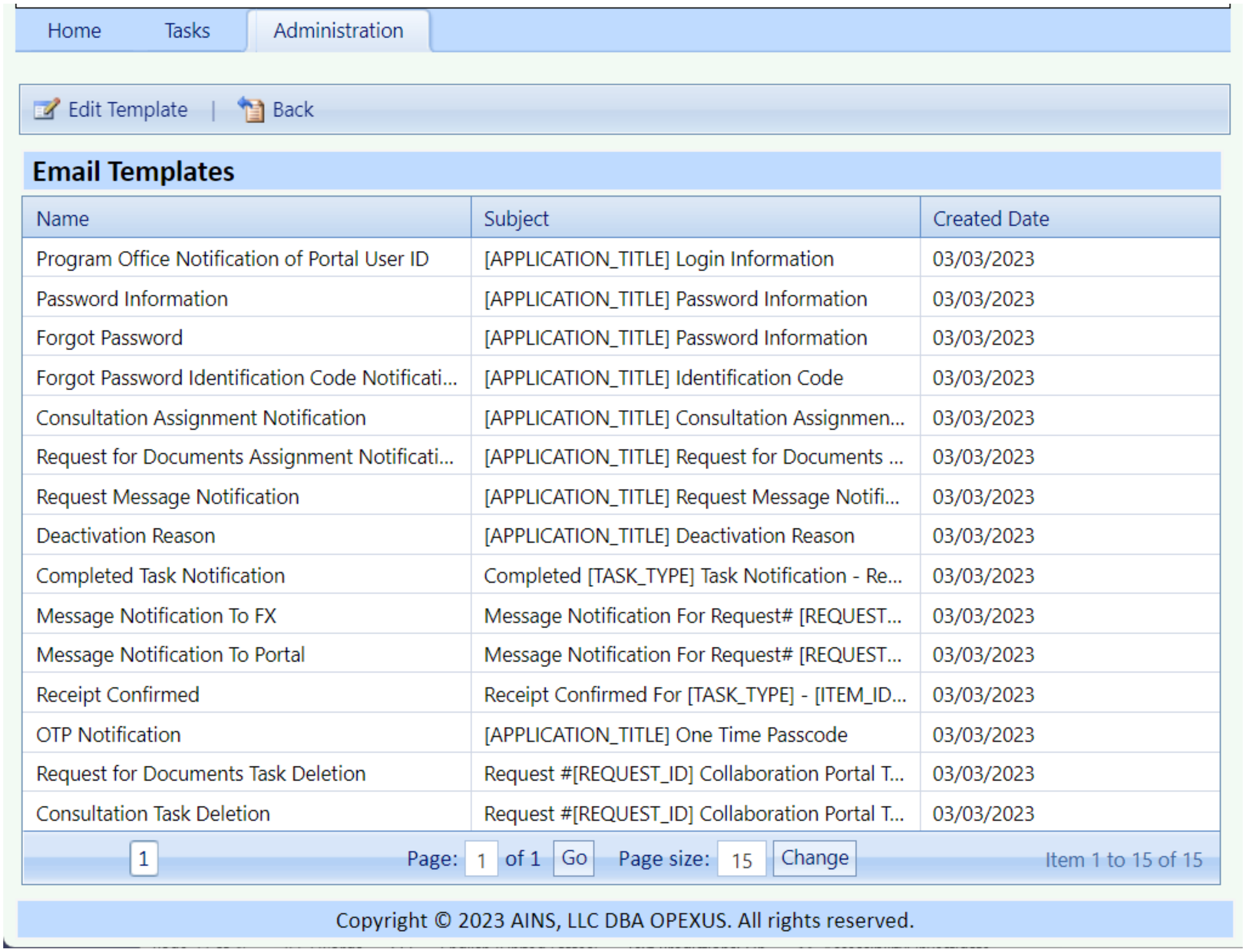
5.1 Email Template Configuration

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



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

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

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.

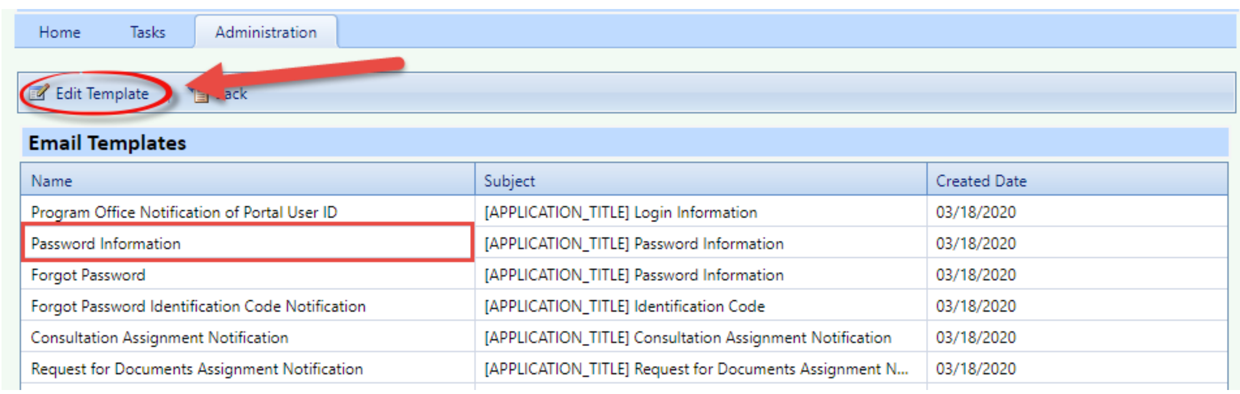
Template	Description
Request for Documents Task Deletion	Message sent to user when a document is removed from their assigned Rfd Tasks.
Consultation Task Deletion	Message sent to user when a document is removed from their assigned Consultation Tasks.

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

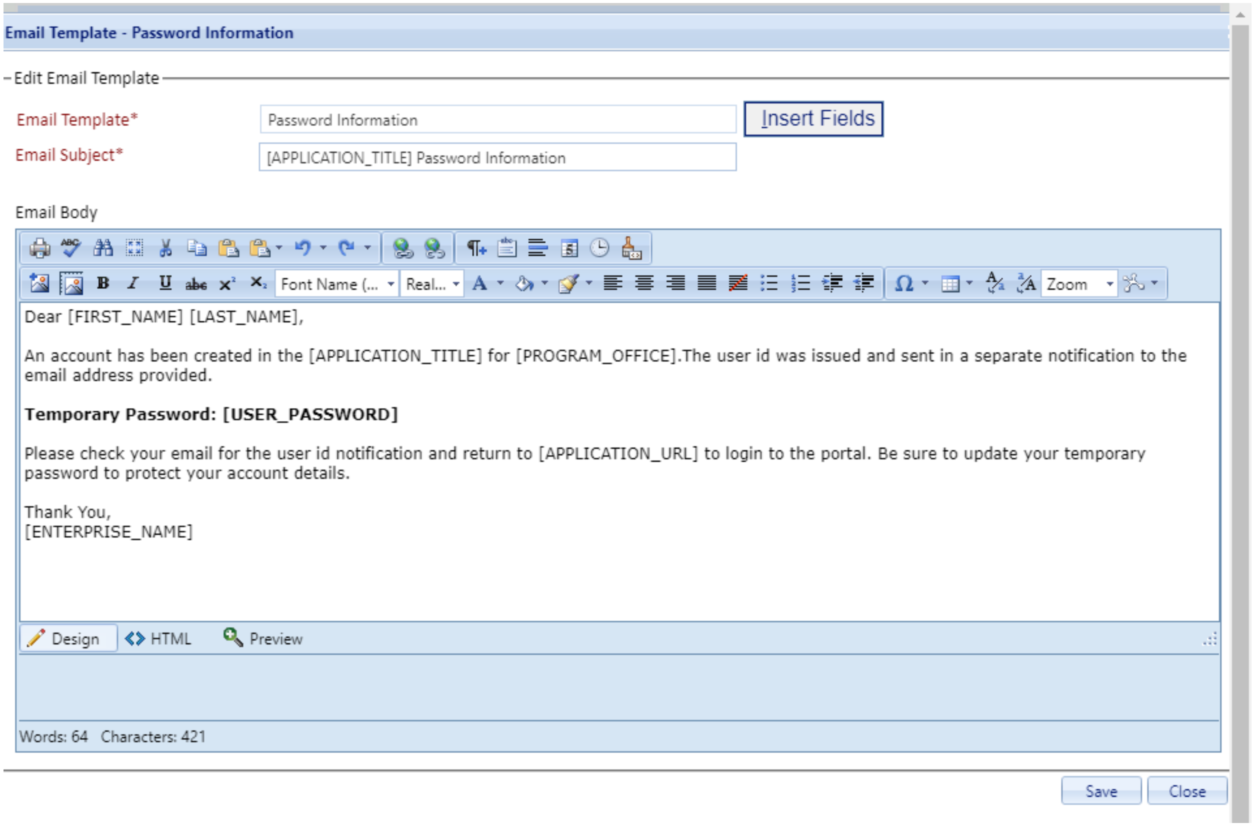
5.2 Edit an Email Template

To edit an existing Email Template:

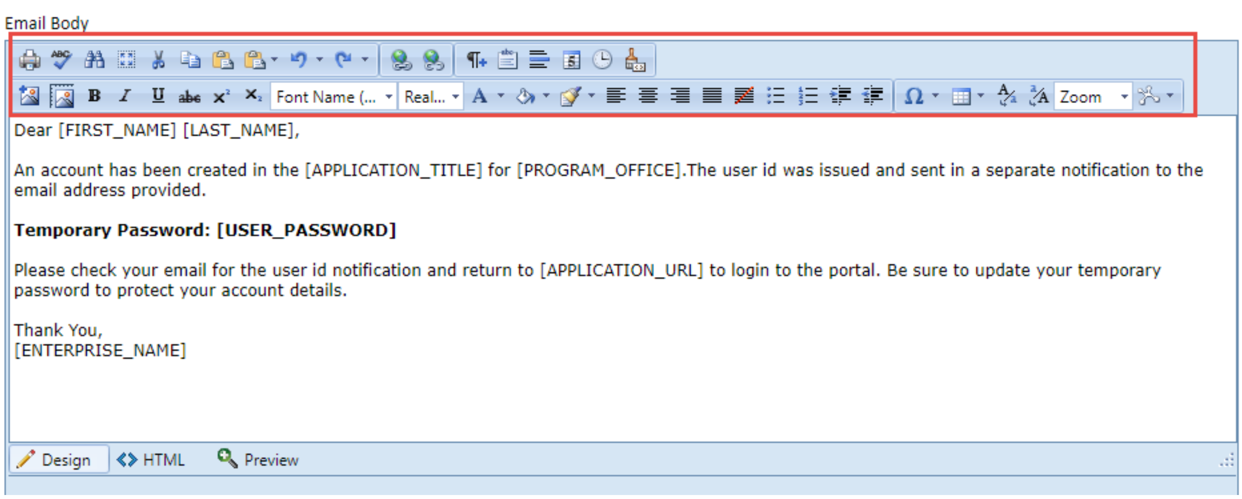
1. Navigate **to Administration > Email Template**.
2. Select an existing **Email Template,** then click **Edit Template**:



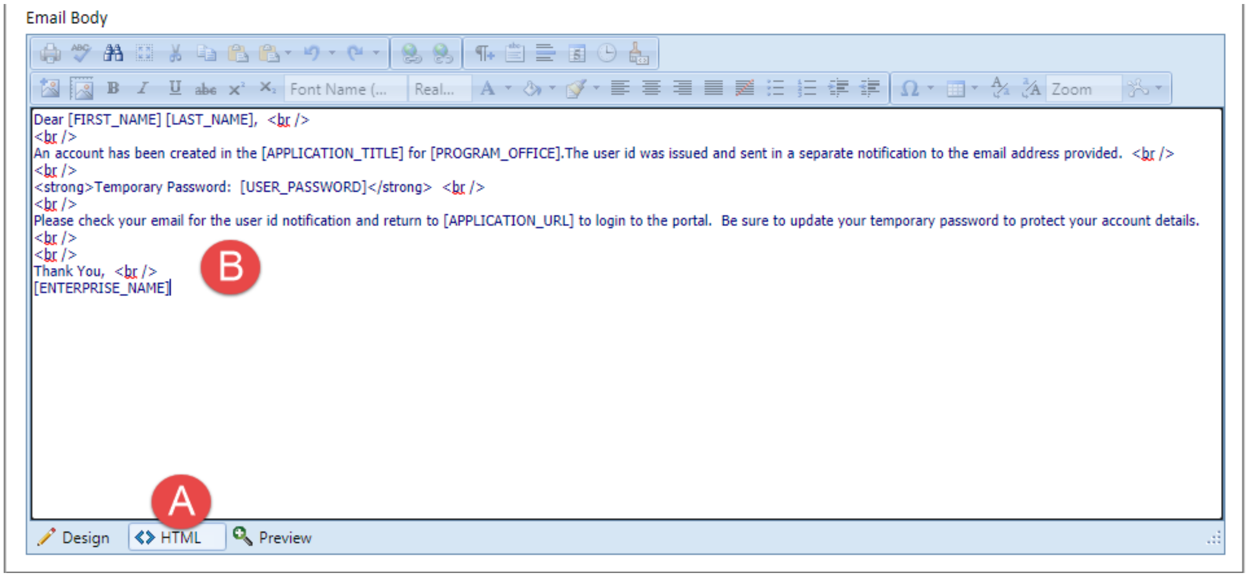
3. The template appears as shown in the following example.



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:



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



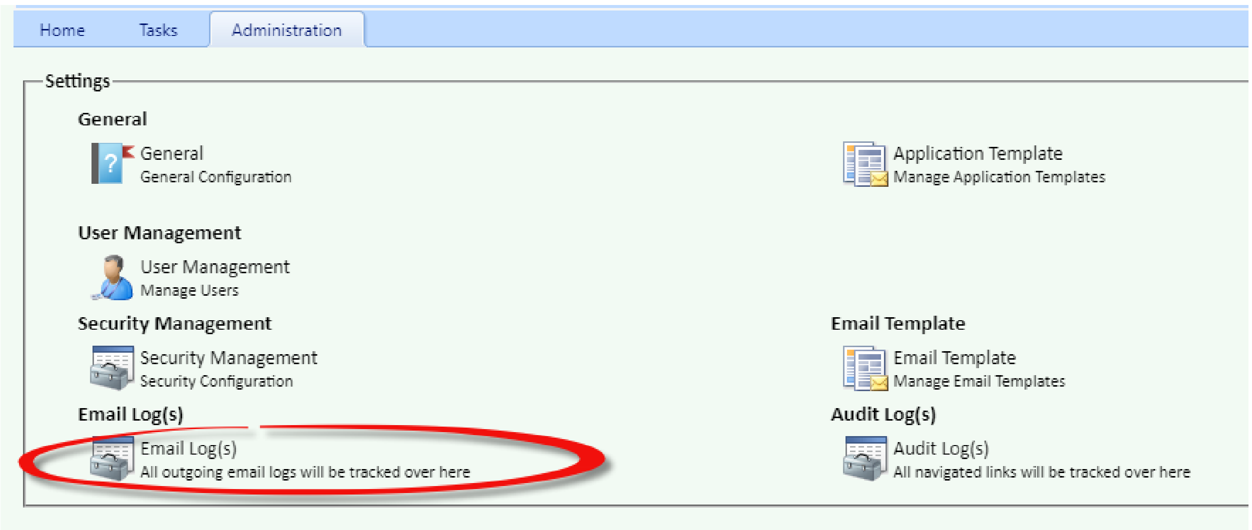
6. Click **Save** to save any changes made to the template.

6 Email Log(s)

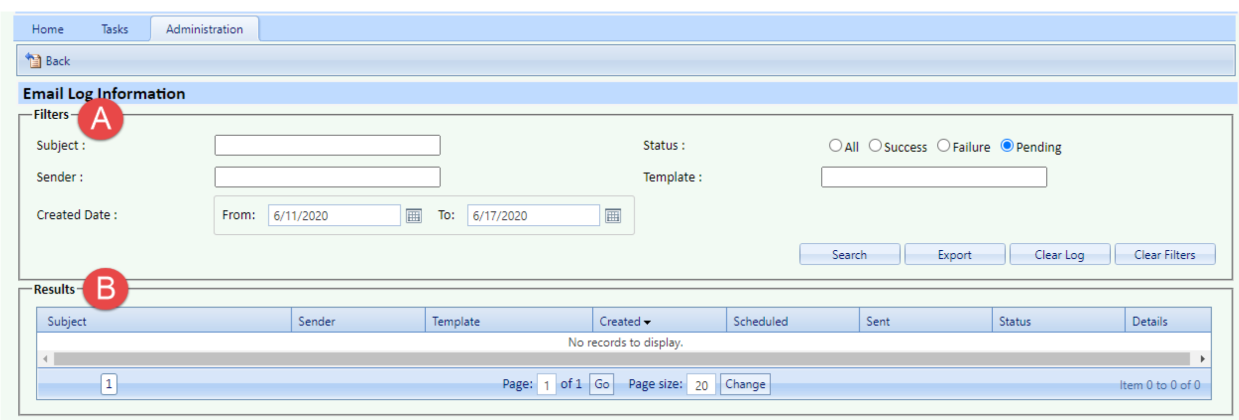
You can use the *Email Log(s)* to monitor email activity in the Collaboration Portal. Use search and filtering options to locate specific messages or a range of messages.

6.1 Accessing the Email Log

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

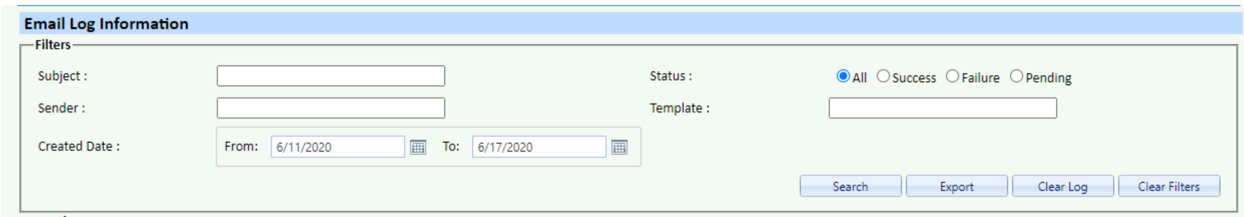


The *Email Log Information* screen appears as shown below. Use the (**A**) *Filters* to locate messages, which display in the (**B**) *Results* list:



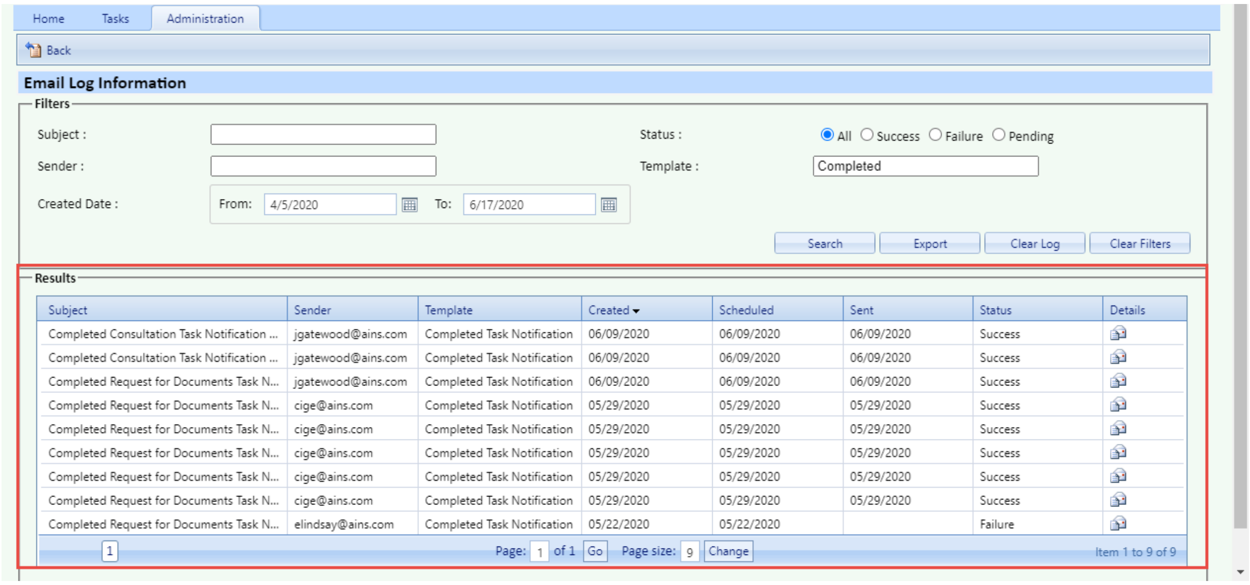
6.2 Search and Filter Emails

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.



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

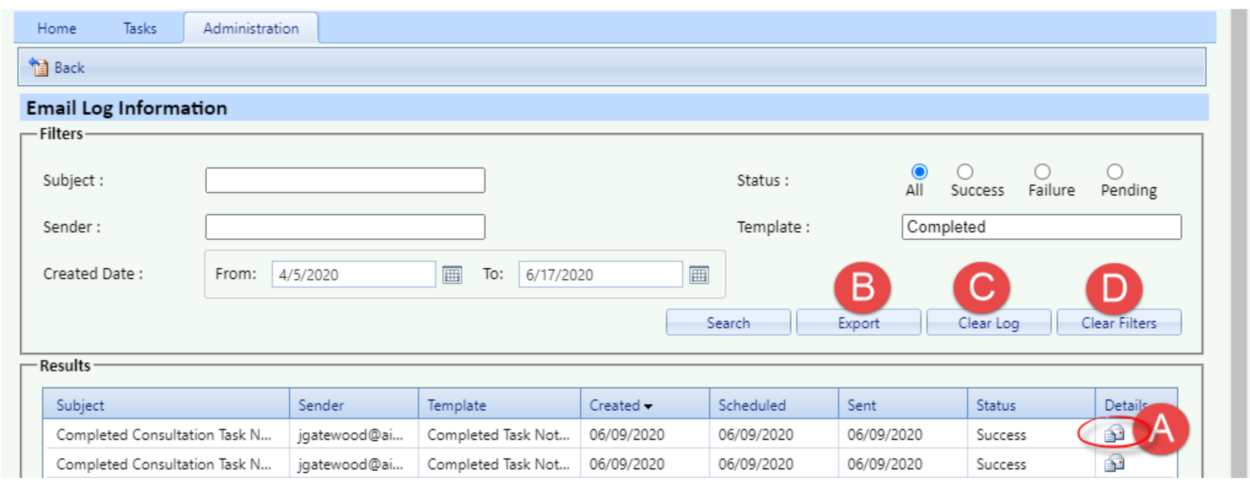
Click **Search** to locate results matching the filters. Sample search results are shown below:



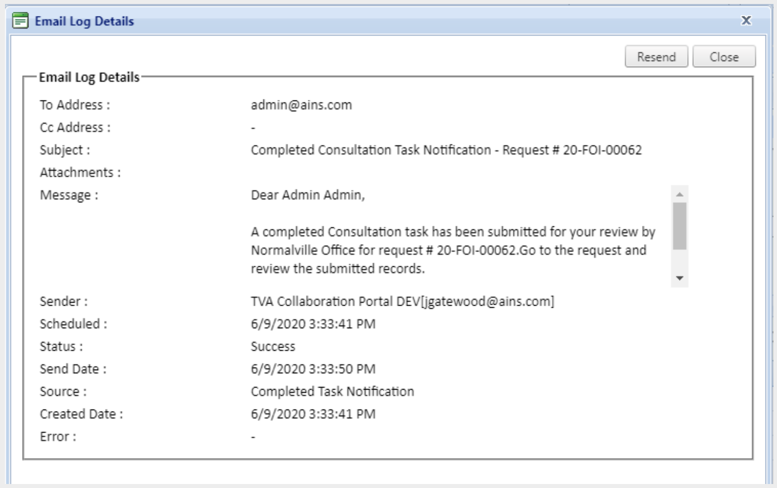
See the next section to view actions you can take on the *Email Log*.

6.3 Email Log Actions

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



<table>
<tr><th>Ref</th><th>Action</th><th>Description</th></tr>
<tr><td>A</td><td>Details</td><td>Click to view the message Details. There is also an option to Resend the message in the Details window:

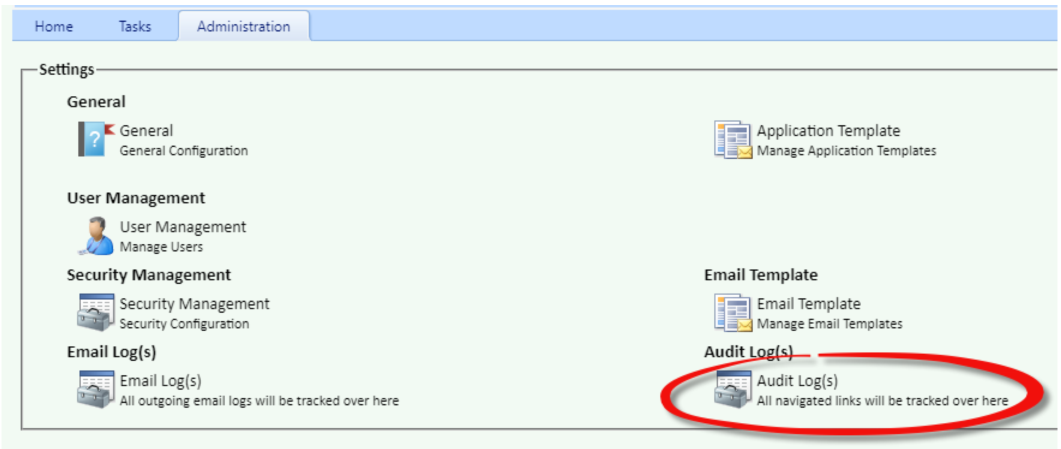


</td></tr>
<tr><td>B</td><td>Export</td><td>Export the results list.</td></tr>
<tr><td>C</td><td>Clear Log</td><td>Click to clear all entries in the Emails Log.</td></tr>
<tr><td>D</td><td>Clear Filters</td><td>Click to clear any data entered in the Filters fields.</td></tr>
</table>

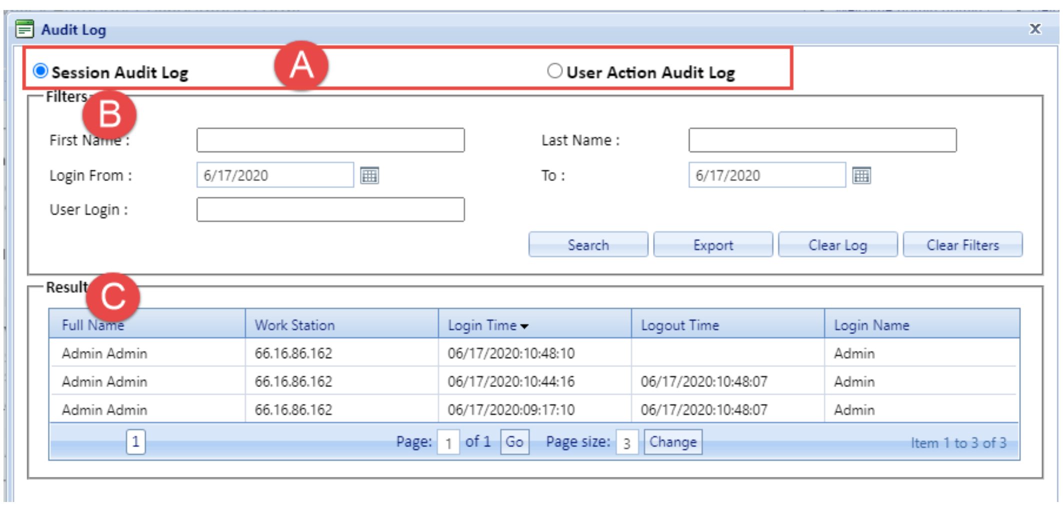
7 Audit Log(s)

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**

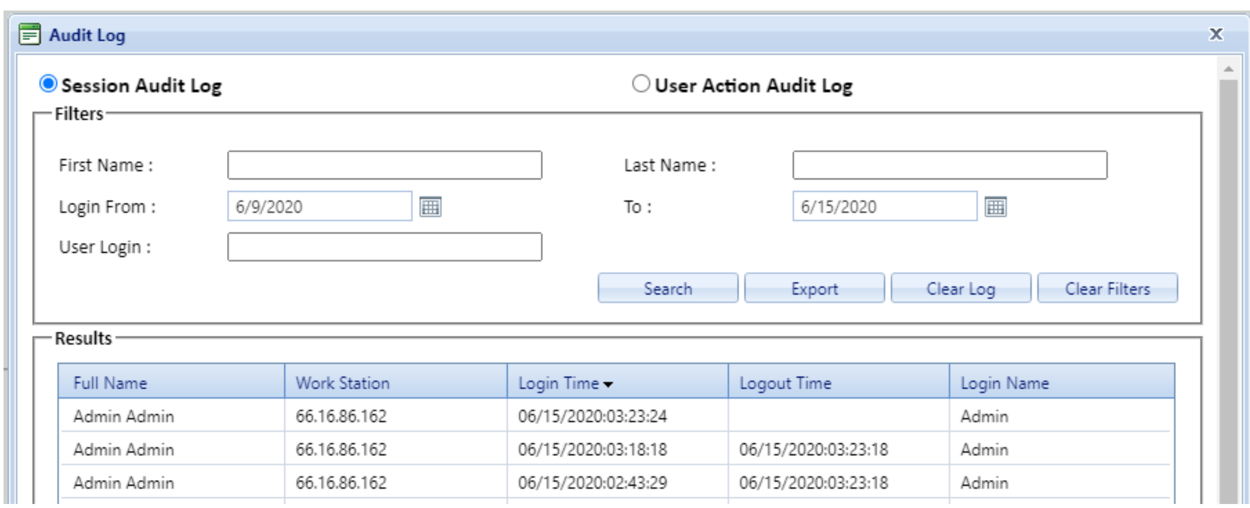
Ref	Element	Description
B	Filters	Use the *Filters* to locate a specific *Session* or *User Action*. Click **Search** to display matching results in the *Results* list. There are also options to **Export** the results list, **Clear Log** to clear the log contents, and **Clear Filters** to clear data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

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

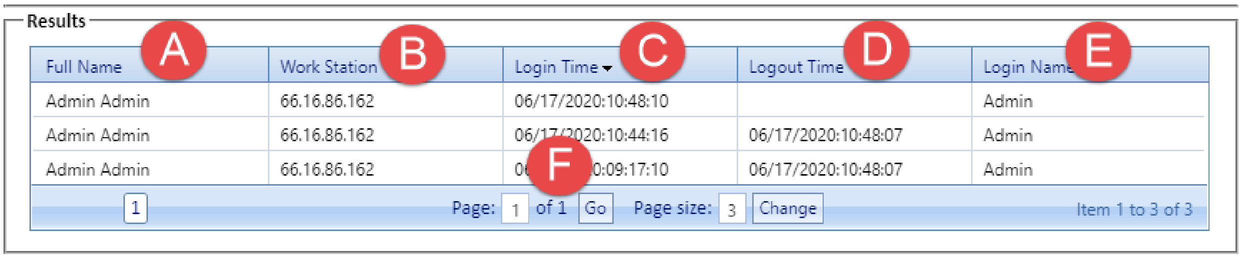
7.1 Session Audit Log

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.



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:

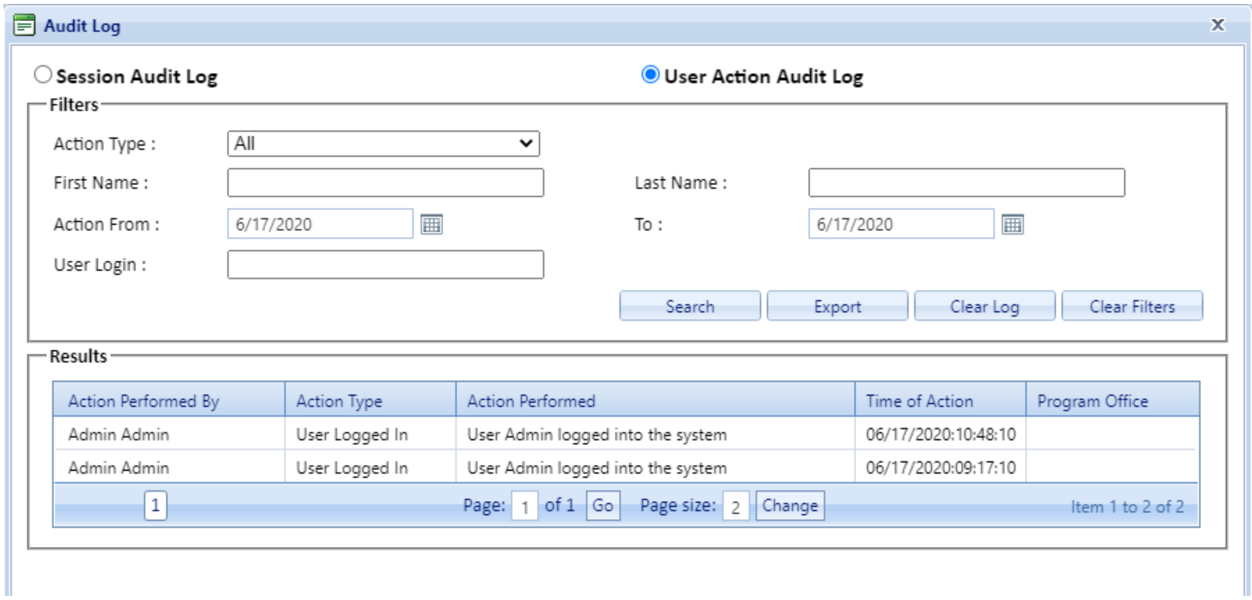


Ref	Field	Description
A	Full Name	Full name of the user account attached to this session.
B	Work Station	IP of the workstation that accessed the portal.
C	Login Time	Time and date the session began.
D	Logout Time	Time and date the session was terminated.
E	Login Name	Login name attached to the session.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

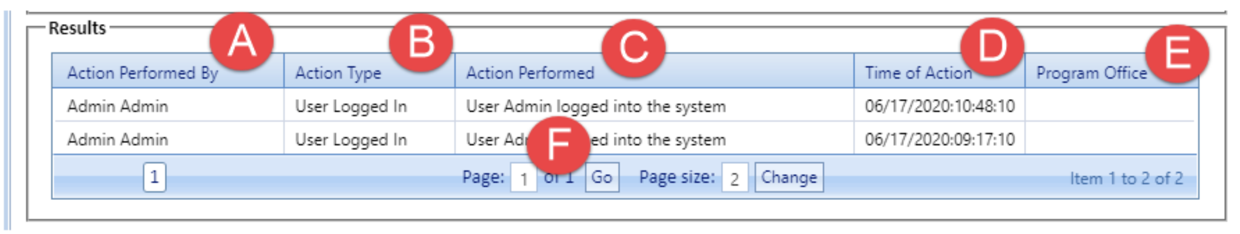
7.2 User Action Audit Log

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.



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:



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.

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