# ATIPXpress press

# Collaboration Portal Admin Manual

v11.1.0 March 2023

# AX 11.1.0 Collaboration Portal Admin Manual

## Notice of Rights

Copyright © 2023, AINS, LLC d/b/a OPEXUS. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission of the publisher: AINS, LLC. For information on obtaining permission for reprints and excerpts, contact info@opexustech.com.

Additionally, all copyrights, confidential information, patents, design rights and all other intellectual property rights of whatsoever nature contained herein are, and shall remain, the sole and exclusive property of the publisher.

## Notice of Liability

The information in this publication is believed to be accurate and reliable. However, the information is distributed by the publisher (AINS, LLC.) on an "As Is" basis without warranty for its use, or for any infringements of patents or other rights of third parties resulting from its use.

While every precaution has been taken in the preparation of this publication, neither the author (or authors) nor the publisher will have any liability to any person or entity with respect to any loss or damage caused or alleged to be caused, directly or indirectly, by the information contained in this publication or by the computer software and hardware products described in it.

### Notice of Trademarks

The publisher's company name, company logo, company patents, and company proprietary products are trademarks or registered trademarks of the publisher: AINS, LLC. All other trademarks or registered trademarks are the property of their respective owners.

### Non-Disclosure Statement

This document's contents are confidential and proprietary to AINS, LLC. This document cannot be released publicly or outside the purchasing agency without prior written permission from AINS, LLC.

Images in this manual are used as examples and may contain data and versioning that may not be consistent with your version of the application or information in your environment.

## Additional Notice

Information in this documentation is subject to change without notice and does not represent a commitment on the part of AINS, LLC.

Notwithstanding any of the foregoing, if this document was produced as a Deliverable or other work for hire under a contract on behalf of a U.S. Government end user, the terms and conditions of that contract shall apply in the event of a conflict.

## Contents

1		Intr	odu	iction	5
	1.	1	In T	This Manual	5
	1.	2	Acc	cessing Portal Administration	5
2		Ger	neral	I Administration	7
	2.	1	Ger	neral	7
		2.1	.1	General Tab	8
		2.1	.2	Header and Footer Configuration	9
		2.1	.3	Allowed File Formats	11
		2.1	.4	Login Logo	12
		2.1	.5	Help Links	14
		2.1	.6	Technical Support	15
		2.1	.7	System Notice	16
	2.	2	Арр	plication Template	18
		2.2.	.1	About Application Templates	18
		2.2	.2	Editing Application Templates	19
3		Use	er M	lanagement	21
4		Sec	urity	y Management	23
5		Ema	ail T	emplate	27
	5.	1	Ema	ail Template Configuration	27
	5.	2	Edi	t an Email Template	30
6		Ema	ail Lo	og(s)	33
	6.	1	Acc	cessing the Email Log	33
	6.	2	Sea	arch and Filter Emails	34
	6.	3	Ema	ail Log Actions	35
7		Auc	dit Lo	og(s)	37
	7.	1	Ses	ssion Audit Log	38

7.2	User Action Audit Log	39

# 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.

Collaboration Portal Home Tasks Administration			♥ Welcome Admin Admin	Figure 2
Collaboration Dashboard	7			Kerresh
Task Summary     Message Summary       Inbox - (0)     Unread (0)       Overdue - (0)     All (0)       Arrived Today - (0)     Outbox (0)		Tasks	Summary sks Found	
Consultation Tasks				
Task ID Request #	Tasked By	Received Date	Due Date	Status
	No records	to display.		
				+
Request For Document Tasks				

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

Introduction

Home Tasks Administration	
Settings	
General	
<pre>? ≤ General General Configuration</pre>	Application Template Manage Application Templates
User Management	
User Management	
Security Management	Email Template
Security Management	Email Template Manage Email Templates
Email Log(s)	Audit Log(s)
Email Log(s) All outgoing email logs will be tracked over here	Auldit Log(s) All navigated links will be tracked over here

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

*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.

General							
General Heade	r and Footer Configuration	Allowed File Formats	Login Logo	Help Links	Technical Support	System Notice	
eneral 🖪							
Enterprise Details –							
Enterprise Name*	OPEXUS		Phone Number				
Contact Name*	Ambica Mekala		Fax				
Contact Email*	ambica.mekala@opexustecł						
Locations							
Correspondence*		C:\Collab\AF	XWCORL\				
Documents*		C:\Collab\AF	XWDOCS				
Temp*		C:\AFXWTM	PL\				]
Mail Server Addres	s						
SMTP Mail Server*		192.168.0.25	i				
Port*		25					
Use SMTP SSL							
- I.a	r						

#### 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:

General							ð
General Header a	and Footer Configuration	Allowed File Formats	Login Logo	Help Links	Technical Support	System Notice	
General	Δ						
– Enterprise Details –							 
Enterprise Name*	OPEXUS Ambica Mekala ambica.mekala@opexustect					Phone Number Fax	
Locations - B							
Correspondence*				c	:\Collab\AFXWCORL\		
Documents*	-			C	:\Collab\AFXWDOCS\		
lemp*	<b>C</b>			C	:\AFXWTMPL\		
-Mail Server Address-							
SMTP Mail Server*				1	92.168.0.25		
Port*				2	5		
Use SMTP SSL					1		
-General Settings Info	rmation						
Application URL*				ŀ	ittps://192.168.3.104/col	laboration	
Application Title*				C	ollaboration Portal		
Application Email*	B			a	mbica.mekala@opexust	ech.com	
- Document Managem	ent Settings						
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.
В	Locations	Configure a disk location for storing and retrieving <i>Correspondence</i> , <i>Documents</i> , and <i>Temp</i> files.
С	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.
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:

E	Header and Footer Configuration	x
	General Header and Footer Configuration Allowed File Formats Login Logo Help Links Technical Support System Notice	Î
¢	Header Configuration	1
	C ♥ # = # % % % • • • 8 % ¶ = = = • 6 😓	
	🕢 🛐 B I U abe x' × Font Name ( ▼ Real▼ A * ૾) * ダ * 臣 喜 言 🖪 BE 扫 律 津 Ω * 団 * 🏠 🕻 Zoom ▼ 🗞 *	
	ATIPXpress	
t		
5		
ř		
)		
	✓ Design ♦ HTML ♥ Preview	
	Words: 3 Characters: 31	
		1
	Image: Imag	
	Copyright © 2023 AINS, LLC DBA OPEXUS. All rights reserved.	1

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.

10

Footer Configuration
🕼 🐡 ሕ 🖾 🔏 🛍 • ") • (* • 😣 😣 👖 🗒 🚍 🗄 🕒 🔚
📓 📓 Ι U abe x <sup>*</sup> ×. Font Name ( ▼ Real ▼ A ▼ ③ ▼ ③ ▼ 副 冨 冨 冨 冨 冨 冨 冨 冨 平 🎋 🕻 Zoom ▼ 🏷 ▼
Copyright © 2023 AINS, LLC DBA OPEXUS. All rights reserved.
✓ Design         ↔ HTML         ♥ Preview
Words: 10 Characters: 56
Save Close

### 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:

neral Header	and Footer Configuration Allowed File Formats Login Logo Help Links Technical Support System	n Notice
wed File Form		
ofigure allowed Fi	ile Formats for Attachments	
dd New		
Allow	File Format B	Extension
	Bitmap Image File	bmp
	Encrypted Post Scripfile	eps
	Graphics Interchange Format	gif
<ul> <li>✓</li> </ul>	Hyper Text Markup Language	htm
2	Joint Photographic Experts Group	gqį
2	Microsoft Excel 2007, 2010	xlsx
<b>Z</b>	Microsoft Excel 97, XP, 2000, 2003	xis
<ul> <li>✓</li> </ul>	Microsoft Outlook Message Format	msg
<b>Z</b>	Microsoft PowerPoint 2007, 2010	pptx
<ul> <li>✓</li> </ul>	Microsoft PowerPoint 96, XP, 2000, 2003	ppt
<ul> <li>✓</li> </ul>	Microsoft Word 2007, 2010	docx
	Microsoft Word 97, XP, 2000, 2003	doc
	Personal Computer eXchange	рсх
✓	Portable Document Format	pdf
	Portable Network Graphics	png
✓	Tagged Image File Format	tif
	Text - Comma Separated	csv
✓	Text (Flat Files)	txt
	Windows Metafile	wmf
	WordPerfect	wpd
	XPS Searchable Image	xpss
	Xtended Markup Language	xml
	Xtended Post Scriptfile	xps

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:

🖥 Login Logo				
General	Header and Footer Configuration	Allowed File Formats	Login Logo	Help
Login Logo	1			
Login Logo				
A				
		_	C	
			ear Logo	
			B	
(Logo Size	120 * 120 pixels recommended)			

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:

=	Help Links				x			
	General	Header and Foot	er Configuration Allowed File Formats Login Logo					
ſ	Help Links	Technical Supp	ort System Notice					
	Help Links							
[	-Hel Bks C	or Cation D			_			
	Add New	Edit Dele	ete					
	Display Nan	ne	Help URL					
			No records to display.	4	÷			
	K		Page: 1 of 1 Go Page size: 10 Change Item 0 to 0	) of 0				
		-	C	ose				
L								

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.

Help Links			
—Help Links C	onfiguration		
Add New	Edit	Delete	
Display Na	me* :		
Туре	:	🖲 URL 🔘 Attachment	
URL*	:		
Save	Cano	el	

- 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.

– Help Links Configuration							
Add New Edit	Delete						
Display Name* :	Sample Attachment Link						
Type :	🔘 URL 💿 Attachment						
Attachment* :	Add						
Save	el						

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.

E	Technical S	upport								x
	General	Header and Foot	ter Configuration	Allowed File Formats	Login Logo	Help Links	Technical Support			<b>^</b>
	System Not	tice								
	🔍 Use Defa	ult Setting	Use Custo	m Defined Content	A					
	Technical S	Support								
	🖨 🂝 🔠	II 🐰 🕩 😩 🕻	<u>- 4) - (4 -</u>	) 🤗 📭 🖹 🚍 🖪	•					
	🔊 🔝 🖪	<i>I</i> <u>U</u> abe x <sup>2</sup> ×	🕻 Verdana, san 🔻	18px 🔹 🗛 🔹 🎒 👻 💕 🔹	E≣∃∎	🗾 汪 汪 律	運			
	Ω • 🔳 •	A Zoom 🔹	%.▼							
	Feedba	ck	B						•	
	At AINS, LLC comments a	C DBA OPEXUS, w and suggestions at	e strive to offer yo any time.	u the best software and	services possibl	e. As our respec	ted client, we welcom	e your		
	Send your fe	eedback to <u>suppo</u>	rt@opexustech.c	com and be sure to inclu	ide the following	information wh	en you contact us.			
	<ul> <li>Produ</li> <li>Subje</li> <li>Brief</li> </ul>	ict name and vers ict (i.e. "reports q description (i.e. "h	ion (i.e. FOIAXpres uestion" or "syster	ss v10.x) n problem") the annual report" or "I	can't unload file	s")				
	• Your	suggestion (i.e. "it	t would be helpful	if you could provide this	function")	- ,				
	🧪 Design	<> HTML 🤷 P	review						•	-

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

<ul> <li>Product name and version (i.e. FOIAApress v10.x)</li> <li>Subject (i.e. "reports question" or "system problem")</li> <li>Brief description (i.e. "how do I generate the annual report" or "I can't upload files")</li> <li>Your suggestion (i.e. "it would be helpful if you could provide this function")</li> </ul>	•
Design	.::
Words: 164 Characters: 1049	lose

### 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:

Collabo	ration Port	al!	
A Be go	ood at collab	oorating!	
Home	Tasks	Administration	
- Settings Ge	neral ∑ <sup>≰</sup> General		
Use	General Co er Managem	nfiguration ent nagement	
5	Manage Us	ers	

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

营 Technical S	Support						x
General	Header and Footer Configuration	Allowed File Formats	Login Logo	Help Links	Technical Support	System Notice	
System Not	tice Text						
Display Thro	ough 3/31/2023 🔳 🗛			-			
<b>B Z</b>	1 🖳 abe 🗄 🗄 👗 🖏 🐴 🐴 🧐	• (* • 🗞 • A • Size	<ul> <li>Font Name</li> </ul>	- ABC C			
Be good a	at collaborating!						
	-						
					D	Save Close	

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**:

Home Tasks	Administration	
-Settings		
General		
Ceneral General Co	onfiguration	Application Template Manage Application Templates
User Managem	ient	
User Mai Manage U	nagement Isers	
Security Manag	gement	Email Template
Security Security C	Management onfiguration	Email Template Manage Email Templates
Email Log(s)		Audit Log(s)
Email Log All outgoir	g(s) ng email logs will be tracked over here	All navigated links will be tracked over here

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				
1 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.

Name	Description			
Disclaimer Configuration	Configure the disclaimer that displays on the Collaboral Portal login screen. (!!) Note: Disclaimer Configuration provides options to the disclaimer either Above or Below the login window Edit Application Template Application Template Instruction Subject Disclaimer Configuration Disclaimer Configuration			
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 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 Inst	ructions
– Edit Application Template ———	
Application Template	Submit Instructions
Instruction Subject	Submit Instructions
Instruction Body	
🖨 🏞 A 🗉 🖁 🗳 🖨	<u>↓</u> • ♥ • ♥ § 8 ¶ # 🖹 🚍 🖪 🕒 🐁
🔀 🔀 B I ∐ abe x² ×	- Font Name ( ▼ Real ▼ A ▼ ③ ▼ ③ ▼ 臣 吾 書 ■ 麗 汪 汪 律 律 Ω ▼ □ ▼ 🏃 ズoom ▼ 🏷 ▼
🥜 Design 🔇 HTML 🔍 P	review
Words: 0 Characters: 0	
	Save

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.

Home Tasks	Administration						
Section Back							
Users							
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		
1		Page: 1 of 1 Go	Page size: 7	Change	Item 1 to 7 of 7		

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

#### User Management

Prefix		Program Office	Normalville Office
First Name*	John	Login*	igatewood@ains.com
Middle Name	Penelope		<u>/5</u>
Last Name*	Gatewood	Locked	
Suffix	•	Active	
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		

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**:

Home Tasks Administration			
Settings			
General			
General Application Template			
User Management			
User Management Manage Users			
Security Management	Email Template		
Security Management Security Configuration	Email Template Manage Email Templates		
Email Log(s)	Audit Log(s)		
Email Log(s) All outgoing email logs will be tracked over here	Audit Log(s) All navigated links will be tracked over here		

The Security Configuration screen is shown below:

#### Security Management

Security Configuration		
Default values	: 🗹	
Passwords never expire	:	
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	: 🗸	
Login fails after*	: 5	invalid login attempts
User Account Inactivation	: 🗹	
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

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.

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**:

Home Tasks Administration	
Settings	
General	
General Configuration	Application Template Manage Application Templates
User Management	
User Management Manage Users	
Security Management	Email Template
Security Management Security Configuration	Email Template Manage Email Templates
Email Log(s)	Audit Log(s)
Email Log(s) All outgoing email logs will be tracked over here	Audit Log(s) All navigated links will be tracked over here

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

Home Tasks Administration

📝 Edit Template \mid 🎽 Back

_			
Emai	il To	mn	ator
EIIId	пе		lates

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

Copyright  $\ensuremath{\mathbb{C}}$  2023 AINS, LLC DBA OPEXUS. All rights reserved.

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:

Home Tasks Administration		
Edit Template		
Email Templates		
Name	Subject	Created Date
Program Office Notification of Portal User ID	[APPLICATION_TITLE] Login Information	03/18/2020
Password Information	[APPLICATION_TITLE] Password Information	03/18/2020
Forgot Password	[APPLICATION_TITLE] Password Information	03/18/2020
Forgot Password Identification Code Notification	[APPLICATION_TITLE] Identification Code	03/18/2020
Consultation Assignment Notification	[APPLICATION_TITLE] Consultation Assignment Notification	03/18/2020
Request for Documents Assignment Notification	[APPLICATION_TITLE] Request for Documents Assignment N	03/18/2020

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

Email Template - Password Inform	ation				
– Edit Email Template –					
Email Template*	Password Information				
Email Subject*	[APPLICATION_TITLE] Password Information				
Email Body					
🖨 🌮 AB 🖾 🐇 🕒 😩 🖡	br ≠9 + (+ +   😣 😣   ¶+ 🖺 🚍 🖪 🕒 🖕				
<u>⊠</u> B <i>I</i> <u>U</u> abe x <sup>2</sup> >	4. Font Name ( * Real * A * ③ * 愛 * 臣 喜 喜 薑 麗 汪 臣 谭 谭 Ω * 📑 * 🏂 Zoom * 🏷 *				
Dear [FIRST_NAME] [LAST_N	AME],				
An account has been created email address provided.	in the [APPLICATION_TITLE] for [PROGRAM_OFFICE]. The user id was issued and sent in a separate notification to the				
Temporary Password: [US	ER_PASSWORD]				
Please check your email for th password to protect your acco	ne user id notification and return to [APPLICATION_URL] to login to the portal. Be sure to update your temporary ount details.				
Thank You, [ENTERPRISE_NAME]					
📝 Design 🔇 HTML 🔍 P	review				
Words: 64 Characters: 421					
	Save				

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:

Email Body
[ 🚓 🎌 🏦 🖾 🐇 🛍 🛍 × り × (Ч × ] 🗶 🚷 👫 🖺 🚍 🖬 🕒 😓
🔯 🔯 B I 및 abe x <sup>3</sup> ×₂ Font Name ( Real A × 為 × ♂ × 臣 喜 重 靈 汪 汪 淳 淳 Ω × □ × ⅔ ⅔ Zoom ※ ×
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. < br/>
Sut /> (strong>Temporary Password: [USER_PASSWORD] kg(/>
 bit /> 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, K You, B
Design      A HTML     Preview

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.



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

Home	Tasks	Administration	
-Settings			
Gen	eral		
	General General Co	onfiguration	Application Template Manage Application Templates
Use	r Managem	ent	
	User Mai Manage U	nagement	
Secu	irity Manag	gement	Email Template
	Security Security C	Management onfiguration	Email Template Manage Email Templates
Ema	il Log(s)		Audit Log(s)
	Email Log All outgoir	g(s) ng email logs will be tra	Audit 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:

Filters       All Osuccess O Failure @ Pending         Subject :       Status :       All Osuccess O Failure @ Pending         Sender :       Template :       Template :         Created Date :       From: 6/11/2020       To: 6/17/2020
Email Log Information         Filters       All Osuccess OFailure @ Pending         Subject :       Template :         Created Date :       From: 6/11/2020
Subject :     Status :     O All O Success O Failure @ Pending       Sender :     Template :       Created Date :     From: 6/11/2020
Sender : Template : Template : Created Date : From: 6/11/2020
Créated Date : 6/11/2020  To: 6/17/2020
Search Export Clear Filters
-Results-B
Subject Sender Template Created + Scheduled Sent Status Details
No records to display.
1         Page: 1         of 1         Go         Page size: 20         Change         Item 0 to 0 of 0

## 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.

Filters			
Subject :		Status :	All OSuccess OFailure OPending
Sender :		Template :	
Created Date :	From: 6/11/2020 To: 6/17/2020		
			Search Evenent Clear Log Clear Fil

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 <b>All</b> , <b>Success</b> , <b>Failure</b> and <b>Pending</b> .
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)

Administr	ration							
Back								
ail Log Information								
Iters								
ubject :				Status :		● All ○ Success ○ Fi	ailure 🔿 Pending	
ender :				Template :	[	Completed		
				·	L			
reated Date :	From: 4/5	/2020	To: 6/17/2020	<b></b>				
					Se Se	arch Export	Clear Lon	Clear Filters
esults								
esults Subject		Sender	Template	Created 🗸	Scheduled	Sent	Status	Details
esults Subject Completed Consultation Task No	otification	Sender jgatewood@ains.com	Template Completed Task Notification	Created - 06/09/2020	Scheduled 06/09/2020	Sent 06/09/2020	Status Success	Details
esults Subject Completed Consultation Task No Completed Consultation Task No	otification	Sender jgatewood@ains.com jgatewood@ains.com	Template Completed Task Notification Completed Task Notification	Created - 06/09/2020 06/09/2020	Scheduled 06/09/2020 06/09/2020	Sent 06/09/2020 06/09/2020	Status Success Success	Details
esults Subject Completed Consultation Task No Completed Consultation Task No Completed Request for Docume	otification otification ents Task N	Sender jgatewood@ains.com jgatewood@ains.com jgatewood@ains.com	Template Completed Task Notification Completed Task Notification Completed Task Notification	Created - 06/09/2020 06/09/2020 06/09/2020	Scheduled 06/09/2020 06/09/2020 06/09/2020	Sent 06/09/2020 06/09/2020 06/09/2020	Status Success Success Success	Details
esults Subject Completed Consultation Task No Completed Consultation Task No Completed Request for Docume Completed Request for Docume	otification otification ents Task N ents Task N	Sender jgatewood@ains.com jgatewood@ains.com jgatewood@ains.com cige@ains.com	Template Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification	Created - 06/09/2020 06/09/2020 06/09/2020 05/29/2020	Scheduled 06/09/2020 06/09/2020 06/09/2020 05/29/2020	Sent 06/09/2020 06/09/2020 06/09/2020 05/29/2020	Status Success Success Success Success Success	Details
sults Subject Completed Consultation Task No Completed Consultation Task No Completed Request for Docume Completed Request for Docume	otification otification ents Task N ents Task N ents Task N	Sender jgatewood@ains.com jgatewood@ains.com jgatewood@ains.com cige@ains.com cige@ains.com	Template Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification	Created ▼ 06/09/2020 06/09/2020 06/09/2020 05/29/2020 05/29/2020	Scheduled           06/09/2020         06/09/2020           06/09/2020         05/09/2020           05/29/2020         05/29/2020	Sent           06/09/2020           06/09/2020           06/09/2020           06/09/2020           05/29/2020           05/29/2020	Status Success Success Success Success Success Success	Details (2) (2) (2) (2) (2) (2) (2) (2)
sults Subject Completed Consultation Task No Completed Consultation Task No Completed Request for Docume Completed Request for Docume Completed Request for Docume	otification otification ents Task N ents Task N ents Task N ents Task N	Sender jgatewood@ains.com jgatewood@ains.com cige@ains.com cige@ains.com cige@ains.com	Template Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification	Created → 06/09/2020 06/09/2020 06/09/2020 05/29/2020 05/29/2020 05/29/2020	Scheduled           06/09/2020         06/09/2020           06/09/2020         05/29/2020           05/29/2020         05/29/2020           05/29/2020         05/29/2020	Sent           06/09/2020           06/09/2020           06/09/2020           06/09/2020           05/29/2020           05/29/2020           05/29/2020	Status Success Success Success Success Success Success Success	Details
sults Subject Completed Consultation Task Nc Completed Request for Docume Completed Request for Docume Completed Request for Docume Completed Request for Docume	otification otification ents Task N ents Task N ents Task N ents Task N ents Task N	Sender jgatewood@ains.com jgatewood@ains.com cjge@ains.com cjge@ains.com cjge@ains.com cjge@ains.com	Template Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification	Created → 06/09/2020 06/09/2020 06/09/2020 05/29/2020 05/29/2020 05/29/2020 05/29/2020 05/29/2020	Scheduled 06/09/2020 06/09/2020 06/09/2020 05/29/2020 05/29/2020 05/29/2020 05/29/2020	Sent           06/09/2020           06/09/2020           06/09/2020           06/09/2020           05/29/2020           05/29/2020           05/29/2020           05/29/2020           05/29/2020	Status Success Success Success Success Success Success Success	Details Ga Ga Ga Ga Ga Ga Ga Ga Ga
sults Subject Completed Consultation Task Nc Completed Consultation Task Nc Completed Request for Docume Completed Request for Docume Completed Request for Docume Completed Request for Docume	otification otification ents Task N ents Task N ents Task N ents Task N ents Task N ents Task N	Sender jgatewood@ains.com jgatewood@ains.com cige@ains.com cige@ains.com cige@ains.com cige@ains.com cige@ains.com	Template Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification Completed Task Notification	Created → 06/09/2020 06/09/2020 06/09/2020 05/29/2020 05/29/2020 05/29/2020 05/29/2020 05/29/2020 05/29/2020	Scheduled 06/09/2020 06/09/2020 06/09/2020 05/29/2020 05/29/2020 05/29/2020 05/29/2020 05/29/2020	Sent           06/09/2020           06/09/2020           06/09/2020           05/29/2020           05/29/2020           05/29/2020           05/29/2020           05/29/2020           05/29/2020           05/29/2020           05/29/2020           05/29/2020	Status Success Success Success Success Success Success Success Success Success	Details Det

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:

Н	ome	Tasks	Administratio	n						
1	Back									
En	nail Log	Inform	ation							
s	uters — Subject :						Status :	) All	O O Success Failu	O re Pending
s	Sender :						Template :	Comp	leted	
0	Created D	ate :	From: 4	/5/2020	To: 6/17/20	20	]	B	С	D
							Search	Export	Clear Log	Clear Filters
	esults —									
	Subject			Sender	Template	Created 🗸	Scheduled	Sent	Status	Details
	Complet	ed Consult	ation Task N	jgatewood@ai	Completed Task Not	06/09/2020	06/09/2020	06/09/2020	Success	
	Complet	ed Consult	ation Task N	jgatewood@ai	Completed Task Not	06/09/2020	06/09/2020	06/09/2020	Success	

Email	Log	(s)
Linan	-05	(5)

Ref	Action	Description
A	Details	Click to view the message Details. There is also an option to Resend the message in the Details window:
В	Export	Export the results list.
С	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.

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)**:

Home Tasks Administration	
Settings	
General	
Ceneral General Configuration	Application Template Manage Application Templates
User Management	
User Management Manage Users	
Security Management	Email Template
Security Management Security Configuration	Email Template Manage Email Templates
Email Log(s)	Audit Log(s)
Email Log(s) All outgoing email logs will be trac	tked over here Audit Log(s) All navigated links will be tracked over here

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

ilters		O User Ac	tion Audit Log	
B First Name :		Last Name :		
Login From :	6/17/2020	To :	6/17/2020	<b>=</b>
User Login :				
		Search	Export	Clear Log Clear Filters
Result C	Work Station	Login Time 🕶	Logout Time	Login Name
run nume	66 16 06 160	06/17/2020:10:48:10		Admin
Admin Admin	00.10.00.102			A 1 - 1
Admin Admin Admin Admin	66.16.86.162	06/17/2020:10:44:16	06/17/2020:10:48:07	Admin
Admin Admin Admin Admin Admin Admin	66.16.86.162 66.16.86.162	06/17/2020:10:44:16 06/17/2020:09:17:10	06/17/2020:10:48:07 06/17/2020:10:48:07	Admin

Ref	Element	Description
Α	Log Selection	Select between Session Audit Log and User Action Audit Log

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

Session Audit Log - Filters		O User Action Audit Log				
First Name :			Last Name :			
Login From :	6/9/2020		To :	6/15/2020	<b></b>	
User Login :						
			Search	Export	Clear Log Clear Filters	
lesults —			Search	Export	Clear Log Clear Filters	
esults Full Name	Work Station	n La	Search	Export Logout Time	Clear Log Clear Filters	
Full Name Admin Admin	Work Station 66.16.86.162	n Lo 2 Of	Search ogin Time - 6/15/2020:03:23:24	Export Logout Time	Clear Log Clear Filters	
Full Name Admin Admin Admin Admin	Work Station 66.16.86.162 66.16.86.162	n Lo 2 Of 2 Of	Search	Export Logout Time 06/15/2020:03:23:18	Clear Log Clear Filters Login Name Admin 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:

Full Name	Work Station	Login Time 🗸 🧡	Logout Time	Login Name
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	0.09:17:10	06/17/2020:10:48:07	Admin

Ref	Field	Description
А	Full Name	Full name of the user account attached to this session.
В	Work Station	IP of the workstation that accessed the portal.
С	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.

Session Audit Log				🖲 User Actic	on Audit Lo	g	
Action Type :	All		~				
First Name :				Last Name :			
Action From :	6/17/2	020		To :	6/17	/2020	
User Login :							
				Search	Ехро	rt Clear Log	Clear Filters
Results							
Action Performed By		Action Type	Action Per	formed		Time of Action	Program Office
Admin Admin		User Logged In	User Admi	n logged into the system		06/17/2020:10:48:10	
Admin Admin		User Logged In	User Admi	n logged into the system		06/17/2020:09:17:10	
			Dager 1	of 1 Go Page size: 2	Change		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:

Results	B			A
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 Adı 🔁 ed into the system	06/17/2020:09:17:10	
1		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.
В	Action Type	Type of action logged in the portal.
С	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 <i>Page</i> options to view additional pages or change the number of entries displayed per page.