

ATIPXpress

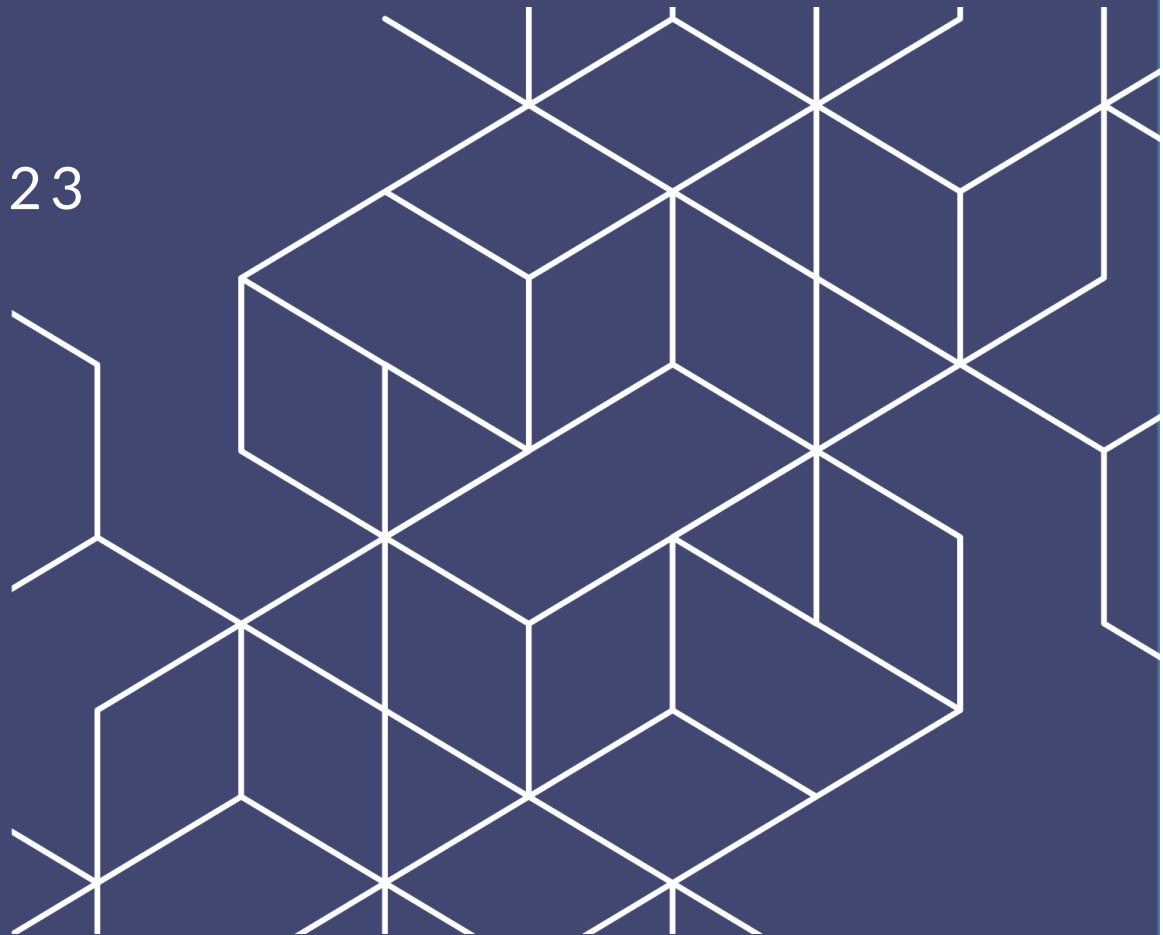


OPEXUS

Collaboration Portal User Manual

v11.1.0

March 2023



AX 11.1.0 Collaboration Portal User Manual

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1 About this Manual

1.1 Introduction

Welcome to the ATIPXpress Collaboration Portal. The AX Collaboration Portal provides a platform for ATIPXpress users to work together on requests with others outside their ATIPXpress environment, easily collaborating on requests for documents and document reviews. This document introduces the portal, the portal UI, and steps for collaborating on requests using the portal. This includes sending requests for ATIPXpress, responding via the portal (including correspondence and document submission), and collaborating on responsive materials.

1.2 How to Use this Manual

This manual is divided in two main sections. The first applies to users on the ATIPXpress side, sending Requests for Documents and Consultation Tasks to the portal for collaboration with outside offices. The *Collaboration for Portal Users* section focuses on the Portal user experience, with instructions for receiving and fulfilling tasks, and utilizing the tools at hand to make collaboration effective.

For ATIPXpress Users:

See the *Collaboration for ATIPXpress Users* section. This section covers topics for *Requests for Documents*, *Consultation Reviews*, and *Correspondence* with Portal users.

For Portal Users:

See the *Collaboration for Portal Users* section. This section covers topics for *Accessing the Collaboration Portal*, *Request for Document Tasks*, *Consultation Tasks*, and *Sending Messages Using the Portal*.

1.3 Typography

The following formatting conventions are used in this manual to highlight important information:

- *Italicized* text indicates a location, for example a particular *Folder*, *Tab*, or *Window*.
- **Bold** text indicates a specific user action, such as clicking a **button**.
- **Red** text and this symbol (!!) are used in *Notes* to **bring attention to crucial information**.



2 Collaboration for ATIPXpress Users

This section provides instructions for ATIPXpress users to work in the Collaboration Portal. The following topics are covered in this section:

- *Requests for Documents*: Details on sending and completing a Request for Documents in the ATIPXpress application.
- *Consultation Reviews*: How to send documents for consultation review using Collaboration.
- *Correspondence*: Sending and receiving messages from the Collaboration Portal

2.1 Requests for Documents

2.1.1 Sending a Request for Documents

One of the main uses for Collaboration is to request documents from a source who does not have access to ATIPXpress. Follow the steps below to submit a Request for Documents to a contact using the Collaboration Portal.

1. Open a request that has been assigned. Requests that are not assigned are not eligible for submitting RFDs.
2. Select (A) **Request for Documents** from the left-hand navigation, then click (B) **New**:

The screenshot displays the ATIPXpress Collaboration Portal interface. At the top, there is a navigation bar with tabs: Home, Requesters, Requests, Document Management, Administration, and Reports. Below this, a breadcrumb trail shows: Home >> Requests View [Search] >> 20-FOI-00055 - Request. The main content area is titled 'FOIA - Request: 20-FOI-00055' and shows 'Remaining Days: 18' and 'Status: Assigned'. On the left, a sidebar contains navigation links: Request Information, Assign Users, Correspondence, Request for Documents (0/0) (highlighted with a red circle 'A'), Electronic Document Review (0/0), and Add/Search/View Documents (0/0). The main content area is titled 'Request for Documents' and contains a table with columns: Action ID, Location(s) Referred, Request Date, Sent Date, Due Date, Completed Date, and Status. Below the table, there is a message: 'There are no Request for Document records.' and a pagination bar showing 'Page size: 100' and '0 items in 1 pages'. At the bottom, there are several buttons: New (highlighted with a red circle 'B'), Take Action, View, Delete, Messages(0/0), Send Email/Reminder, Send Reminder by Print, and Action(s) Log.

3. On the *New Request for Documents* screen, locate the *Request for Documents mode* and select **Send via Collaboration**. This option submits the request to the Collaboration Portal.



Collaboration for ATIPXpress Users

Previous

New Request for Documents - Step 1

New Request for Documents - Step 2

Request for Documents mode : **Send via Email/Save**

Request for Documents Information

Request Date * : 6/8/2020

Comments :

Spell Check

Note: If including an [Empty ADX File](#) with the Request for Documents the Comments entered will be included in the file for the recipients review otherwise the comment is kept for internal purposes only.

Due Date * : 6/8/2020 ☐ Add Reminder

Priority :

- In the Send to: Offices of Primary Interest section, click **Add Office of Primary Interest**. The Create/Search Offices of Primary Interest/Consultancy screen appears as shown below:

Create/Search Offices of Primary Interest/Consultancy

Search Offices of Primary Interest/Consultancy Create New Offices of Primary Interest/Consultancy

Search Criteria Wild card searches (*) are supported

Basic Information

Offices of Primary Interest : *

Action Office 01 : All

Active : ☒ All ☐ No ☐ Yes

Category 01 : ☐ Offices of Primary Interest ☐ Consultancy Location ☒ Both

edit 01 Delete Search Clear Close 01

Name	Contact Name	Phone Number	Province	Postal Code	Active	Has RX	RFD Provider	Action Office 01	Category 01
HQ PQ	M, Ambica				Yes	Yes	No	HQ	Program Office
Test PQ	Milbourne, Marcus				Yes	No	Yes	AINS	Both
test PQ	M, Ambica M				Yes	No	Yes	HQ	Consultancy Location

Page size 100

3 items in 1 pages

Note: Click on hyperlink to view/edit Office of Primary Interest.

- Here you can search for and select from existing Offices of Primary Interest/Consultancies, or **Create New Office of Primary Interest /Consultancy**.

(!!) Note: If you create a new Office of Primary Interest/Consultancy, you must select the Collaborate Access Portal checkbox to submit requests to a office/consultancy:

[Use , to separate mail addresses]

Phone Number:

Alternate Phone Number:

Fax:

State: Select a State

ZIP Code: [12345]

☒ Collaboration Access Portal

Login (Email) :

Check Availability

Note: The Collaboration Room allows a single email address and will automatically pick up the first email



- When you've selected at least one office/consultancy, click **Select** to add these to the RFD, then click **Next** to move to step 2:

Previous

New Request for Documents - Step 1 → New Request for Documents - Step 2

Request for Documents mode: Send via Collaboration

Request for Documents Information

Request Date * : 6/8/2020

Comments : Need all the documents you have about that thing. You know the one. Spell Check

Note: If including an [Empty ADX File](#) with the Request for Documents the Comments entered will be included in the file for the recipients review otherwise the comment is kept for internal purposes only.

Due Date * : 6/8/2020 ☐ Add Reminder

Priority :

Send To : Program Offices Add Program Offices

Action Office	Program Office	Contact Name	Phone	Contact Address	Email	Actions
HQ	Normalville Office	Gatewood, John			jgatewood@ains.com	✖

Next

Note: * fields are mandatory

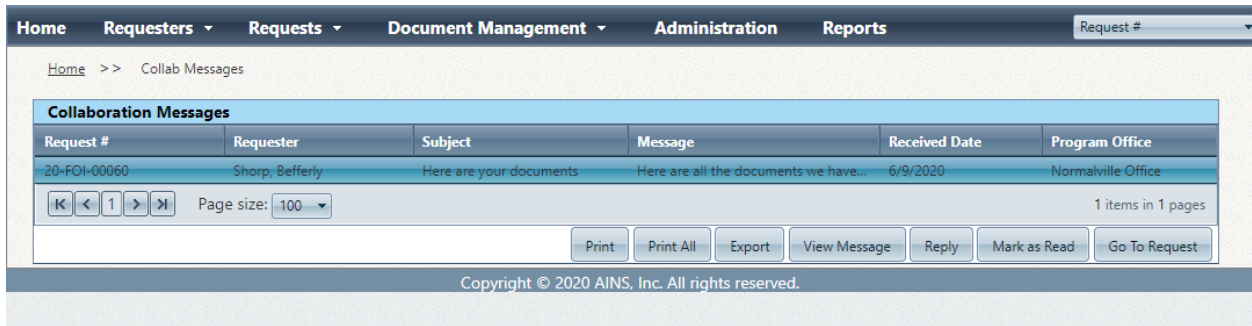
- The *New RFD - Step 2* screen appears as shown below. First add any (A) Attachments, such as the original request letter for context:
- You can also configure the message the end user receives with the request in the collaboration portal. First add a (B) Subject for the message. You can also edit the (C) message body as needed.
- When you're ready to submit the request, click **Send Message**. A pop up message appears to confirm sending the RFD. Click **OK** to continue.
- After the job processes, click **Close Window**. The *Request for Documents* screen refreshes with the new RFD included on the list.

2.1.2 Receiving an RFD Response

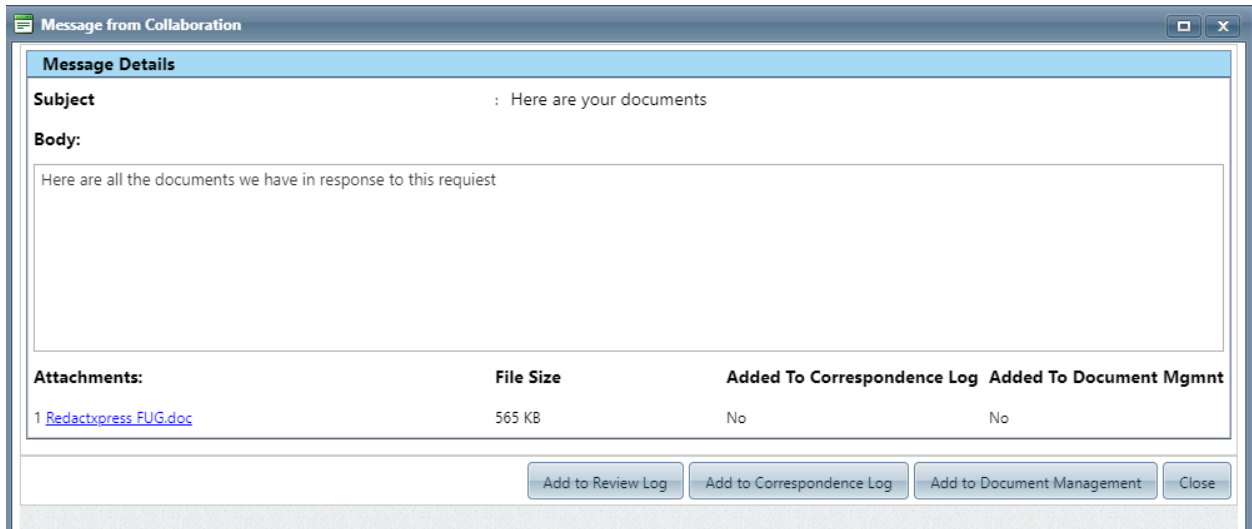
When you receive a response to a request sent to the portal, the easiest point of access is via your *Messages* on the Home Page. Follow the steps below to receive records provided from the portal.

- Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:

Collaboration for ATIPXpress Users

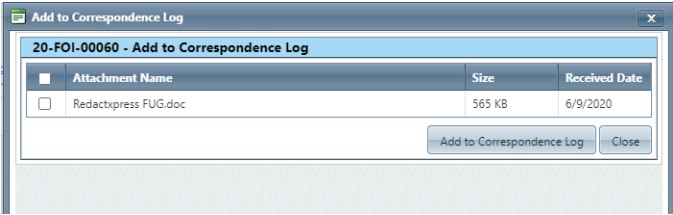
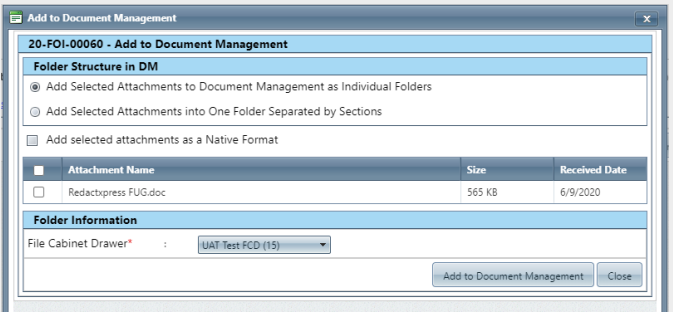


2. Select the new message and click **View Message**. The subject/body of the message should alert you that this message contains the responsive documents:

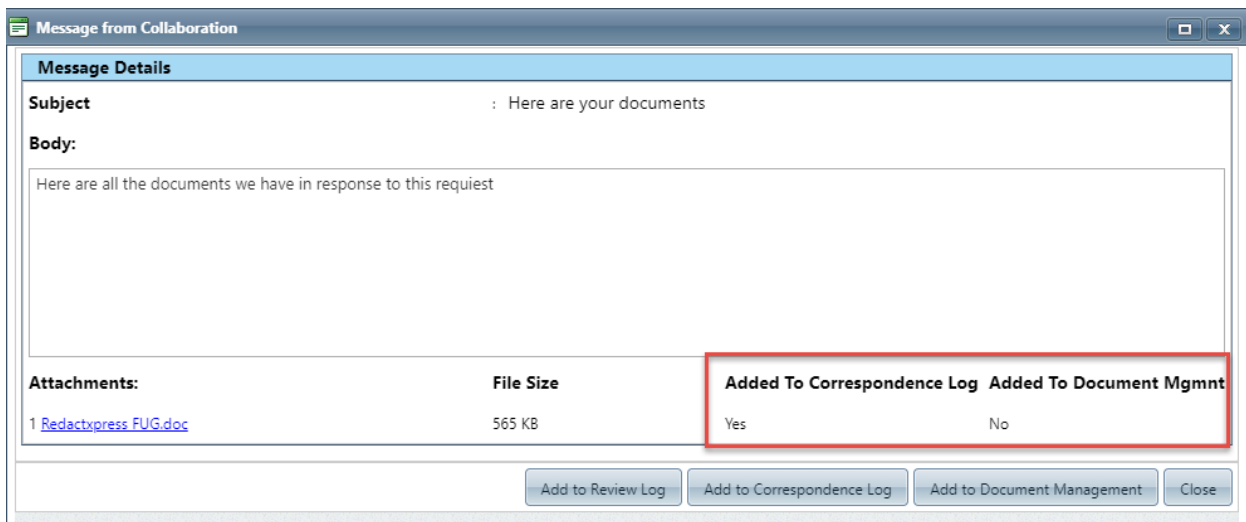


3. There are three options for moving the documents into ATIPXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

Action	Description	Image
Add to Review Log	<p>Add the attachments to the Review Log of the request for further processing.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	

Action	Description	Image
Add to Correspondence Log	<p>Add the attachments to the Correspondence Log of the request.</p> <p>Select <i>Attachments</i> to include and click Add to Correspondence Log.</p>	
Add to Document Management	<p>Add the attachments to Document Management.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	

4. After adding attachments, the action is reflected on the *Message Details* screen as shown below:



Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 Redactxpress FUG.doc	565 KB	Yes	No

5. Click **Close**, then click **Go To Request** from the *Collaboration Messages* screen:

The screenshot shows the 'Collaboration Messages' screen. At the top, there is a navigation bar with 'Home', 'Requesters', 'Requests', 'Document Management', 'Administration', and 'Reports'. Below this, there is a table with columns: Request #, Requester, Subject, Message, Received Date, and Program Office. The first row shows a request with ID '20-FOI-00060' from 'Shorp, Befferly' with the subject 'Here are your documents' and message 'Here are all the documents we have...'. Below the table, there are navigation buttons (K, <, 1, >, X) and a 'Page size: 100' dropdown. At the bottom right, the 'Go To Request' button is circled in red. Other buttons include 'Print', 'Print All', 'Export', 'View Message', 'Reply', and 'Mark as Read'.

6. Click **Request for Documents** then select the request you just completed and click **Take Action**:

The screenshot shows the 'Request for Documents' screen. It features a table with columns: Action ID, Location(s) Referred, Request Date, Sent Date, Due Date, Completed Date, and Status. Two rows are visible, both with status 'Request for Documents Sent'. Below the table, there are navigation buttons (K, <, 1, >, X) and a 'Page size: 100' dropdown. At the bottom, the 'Take Action' button is circled in red. Other buttons include 'New', 'View', 'Delete', 'Messages (0/0)', 'Send Email/Reminder', 'Send Reminder by Print', and 'Action(s) Log'.

7. On the *Request for Documents Action* screen, under *Status* select **Completed**.

The screenshot shows the 'Request For Documents Action' screen. It has a title bar 'Request For Documents Action' and a subtitle 'New Action - Request for Documents -49'. The form contains several fields: 'Location' (Normalville Office (jgatewood@ains.com)), 'Action Date*' (6/9/2020), 'Status*' (Completed), 'Comments' (empty text area), 'Due Date*' (6/7/2020), 'Completed Date*' (6/9/2020), and 'Attachment' (a dashed box labeled 'Drag and Drop Zone' containing buttons for 'Scan File', 'Attach File', 'Print Barcode', and a link for 'Professional Referen...'). At the bottom right, there are 'Save' and 'Cancel' buttons.

8. Check the **Completed** checkbox and enter the **Completed Date**.
9. Click **Save** to save the action. The status updated to *Completed*, and the RFD updates on the portal side to let the portal user know the task is complete:

Request for Documents						
Action ID	Location(s) Referred	Request Date	Sent Date	Due Date	Completed Date	Status
49	Normalville Office (jgatewood@ai...	06/07/2020	06/08/2020	06/07/2020	06/09/2020	Completed
48	Normalville Office (jgatewood@ai...	06/08/2020	06/08/2020	06/08/2020		Request for Documents Sent

[Navigation icons] Page size: 100 2 items in 1 pages

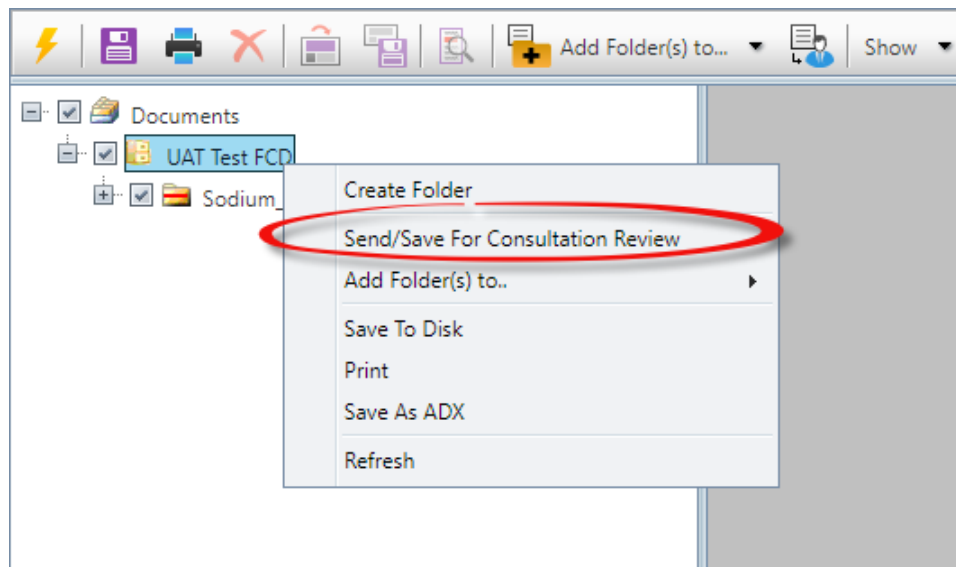
[New] [Take Action] [View] [Delete] [Messages(0/0)] [Send Email/Reminder] [Send Reminder by Print] [Action(s) Log]

2.2 Consultation Reviews

2.2.1 Send Documents for Consultation Review

The Collaboration Portal allows you to send documents directly from Document Management to the portal for review. Follow the steps below to send documents for consultation:

1. First, open the folder you'd like to send in Document Management. In *Document Management*, select the **Document/Folder** to send for review and load any review layer you'd like to include.
2. Right click the Document/Folder and click Send/Save for Consultation Review:



3. The *Send/Save Documents for Consultation* screen appears as shown below. First, under *Consultation Type*, you must select **Send via Collaboration Room**. This ensures the request is sent to the portal for consultation review:

Collaboration for ATIPXpress Users

Send/Save Documents for Consultation

Consultation Contact

Consultation Type

Review Information

Request ID: [Text Box]

Review Due Date *: 6/9/2020 [Calendar Icon]

Comments: [Text Area]

☐ Add Reminder

Task: [Dropdown Menu]

Include Document Review Flags: All [Dropdown Menu]

Reviewers Information

Location(s) Referred: * HQ [Text Box]

Include Co []

Select a M []

Include Revi []

Comment []

Highlight []

4. In the *Review Information* section, click the **Lookup** button to locate a request to associate with this consultation.
5. In the *Reviewers Information*, select an eligible **Consultation Location**.
6. Under *Email Template*, select a message template to send with the consultation. Click **Customize** to customize the template for this consultation:

Customize Email Template

Subject* FOIA Request #20-FOI-00060 - Request for Re

Email Body*

June 09, 2020

To: Normalville Office

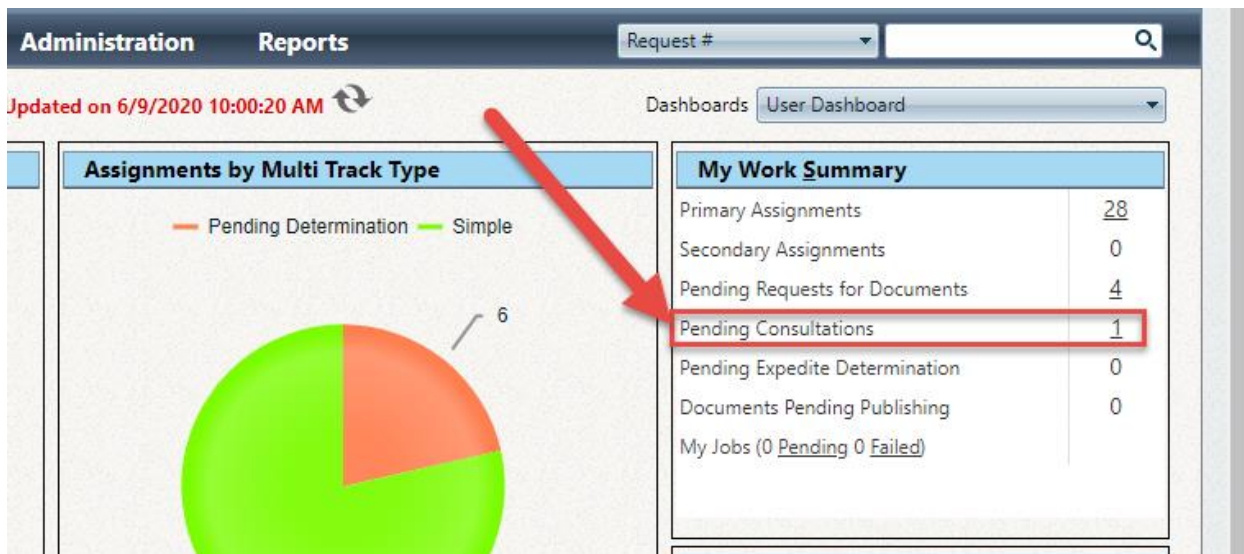
Save Cancel

Note: * fields are mandatory

7. In the *Customize Email Template* screen, edit the message however you need. When you're done, click **Save**.
8. When you've configured all of the details on the *Send/Save Documents for Consultation* screen, click **OK** to continue.



- The job processes, and on completion the consultation is sent to the portal. You can view the consultation from the *My Work Summary* section of the Home Page by clicking **Pending Consultations**:



- Follow the steps in the *Receiving Responsive Documents* section for details on receiving a Consultation Review from the portal.

2.2.2 Receiving a Consultation Review

When you receive a response to a consultation review sent to the portal, the easiest point of access is via your *Messages* on the Home Page. Follow the steps below to receive records provided from the portal. These steps apply to both *Consultation Reviews* and *Requests for Documents*.

- Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:

Home >> Collab Messages

Collaboration Messages

Request #	Requester	Subject	Message	Received Date	Program Office
20-FOI-00062	Sharp, Befferly	Reviewed Documents	Made some minor changes, otherwise lo...	6/9/2020	Normalville Office

Page size: 100

1 items in 1 pages

Print Print All Export View Message Reply Mark as Read Go To Request

- Select the new message and click **View Message**. The subject/body of the message should alert you that this message contains the responsive documents:

Message from Collaboration

Message Details

Subject : Reviewed Documents

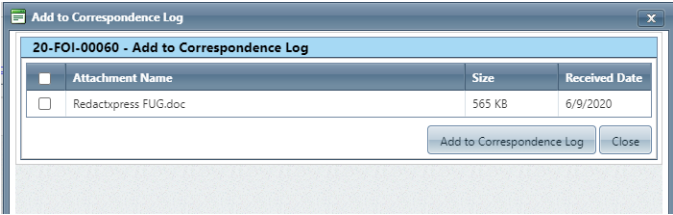
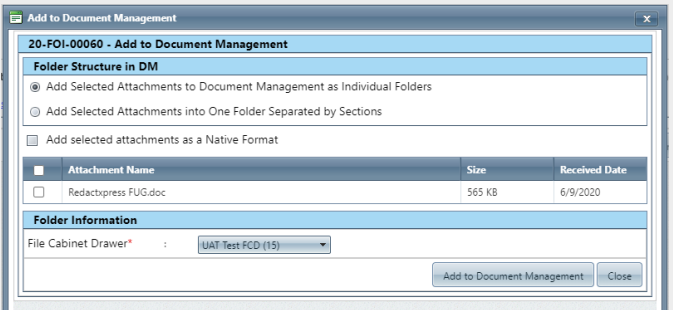
Body:

Made some minor changes, otherwise looks good!

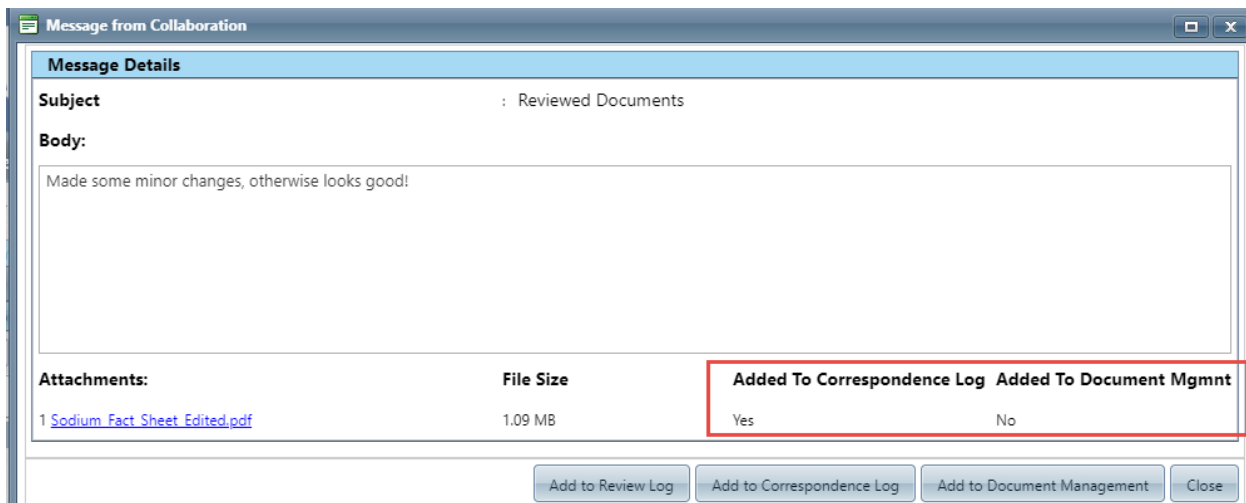
Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 Sodium Fact Sheet Edited.pdf	1.09 MB	No	No

3. There are three options for moving the documents into ATIPXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

Action	Description	Image						
Add to Review Log	<p>Add the attachments to the Review Log of the request for further processing.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	<p>Add to Review Log</p> <p>20-FOI-00060 - Add to Review Log</p> <p>Folder Structure in DM</p> <p> <input checked="" type="radio"/> Add Selected Attachments to Document Management as Individual Folders <input type="radio"/> Add Selected Attachments into One Folder Separated by Sections <input type="checkbox"/> Add selected attachments as a Native Format </p> <table border="1"> <thead> <tr> <th>Attachment Name</th> <th>Size</th> <th>Received Date</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Redactxpress FUG.doc</td> <td>565 KB</td> <td>6/9/2020</td> </tr> </tbody> </table> <p>Folder Information</p> <p>File Cabinet Drawer* : <input type="text" value="UAT Test PCD (15)"/></p> <p> <input type="button" value="Add to Review Log"/> <input type="button" value="Close"/> </p>	Attachment Name	Size	Received Date	<input type="checkbox"/> Redactxpress FUG.doc	565 KB	6/9/2020
Attachment Name	Size	Received Date						
<input type="checkbox"/> Redactxpress FUG.doc	565 KB	6/9/2020						

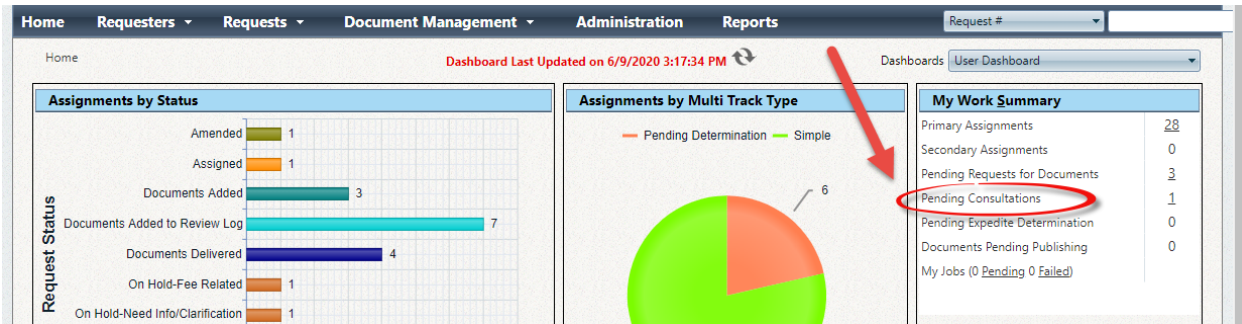
Action	Description	Image
Add to Correspondence Log	<p>Add the attachments to the Correspondence Log of the request.</p> <p>Select <i>Attachments</i> to include and click Add to Correspondence Log.</p>	
Add to Document Management	<p>Add the attachments to Document Management.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	

4. After adding attachments, the action is reflected on the *Message Details* screen as shown below:



Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 Sodium Fact Sheet Edited.pdf	1.09 MB	Yes	No

- Click **Close**, then click **Home** to access the home screen. Under *My Work Summary*, select **Pending Consultations**:



- Select the request you just completed and click **Take Action**:

Request for Documents						
Action ID	Location(s) Referred	Request Date	Sent Date	Due Date	Completed Date	Status
49	Normalville Office (jgatewood@ai...	06/07/2020	06/08/2020	06/07/2020		Request for Documents Sent
48	Normalville Office (jgatewood@ai...	06/08/2020	06/08/2020	06/08/2020		Request for Documents Sent

K < 1 > X Page size: 100 2 items in 1 pages

New Take Action View Delete Messages (0/0) Send Email/Reminder Send Reminder by Print Action(s) Log

- On the *Take Action* screen, under *Status* select **Review Complete**.
- Check the **Completed** checkbox and enter the **Completed Date**.

New Action - Consultation Review Log -1

Location : Normalville Office

Action Date* : 6/9/2020

Status* : Review Complete

Import

Comments :

Due Date* : 6/9/2020

☒ Completed

Completed Date* : 6/9/2020

Attachment :

Drag and Drop Zone

Scan File

Attach File

Print Barcode

Save

Cancel

Note: * fields are mandatory

9. Click **Save** to save the action.

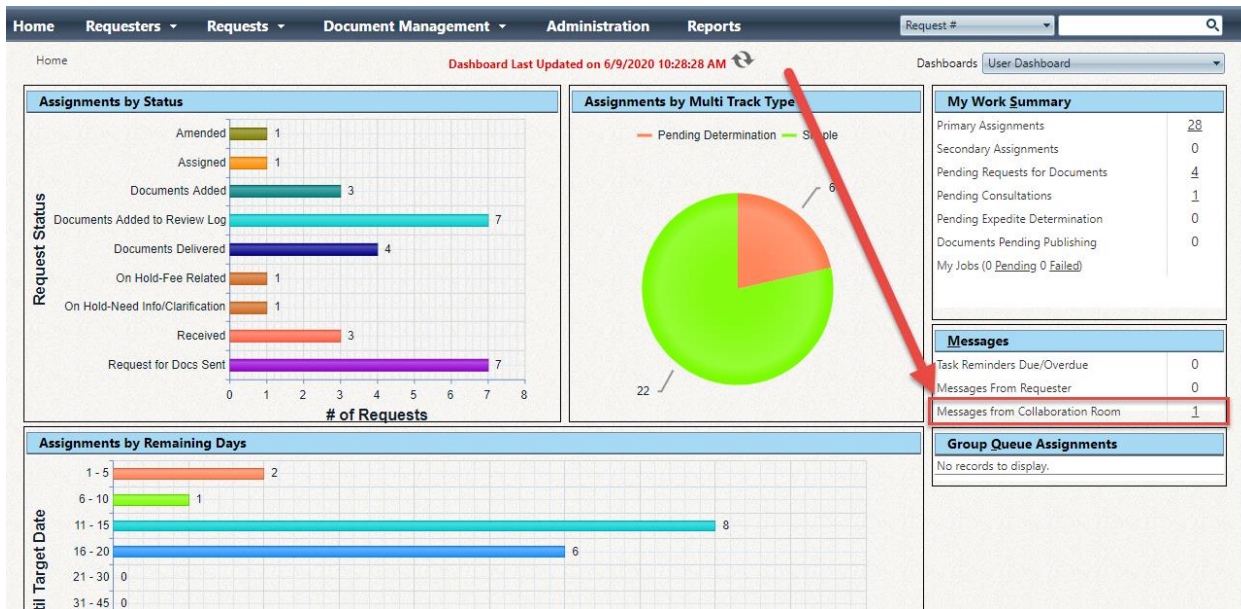
2.3 Correspondence

You can use the *Messages* feature to communicate with Portal users. Keep an eye on the *Messages* widget on the Home Page, where you can view **Messages from Collaboration Room**.

1. From the Home Page, click the **Messages from Collaboration Room** link to view messages received from the Collaboration Room.



Collaboration for ATIPXpress Users



- The *Collaboration Messages* screen appears as shown below. The screen includes a (A) list of messages received from the Collaboration Portal, as well as (B) Actions you can take on the messages, including **View Message**, **Reply**, **Mark as Read**, and **Go To Request**, which links directly to the associated Request.

Home >> Collab Messages

Request #	Requester	Subject	Message	Received Date	Program Office
20-FOI-00060	Shorp, Befferly	Example attachment	Here's an attachment, as an example.	6/9/2020	Normalville Office
20-FOI-00060	Shorp, Befferly	Clarification on the thing	Do you mean THE thing, or THAT thing...	6/9/2020	Normalville Office

Page size: 100 2 items in 1 pages

Print Print All Export View Message Reply Mark as Read Go To Request

- Select a message from the list and click **View Message** to view the message contents and details:

Message from Collaboration

Message Details

Subject: Example attachment

Body:

Here's an attachment, as an example.

Attachments: (A) 1 10.6 Cover Page.pdf

File Size: 1.04 MB

Added To Correspondence Log: No

Added To Document Mgmt: No

(B) Add to Review Log (C) Add to Correspondence Log (D) Add to Document Management Close



4. The *Message Details* includes the message *Subject* and *Body*. If the message includes any (A) *Attachments*, there are options to take these attachments and (B) **Add to Review Log**, (C) **Add to Correspondence Log**, or (D) **Add to Document Management**.
5. You can also click **Reply** to respond to the portal. The correspondence interface appears as shown below:
6. The (A) *Original Message* is present in the top portion of the screen. Enter your response in the *Compose Message* fields, providing both the (B) **Subject** and (C) **Body**, as well as (optionally) any *Attachments*. When you're ready to send it, click (D) **Send**:

The screenshot shows a web application window titled "Message from Collaboration". It is divided into two main sections: "Original Message" and "Compose Message".

Original Message (A): This section displays the details of a received message. The subject is "Clarification on the thing" and the body is "Do you mean THE thing, or THAT thing? This is an i...".

Compose Message: This section allows the user to reply. It includes:

- Subject* (B):** A text field with "Re:" entered.
- Body* (C):** A large text area for composing the response.
- Attachment:** A section with "Attach From Disk" and a "Select" button, followed by "OR" and a link "Attach from Request Correspondence Log".
- Buttons (D):** "Send" and "Back" buttons at the bottom right.

Note: * fields are mandatory

7. If you click **Mark as Read** on a selected message, it is removed from this *Collaboration Messages* list.

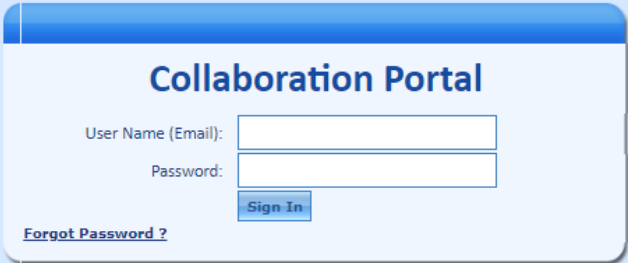
3 Collaboration for Portal Users

This section provides instructions for Collaboration Portal users to work on tasks received from ATIPXpress. The following topics are covered in this section:

- *Accessing the Collaboration Portal:* Logging in to the portal and an overview of the UI
- *Requests for Documents:* Details on receiving and fulfilling a Request for Documents.
- *Consultation Reviews:* How to complete and assigned Consultation Review using Collaboration.
- *Sending Messages Using the Portal:* Sending and receiving messages from the Portal

3.1 Accessing the Collaboration Portal

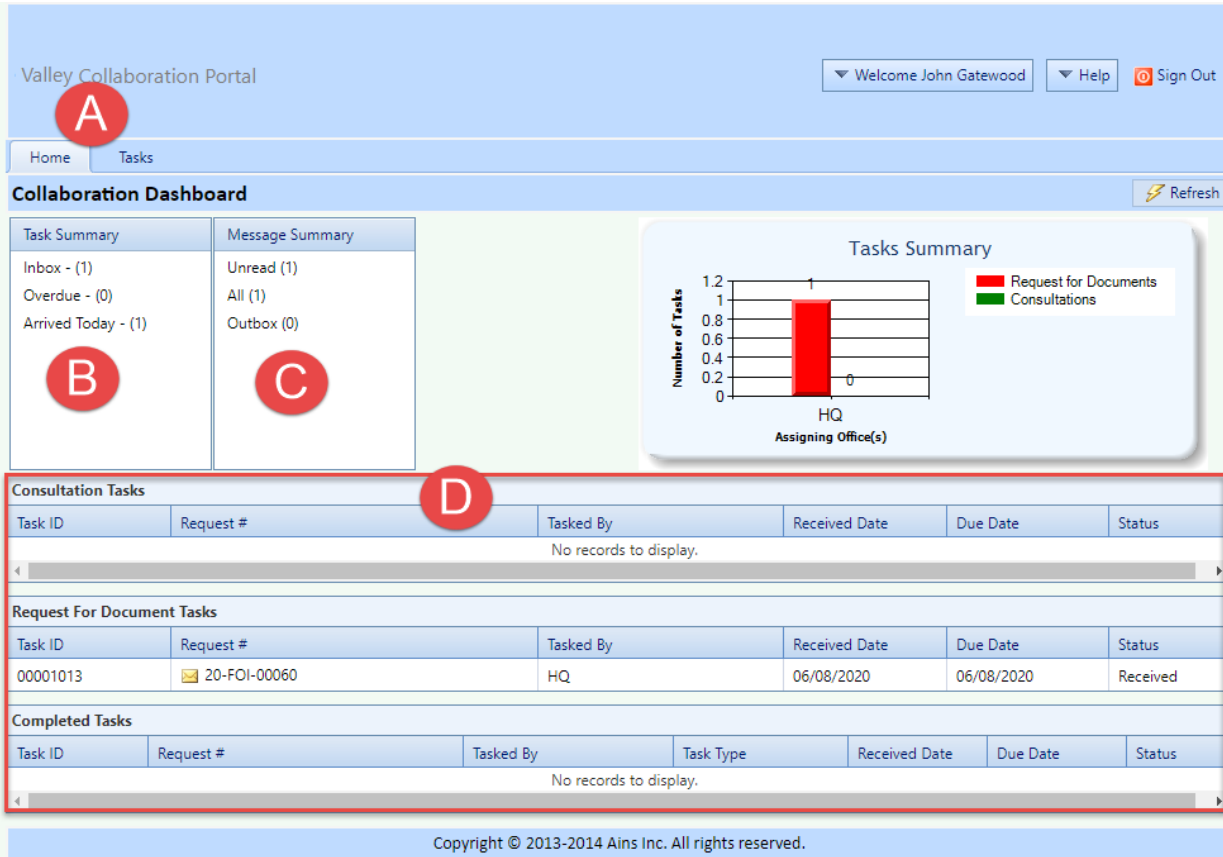
As a collaboration portal user, you will receive an email when your account is created, allowing you to log in to the portal. An example log in screen is shown below:

The image shows a login form for the 'Collaboration Portal'. The form has a blue header bar with the title 'Collaboration Portal' in white. Below the header, there are two input fields: 'User Name (Email):' and 'Password:'. To the right of the 'Password:' field is a blue 'Sign In' button. Below the 'User Name (Email):' field is a blue link that says 'Forgot Password?'. The entire form is set against a light blue background.

To access the portal, provide your email address (the one associated with the portal, where you received the initial email) as well as your password, then click **Sign In**. After signing in, the *Collaboration Dashboard* appears as shown below:



Collaboration for Portal Users



The main areas of the Dashboard are described in the following table:

Ref	Element	Description
A	Tabs	The dashboard contains two tabs: the main <i>Home</i> tab (where you land on login), as well as the <i>Tasks</i> tab, which consolidates all of your current tasks in one location
B	Task Summary	The <i>Task Summary</i> widget provides links to your Inbox , Overdue tasks, and tasks which Arrived Today
C	Message Summary	The <i>Message Summary</i> widget provides quick links to Unread messages, All of your messages, and your Outbox



Ref	Element	Description
D	Tasks	Ongoing <i>Consultation Tasks</i> and <i>Request for Document Tasks</i> are listed here. There is also a listing of your <i>Completed</i> tasks.

The next sections provide steps to complete *Request for Documents Tasks*, *Consultation Tasks*, and *Sending Messages Using the Portal*.

3.2 Request for Document Tasks

3.2.1 Responding to a Request for Documents Task

After you log in to the Collaboration Portal, there are a few indicators that a new request is waiting for you. New tasks arrive in your *Task Summary*, as an unread message in your *Message Summary*, and in your *Request for Document Tasks* list.

1. In this example, we'll double click the request listed in the *Request for Documents Task* list.

The screenshot shows the 'Collaboration Dashboard' with a 'Tasks' tab selected. It includes a 'Task Summary' bar chart, a 'Message Summary' list, and three task lists: 'Consultation Tasks', 'Request For Document Tasks', and 'Completed Tasks'. A red arrow points to the task with ID 00001013 in the 'Request For Document Tasks' list.

Assigning Office(s)	Request for Documents	Consultations
HQ	2	1

Task ID	Request #	Tasked By	Received Date	Due Date	Status
00001015	20-FOI-00062	HQ	06/09/2020	06/09/2020	Received

Task ID	Request #	Tasked By	Received Date	Due Date	Status
00001014	20-FOI-00062	HQ	06/08/2020	06/08/2020	Received
00001013	20-FOI-00060	HQ	06/08/2020	06/08/2020	Submitted

Task ID	Request #	Tasked By	Task Type	Received Date	Due Date	Status
No records to display.						

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2. When you access a request for the first time, a pop up appears letting you know that confirmation of receipt has been sent to the person who sent you the RFD:



test.efoia-host.com says

Confirmation of receipt has been sent to sender.

OK

- Click **OK** to dismiss the message and view the task. The *Tasks* tab appears as shown below:

Home
Tasks

Task ID: 00001013

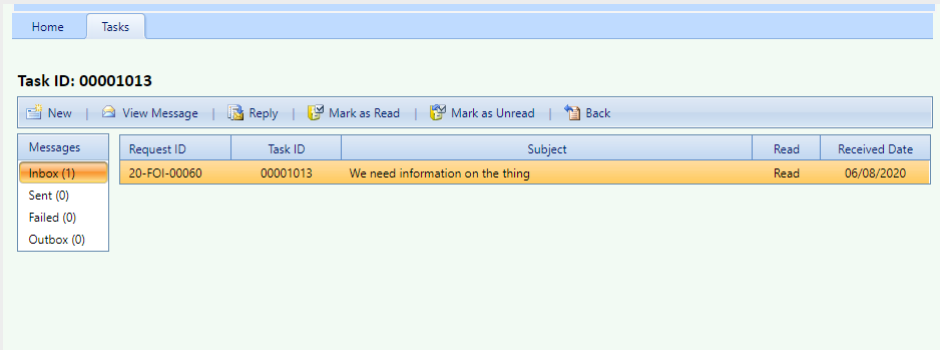
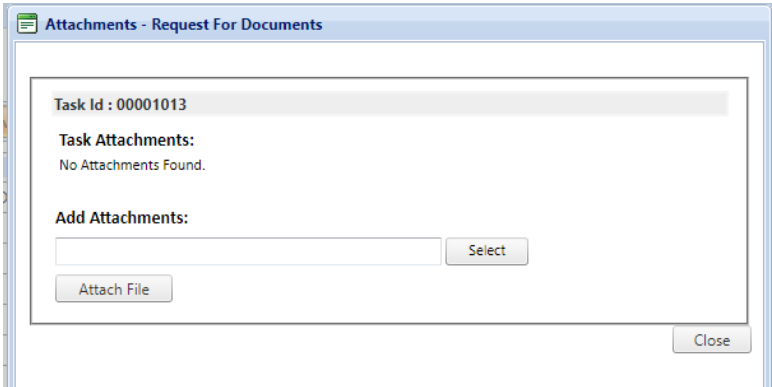
Messages 1/1
View/Add Attachments (0)
Notes Log (1)
Change Status
Submit Completed Task
Back

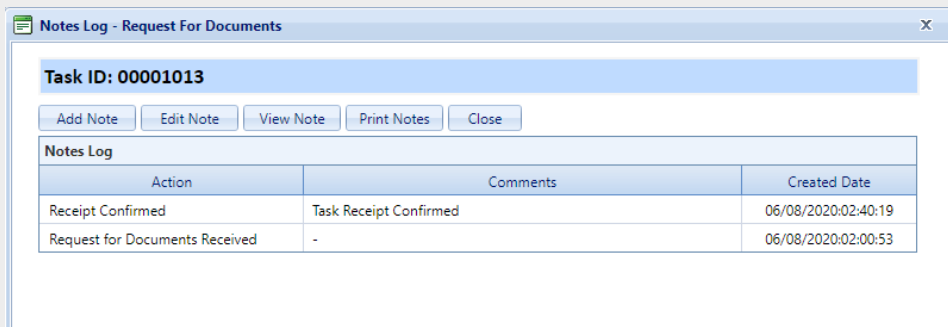
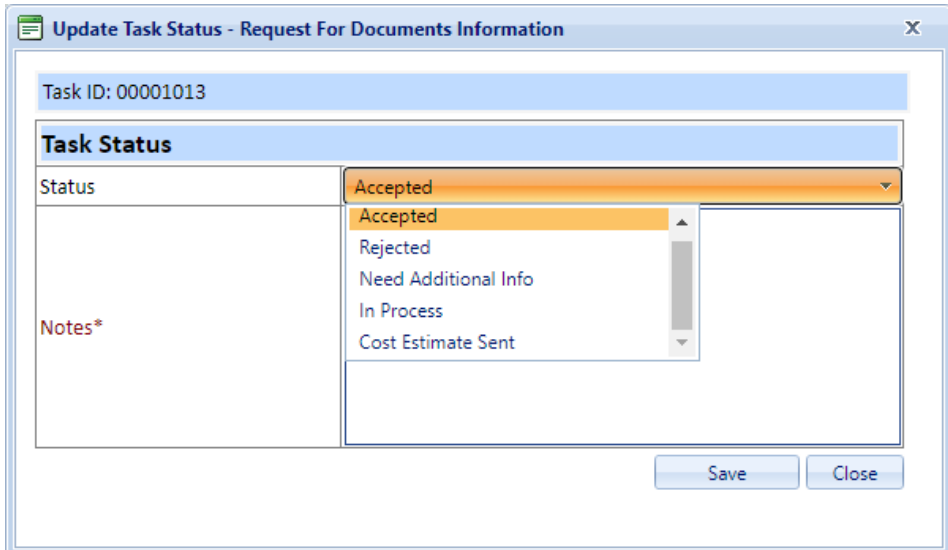
Request Information	
Request for Documents ID	48
Request #	20-FOI-00060
Status	Received
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	I want to know about that thing. You know what I mean. (Date Range for Record Search: From 1/1/2020 To 6/1/2020)

Sender Information	
First Name	Admin
Last Name	Admin
Email	admin@ains.com
Tasked By	HQ
Phone Number	-
Comments	Need all the documents you have about that thing. You know the one.

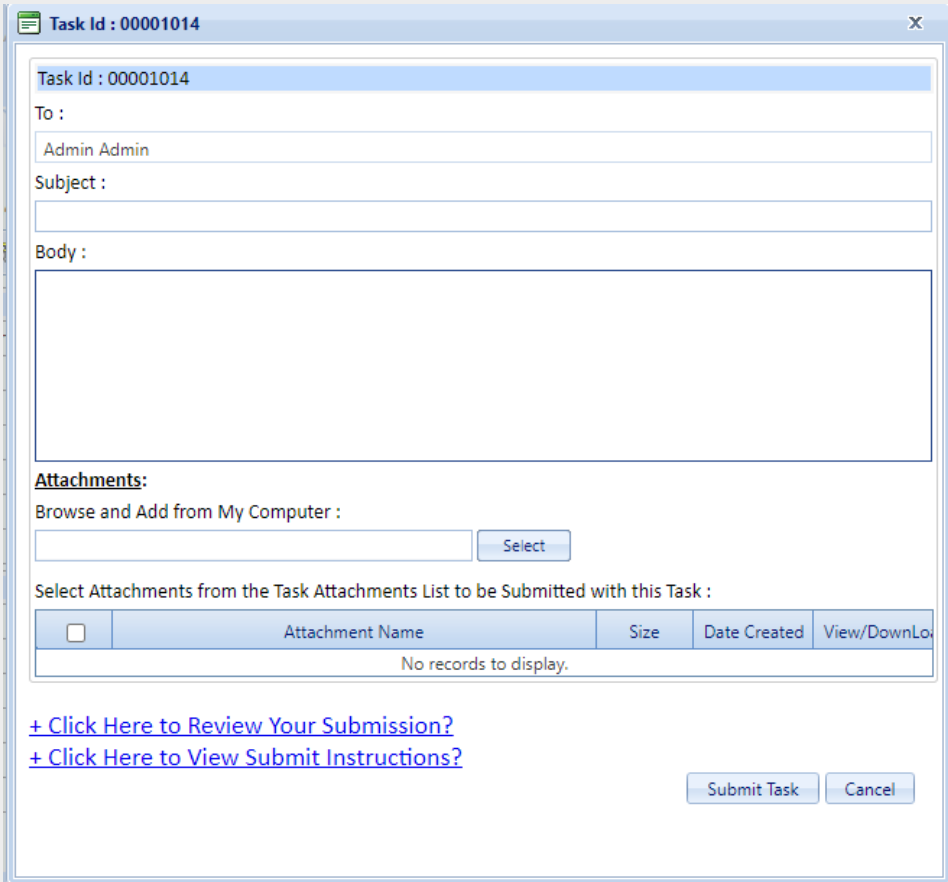
- This includes all the information provided by the user who sent the RFD. This is also the screen where you'll take action to respond to this request. These actions are described below:



Action	Interface
<p>Click Messages to access correspondence for this task. You can send a New message to the user who sent the request, or View/Reply to messages in your inbox.</p>	 <p>The screenshot shows a web interface for a task. At the top, there are tabs for 'Home' and 'Tasks'. Below this, the task ID '00001013' is displayed. A toolbar contains icons for 'New', 'View Message', 'Reply', 'Mark as Read', 'Mark as Unread', and 'Back'. On the left, a 'Messages' sidebar shows 'Inbox (1)', 'Sent (0)', 'Failed (0)', and 'Outbox (0)'. The main area displays a table with columns: Request ID, Task ID, Subject, Read, and Received Date. One message is listed with Request ID '20-FOI-00060', Task ID '00001013', Subject 'We need information on the thing', Read status 'Read', and Received Date '06/08/2020'.</p>
<p>Click View/Add Attachments to attach documents to this RFD for submittal back to the requester. You can also view any attachments included with this original request.</p>	 <p>The screenshot shows a dialog box titled 'Attachments - Request For Documents'. It contains the text 'Task Id : 00001013' and 'Task Attachments: No Attachments Found.' Below this, there is an 'Add Attachments:' section with a text input field, a 'Select' button, and an 'Attach File' button. A 'Close' button is located at the bottom right of the dialog.</p>

Action	Interface									
<p>The Notes option lets you view all notes on this task. This includes both automated notes on system processes, as well as any notes added manually using the Add Note option.</p>	 <p>Notes Log - Request For Documents</p> <p>Task ID: 00001013</p> <p>Buttons: Add Note, Edit Note, View Note, Print Notes, Close</p> <table><thead><tr><th>Action</th><th>Comments</th><th>Created Date</th></tr></thead><tbody><tr><td>Receipt Confirmed</td><td>Task Receipt Confirmed</td><td>06/08/2020:02:40:19</td></tr><tr><td>Request for Documents Received</td><td>-</td><td>06/08/2020:02:00:53</td></tr></tbody></table>	Action	Comments	Created Date	Receipt Confirmed	Task Receipt Confirmed	06/08/2020:02:40:19	Request for Documents Received	-	06/08/2020:02:00:53
Action	Comments	Created Date								
Receipt Confirmed	Task Receipt Confirmed	06/08/2020:02:40:19								
Request for Documents Received	-	06/08/2020:02:00:53								
<p>Use the Update Task Status feature to track progress on this task. This status is internal to the Collaboration Portal and is not reported back to the requester. The selectable statuses are shown in the example screen.</p>	 <p>Update Task Status - Request For Documents Information</p> <p>Task ID: 00001013</p> <p>Task Status</p> <p>Status: Accepted (dropdown menu open showing: Accepted, Rejected, Need Additional Info, In Process, Cost Estimate Sent)</p> <p>Notes*</p> <p>Buttons: Save, Close</p>									



Action	Interface
<p>Click Submit Completed Task to submit responsive materials to the requester.</p> <p>Here you can include a message, as well as select from existing attachments to include with the response package. There is also the option to add attachments by clicking Select from the <i>Browse and Add from My Computer</i> field.</p> <p>See the <i>Complete a Request for Documents</i> section for more.</p>	

5. You can now opt to *Accept* or *Reject* this request. Click **Change Status** to mark this request as **Accepted** or **Rejected**:



Update Task Status - Consultation Review Information

Task ID: 00001015

Task Status

Status: Accepted

Notes*

Save Close

(!!) **Note:** There are also options to select *Need Additional Info*, *In Process*, and *Cost Estimate Sent*.

6. If for whatever reason you cannot fulfill the request, select **Rejected**, otherwise select **Accepted**. Provide **Notes** (required regardless of the status you select), then click **Save**. In this example we will accept the request.
7. Use the tools available to collaborate and fulfill this request. This includes *Sending Messages Using the Portal*

3.2.2 Completing a Request for Documents Task

When you've gathered all responsive documents to fulfill a RFD and are ready to complete the task, use the **Submit Completed Task** feature. Follow the steps below to submit a completed task.

1. In the Collaboration Portal, open the *Request For Document Task* that you are ready to complete.
2. On the *Tasks* tab, click **Submit Completed Task**:

Home Tasks

Task ID: 00001013

Messages 0/1 View/Add Attachments (1) Notes Log (2) Change Status **Submit Completed Task** Back

Request Information	
Request for Documents ID	48
Request #	20-FOI-00060
Status	Received
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	I want to know about that thing. You know what I mean. (Date Range for Record Search: From 1/1/2020 To 6/1/2020)

3. After clicking **Submit Completed Task**, the *Task Id* screen appears as shown below.

Task Id : 00001013

Task Id : 00001013

To :
Admin Admin

Subject :

Body :

Attachments:
Browse and Add from My Computer :

Select Attachments from the Task Attachments List to be Submitted with this Task :

<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

[+ Click Here to Review Your Submission?](#)
[+ Click Here to View Submit Instructions?](#)

- On this screen, provide the *Subject* and *Body* for the message that accompanies the completed Request.
- In the *Attachments* field, use the **Select** button to upload documents to include with the completed request, or you can select attachments from this task to include in the response package.
- There are also options to Click Here to Review Your Submission? And Click Here to View Submit Instructions.



- When you're ready to submit click **Submit Task**. A pop up message appears as shown below:

efoia-host.com says

Job ID '1032' has been submitted. The status of this job can be viewed from the 'My Jobs' link in your welcome dropdown on the Home Screen. An email notification will be sent when the process is complete.

OK

- Click **OK** to dismiss the message. The *Tasks* tab refreshes, with the *Status* updated to *Submitted*. Additionally, the options to **Change Status** and **Submit Completed Task** are no longer available.

3.3 Consultation Tasks

3.3.1 Responding to a Consultation Task

Consultation Tasks arrive in the *Consultation Tasks* list on your Collaboration Portal *Home* tab.

- When you receive a new Consultation Task, it appears in the list as shown below. Double click the new **Consultation Task** to open it.

Collaboration Dashboard

Task Summary
Inbox - (3)
Overdue - (2)
Arrived Today - (1)

Message Summary
Unread (1)
All (3)
Outbox (0)

Tasks Summary
Number of Tasks
2.5
2
1.5
1
0.5
0
HQ
Assigning Office(s)
Request for Documents
Consultations

Task ID	Request #	Tasked By	Received Date	Due Date	Status
00001015	20-FOI-00062	HQ	06/09/2020	06/09/2020	Received

Request For Document Tasks

Task ID	Request #	Tasked By	Received Date	Due Date	Status
00001014	20-FOI-00062	HQ	06/08/2020	06/08/2020	Received
00001013	20-FOI-00060	HQ	06/08/2020	06/08/2020	Submitted

Completed Tasks

Task ID	Request #	Tasked By	Task Type	Received Date	Due Date	Status
No records to display.						

- A pop up appears informing that the sender has been notified that you opened the task. Click **OK** to dismiss this message.

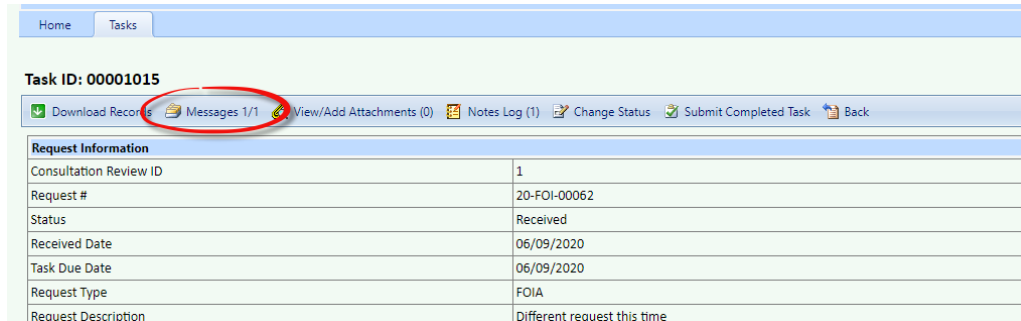


tva-test.efoia-host.com says

Confirmation of receipt has been sent to sender.

OK

- The *Tasks* tab appears with the new task details. First, click **Messages** to view the message sent with this consultation:



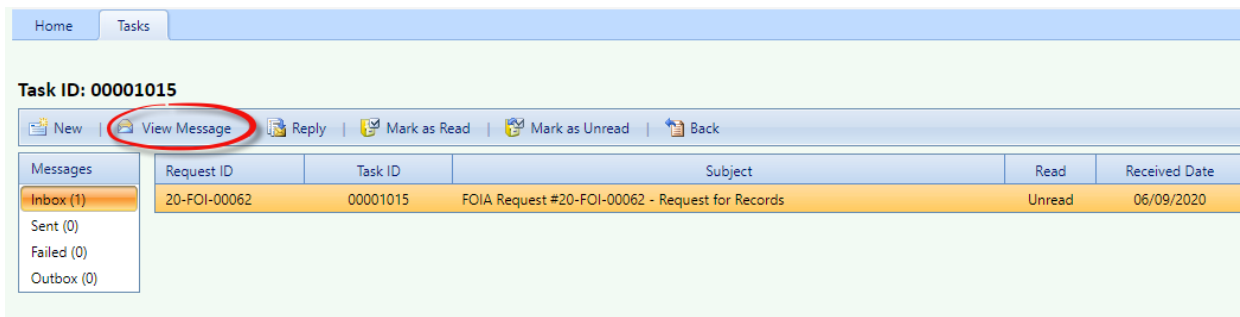
Home Tasks

Task ID: 00001015

Download Records Messages 1/1 View/Add Attachments (0) Notes Log (1) Change Status Submit Completed Task Back

Request Information	
Consultation Review ID	1
Request #	20-FOI-00062
Status	Received
Received Date	06/09/2020
Task Due Date	06/09/2020
Request Type	FOIA
Request Description	Different request this time

- Click **View Message** to view the message details:



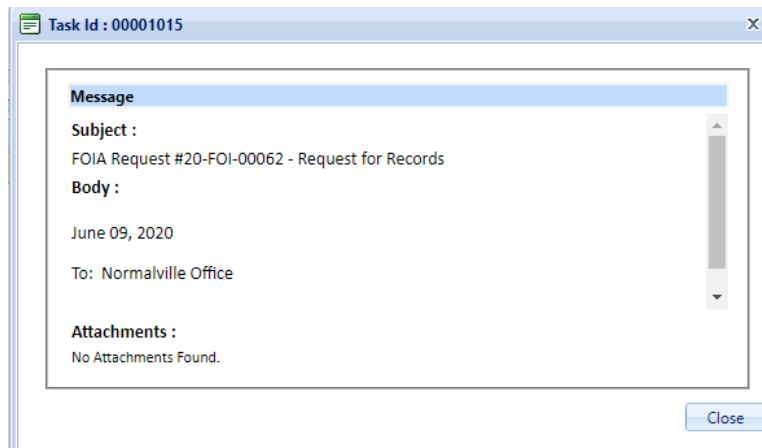
Home Tasks

Task ID: 00001015

New View Message Reply Mark as Read Mark as Unread Back

Messages	Request ID	Task ID	Subject	Read	Received Date
Inbox (1)	20-FOI-00062	00001015	FOIA Request #20-FOI-00062 - Request for Records	Unread	06/09/2020
Sent (0)					
Failed (0)					
Outbox (0)					

- Review the details of the consultation request, then click **Close**.



Task Id : 00001015

Message

Subject :
FOIA Request #20-FOI-00062 - Request for Records

Body :
June 09, 2020
To: Normalville Office

Attachments :
No Attachments Found.

Close

- The *Status* of the message updates to *Read*. Click **Back** to return to the *Task Details*.



- You can now opt to *Accept* or *Reject* this request. Click **Change Status** to mark this request as **Accepted** or **Rejected**:

(!!) **Note:** There are also options to select *Need Additional Info*, *In Process*, and *Cost Estimate Sent*.

- If for whatever reason you cannot fulfill the request, select **Rejected**, otherwise select **Accepted**. Provide **Notes** (required regardless of the status you select), then click **Save**. In this example we will accept the request.
- The status updates to *Accepted*. Next, click **Download Records**. This allows you to access the materials provided for your review.

Request Information	
Consultation Review ID	1
Request #	20-FOI-00062
Status	Accepted
Received Date	06/09/2020
Task Due Date	06/09/2020
Request Type	FOIA
Request Description	Different request this time

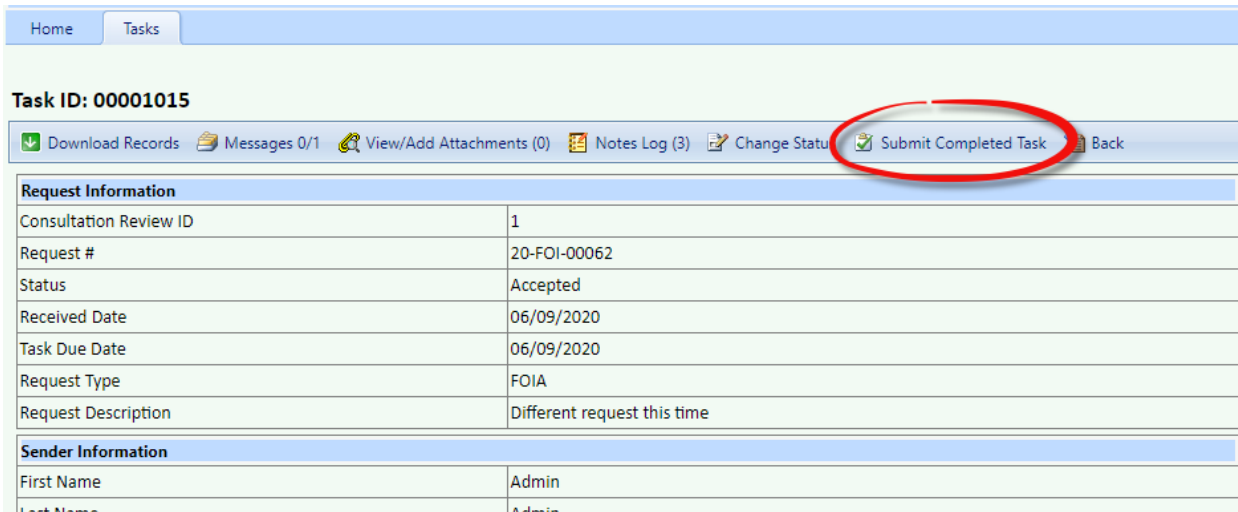
- A pop up appears confirming that you'd like to download the records for review. Click **OK** to continue:

11. The download automatically begins. You can now conduct offline review of the materials. Once your review is complete, follow the steps in the *Completing a Consultation Task* section to complete the task.

3.3.2 Completing a Consultation Task

When you've completed the offline consultation review assigned to you in the Collaboration Portal, follow the steps below to submit the completed task.

1. In the Collaboration Portal, open the *Collaboration Task* that you are ready to complete.
2. On the *Task* tab, click **Submit Completed Task**:



The screenshot shows the 'Task ID: 00001015' screen in the Collaboration Portal. At the top, there are tabs for 'Home' and 'Tasks'. Below the tabs, the task ID is displayed. A navigation bar contains several icons and labels: 'Download Records', 'Messages 0/1', 'View/Add Attachments (0)', 'Notes Log (3)', 'Change Status', 'Submit Completed Task' (which is circled in red), and 'Back'. Below the navigation bar, there are two sections: 'Request Information' and 'Sender Information'. The 'Request Information' section contains a table with the following data:

Request Information	
Consultation Review ID	1
Request #	20-FOI-00062
Status	Accepted
Received Date	06/09/2020
Task Due Date	06/09/2020
Request Type	FOIA
Request Description	Different request this time

The 'Sender Information' section contains a table with the following data:

Sender Information	
First Name	Admin
Last Name	Admin

3. After clicking **Submit Completed Task**, the *Task Id* screen appears as shown below.



Task Id : 00001013

To :
Admin Admin

Subject :

Body :

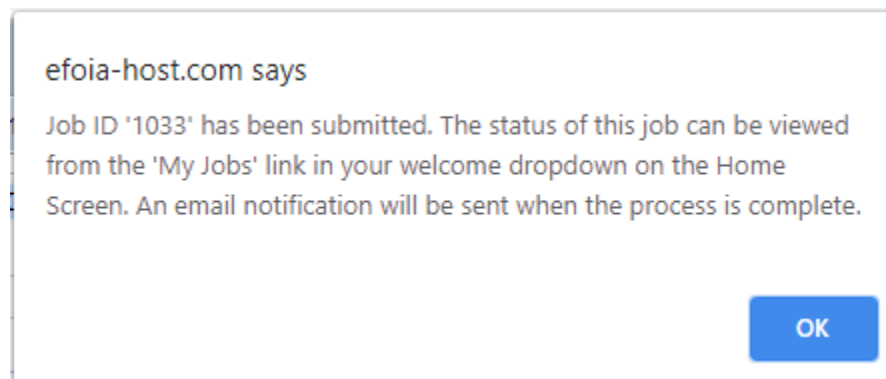
Attachments:
Browse and Add from My Computer :

Select Attachments from the Task Attachments List to be Submitted with this Task :

<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

[+ Click Here to Review Your Submission?](#)
[+ Click Here to View Submit Instructions?](#)

4. On this screen, provide the *Subject* and *Body* for the message that accompanies the completed Consultation Task.
5. In the *Attachments* field, use the **Select** button to upload the reviewed documents to be included with the completed request.
6. There are also options to Click Here to Review Your Submission? and Click Here to View Submit Instructions.
7. When you're ready to submit click **Submit Task**. A pop up message appears as shown below:

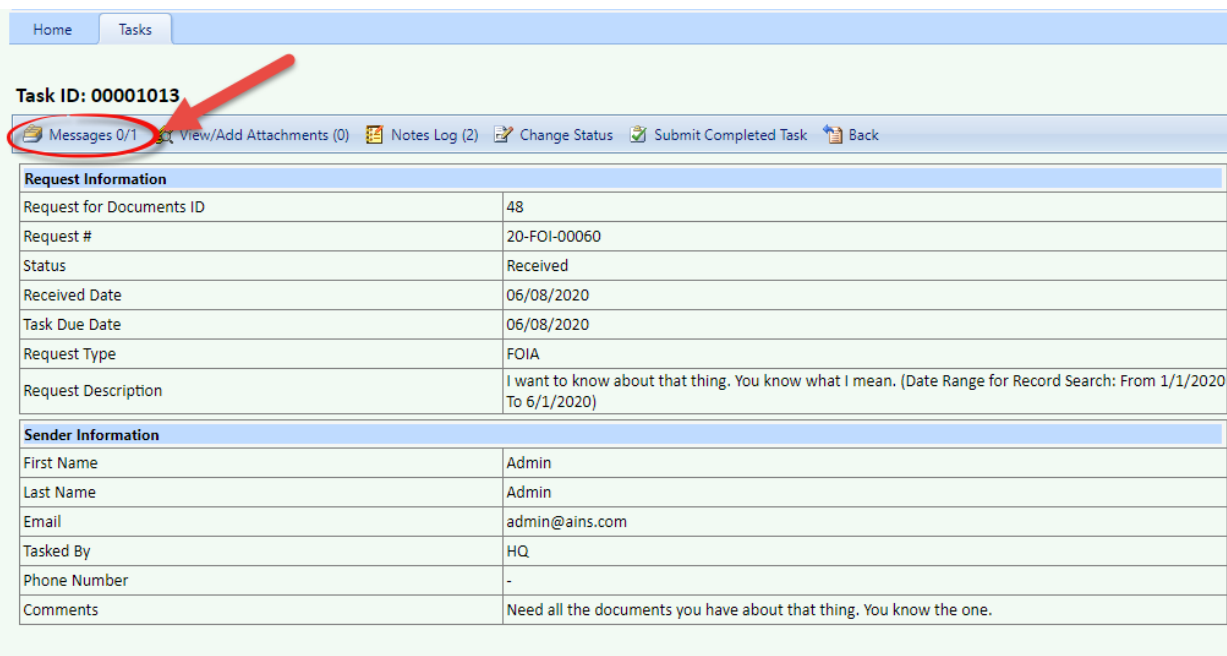


- Click **OK** to dismiss the message. The *Tasks* tab refreshes, with the *Status* updated to *Submitted*. Additionally, the options to **Change Status** and **Submit Completed Task** are no longer available.

3.4 Sending Messages Using the Portal

You can use the Collaboration Portal to communicate with the requester, share attachments, or update the status of the request. Follow the steps below to use the *Messages* feature:

- Open a Task, either an RFD or a Consultation. The process is the same for both. From the *Tasks* tab, click **Messages**:



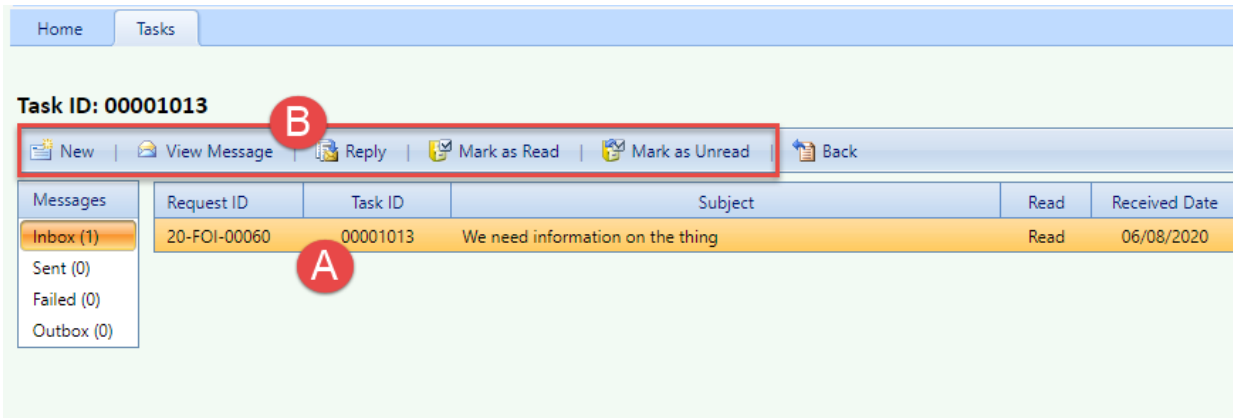
Task ID: 00001013

Messages 0/1 | View/Add Attachments (0) | Notes Log (2) | Change Status | Submit Completed Task | Back

Request Information	
Request for Documents ID	48
Request #	20-FOI-00060
Status	Received
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	I want to know about that thing. You know what I mean. (Date Range for Record Search: From 1/1/2020 To 6/1/2020)

Sender Information	
First Name	Admin
Last Name	Admin
Email	admin@ains.com
Tasked By	HQ
Phone Number	-
Comments	Need all the documents you have about that thing. You know the one.

- The *Messages* screen includes a (A) list of all messages received for this task (click **Outbox** to see any sent messages), as well as (B) *Actions* you can take:



Task ID: 00001013

New | View Message | Reply | Mark as Read | Mark as Unread | Back

Messages	Request ID	Task ID	Subject	Read	Received Date
Inbox (1)	20-FOI-00060	00001013	We need information on the thing	Read	06/08/2020
Sent (0)					
Failed (0)					
Outbox (0)					

3. You can select a message from the list and click to **View Message**, click **Reply** to reply to the selected message, or toggle the *Read* status for the selected message by clicking **Mark as Read** or **Mark as Unread**.
4. You can also send a message to the requester. Click **New** to send a new message. The *New Message* screen appears as shown below:

5. First enter a (A) *Subject*, fill in the message (B) *Body*, and add any (C) *Attachments* if needed. While you can attach documents, you should provide all responsive documents as part of the request completion process. See the *Complete a Request Details* section for steps to provide responsive documents.
6. When you're ready, click (D) **Send Message** to send the message to the requester in AX. The message appears in the *Outbox*, and after processing, is viewable by clicking your **Sent** messages:

Request ID	Task ID	Subject	Read	Received Date
20-FOI-00060	00001013	Clarification on the thing	Unread	06/09/2020

(!!) Note: If an error occurs when sending a message, it appears under the *Failed* messages.



3.5 Using Attachments in Tasks

Completing tasks assigned to you will require adding attachments to messages and task submissions. Regardless of how you access the *Attachments* function, the steps are the same. Follow the example below to use *Attachments*.

1. Open any *Task*. On the *Tasks* tab, click **View/Add Attachments**:

Task ID: 00001014

Messages 0/1 **View/Add Attachments (1)** Notes Log (3) Change Status Submit Completed Task Back

Request Information	
Request for Documents ID	50
Request #	20-FOI-00062
Status	Accepted
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	Different request this time

2. The *Attachments* screen appears. Included here are a (A) *Task Attachments* list with all current attachments (if any), as well as space to (B) *Add Attachments*:

Attachments - Request For Documents

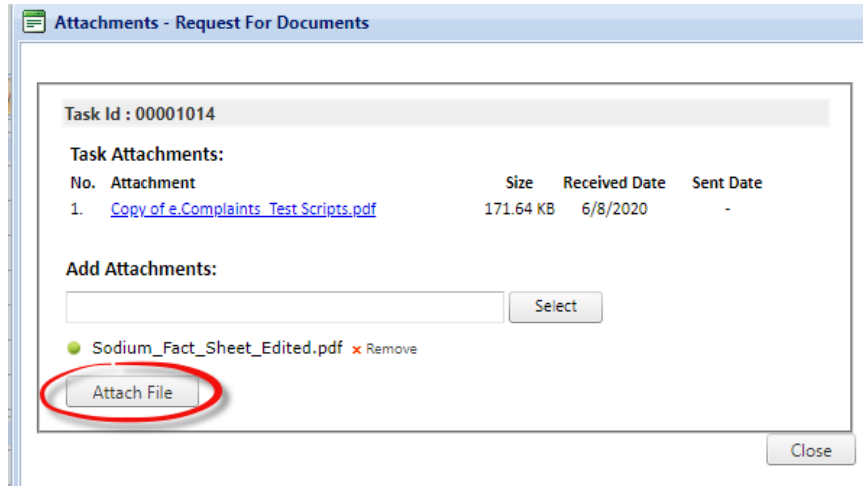
Task Id : 00001014

Task Attachments:

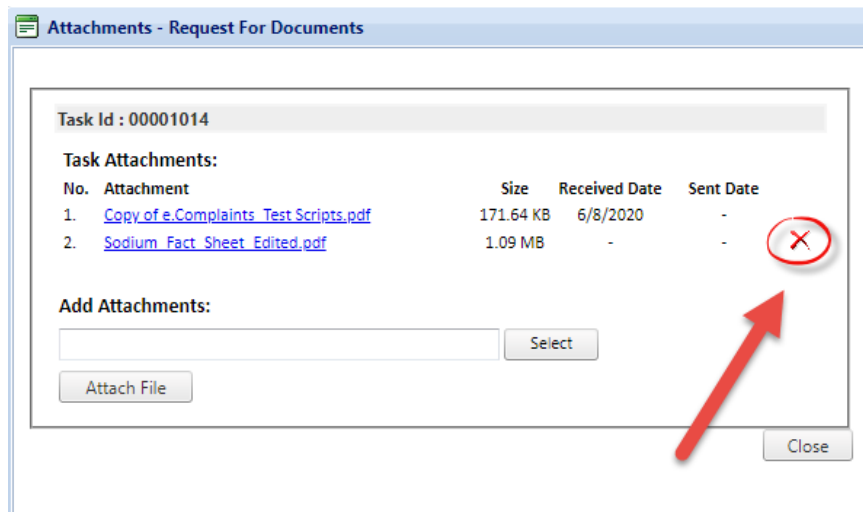
No.	Attachment	Size	Received Date	Sent Date
1.	Copy of e.Complaints Test Scripts.pdf	171.64 KB	6/8/2020	-

Add Attachments:

3. To add an attachment to the Task, first click **Select**. This opens an explorer window to locate the attachment you'd like to add. Locate the record(s) and click **Open**.
4. In the *Attachments* window, the selected files are listed under the *Add Attachments* field. When all attachments are listed, click **Attach File**.



5. The selected file is added to the *Task Attachments* list. You can also click the X next to any attachment to remove it from the Task:



(!!) Note: You can only delete records you've attached to this task.

6. A similar *Attachments* interface also appears when using the **Submit Completed Task** function:

Task Id : 00001014

Task Id : 00001014

To :
Admin Admin

Subject :

Body :

Attachments:

Browse and Add from My Computer :

Select Attachments from the Task Attachments List to be Submitted with this Task :

<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
<input type="checkbox"/>	Sodium_Fact_Sheet_Edited.pdf	1121.09...	06/09/2020	

[+ Click Here to Review Your Submission?](#)
[+ Click Here to View Submit Instructions?](#)

- Here you can click **Select** to add new attachments to the submission, or select existing attachments added through the **View/Add Attachments** interface.

3.6 Notes Log

Both Requests for Documents and Consultation Tasks include a *Notes Log* to document actions taken on these tasks. You can access the *Notes Log* from within a *Task* by click the **Notes Log** as shown in the following example:

Home Tasks

Task ID: 00001014

Messages 0/1 View/Add Attachments (2) **Notes Log (3)** Change Status Submit Completed Task Back

Request Information	
Request for Documents ID	50
Request #	20-FOI-00062
Status	Accepted
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	Different request this time

Sender Information	
First Name	Admin
Last Name	Admin
Email	admin@ains.com
Tasked By	HQ
Phone Number	-
Comments	-

The *Notes Log* appears as shown below. This screen includes a (A) Notes Log with the actions taken in filling this request. There are also several (B) Actions you can take on the log.

Notes Log - Request For Documents

Task ID: 00001014

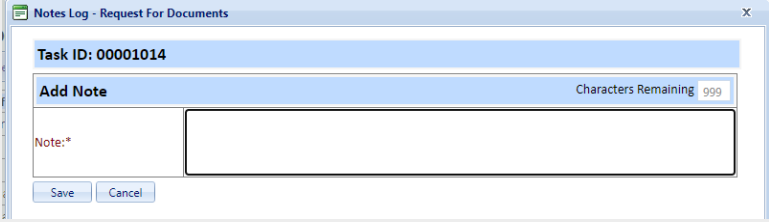
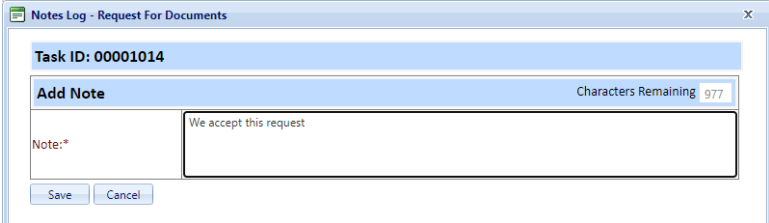
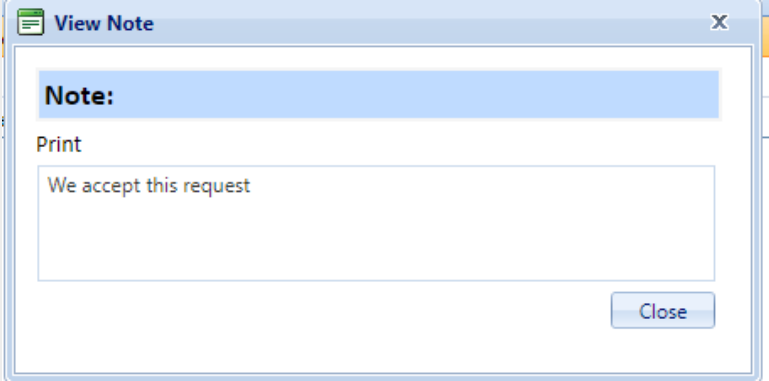
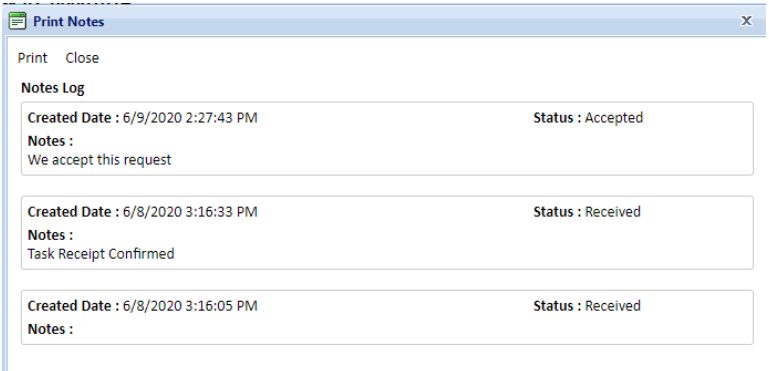
Add Note Edit Note View Note Print Notes Close

Notes Log

Action	Comments	Created Date
Request for Documents Accepted	We accept this request	06/09/2020:02:27:43
Receipt Confirmed	Task Receipt Confirmed	06/08/2020:03:16:33
Request for Documents Received	-	06/08/2020:03:16:05

You can take actions on notes by selecting a note from the (A) Log and selecting an (B) Action. These are described below:



Action	Description	Image
Add Note	Click Add Note to manually add a note to the log. Add comments in the <i>Note</i> field, then click Save to save the note in the log	
Edit Note	Select a note from the list and click Edit Note to edit the content. Click Save to save any changes you make.	
View Note	Select a note from the list and click View Note to view the note contents.	
Print Notes	View all notes in a printable list. Click Print to send the list to a connected printer.	

Action	Description	Image
Close	Click Close to close the <i>Notes Log</i> .	