

# ATIPXpress



OPEXUS

## Collaboration Portal User Manual

v11.4.0

October 2023



# AX 11.4.0 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 application interface. At the top, there is a navigation bar with links: Home, Requesters, Requests, Document Management, Administration, and Reports. Below this, a breadcrumb trail shows 'Home >> 24-FOI-00007 - Request'. The main content area is titled 'FOIA - Request: 24-FOI-00007' and shows 'Remaining Days: 20' and 'Status: Assigned'. On the left, a sidebar menu includes 'Request Information', 'Assign Users', 'Set Perfect Status', 'Correspondence', 'Request for Documents (0/0)', and 'Electronic Document Review (0/0)'. The 'Request for Documents (0/0)' item is highlighted with a red circle labeled 'A'. The main content area shows a 'Request for Documents' section with a table header: 'Action ID', 'Location(s) Referred', 'Sent By', '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 control showing 'Page size: 20' and '0 items in 1 pages'. At the bottom of the section, there are several buttons: 'New', 'Action', 'View', 'Delete', 'Messages(0/0)', 'Send Email/Reminder', 'Send Reminder by Print', and 'Action(s) Log'. The 'New' button is highlighted with a red circle labeled 'B'.

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

4. 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:

Name	Contact Name	Phone Number	Has RX	RFD Provider	Action Office	Category	Mapped To Collabo...
<a href="#">Multiple email...</a>	shtyen, candler		No	No	HQ	Both	No
<a href="#">TestPO</a>	Milbourne, Marcus		No	No	HQ	Both	Yes

5. 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 an office/consultancy:**

6. 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 :

Request for Documents Information

Request Date \* :

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 \* :  ☐ Add Reminder

Priority :

Send To: Program Offices

Action Office	Program Office	Contact Name	Phone	Contact Address	Email	Has RX?	Actions
HQ	<a href="#">Normalville Office</a>	Gatewood, John				No	<a href="#">X</a>

Add Program Offices

Dispatch Mode\*

☒ Email ☐ Print ☐ Save to Disk

Delivery Mode

Dispatch Date :

☐ Send To: Other Email Recipients

Next

Note: \* fields are mandatory

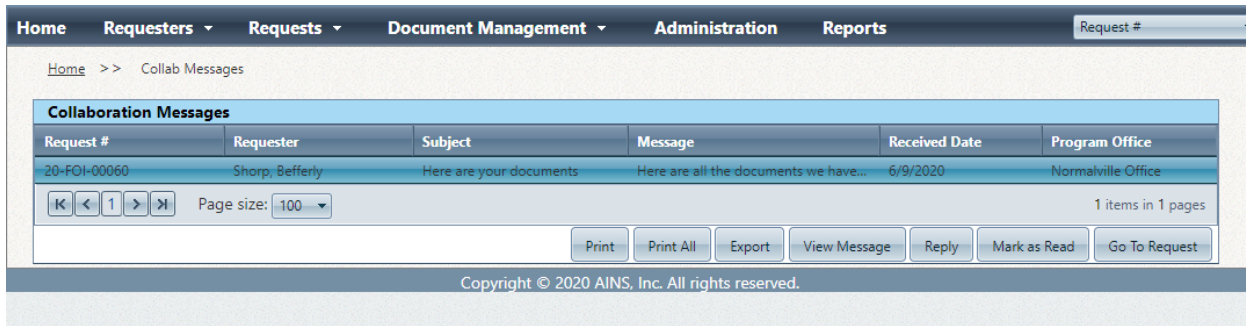
7. The *New RFD - Step 2* screen appears as shown below. First add any (A) Attachments, such as the original request letter for context:
8. You can also configure the message the end user receives with the request in the collaboration portal. First add a (B) Subject for the message. You can also edit the (C) message body as needed.
9. 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.
10. 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

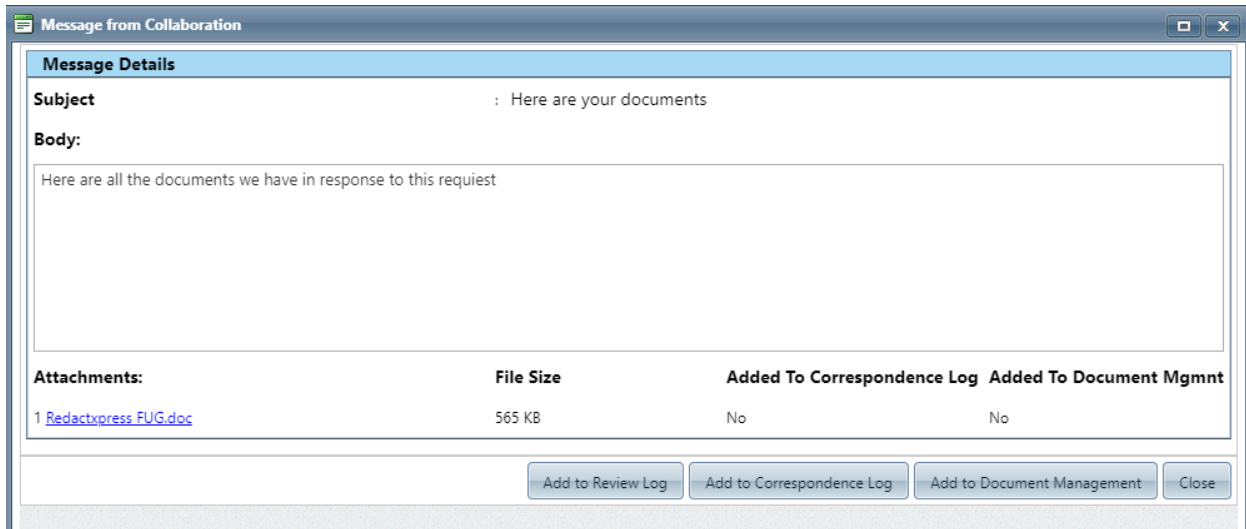
When you receive a response to a request sent to the portal, the easiest point of access is via your *Messages* on the Home Page. Follow the steps below to receive records provided from the portal.

1. 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



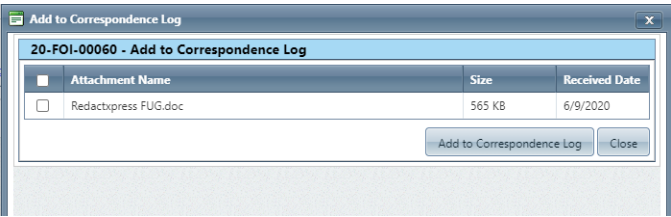
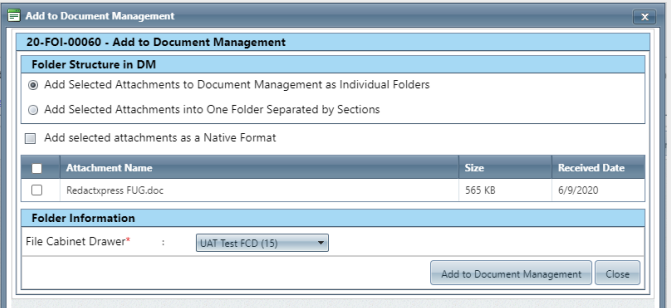
2. Select the new message and click **View Message**. The subject/body of the message should alert you that this message contains the responsive documents:



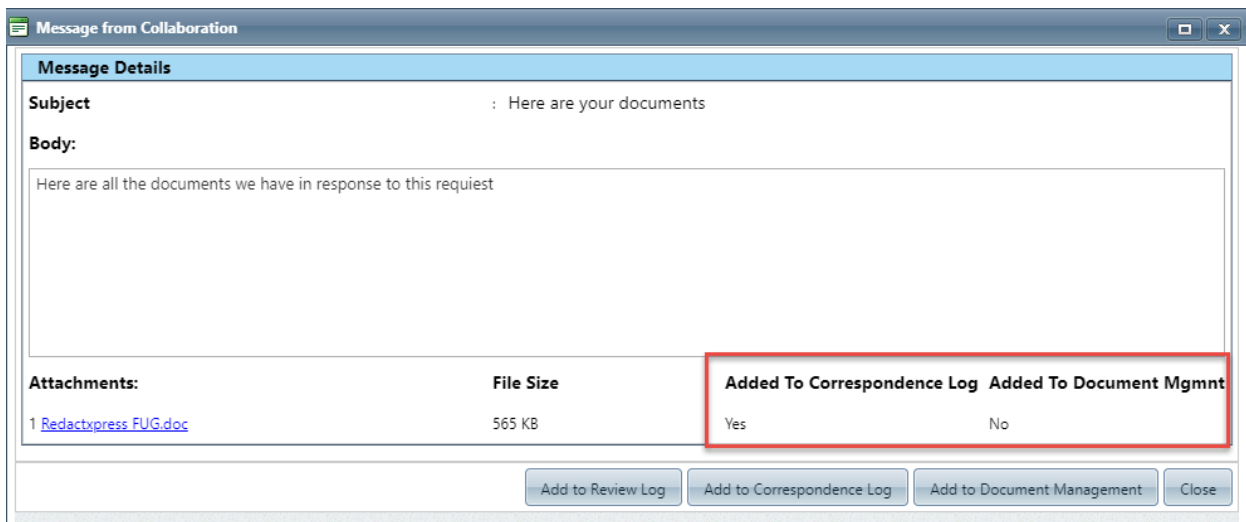
3. There are three options for moving the documents into ATIPXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

Action	Description	Image
<b>Add to Review Log</b>	<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
<b>Add to Correspondence Log</b>	<p>Add the attachments to the Correspondence Log of the request.</p> <p>Select <i>Attachments</i> to include and click <b>Add to Correspondence Log</b>.</p>	
<b>Add to Document Management</b>	<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 Mgmnt
1 <a href="#">Redactxpress FUG.doc</a>	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', '>', and 'X'. To the right of these buttons is a 'Page size' dropdown set to '100'. Further right, it says '1 items in 1 pages'. At the bottom, there are buttons: 'Print', 'Print All', 'Export', 'View Message', 'Reply', 'Mark as Read', and 'Go To Request'. The 'Go To Request' button is circled in red. At the very bottom, there is a copyright notice: 'Copyright © 2020 AINS, Inc. All rights reserved.'

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. There are two rows of data. The first row has Action ID '49', Location 'Normalville Office (jgatewood@ains.com)', Request Date '06/07/2020', Sent Date '06/08/2020', Due Date '06/07/2020', and Status 'Request for Documents Sent'. The second row has Action ID '48', Location 'Normalville Office (jgatewood@ains.com)', Request Date '06/08/2020', Sent Date '06/08/2020', Due Date '06/08/2020', and Status 'Request for Documents Sent'. Below the table, there are navigation buttons: 'K', '<', '1', '>', and 'X'. To the right of these buttons is a 'Page size' dropdown set to '100'. Further right, it says '2 items in 1 pages'. At the bottom, there are buttons: 'New', 'Take Action', 'View', 'Delete', 'Messages (0/0)', 'Send Email/Reminder', 'Send Reminder by Print', and 'Action(s) Log'. The 'Take Action' button is circled in red.

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' with window controls. Below the title bar, there is a section titled 'New Action - Request for Documents -49'. This section contains several fields: 'Location' with the value 'Normalville Office (jgatewood@ains.com)', 'Action Date\*' with a date picker set to '6/9/2020', 'Status\*' with a dropdown menu set to 'Completed', 'Comments' with a text area, 'Due Date\*' with a date picker set to '6/7/2020', and 'Completed Date\*' with a date picker set to '6/9/2020'. There is a checkbox labeled 'Completed' which is checked. Below these fields is a 'Drag and Drop Zone' with buttons: 'Scan File', 'Attach File', 'Print Barcode', and a link '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

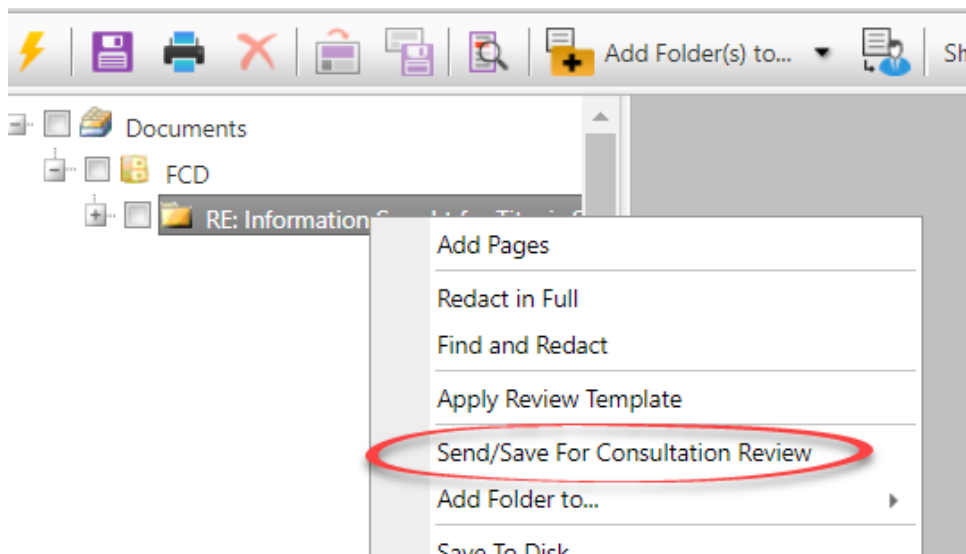
[New] [Take Action] [View] [Delete] [Messages(0/0)] [Send Email/Reminder] [Send Reminder by Print] [Action(s) Log]

## 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:

**Send/Save Documents for Consultation**

Consultation Contact

Consultation Type: Send via Collaboration Room

Review Information

Request ID:

Review Due Date \*:

Comments:

☐ Add Reminder

Task::

Include Document Review Flags: All

Reviewers Information

☐ Include Co  
☐ Select a M

Include Review  
☐ 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\*

Email Body\*

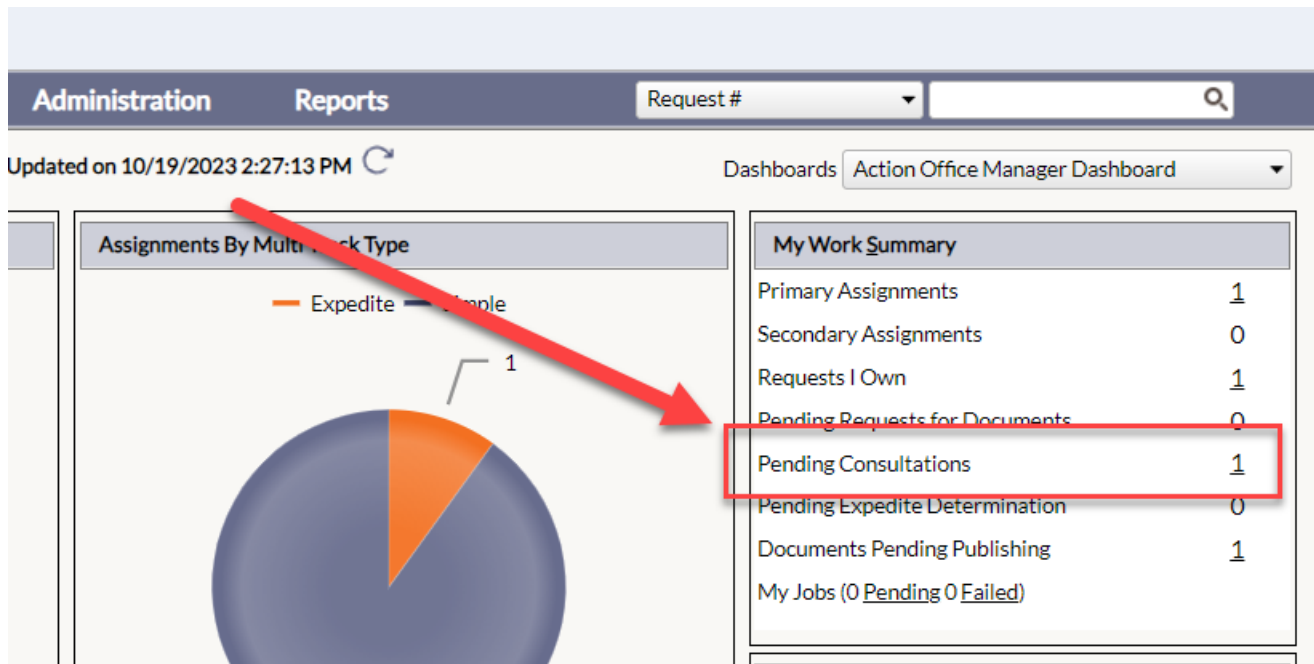
Lato  **B** *I* U

text

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.
9. 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**:



10. 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*.

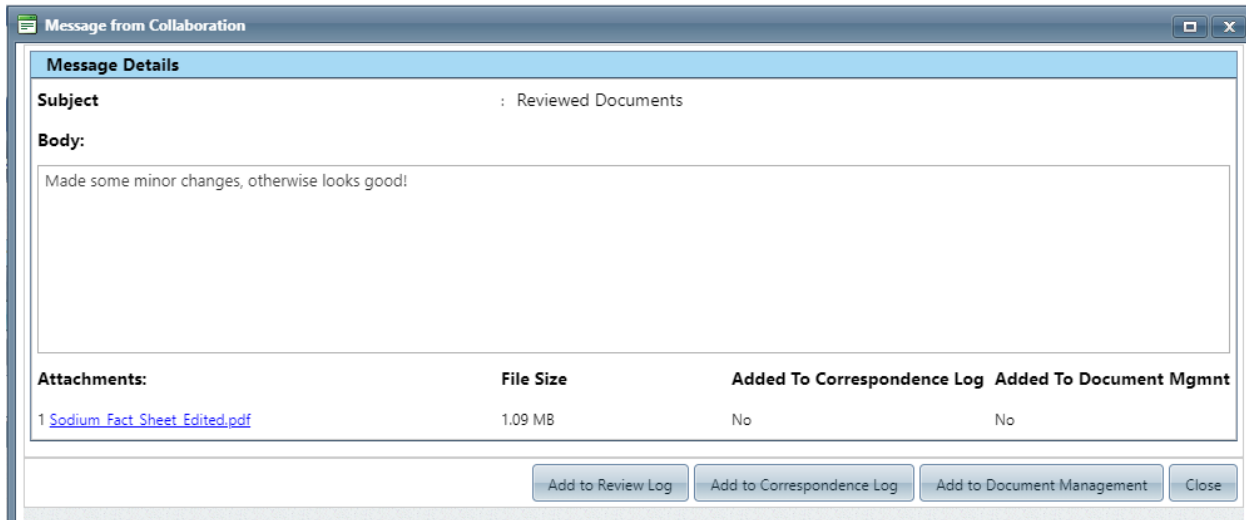
1. Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:

The screenshot shows the 'Collaboration Messages' screen. At the top, there are tabs for 'Home', 'Requesters', 'Requests', 'Document Management', 'Administration', and 'Reports', along with a search bar for 'Request #'. Below this, a breadcrumb trail shows 'Home >> Collab Messages'. The main content area is a table titled 'Collaboration Messages' with the following columns: Request #, Requester, Subject, Message, Received Date, and Program Office. The table contains one record:

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

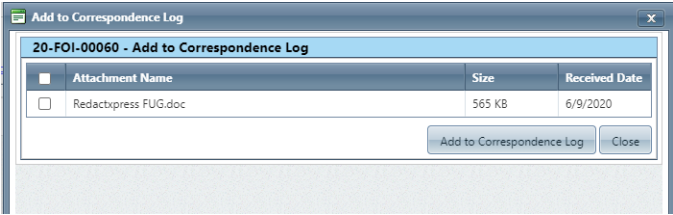
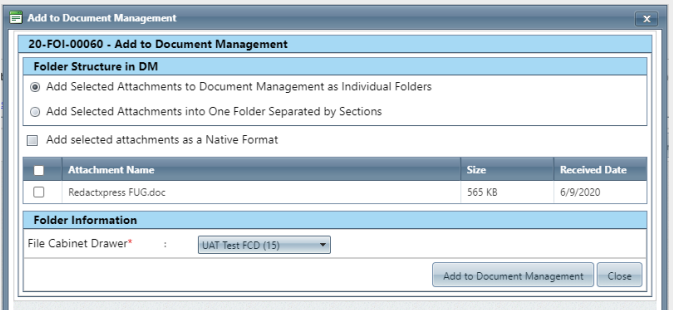
Below the table, there are navigation controls including 'Page size: 100' and '1 items in 1 pages'. At the bottom, there are buttons for 'Print', 'Print All', 'Export', 'View Message', 'Reply', 'Mark as Read', and 'Go To Request'.

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:

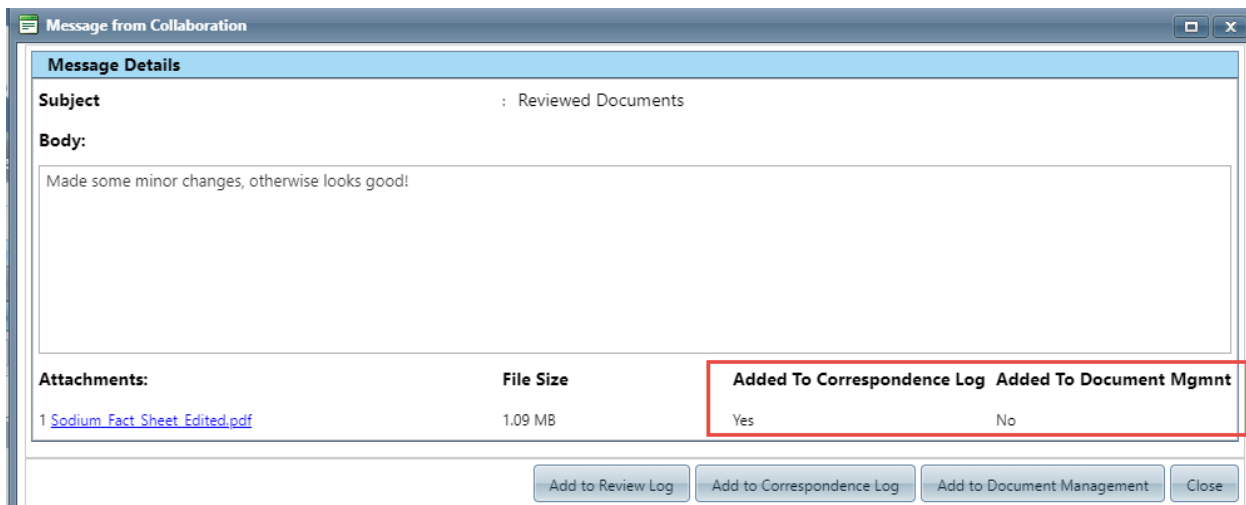


3. There are three options for moving the documents into ATIPXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

Action	Description	Image
<b>Add to Review Log</b>	<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>The screenshot shows a dialog box titled "20-FOI-00060 - Add to Review Log". It has a "Folder Structure in DM" section with three radio buttons: "Add Selected Attachments to Document Management as Individual Folders" (selected), "Add Selected Attachments into One Folder Separated by Sections", and "Add selected attachments as a Native Format". Below this is a table with columns "Attachment Name", "Size", and "Received Date". It contains one row: "Redactxpress FUG.doc", "565 KB", "6/9/2020". There's also a "Folder Information" section with a dropdown menu set to "UAT Test FCD (15)". At the bottom are "Add to Review Log" and "Close" buttons.</p>

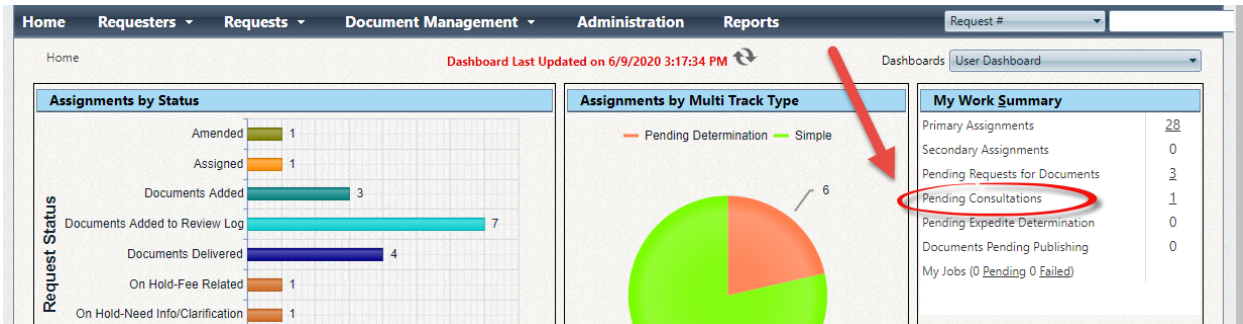
Action	Description	Image
<b>Add to Correspondence Log</b>	<p>Add the attachments to the Correspondence Log of the request.</p> <p>Select <i>Attachments</i> to include and click <b>Add to Correspondence Log</b>.</p>	
<b>Add to Document Management</b>	<p>Add the attachments to Document Management.</p> <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 Mgmnt
1 <a href="#">Sodium Fact Sheet Edited.pdf</a>	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



### 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.

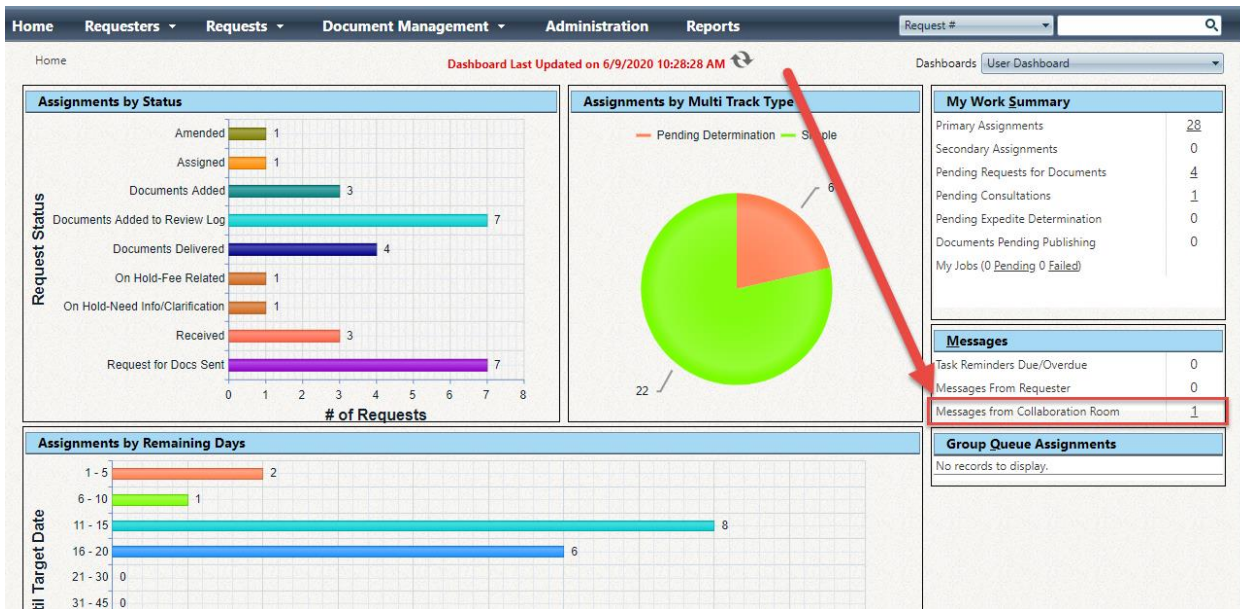
## 2.3 Correspondence

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.

The Collaboration Messages screen displays the following table:

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.

Buttons: 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:

The Message from Collaboration screen displays the following details:

**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

Buttons: (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 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 file selection button labeled "Select". Below this is an "OR" option 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.

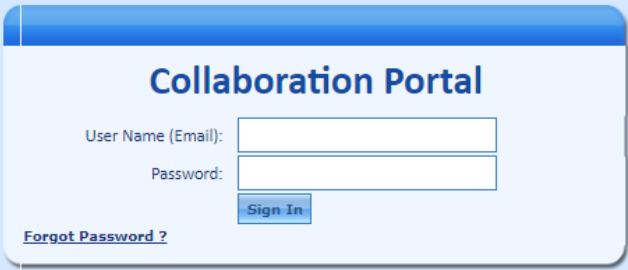
## 3 Collaboration for Portal Users

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

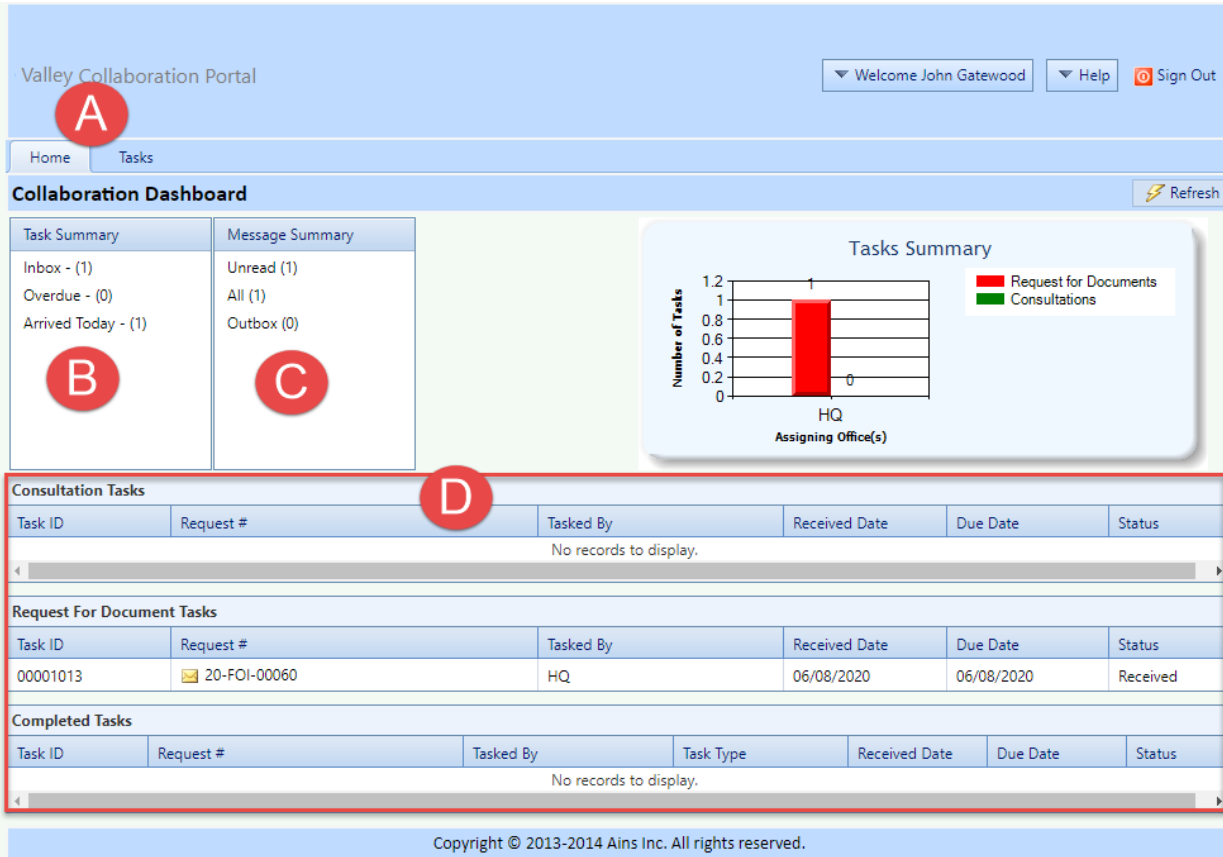
As a Collaboration Portal user, you will receive an email when your account is created, allowing you to log in to the portal. An example log in screen is shown below:



The screenshot shows a login window titled "Collaboration Portal". It contains two input fields: "User Name (Email):" and "Password:". Below the password field is a blue "Sign In" button. At the bottom left of the window is a link that says "Forgot Password ?". The entire login window is centered on 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 <b>Inbox</b> , <b>Overdue</b> tasks, and tasks which <b>Arrived Today</b>
C	Message Summary	The <i>Message Summary</i> widget provides quick links to <b>Unread</b> messages, <b>All</b> of your messages, and your <b>Outbox</b>

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 navigation bar (Home, Tasks) and a Refresh button. The dashboard includes a Task Summary (Inbox: 3, Overdue: 2, Arrived Today: 1), a Message Summary (Unread: 1, All: 3, Outbox: 0), and a Tasks Summary bar chart. The bar chart shows 2 Request for Documents tasks and 1 Consultations task for HQ. Below the charts are three tables: Consultation Tasks (1 row), Request For Document Tasks (2 rows), and Completed Tasks (0 rows). A red arrow points to the second row of the Request For Document Tasks table, which has Task ID 00001013 and Request # 20-FOI-00060.

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:



## Collaboration for Portal Users

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Confirmation of receipt has been sent to sender.

OK

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

Home Tasks

**Task ID: 00001013**

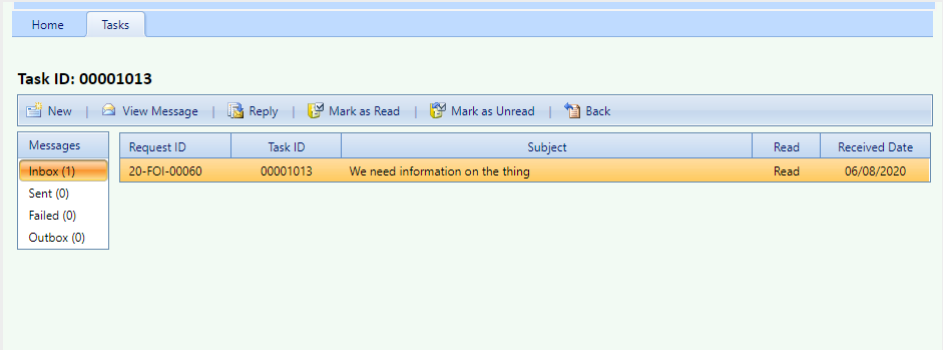
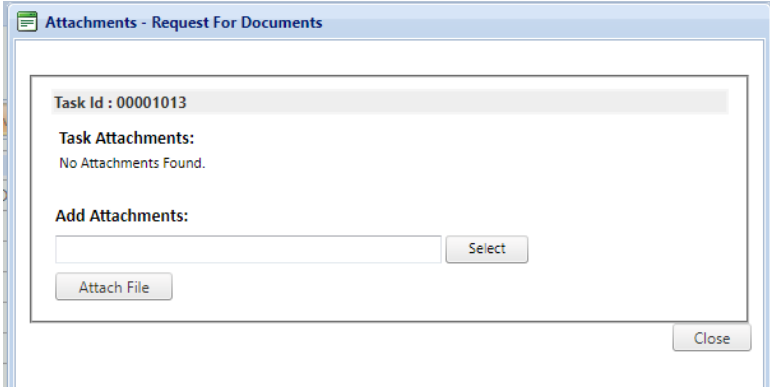
Messages 1/1 View/Add Attachments (0) Notes Log (1) Change Status Submit Completed Task Back

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)

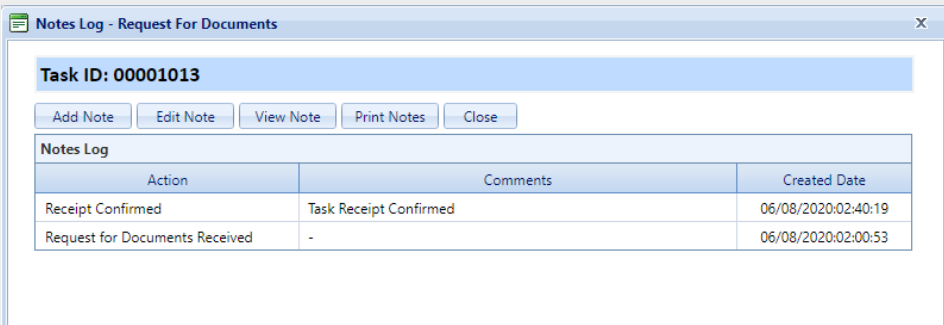
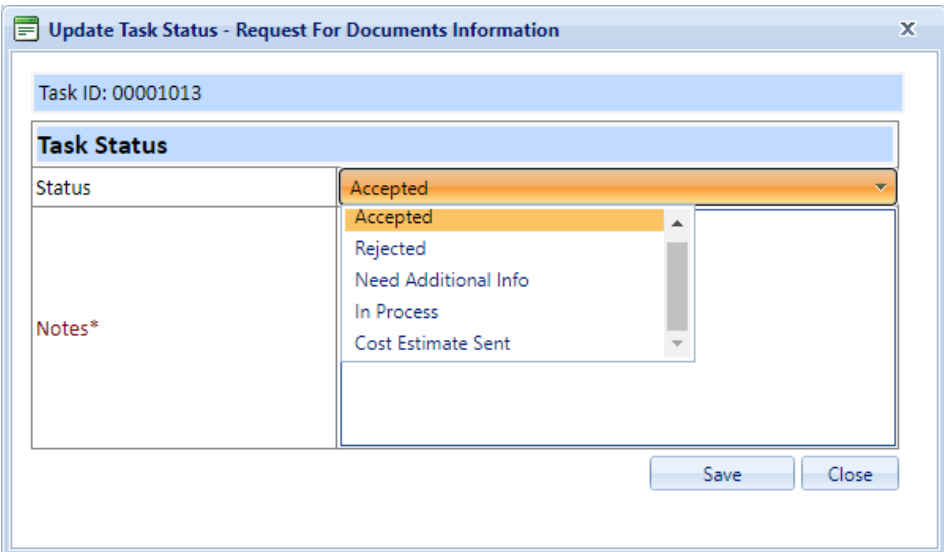
Sender Information	
First Name	Admin
Last Name	Admin
Email	admin@ains.com
Tasked By	HQ
Phone Number	-
Comments	Need all the documents you have about that thing. You know the one.

4. 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:

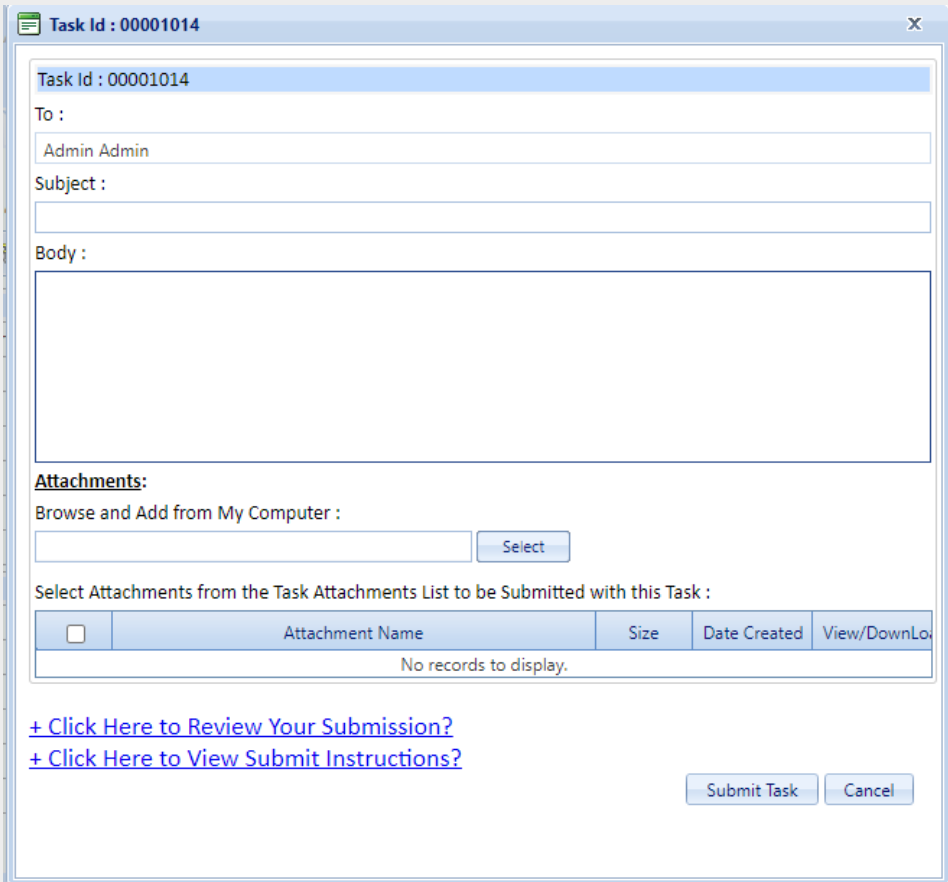


Action	Interface
<p>Click Messages to access correspondence for this task. You can send a New message to the user who sent the request, or View/Reply to messages in your inbox.</p>	
<p>Click View/Add Attachments to attach documents to this RFD for submittal back to the requester.</p> <p>You can also view any attachments included with this original request.</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><b>Notes Log - Request For Documents</b></p> <p>Task ID: 00001013</p> <p>Buttons: Add Note, Edit Note, View Note, Print Notes, Close</p> <table><thead><tr><th colspan="3">Notes Log</th></tr><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>	Notes Log			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
Notes Log													
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><b>Update Task Status - Request For Documents Information</b></p> <p>Task ID: 00001013</p> <p><b>Task Status</b></p> <p>Status: Accepted (dropdown menu showing: Accepted, Rejected, Need Additional Info, In Process, Cost Estimate Sent)</p> <p>Notes*</p> <p>Buttons: Save, Close</p>												



Action	Interface
<p>Click <b>Submit Completed Task</b> 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 <b>Select from the <i>Browse and Add from My Computer</i> field.</b></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\*

Accepted  
Rejected  
Need Additional Info  
In Process  
Cost Estimate Sent

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 :

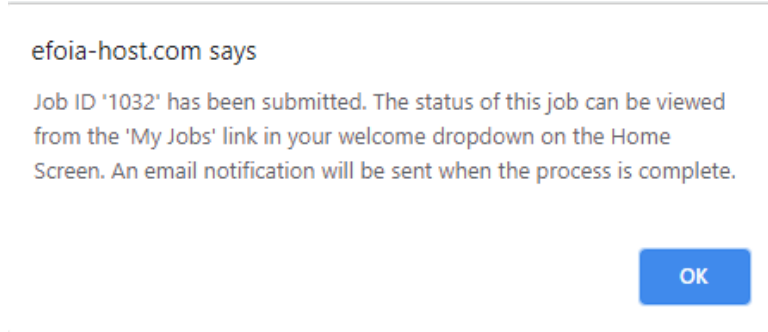
<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

[+ 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:



- 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.

The screenshot shows the 'Collaboration Dashboard' with tabs for 'Home' and 'Tasks'. It includes a 'Task Summary' box with 'Inbox - (3)', 'Overdue - (2)', and 'Arrived Today - (1)'. A 'Message Summary' box shows 'Unread (1)', 'All (3)', and 'Outbox (0)'. A 'Tasks Summary' bar chart shows 'Request for Documents' (red bar, value 2) and 'Consultations' (green bar, value 1) for 'HQ'. Below these are three tables: 'Consultation Tasks', 'Request For Document Tasks', and 'Completed Tasks'.

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.						

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



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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*.



7. 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*.

8. 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.
9. 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

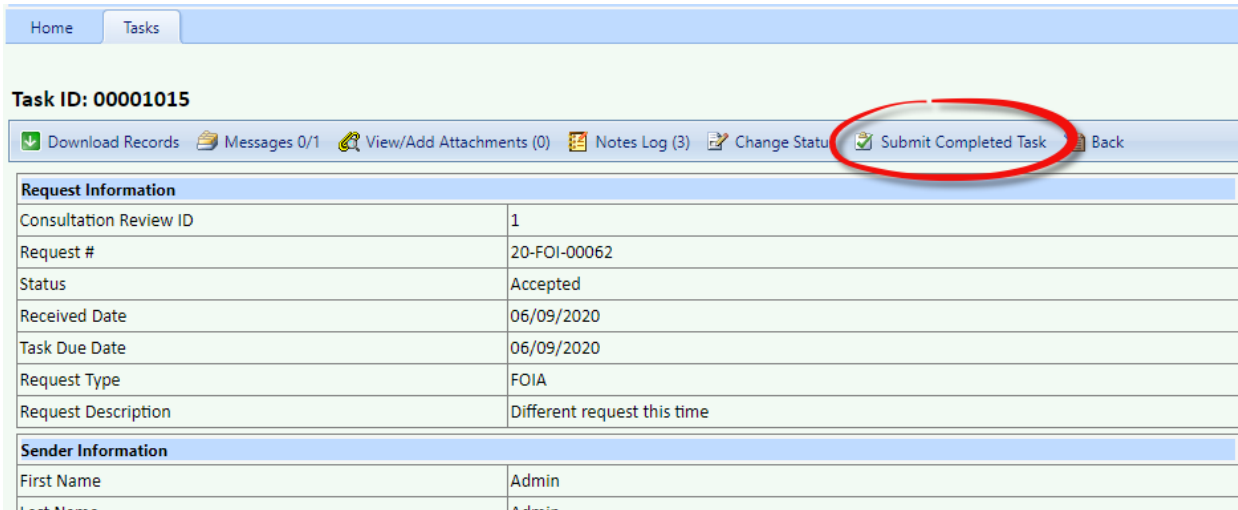
10. A pop up appears confirming that you'd like to download the records for review. Click **OK** to continue:

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, there is a navigation bar with 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 main 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

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:

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Job ID '1033' 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.

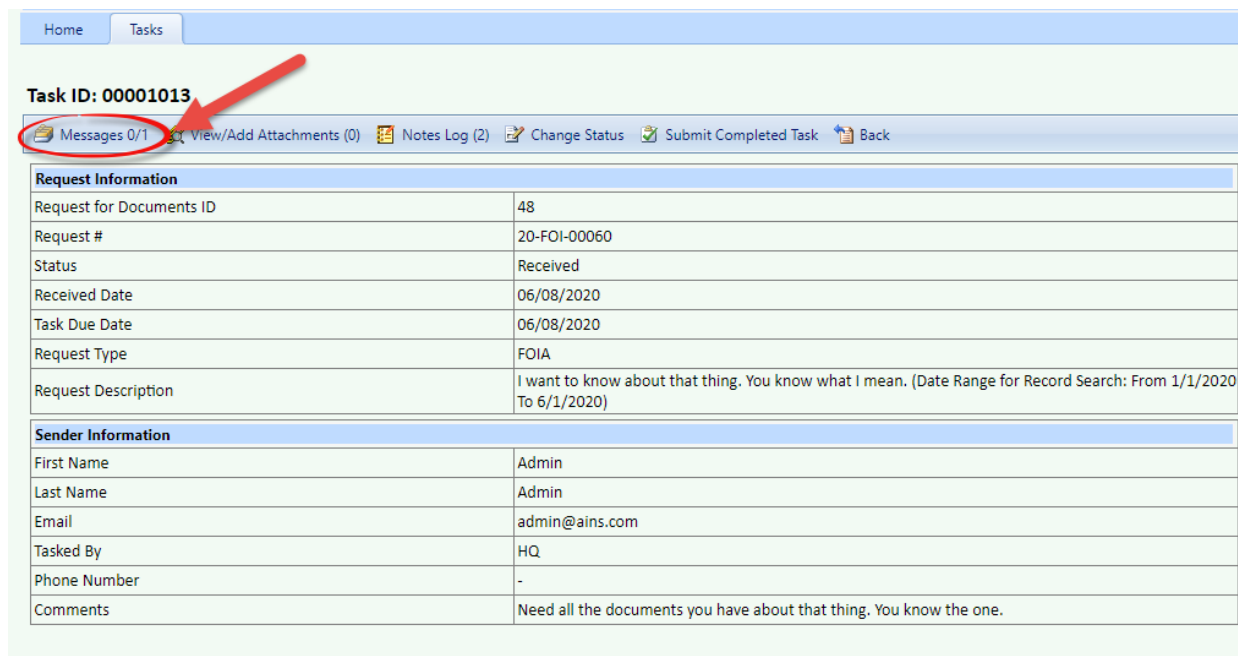


- Click **OK** to dismiss the message. The *Tasks* tab refreshes, with the *Status* updated to *Submitted*. Additionally, the options to **Change Status** and **Submit Completed Task** are no longer available.

## 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**:



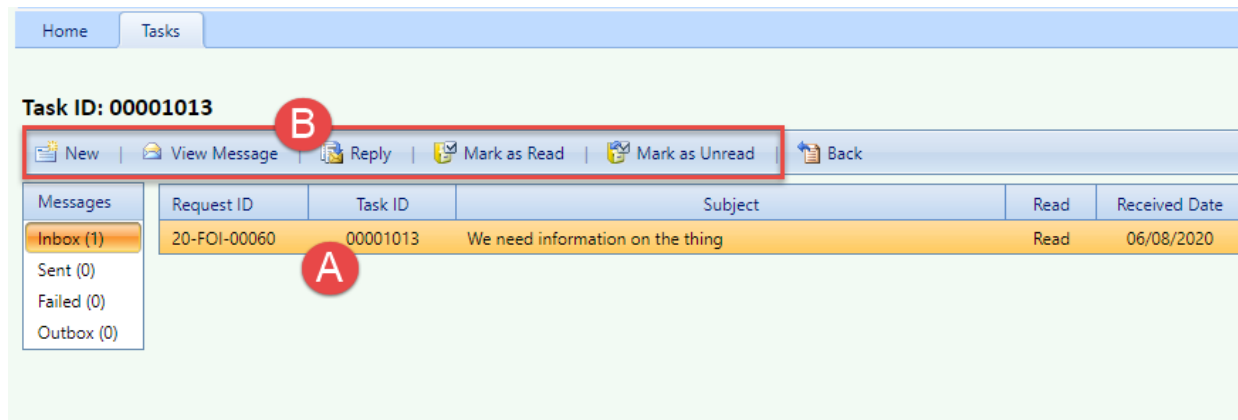
Task ID: 00001013

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

Request ID	Task ID	Subject	Read	Received Date
20-FOI-00060	00001013	We need information on the thing	Read	06/08/2020

Messages

- Inbox (1)
- 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:

Task Id : 00001013

To : Admin Admin

Subject : A

Body : B

**Attachments:**

Browse and Add from My Computer : C

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

	Attachment Name	Size	Date Created	View/DownLc
No records to display.				

D

Send Message Cancel

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:

Task ID: 00001013

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

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

Messages

- Inbox (2)
- Sent (1)
- Failed (0)
- Outbox (0)

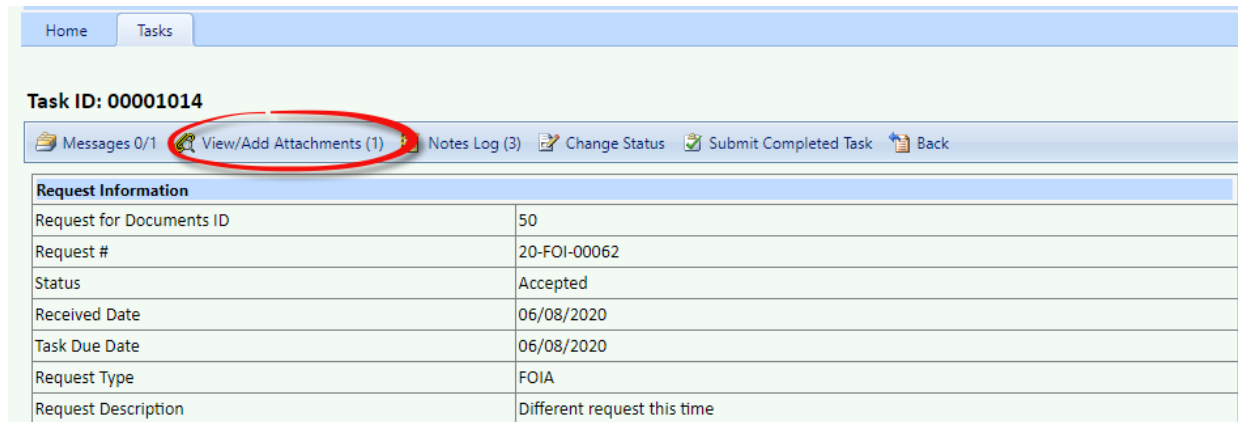
(!!) Note: If an error occurs when sending a message, it appears under the *Failed* messages.



## 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**:



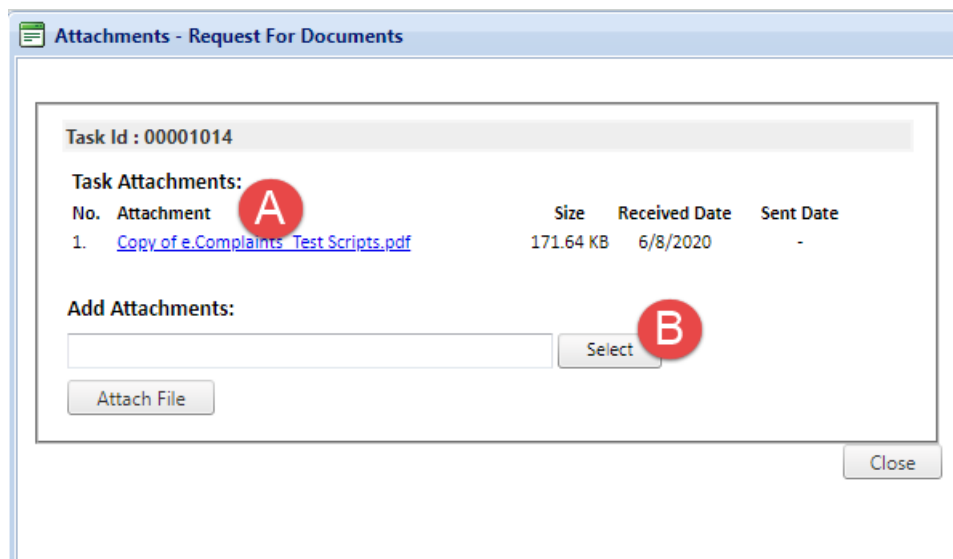
Home Tasks

**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.	<a href="#">Copy of e.Complaints Test Scripts.pdf</a>	171.64 KB	6/8/2020	-

**Add Attachments:**

**Select** **Attach File**

Close

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**.



**Attachments - Request For Documents**

Task Id : 00001014

**Task Attachments:**

No.	Attachment	Size	Received Date	Sent Date
1.	<a href="#">Copy of e.Complaints Test Scripts.pdf</a>	171.64 KB	6/8/2020	-

**Add Attachments:**

● Sodium\_Fact\_Sheet\_Edited.pdf ✕ Remove

- 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:

**Attachments - Request For Documents**

Task Id : 00001014

**Task Attachments:**

No.	Attachment	Size	Received Date	Sent Date
1.	<a href="#">Copy of e.Complaints Test Scripts.pdf</a>	171.64 KB	6/8/2020	-
2.	<a href="#">Sodium_Fact_Sheet_Edited.pdf</a>	1.09 MB	-	-

**Add Attachments:**

✕

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

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

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/Download
<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

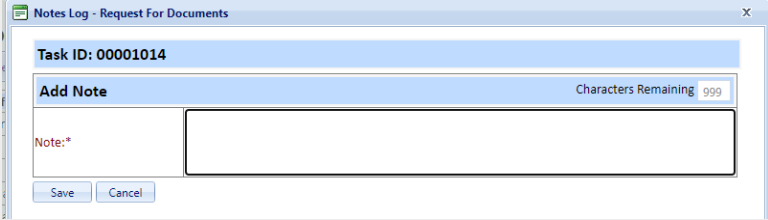
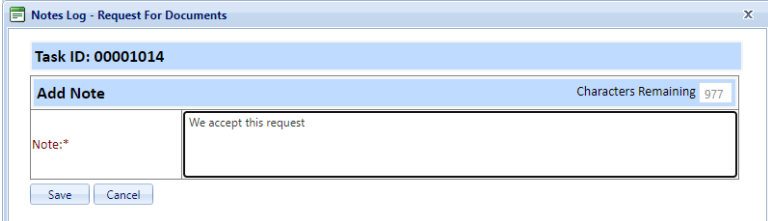
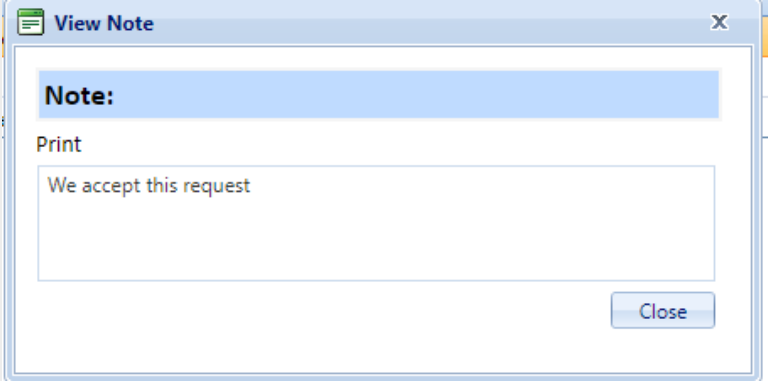
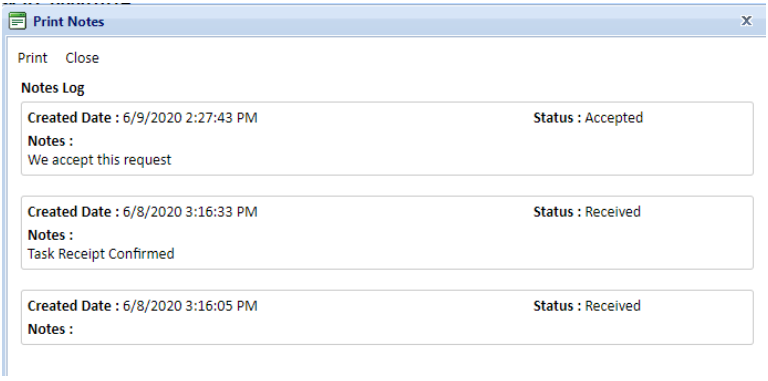
**(A)**

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

**(B)**

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



## Collaboration for Portal Users

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

