

ATIPXpress



OPEXUS

PAL Reading Room Instructions

v11.4.0

October 2023



AX 11.4.0 PAL Reading Room Instructions

Notice of Rights

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

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

Notice of Liability

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

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

Notice of Trademarks

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

Non-Disclosure Statement

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

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

Additional Notice

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

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



Contents

| | | |
|-----|---------------------------------------|---|
| 1 | About the PAL Reading Room | 4 |
| 2 | Reading Room Notes and Tips | 5 |
| 2.1 | Notes | 5 |
| 2.2 | Tips | 5 |
| 2.3 | Using Boolean Operators | 6 |
| 3 | Searching and Viewing Documents | 7 |



1 PAL Reading Room

The PAL Reading Room provides a repository where records designated for release to the public are stored in the appropriate format and are available for review and download. AX allows for information to be posted to the Access to Information and Privacy Requests (ATIP) PAL Reading Room on a scheduled basis or on-demand, so the public has access to review or download records posted for public inspection/release.

The PAL Reading Room is updated based on the frequency of the requests received by the agency, and it can include the following information:

- Final opinions and orders made in adjudicating cases.
- Frequently requested records. Agencies are required to post records that have received three or more requests for the same information. Agencies are then required to proactively post such records for public inspection.
- Final statements of policy and interpretations that have not been published in the Federal Register.
- Administrative staff manuals and instructions to staff that affect a member of the public.
- Copies of records that have been the subject of a ATIP request that are of sufficient public interest or curiosity that the agency believes other persons are likely to request them.
- Your agency's annual ATIP report, which includes:
 - The number of requests received by the agency.
 - The amount of time taken to process requests.
 - The total fee amount collected by the agency.
 - ATIP Logs regarding pending or backlog requests.
 - Other information about the agency's handling of ATIP requests.

Additionally, other documents may also be available in the ATIP PAL Reading Room. Any user that has access to the PAL Reading Room can view or download any document(s) in the ATIP PAL Reading Room.



2 Reading Room Notes and Tips

The following subsections offer items of note and tips for using the application.

2.1 Notes

The bullets below relate to searching and viewing documents in the PAL Reading Room:

- All file cabinets are selected by default. Make sure to only select the desired file cabinet before searching by clicking only the desired checkboxes.
- Refine your search by entering search criteria in the available search fields.
- By default, the *Document Name* field contains an asterisk. The asterisk causes the system to retrieve all documents based on the search criteria.
- Searching using the *Content Search* field provides more precise search results.
- When you enter a word or phrase in the *Content Search* field, the system searches the content of all documents for matches.
- When you enter a word or phrase in the *Document Name* field, the system searches the name of all documents for matches.
- Click **Clear** to remove all information entered in the search fields.

2.2 Tips

The bullets below provide some basic rules for formulating queries:

- You can type text in upper or lowercase.
- You can search for any combination of letters (a-z) and numbers (0-9).
- Symbols such as / \ @ " ' + ^ # : . are ignored during a search.
- To search for a complete phrase, use quotation marks. For example, the query "administrative appeal" returns documents exclusively containing the phrase administrative appeal. Typing the phrase without the quotes returns documents containing the separate words.
- To search using part of a word or phrase, use the asterisk to represent the missing characters. For example, if you are searching for the document titled "Texas - Natural Resources" but don't recall the word "Natural", type "Texas*resources" as the document name. The system will retrieve all documents containing the word 'Texas' and "resources" in the name.

(!!) Note: Do not use the pipe (|), ampersand (&), or exclamation point (!) as wild card expressions.



2.3 Using Boolean Operators

You can use Boolean Operators within the AX Search. Boolean operators function as follows:

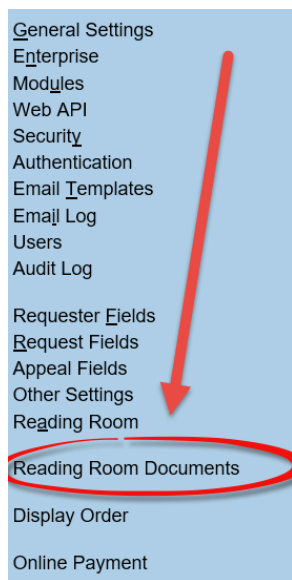
- The AND & OR operators refine your search by creating a relationship between search terms.
- The AND operator locates documents containing all words in any order. For example, reading AND room returns documents with both "reading" and "room" anywhere in the documents.
- The OR operator locates documents containing either of the two words. For example, reading OR room will fetch documents that contain either the word "reading" or the word "room".



3 Searching and Viewing Documents

Before you begin, ensure you have read the *Reading Room Notes and Tips* subsection of this manual for notes and guidance when searching the reading room for documents. You can also click the **Search Tips** button in the *Search for Documents in Reading Room* page to view document search tips. Follow the steps below to search for and view documents in the ATIP PAL Reading Room:

1. Login to the *PAL Configuration* site. Within the menu panel, click **Reading Room Documents**.



2. The *Search for Documents in Reading Room* page appears. Select the **check box** adjacent the reading room file cabinet you want to search.

(!!) Note: Click the checkbox in the header row to select all reading room file cabinets.

Search for Documents in Reading Room

Refine your Search

| <input checked="" type="checkbox"/> | Reading Room File Cabinet | Description |
|-------------------------------------|---------------------------|-------------|
| <input checked="" type="checkbox"/> | Annual Reports | |
| <input checked="" type="checkbox"/> | FOIA Logs | |
| <input checked="" type="checkbox"/> | Contracts | |
| <input checked="" type="checkbox"/> | Policies & Manuals | |
| <input checked="" type="checkbox"/> | FOIA Requests | |

Folder Name:

Published Date: To

Content Search:

Standard Reading Room

Request Number:



Searching and Viewing Documents

3. Enter the **Folder Name** to search for in the field.

(!!) Note: The Folder Name is the specific name of the folder inside which you want to search.

4. Enter the desired **search terms** in the *Content Search* field.

5. To search for documents published within a specific **date range**, use the *Published Date* pickers to select the desired date range.

Search for Documents in Reading Room

Refine your Search

| <input checked="" type="checkbox"/> | Reading Room File Cabinet | Description |
|-------------------------------------|---------------------------|-------------|
| <input checked="" type="checkbox"/> | Annual Reports | |
| <input checked="" type="checkbox"/> | FOIA Logs | |
| <input checked="" type="checkbox"/> | Contracts | |
| <input checked="" type="checkbox"/> | Policies & Manuals | |
| <input checked="" type="checkbox"/> | FOIA Requests | |

Folder Name:

Published Date: To

Content Search:

Standard Reading Room

Request Number:

New Search Clear Search Tips

6. After configuring the desired search terms, click **Search**. The page refreshes and the *Reading Room Search Results* page appears as shown below.

Reading Room Documents

| Folder Name | Reading Room File Cabinet | Published Date | Expiration Date | # Pages | Format | Added From | Popular Document? |
|---|---------------------------|----------------|-----------------|---------|--------|------------|---------------------|
| <input type="checkbox"/> The title of this document can contain up to 100 characters including spaces | Annual Reports | 09/26/2018 | - | 32 | | PAL Config | Yes |
| <input type="checkbox"/> Test Reading Room Post | FOIA Requests | 10/07/2021 | - | 32 | | FOIAXpress | No |
| <input type="checkbox"/> Test Folder 8-25-17 | FOIA Requests | 10/07/2021 | - | 32 | | FOIAXpress | No |
| <input type="checkbox"/> Test Folder | Annual Reports | 10/07/2021 | - | 28 | | FOIAXpress | No |
| <input type="checkbox"/> Tagged Attachments | FOIA Requests | 10/07/2021 | - | 957 | | FOIAXpress | Yes |
| <input type="checkbox"/> Summer Brochure 2017 | Policies & Manuals | 10/07/2021 | - | 28 | | FOIAXpress | Yes |
| <input type="checkbox"/> State Dept Program Tags | Policies & Manuals | 10/07/2021 | - | 32 | | FOIAXpress | Yes |
| <input type="checkbox"/> State Department Report | FOIA Requests | 10/07/2021 | - | 27 | | FOIAXpress | No |
| <input type="checkbox"/> SEC DEMO | FOIA Logs | 10/07/2021 | - | 32 | | FOIAXpress | Yes |
| <input type="checkbox"/> Report Manual | Policies & Manuals | 10/07/2021 | - | 32 | | FOIAXpress | No |

Page 1 of 5







New Edit Delete Back

* Note: If selection boxes are grayed out it is because the documents were published from FOIAXpress and must be edited from that application.





7. To download a document, click the desired document **icon** in the *Format* column. The system begins the file download immediately.



Searching and Viewing Documents

| | <u># Pages</u> | <u>Format</u> | <u>Added From</u> | <u>Popular Document?</u> |
|--|----------------|---|-------------------|--------------------------|
| | 67 |  | FOIAXpress | No |
| | 2 |  | FOIAXpress | No |
| | 2 |  | FOIAXpress | Yes |
| | 7 |  | FOIAXpress | No |
| | 2 |  | FOIAXpress | No |
| | 2 |  | FOIAXpress | No |

(!!) Note: Click the Yes/No links in the *Popular Document* column to view information regarding how frequently users have viewed the document.

| <u># Pages</u> | <u>Format</u> | <u>Added From</u> | <u>Popular Document?</u> |
|----------------|---|-------------------|--------------------------|
| 32 |  | PAL Config | Yes |
| 32 |  | FOIAXpress | No |
| 32 |  | FOIAXpress | No |
| 28 |  | FOIAXpress | No |

8. After reviewing the search results, click **Back** to return to the *Search for Documents in Reading Room* page.

| | | |
|---|------------|--|
| FOIA Requests | 10/07/2021 | |
| FOIA Logs | 10/07/2021 | |
| Policies & Manuals | 10/07/2021 | |
| Page 1 of 5 | | |
| <div> <input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Back"/> </div> | | |

