ATIPXpress

OPEXUS

Collaboration Portal
User Manual

v11.5.0

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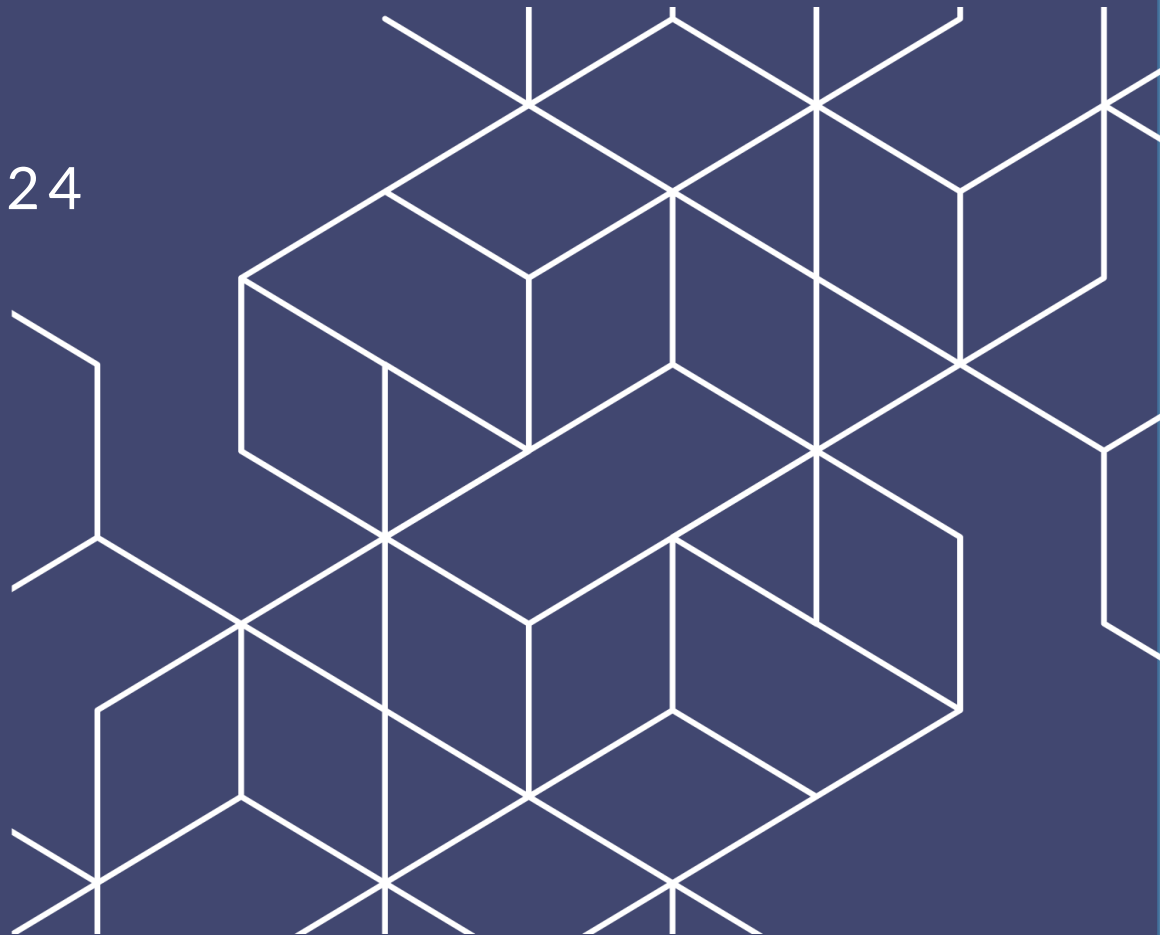
AX 11.5.0 Collaboration Portal User Manual

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Contents

1   About this Manual

1.1   Introduction

Welcome to the Collaboration Portal User Manual. The 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 provides instructions for portal users, including the portal UI and steps for collaborating on requests.

1.2   How to Use this Manual

This manual focuses on the Portal user experience, with instructions for receiving and fulfilling tasks, and utilizing the tools available to make collaboration effective. It includes topics for:

- Accessing the Collaboration Portal
- Request for Document Tasks
- Consultation Tasks
- Sending Messages Using the Portal
- Using Attachments in Tasks
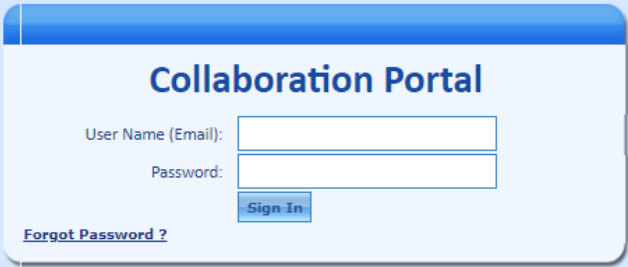- Notes Log

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 is used in *Notes* to bring attention to **crucial information**.
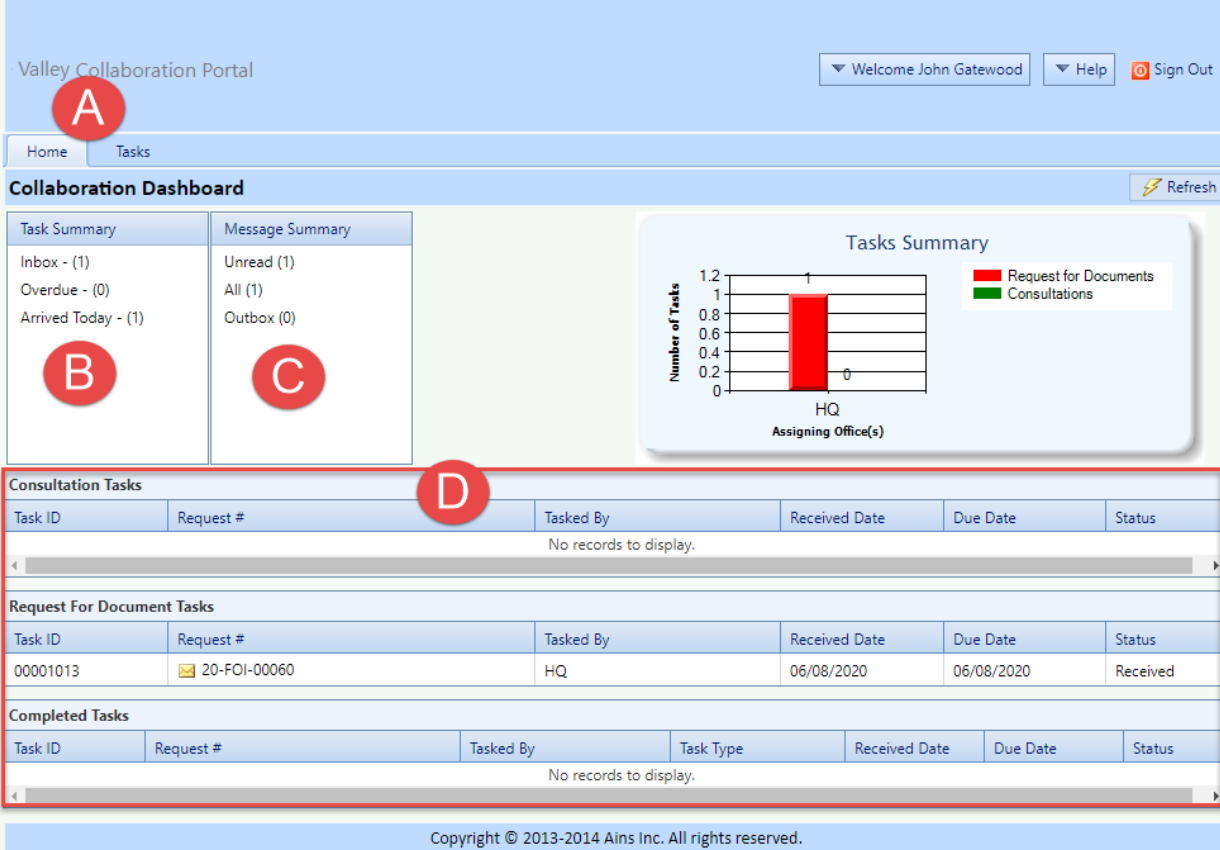
2 Accessing the Collaboration Portal

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:

Collaboration Portal

User Name (Email): [   ]

Password: [   ]

Sign In

Forgot Password ?

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:

Valley Collaboration Portal — ▼ Welcome John Gatewood | ▼ Help | ⊙ Sign Out

A

| Home | Tasks |

Collaboration Dashboard   ⚡ Refresh

Task Summary	Message Summary
Inbox – (1)	Unread (1)
Overdue – (0)	All (1)
Arrived Today – (1)	Outbox (0)

B   **C**

Tasks Summary

■ Request for Documents
■ Consultations

Number of Tasks / HQ / Assigning Office(s)

Consultation Tasks   **D**

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

Request For Document Tasks

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

Completed Tasks

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

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

Ref	Element	Description
A	Tabs	The dashboard contains two tabs: the main *Home* tab (where you land on login), as well as the *Tasks* tab, which consolidates all your current tasks in one location
B	Task Summary	The *Task Summary* widget provides links to your **Inbox**, **Overdue** tasks, and tasks which **Arrived Today.**
C	Message Summary	The *Message Summary* widget provides quick links to **Unread** messages, **All** your messages, and your **Outbox.**
D	Tasks	Ongoing *Consultation Tasks* and *Request for Document Tasks* are listed here. There is also a listing of your *Completed* tasks.

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

3 Request for Document Tasks

3.1 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.

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:

3. Click **OK** to dismiss the message and view the task. The *Tasks* tab appears as shown below:
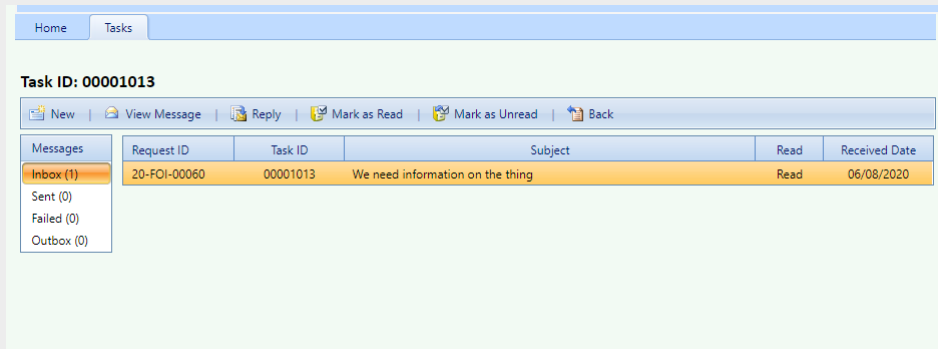
4. This includes all the information provided by the user who sent the RFD. This is also the screen where you'll take action to respond to this request. These actions are described below:

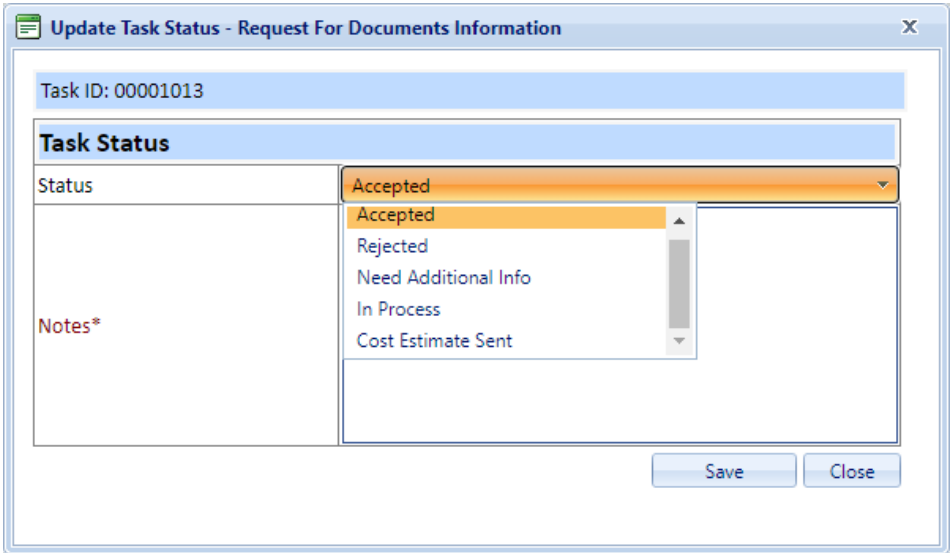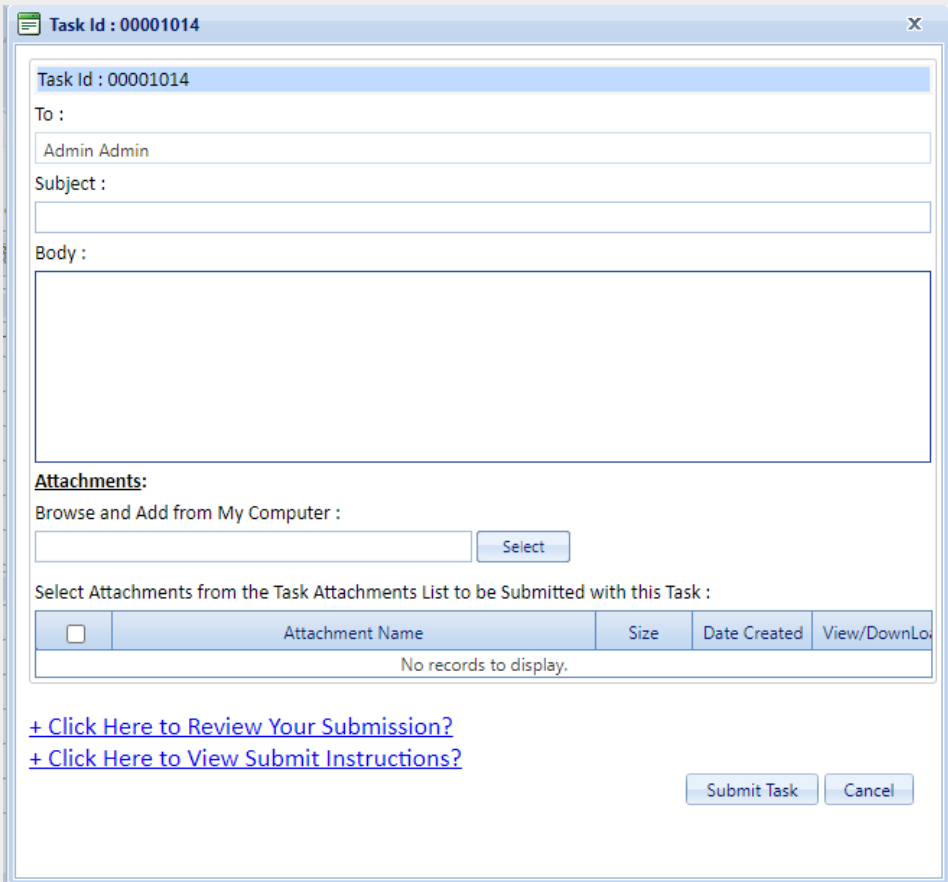| Action	Interface
Click Messages to access correspondence for this task. You can send a New message to the user who sent the request, or View/Reply to messages in your inbox.	

Action	Interface
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.**	Attachments - Request For Documents Task Id : 00001013 Task Attachments: No Attachments Found. Add Attachments: [ ] Select Attach File Close
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.	Notes Log - Request For Documents x Task ID: 00001013 Add Note Edit Note View Note Print Notes Close 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

Action	Interface
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.	

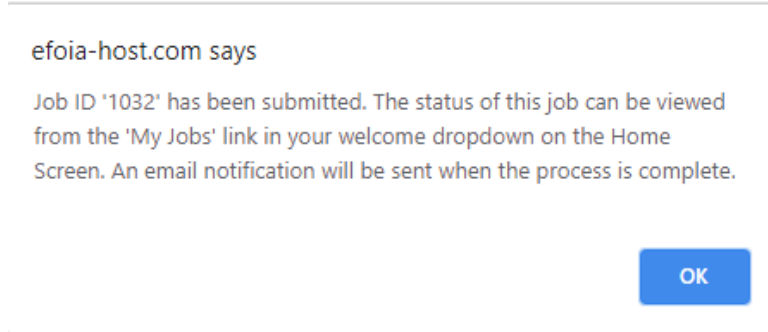| Action	Interface
Click Submit Completed Task to submit responsive materials to the requester. **Here you can include a message, as well as select from existing attachments to include with the response package. There is also the option to add attachments by clicking Select from the *Browse and Add from My Computer* field.** **See the *Complete a Request for Documents* section for more.**	Task Id : 00001014 Task Id : 00001014 To : Admin Admin Subject : Body : Attachments: Browse and Add from My Computer : [Select] Select Attachments from the Task Attachments List to be Submitted with this Task : | ☐	Attachment Name	Size	Date Created	View/DownLo | No records to display. + Click Here to Review Your Submission? + Click Here to View Submit Instructions? [Submit Task] [Cancel]

5. 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.

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 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.

8. In the Collaboration Portal, open the *Request For Document Task* that you are ready to complete.

9. On the *Tasks* tab, click **Submit Completed Task**:

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

11. On this screen, provide the *Subject* and *Body* for the message that accompanies the completed Request.

12. 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.

13. There are also options to Click Here to Review Your Submission? And Click Here to View Submit Instructions.

14. 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

15. 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.

4 Consultation Tasks

4.1 Responding to a Consultation Task

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

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

17. 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

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

19. Click **View Message** to view the message details:

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

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

22. You can now opt to *Accept* or *Reject* this request. Click **Change Status** to mark this request as **Accepted** or **Rejected**:
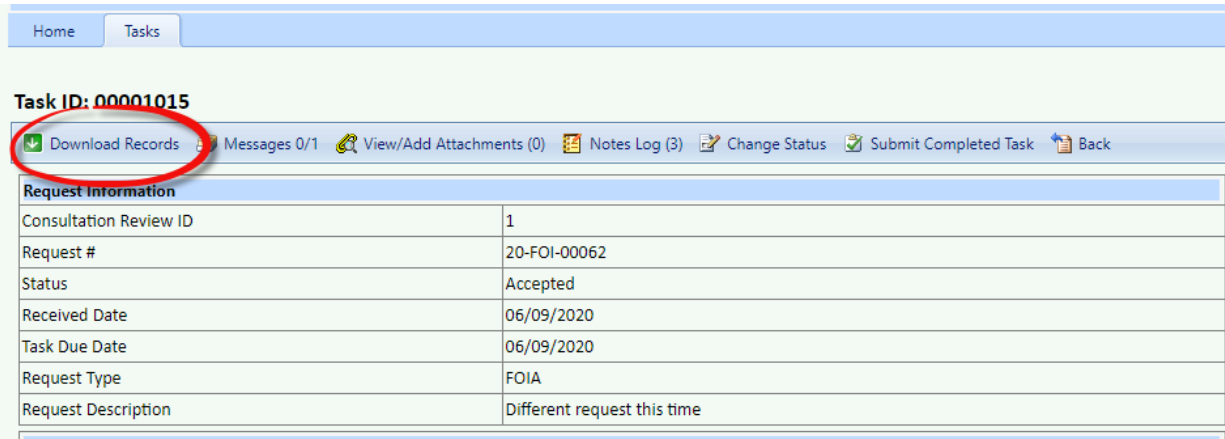
(!!) Note: There are also options to select *Need Additional Info*, *In Process*, and *Cost Estimate Sent*.

23. 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.

24. The status updates to *Accepted*. Next, click **Download Records**. This allows you to access the materials provided for your review.
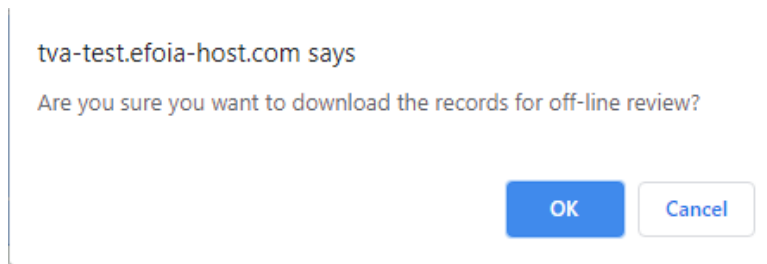

25. A pop up appears confirming that you'd like to download the records for review. Click **OK** to continue:

26. 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.

4.2 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.

27. In the Collaboration Portal, open the *Collaboration Task* that you are ready to complete.

28. On the *Task* tab, click **Submit Completed Task**:

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

30. On this screen, provide the *Subject* and *Body* for the message that accompanies the completed Consultation Task.

31. In the *Attachments* field, use the **Select** button to upload the reviewed documents to be included with the completed request.

32. There are also options to Click Here to Review Your Submission? and Click Here to View Submit Instructions.

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

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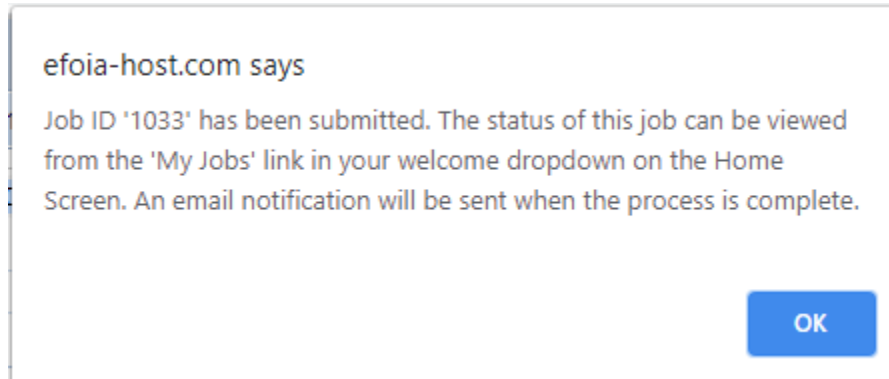
34. Click **OK** to dismiss the message. The *Tasks* tab refreshes, with the *Status* updated to *Submitted*. Additionally, the options to **Change Status** and **Submit Completed Task** are no longer available.

5 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:

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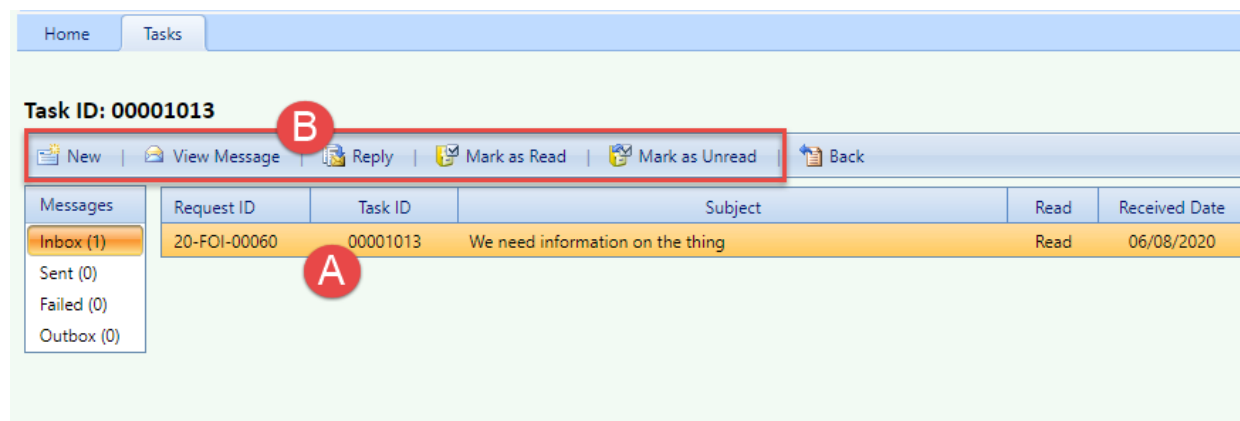

36. The *Messages* screen includes a (**A**) list of all messages received for this task (click **Outbox** to see any sent messages), as well as (**B**) *Actions* you can take:

37. 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**.

38. You can also send a message to the requester. Click **New** to send a new message. The *New Message* screen appears as shown below:

39. 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.

40. 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:
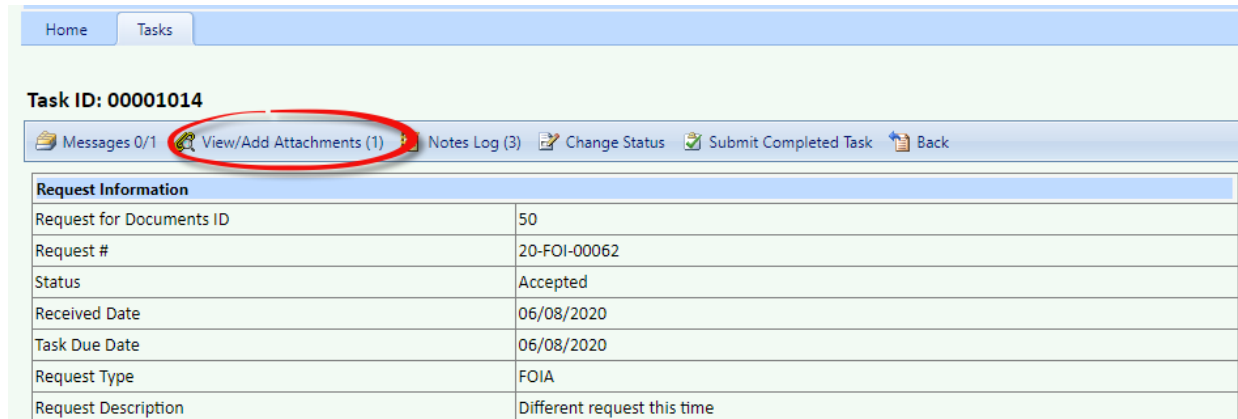

(!!) **Note: If an error occurs when sending a message, it appears under the *Failed* messages.**

6 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*.

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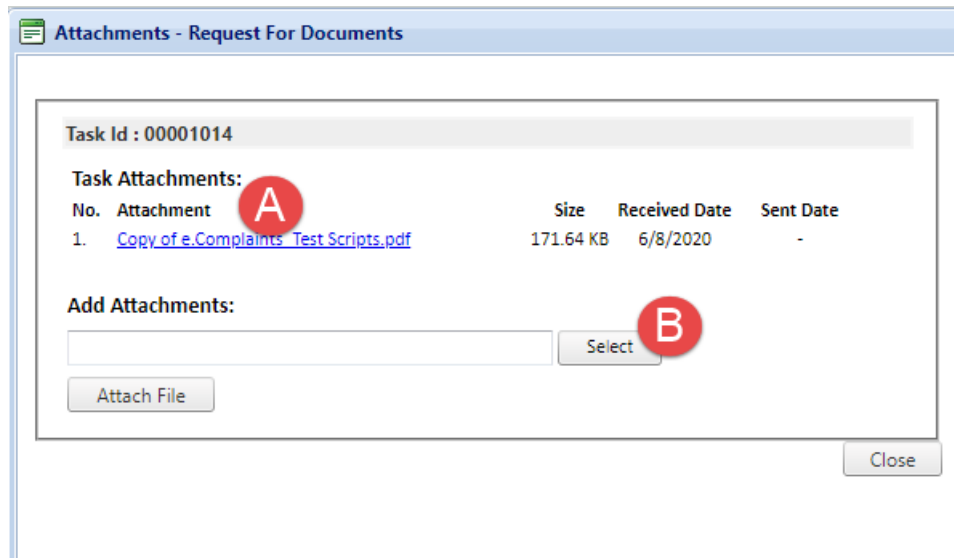

42. The *Attachments* screen appears. Included here are a (**A**) *Task Attachments* list with all current attachments (if any), as well as space to (**B**) *Add Attachments*:

43. 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**.

44. In the *Attachments* window, the selected files are listed under the *Add Attachments* field. When all attachments are listed, click **Attach File**.

45. 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.

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

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

7   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:
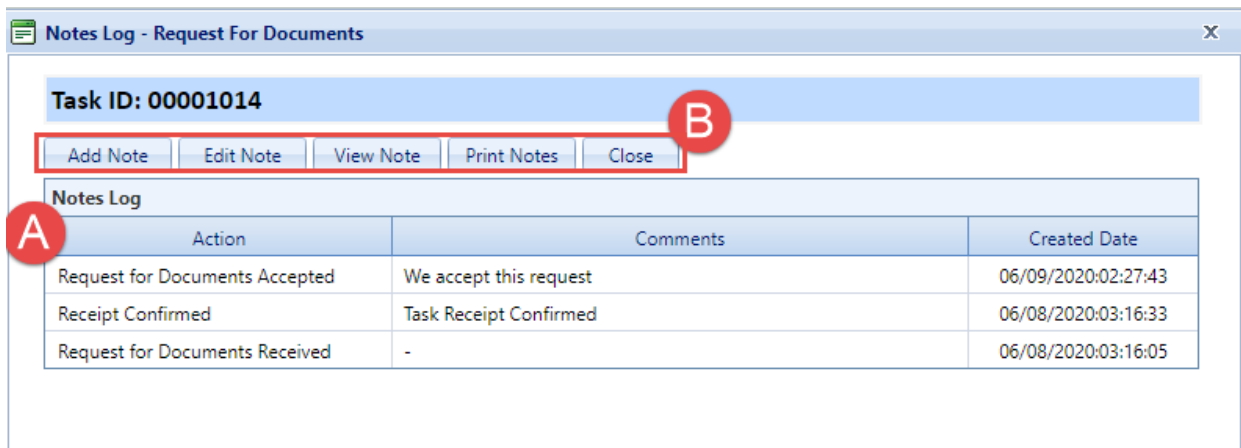

The *Notes Log* appears as shown below. This screen includes a **(A)** *Notes Log* with the actions taken in filling this request. There are also several **(B) Actions** you can take on the log.
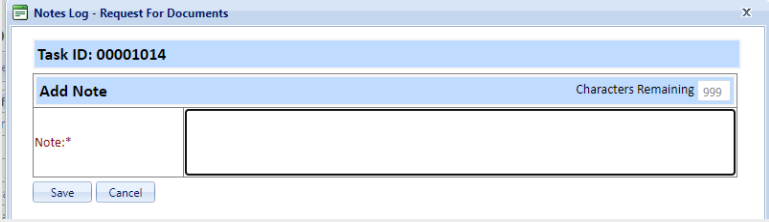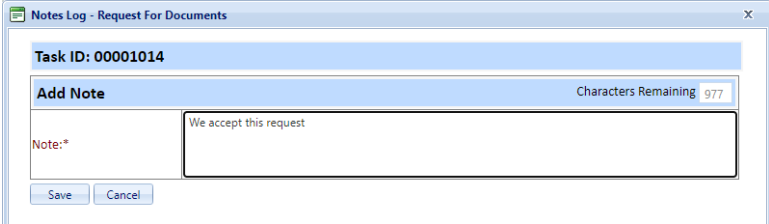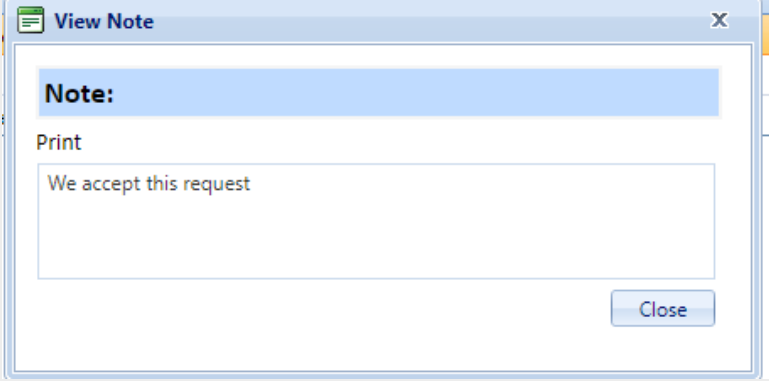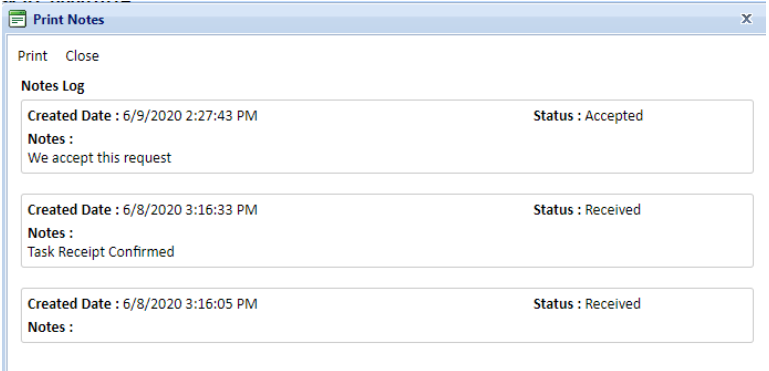

You can take actions on notes by selecting a note from the **(A)** *Log* and selecting an **(B) Action**. These are described below:

Action	Description	Image
Add Note	Click **Add Note** to manually add a note to the log. Add comments in the *Note* 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 *Notes Log*.	N/A