

ATIPXpress

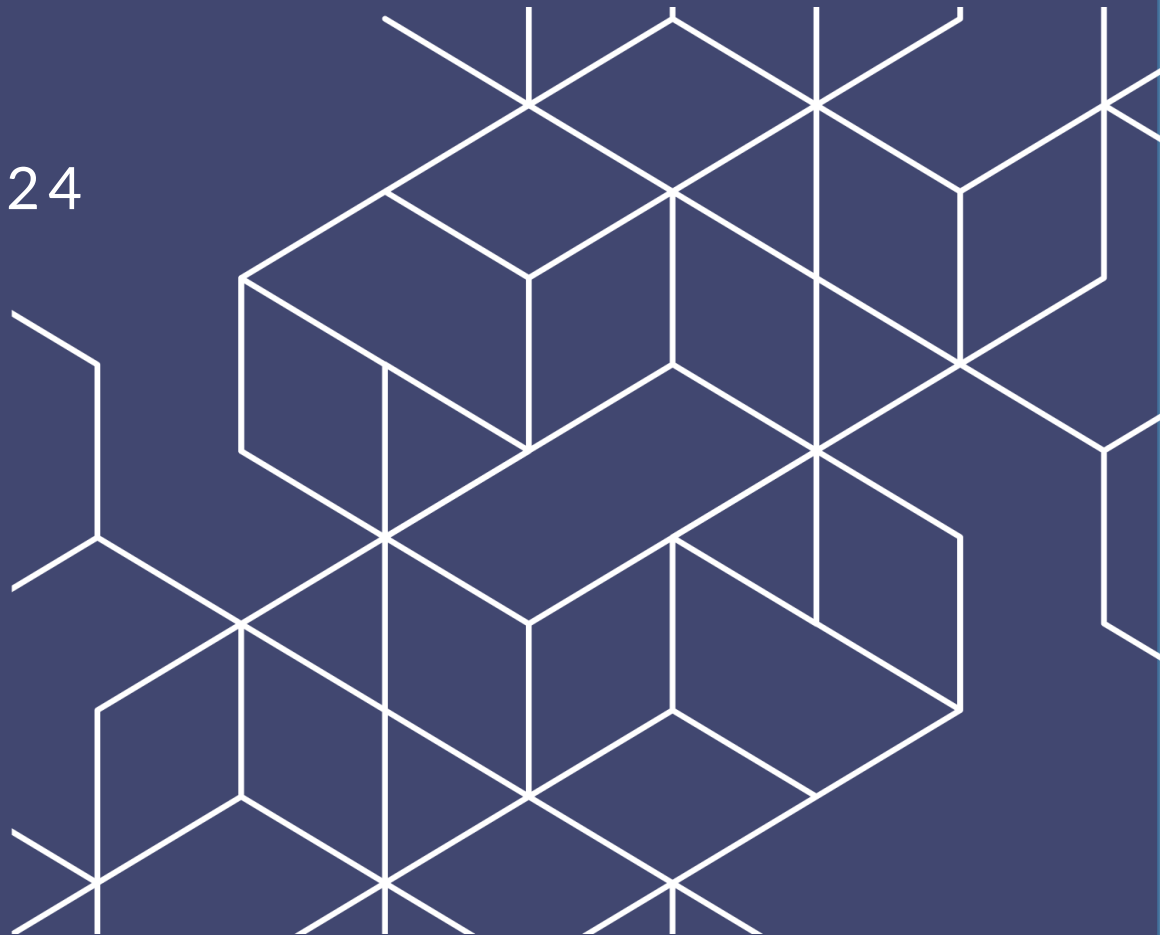


OPEXUS

Collaboration Portal User Manual

v11.5.0

March 2024



AX 11.5.0 Collaboration Portal User Manual

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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

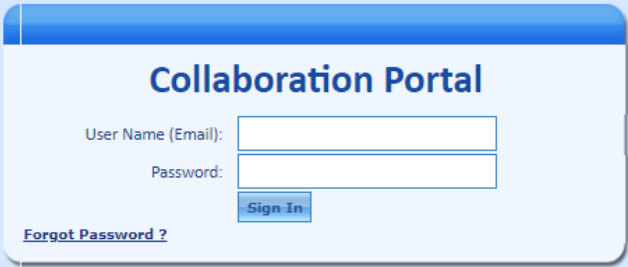
The following formatting conventions are used in this manual to highlight important information:

- *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**.

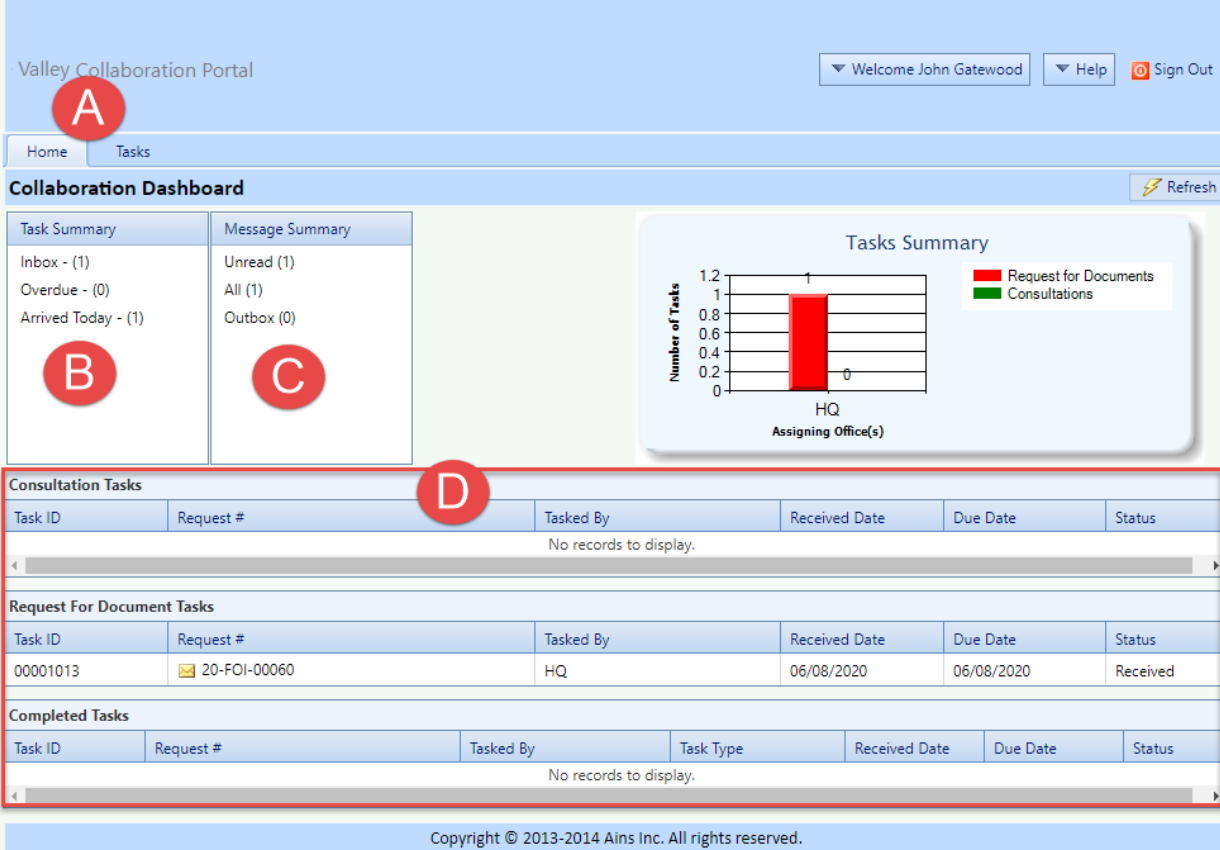


2 Accessing the Collaboration Portal

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:



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

Home Tasks

Collaboration Dashboard Refresh

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

Tasks Summary

Number of Tasks

HQ

Assigning Office(s)

Request for Documents

Consultations

Consultation Tasks

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.						

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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 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 your messages, and your Outbox .
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 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.

The screenshot shows the Collaboration Dashboard with the following components:

- Task Summary:** Inbox - (3), Overdue - (2), Arrived Today - (1)
- Message Summary:** Unread (1), All (3), Outbox (0)
- Tasks Summary:** A bar chart showing the number of tasks for HQ. The y-axis is 'Number of Tasks' (0 to 2.5). The x-axis is 'Assigning Office(s)' with 'HQ' listed. There are two bars: a red bar for 'Request for Documents' with a value of 2, and a green bar for 'Consultations' with a value of 1.
- Consultation Tasks:** A table with columns: Task ID, Request #, Tasked By, Received Date, Due Date, Status. It contains one row: Task ID 00001015, Request # 20-FOI-00062, Tasked By HQ, Received Date 06/09/2020, Due Date 06/09/2020, Status Received.
- Request For Document Tasks:** A table with columns: Task ID, Request #, Tasked By, Received Date, Due Date, Status. It contains two rows: Task ID 00001014, Request # 20-FOI-00062, Tasked By HQ, Received Date 06/08/2020, Due Date 06/08/2020, Status Received; and Task ID 00001013, Request # 20-FOI-00060, Tasked By HQ, Received Date 06/08/2020, Due Date 06/08/2020, Status Submitted. A red arrow points to the second row.
- Completed Tasks:** A table with columns: Task ID, Request #, Tasked By, Task Type, Received Date, Due Date, Status. It contains no records.

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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:

The screenshot shows a confirmation pop-up message with the following text:

test.foia-host.com says
Confirmation of receipt has been sent to sender.

There is a blue button labeled **OK** at the bottom right of the pop-up.

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



Collaboration for Portal Users

Home
Tasks

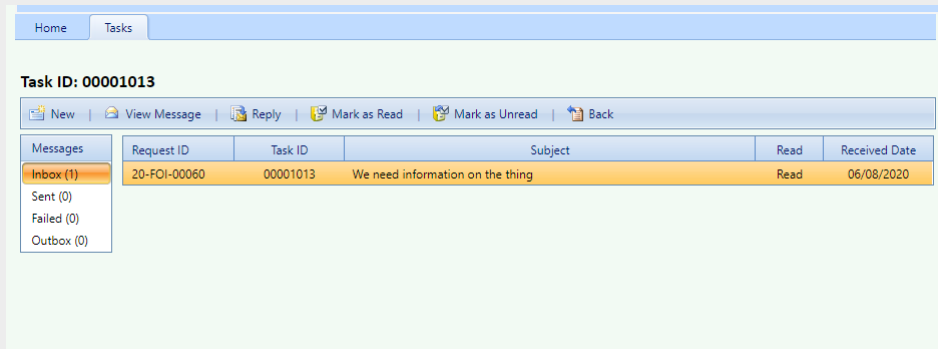
Task ID: 00001013

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

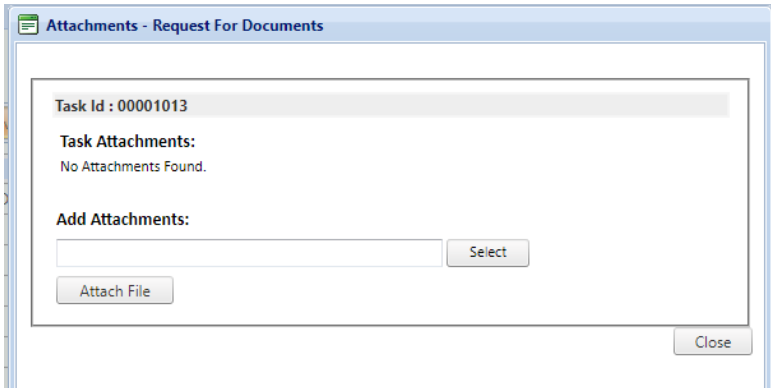
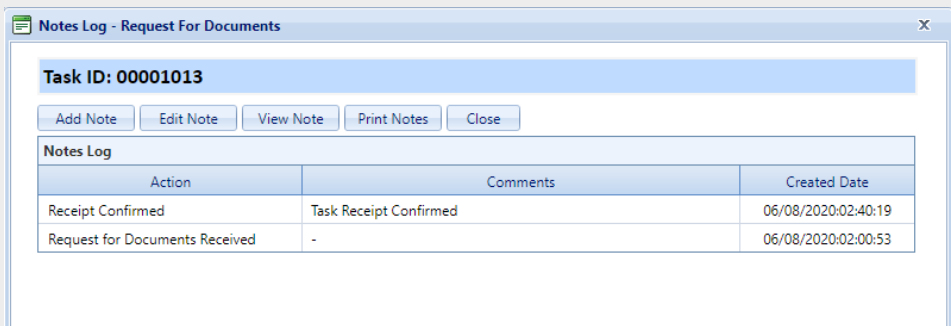
Request Information	
Request for Documents ID	48
Request #	20-FOI-00060
Status	Received
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	I want to know about that thing. You know what I mean. (Date Range for Record Search: From 1/1/2020 To 6/1/2020)

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.

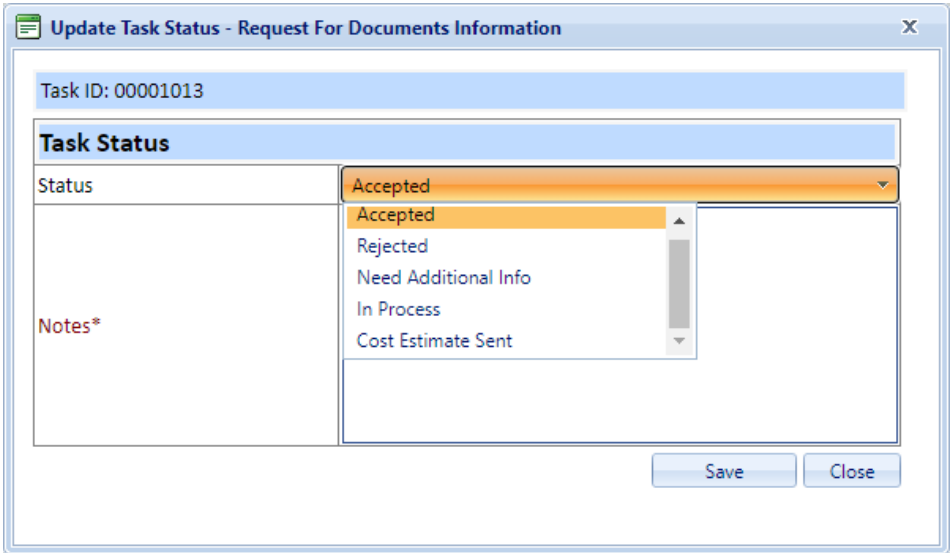
4. This includes all the information provided by the user who sent the RFD. This is also the screen where you'll take action to respond to this request. These actions are described below:

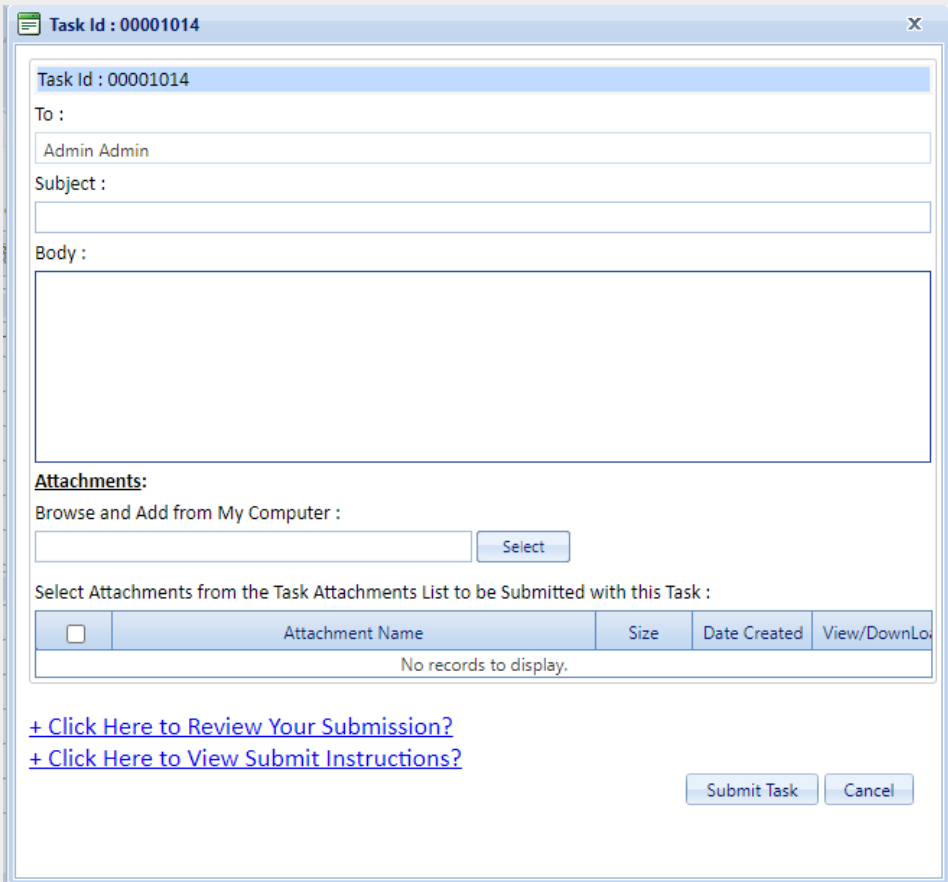
Action	Interface
<p>Click Messages to access correspondence for this task. You can send a New message to the user who sent the request, or View/Reply to messages in your inbox.</p>	



Action	Interface												
<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>													
<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>	 <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											



Action	Interface
<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>	

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*

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 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**:



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)

10. 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 :

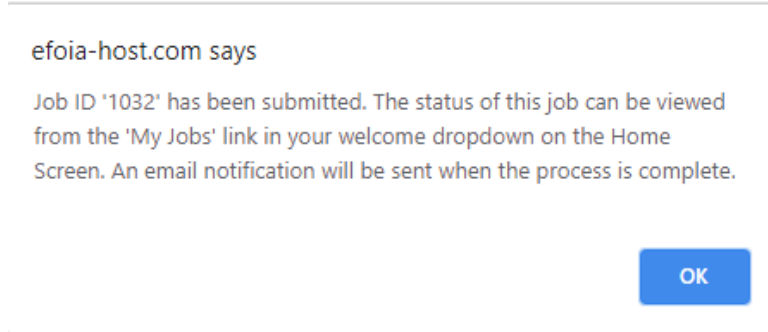
<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

[+ 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.



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



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.

The screenshot shows the 'Collaboration Dashboard' with a 'Tasks' tab selected. 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' at 2 and 'Consultations' at 1 for 'HQ'. Below these are three tables: 'Consultation Tasks', 'Request For Document Tasks', and 'Completed Tasks'. The 'Consultation Tasks' table has one row with 'Task ID' 00001015, 'Request #' 20-FOI-00062 (circled in red), 'Tasked By' HQ, 'Received Date' 06/09/2020, 'Due Date' 06/09/2020, and 'Status' Received.

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.						

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:

The screenshot shows the 'Task ID: 00001015' details page. It has a 'Messages' button circled in red. Below the button is a table with 'Request Information'.

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



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

Task ID: 00001015

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

Request ID	Task ID	Subject	Read	Received Date
20-FOI-00062	00001015	FOIA Request #20-FOI-00062 - Request for Records	Unread	06/09/2020

Messages: Inbox (1), Sent (0), Failed (0), Outbox (0)

20. 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

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**:

Update Task Status - Request For Documents Information

Task ID: 00001014

Task Status

Status: Accepted

Notes*

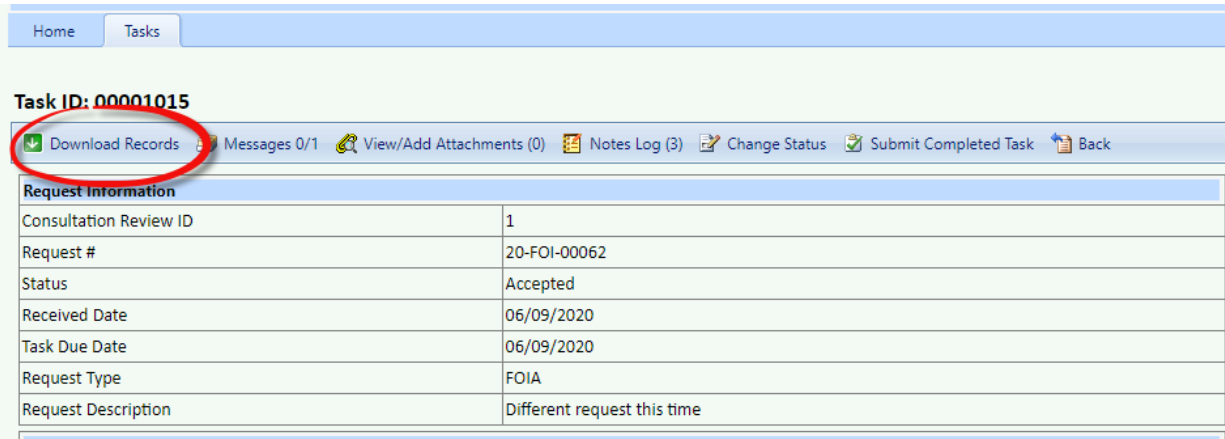
Accepted
Rejected
Need Additional Info
In Process
Cost Estimate Sent

Save Close

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



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.



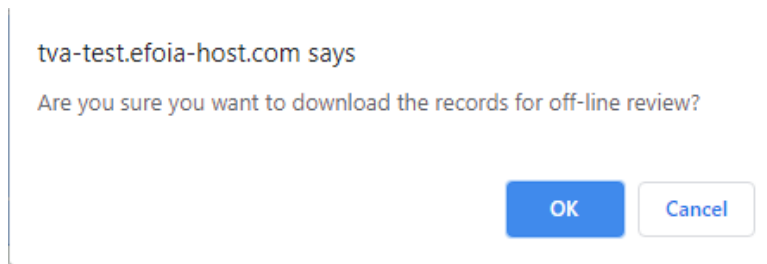
Home Tasks

Task ID: 00001015

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

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

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



tva-test.efoia-host.com says

Are you sure you want to download the records for off-line review?

OK Cancel

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**:



Home Tasks

Task ID: 00001015

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

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

Sender Information	
First Name	Admin
Last Name	Admin

29. 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 :

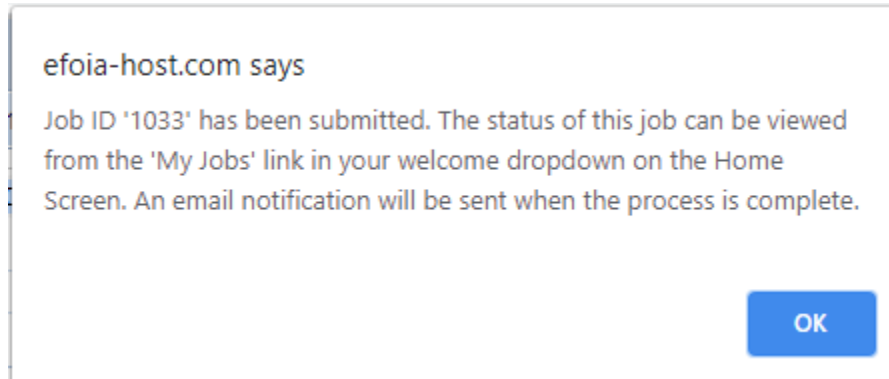
<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

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

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:



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**:



Home Tasks

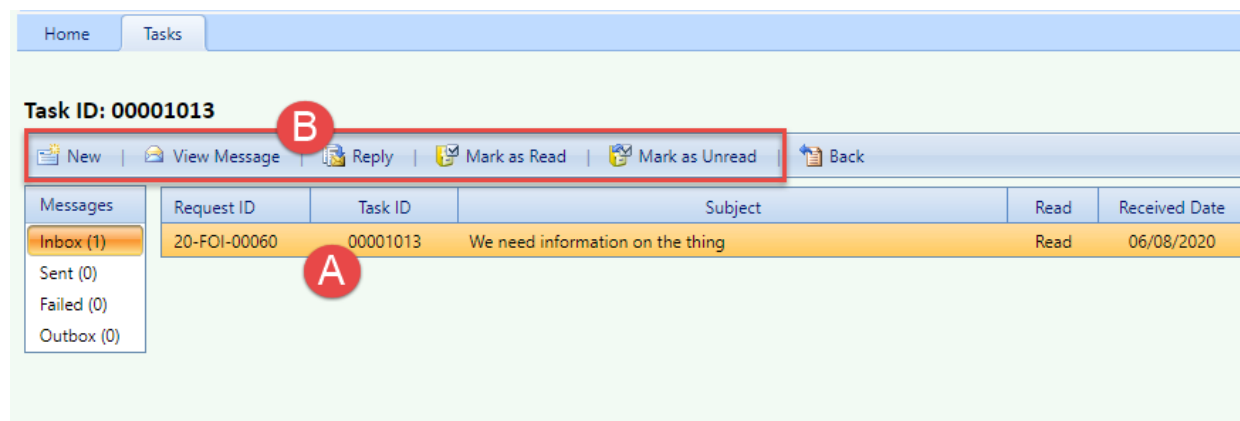
Task ID: 00001013

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.

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:



Home Tasks

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)					

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:

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/DownLd
No records to display.				

D

Send Message Cancel

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:

Task ID: 00001013

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

Messages

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

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

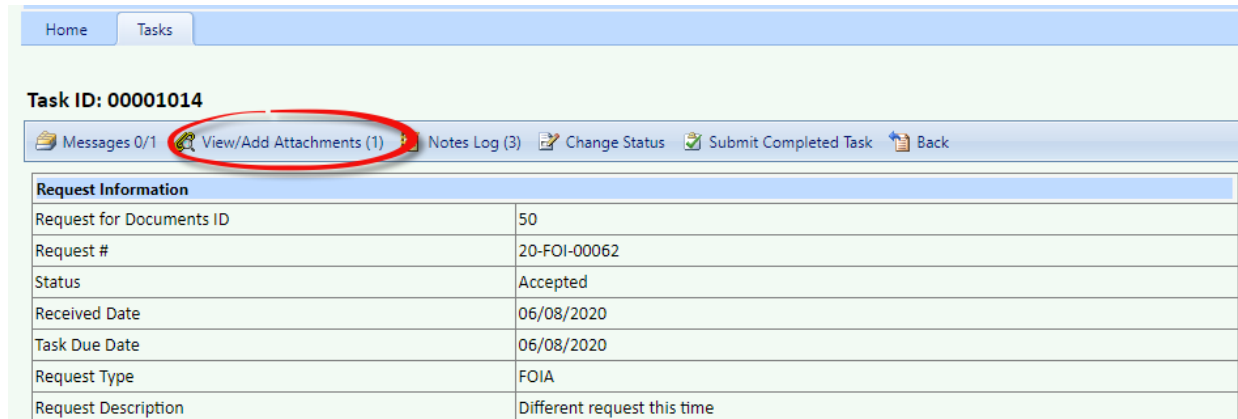
(!!) **Note:** If an error occurs when sending a message, it appears under the *Failed* messages.



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**:



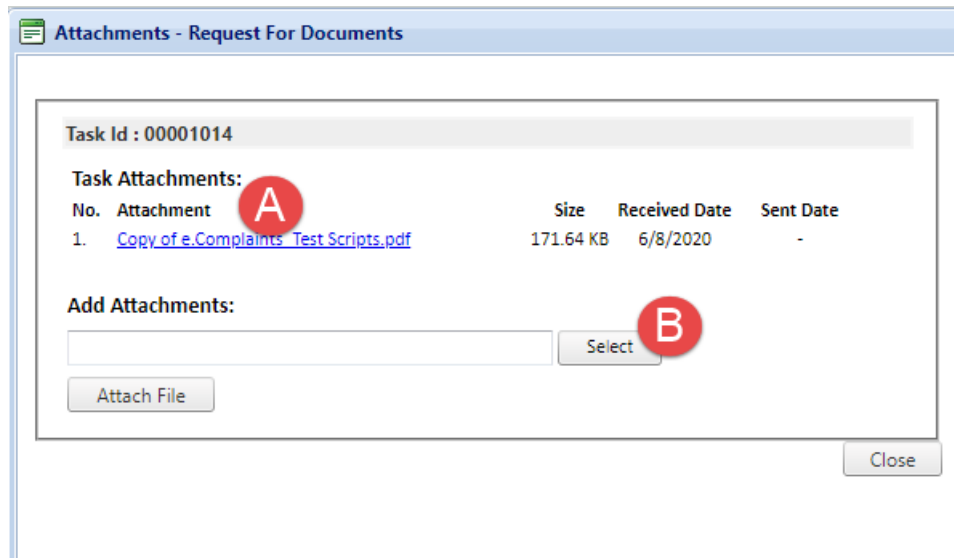
Home Tasks

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

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*:



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:

Select **Attach File**

Close

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**.



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:

● Sodium_Fact_Sheet_Edited.pdf ✕ Remove

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:

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	-
2.	Sodium_Fact_Sheet_Edited.pdf	1.09 MB	-	-

Add Attachments:

✕

(!!) 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:

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 :

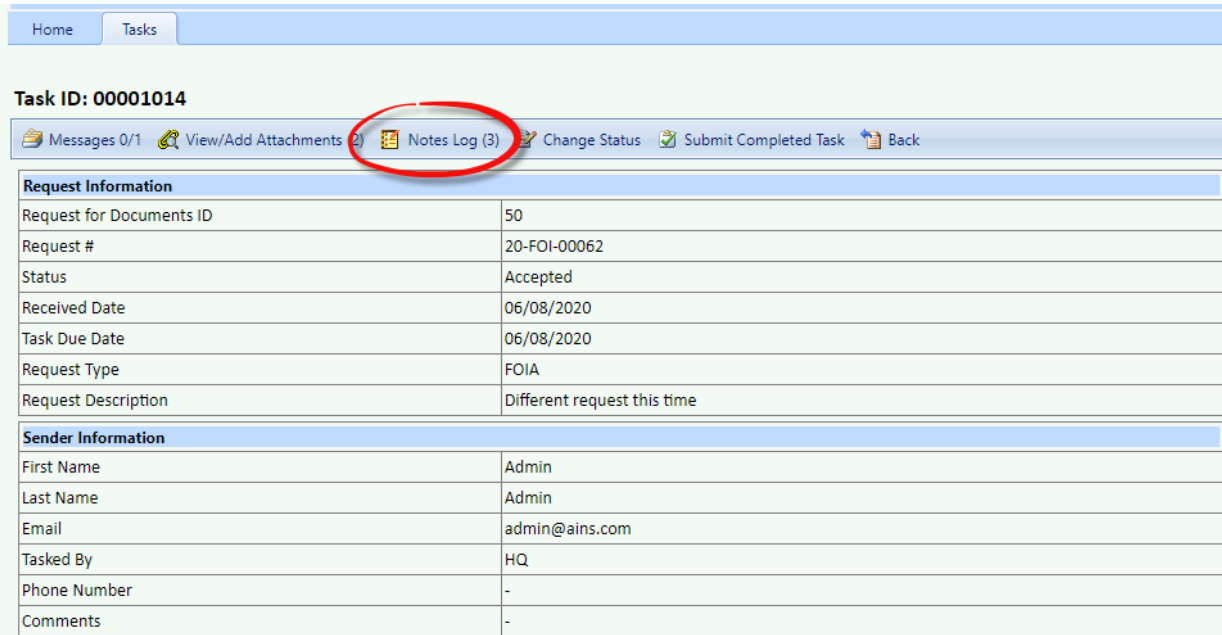
<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
<input type="checkbox"/>	Sodium_Fact_Sheet_Edited.pdf	1121.09...	06/09/2020	

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

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:



Home Tasks

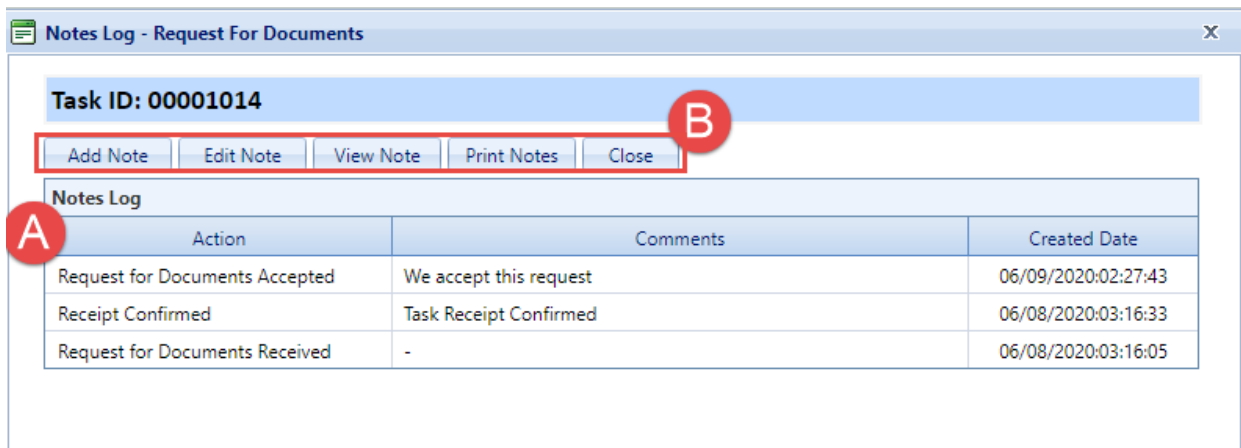
Task ID: 00001014

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

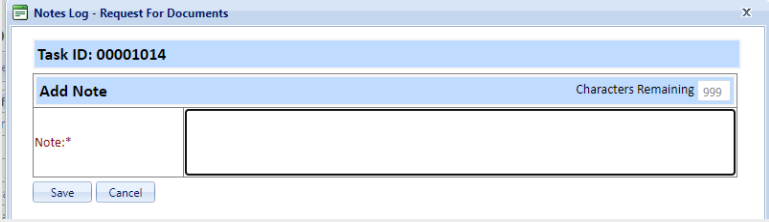
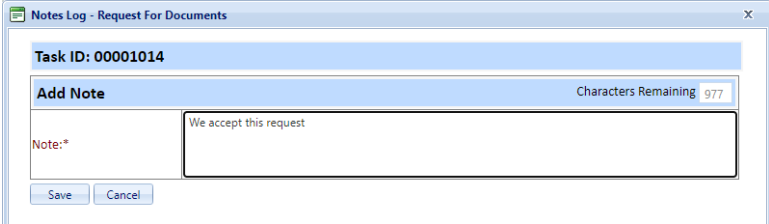
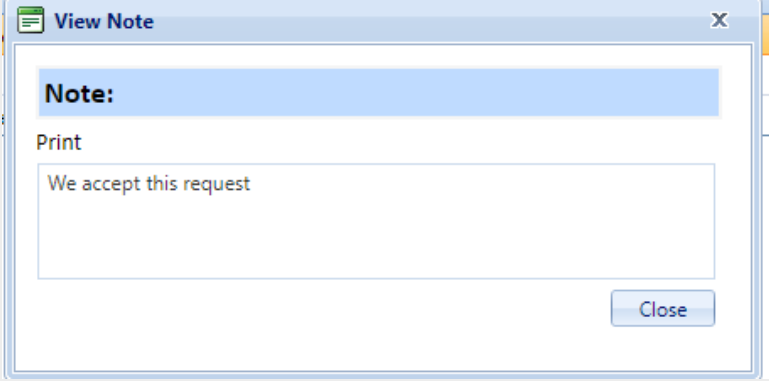
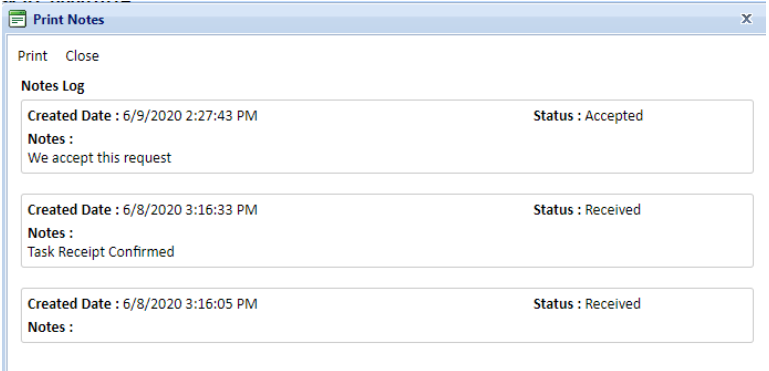
Task ID: 00001014

Add Note Edit Note View Note Print Notes Close

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.	

Collaboration for Portal Users

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

