

ATIPXpress



OPEXUS

Collaboration Application User Manual

v11.5.0

January 2024



AX 11.5.0 Collaboration Application User Manual

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1 About this Manual

1.1 Introduction

Welcome to the ATIPXpress Collaboration Application User Manual. 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 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

1.2 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 Requests for Documents

2.1 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 shows the ATIPXpress interface. The top navigation bar includes links for Home, Requesters, Requests, Document Management, Administration, and Reports. A search bar is on the right. The main content area shows a request for FOIA - Request: 24-FOI-00007, with a status of 'Assigned' and 'Remaining Days: 20'. On the left, a sidebar contains navigation links: Request Information, Assign Users, Set Perfect Status, Correspondence, Request for Documents (0/0), and Electronic Document Review (0/0). A red circle labeled 'A' highlights the 'Request for Documents (0/0)' link. In the main content area, there is a table titled 'Request for Documents' with columns: Action ID, Location(s) Referred, Sent By, Sent Date, Due Date, Completed Date, and Status. Below the table, it says 'There are no Request for Document records.' and '0 items in 1 pages'. A red circle labeled 'B' highlights the 'New' button in the table's footer.

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.

The screenshot shows the 'New Request for Documents - Step 1' screen. The 'Request for Documents mode' dropdown menu is open, showing three options: 'Send via Collaboration', 'Send via Email/Save', and 'Send via Collaboration'. A red circle highlights the 'Send via Collaboration' option. Below the dropdown, there is a 'Request Date' field with a date picker set to 10/19/2023, a 'Comments' text area, and a 'Spell Check' button. A note states: '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.' There is also a 'Due Date' field set to 10/19/2023 and an 'Add Reminder' checkbox. A 'Priority' dropdown menu is at the bottom.

4. In the *Send to: Program Offices* section, click **Add Program Offices**. The *Create/Search Program Office/Consultancy* screen appears as shown below:



Collaboration for Portal Users

Create/Search Program Office/Consultancy

Search Program Office/Consultancy Create New Program Office/Consultancy

Search Criteria Wild card searches (*) are supported

Basic Information

Program Office : * Action Office : OPX

Contact Email : * Active : ☐ All ☐ No ☒ Yes Category : ☒ Program Office ☐ Consultancy Location ☐ Both

<input type="checkbox"/>	Name	Contact Name	Phone Number	Has RX	Action Office	Category	Mapped To Collabo...
No records to display.							
Page size 20 0 items in 1 pages							
							<input type="button" value="Select"/>

5. Here you can search for and select from existing Program Offices/Consultancies, or **Create New Program Office/Consultancy**.

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

Phone Number: Count

Alternate Phone Number: St

Fax: ZIP Code

☒ Collaboration Access Portal

Note: * fields are mandatory

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:



Collaboration for Portal Users

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	Normalville Office	Gatewood, John				No	<input type="button" value="X"/>

Dispatch Mode*

☒ Email ☐ Print ☐ Save to Disk

Delivery Mode:

Dispatch Date:

☐ Send To: Other Email Recipients

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 **Subject** for the message. You can also edit the **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.

2.2 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 Portal Users

Home >> Collab Messages

Request #	Requester	Subject	Message	Received Date	Program Office
20-FOI-00060	Shorp, Befferly	Here are your documents	Here are all the documents we have...	6/9/2020	Normalville Office

Page size: 100 1 items in 1 pages

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

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

Message from Collaboration

Message Details

Subject : Here are your documents

Body:

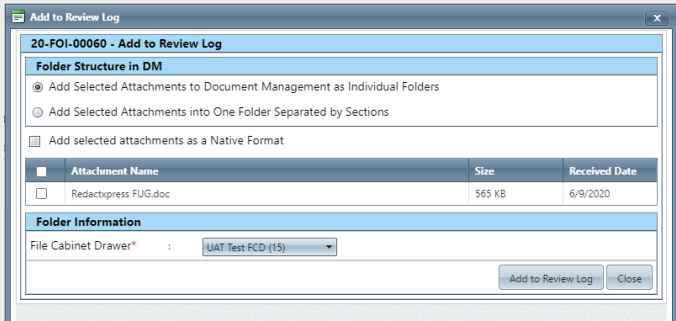
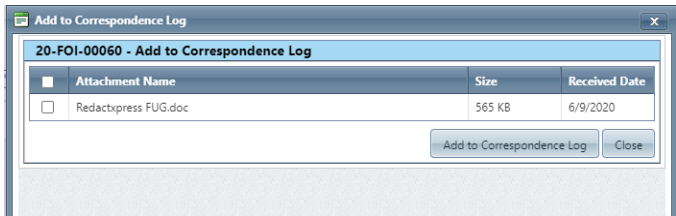
Here are all the documents we have in response to this request

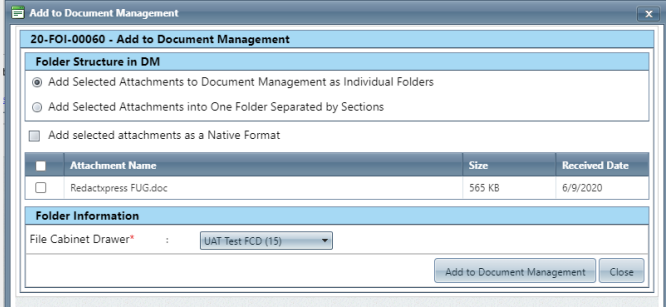
Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmnt
1 Redactxpress FUG.doc	565 KB	No	No

Add to Review Log Add to Correspondence Log Add to Document Management Close

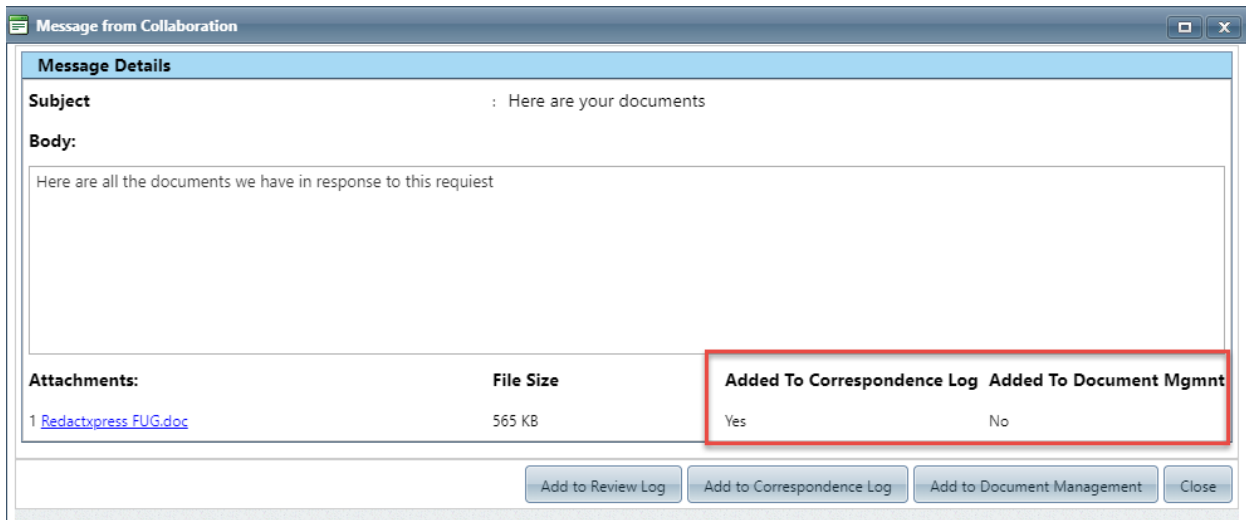
- There are three options for moving the documents into ATIPXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:



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

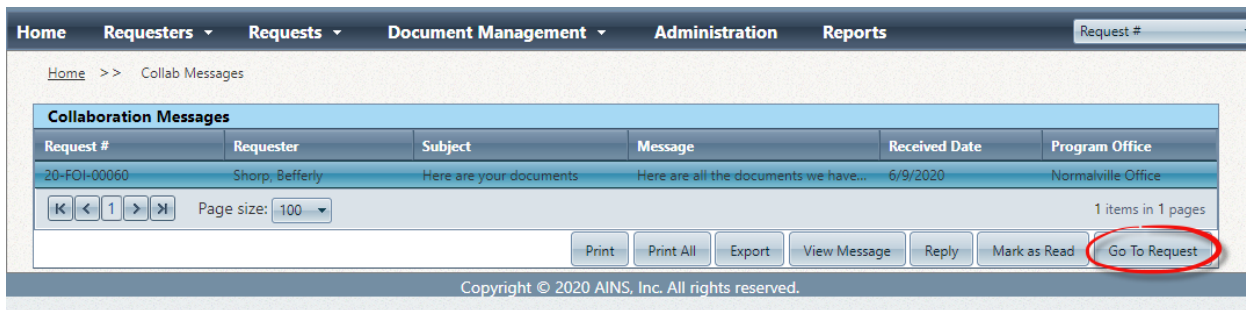
Action	Description	Image
Add to Document Management	<p>Add the attachments to Document Management.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	

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



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

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



Request #	Requester	Subject	Message	Received Date	Program Office
20-FOI-00060	Shorp, Beverly	Here are your documents	Here are all the documents we have...	6/9/2020	Normalville Office

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

The screenshot shows a table titled "Request for Documents" with the following data:

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

Below the table, there are navigation buttons: "New", "Take Action" (circled in red), "View", "Delete", "Messages (0/0)", "Send Email/Reminder", "Send Reminder by Print", and "Action(s) Log". A status bar at the bottom indicates "2 items in 1 pages".

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

The screenshot shows the "Request For Documents Action" form. The "Status" dropdown is set to "Completed". The "Action Date" is 6/9/2020. The "Due Date" is 6/7/2020. The "Completed Date" is 6/9/2020. The "Comments" field is empty. The "Attachment" section has a "Drag and Drop Zone" with buttons for "Scan File", "Attach File", "Print Barcode", and a link for "Professional Referen...". The "Save" and "Cancel" buttons are at the bottom right.

- Check the **Completed** checkbox and enter the **Completed Date**.
- 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:



Collaboration for Portal Users

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
<div><div><div>K</div><div><</div><div>1</div><div>></div><div>X</div></div><div>Page size: 100</div><div>2 items in 1 pages</div></div>						
<div><div>New</div><div>Take Action</div><div>View</div><div>Delete</div><div>Messages(0/0)</div><div>Send Email/Reminder</div><div>Send Reminder by Print</div><div>Action(s) Log</div></div>						

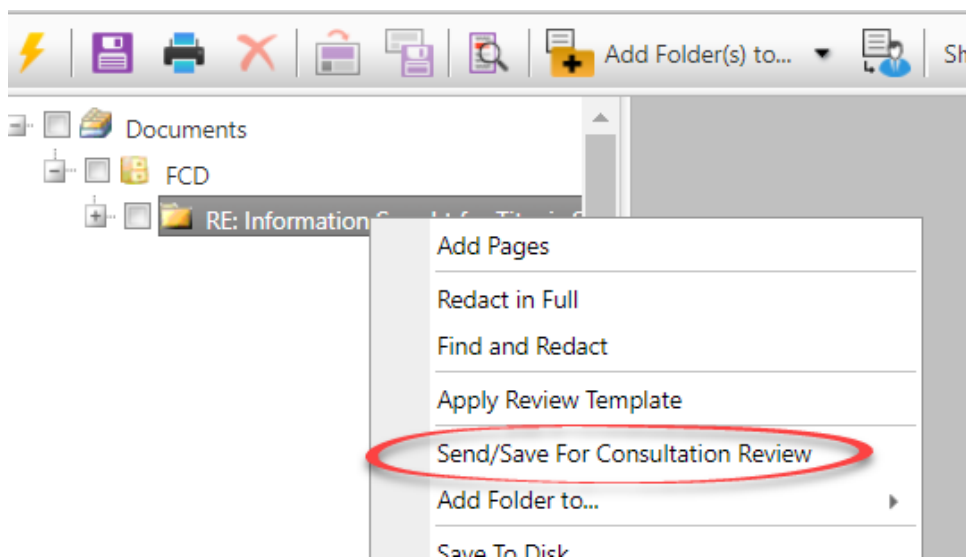


3 Consultation Reviews

3.1 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:

10. 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.
11. Right click the Document/Folder and click **Send/Save for Consultation Review**:



12. 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

Review Information

Request ID:

Review Due Date *: 10/19/2023

Comments:

☐ Add Reminder

Task:

Include Document Review Flags: All

Reviewers Information

Send via Collaboration Room

Send via Email/Save

Send via Collaboration Room

☐ Include Co

☐ Select a M

Include Review

☐ Comment

☐ Highlight

13. In the *Review Information* section, click the **Lookup** button to locate a request to associate with this consultation.
14. In the *Reviewers Information*, select an eligible **Consultation Location**.
15. 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* memo

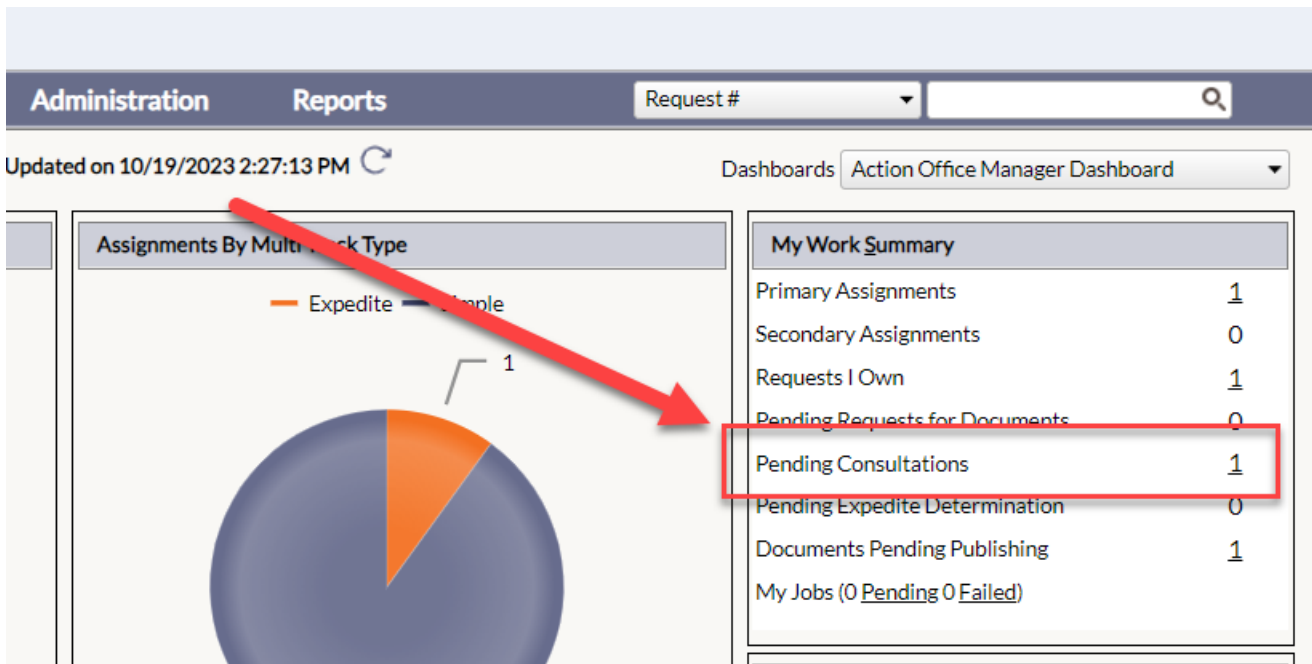
Email Body*

text

Save Cancel

Note: * fields are mandatory

16. In the *Customize Email Template* screen, edit the message however you need. When you're done, click **Save**.
17. When you've configured all the details on the *Send/Save Documents for Consultation* screen, click **OK** to continue.
18. 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**:



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

3.2 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*.

20. 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 Portal Users

Home >> Collab Messages

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

Page size: 100

1 items in 1 pages

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

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

Message from Collaboration

Message Details

Subject: : Reviewed Documents

Body:

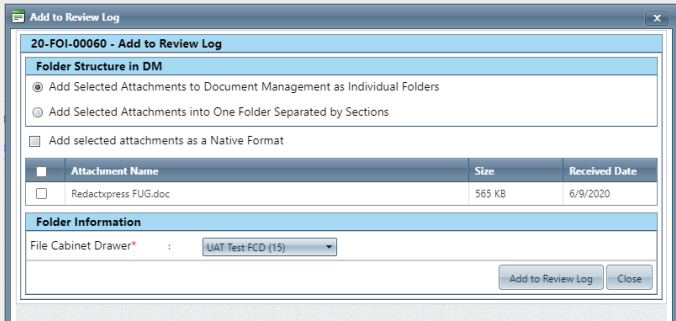
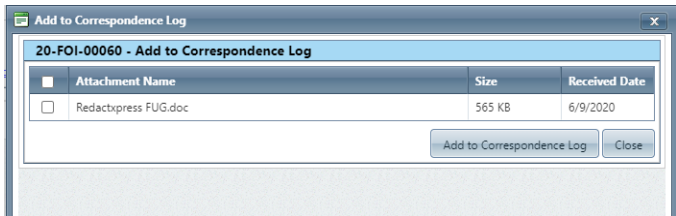
Made some minor changes, otherwise looks good!

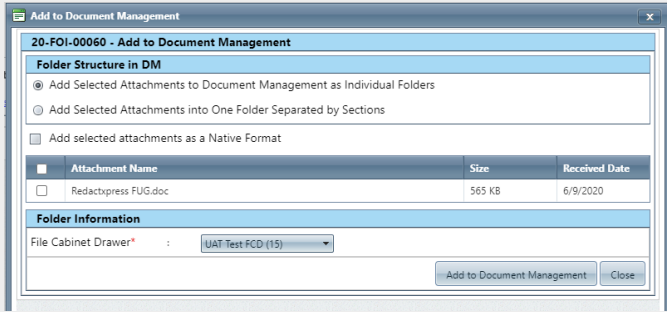
Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 Sodium Fact Sheet Edited.pdf	1.09 MB	No	No

Add to Review Log Add to Correspondence Log Add to Document Management Close

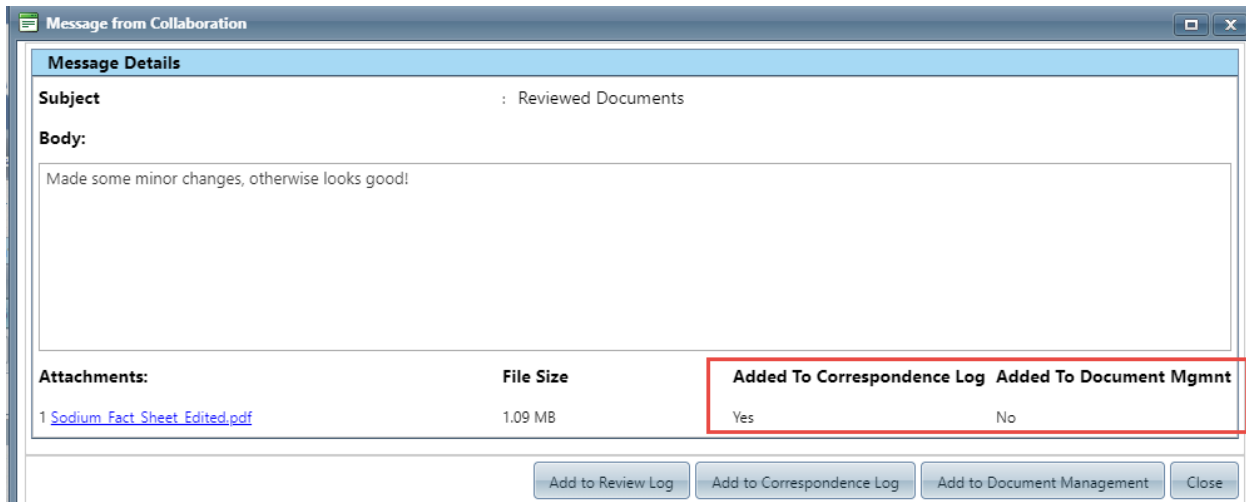
22. There are three options for moving the documents into ATIPXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:



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

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

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

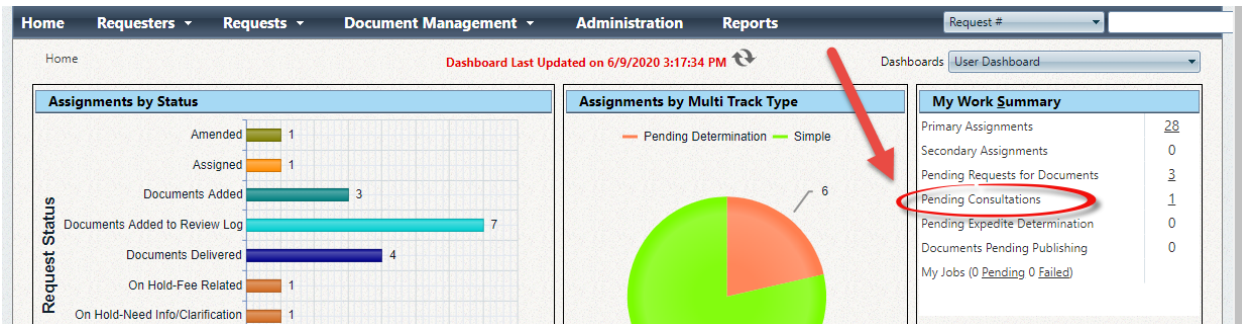


Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 Sodium Fact Sheet Edited.pdf	1.09 MB	Yes	No

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



Collaboration for Portal Users



25. 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

Page size: 100
 2 items in 1 pages


26. On the *Take Action* screen, under *Status* select **Review Complete**.



27. Check the **Completed** checkbox and enter the **Completed Date**.





New Action - Consultation Review Log -1

Location : Normalville Office


Action Date* : 6/9/2020 

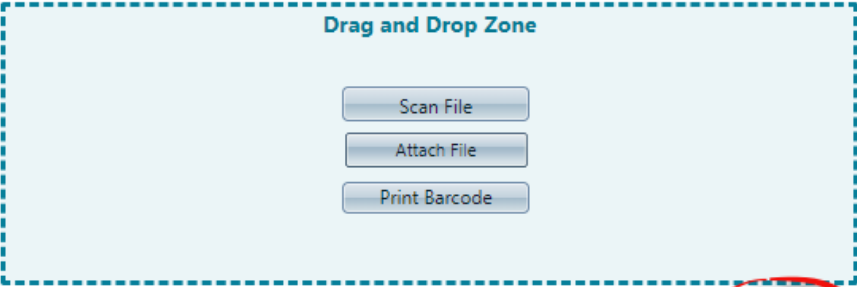
Status* : Review Complete  

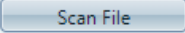
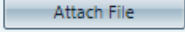
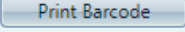
Comments : 



Due Date* : 6/9/2020 

☒ Completed

Completed Date* : 6/9/2020 

Attachment : 

Note: * fields are mandatory

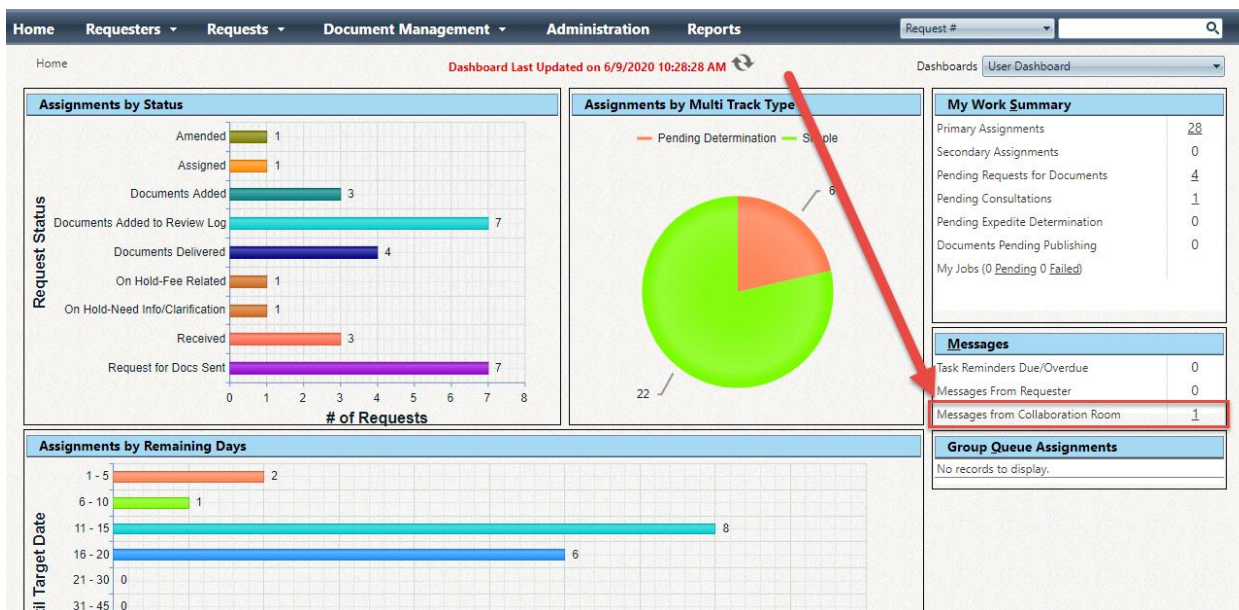
28. Click **Save** to save the action.



4 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**.

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



30. 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 screenshot shows the Collaboration Messages screen with 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

Below the table, there are navigation controls (Previous, First, Next, Last) and a 'Page size: 100' dropdown. At the bottom, there are action buttons: Print, Print All, Export, View Message, Reply, Mark as Read, and Go To Request.

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

The screenshot shows a window titled "Message from Collaboration". It has a "Message Details" section with a "Subject" field containing ": Example attachment" and a "Body" field containing "Here's an attachment, as an example." Below this is an "Attachments" table with one row: "1 10.6 Cover Page.pdf", "1.04 MB", "No", and "No". At the bottom are four buttons: "Add to Review Log" (labeled B), "Add to Correspondence Log" (labeled C), "Add to Document Management" (labeled D), and "Close". A red circle labeled A is next to the "Attachments" header.

Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 10.6 Cover Page.pdf	1.04 MB	No	No

32. 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**.
33. You can also click **Reply** to respond to the portal. The correspondence interface appears as shown below:
34. 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 the same window, but with the "Original Message" section expanded. It shows the "Subject" as "Clarification on the thing" and the "Body" as "Do you mean THE thing, or THAT thing? This is an i...". Below this is the "Compose Message" section with fields for "Subject*" (containing "Re:"), "Body*", and "Attachment:". The "Attachment:" field has a "Select" button. At the bottom right are "Send" (labeled D) and "Back" buttons. A red circle labeled A is next to the "Original Message" header, B is next to the "Subject*" field, C is next to the "Body*" field, and D is next to the "Send" button. A note at the bottom left says "Note: * fields are mandatory".

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

