

ATIPXpress

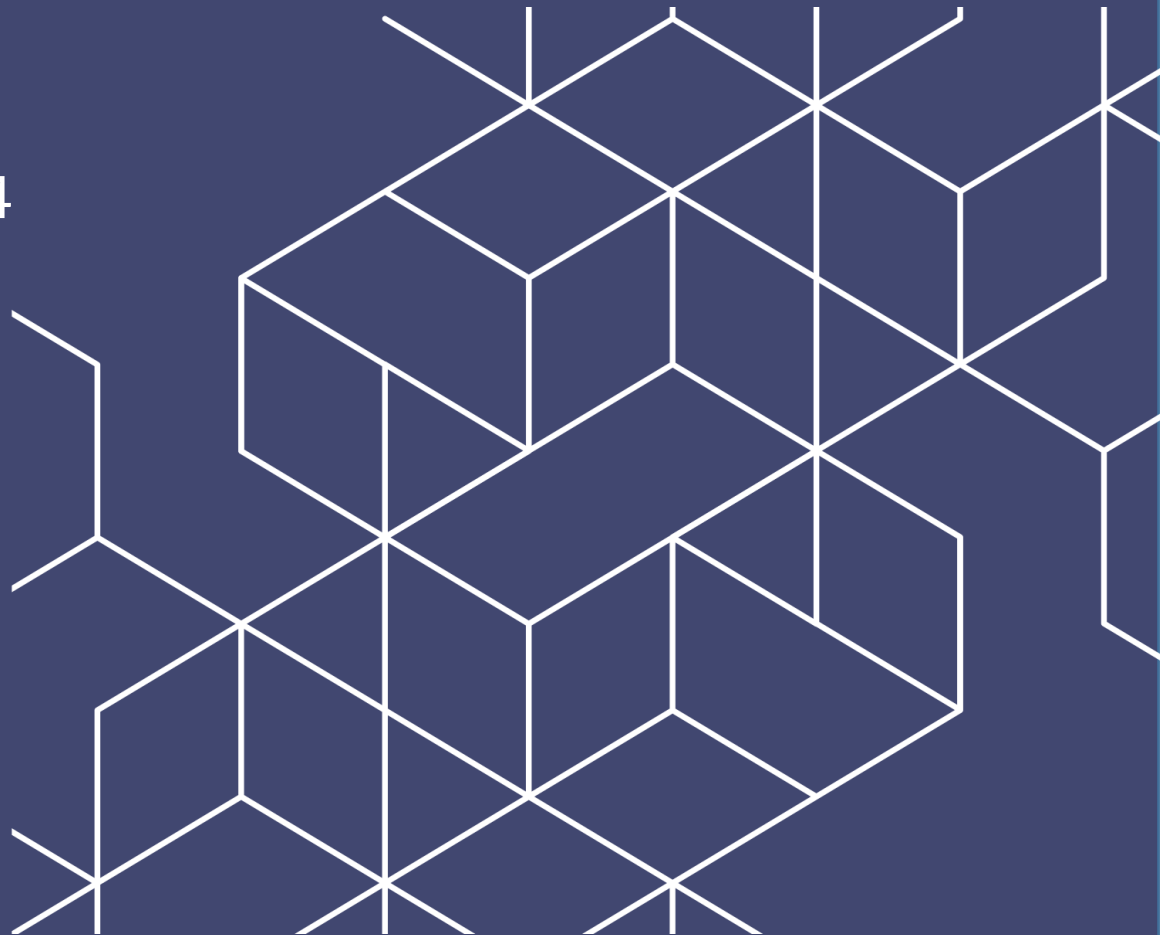


OPEXUS

PAL System Configuration Manual

v11.7.0

May 2024



AX 11.7.0 PAL System Configuration Manual

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Version History

| Version | Date | Revision Summary |
|---------|------------|---|
| 1.0 | 8/9/2023 | New version for v11.3.0 |
| 1.1 | 9/12/2023 | Updated the Security section to reflect new fields on the <i>Security Configuration</i> menu. |
| 1.2 | 10/17/2023 | New version for v11.4.0 |
| 1.3 | 12/20/2023 | New version for v11.5.0 |
| 1.4 | 5/22/2024 | Updates to the Authentication section (3.6) to cover the migration of SAML SSO configuration fields into the application. |



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1 Introduction

1.1 Scope

The purpose of this manual is to guide the user through configuration settings for the Public Access Link (PAL) application.

1.2 Overview

ATIPXpress PAL facilitates the submission of ATIP (Access to Information and Privacy) requests over the internet and allows information to be published to the Electronic Reading Room. ATIPXpress PAL is only supported on SQL Databases.

1.3 Getting Started

Before proceeding with the installation, it is necessary to do the following:

- Install and setup the ATIPXpress application and related components.
- Install the PAL application and related components.
- Configure the SMTP Server to relay email to the email server while using ATIPXpress PAL. The SMTP server must be configured to relay email messages to other domains.

1.4 References

The following resources were used as a reference in preparing this manual:

- ATIPXpress PAL Server Installation Manual
- ATIPXpress Online Manual



2 Enabling PAL Options in ATIPXpress

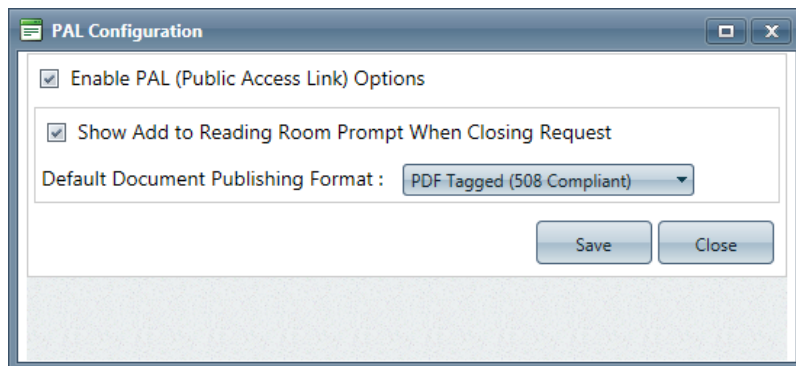
To configure PAL for use, it is necessary to enable PAL and its associated options (**Action Offices, Request Types, Custom Fields, Requester Categories, and Miscellaneous Fields**) in the ATIPXpress application. By doing this, the information displays in the PAL application.

(!!) Notes:

- The information in this section expects the ATIPXpress application to be installed and configured for use.
- You must be a member of the Admin group to enable PAL options.
- For further information concerning PAL options, please refer to the ATIPXpress Online Manual.

Follow the steps below to enable the ATIPXpress PAL:

1. Log in to the ATIPXpress application as an Administrator.
2. Click **Administration > System Configuration > PAL Configuration**. The *PAL Configuration* screen appears.
3. Select the **Enable PAL (Public Access Link) Options** checkbox.
4. Select the **Show Add to Reading Room Prompt When Closing Request** checkbox.
5. Select a **Default Document Publishing Format**.
6. Click **Save** to retain your modified settings, and then click **OK** within the confirmation window.



(!!) Note: An option to *Show in PAL* becomes visible for all PAL objects.



2.1 Action Offices

An Action Office is a location (region or department) that shares your instance of ATIPXpress for receiving and responding to ATIP/PA requests. Complete the steps below to configure Action Offices for the PAL:

1. Select **Administration > Organization Setup > Action Offices**. The *Action Offices* screen appears.
2. In the list, click the **Office Code** you want to configure to *Show in PAL*, and then click the **Show in PAL (Public Access Link)** checkbox, as shown in the image below.

MARAD - Edit Action Office

Action Office Information

Office Code*: MARAD x

Office Name*: MARAD Office

Office Details*: MARAD Pvt Ltd

Email: maradoffice@ains.com

Phone Number: 234.234.1234

Parent Office: HQ

Active: ☒

Show in PAL (Public Access Link): ☒

☒ Keep Remittance Address same as Correspondence Address Information

Correspondence Address

Address 1: H.No: 123-1/11

Address 2: Near Westin Main Gate

City: Idhohi

Country*: United States

State: Hawaii

ZIP Code: 45678-3456

[12345 or 12345-6789 format for US]

Remittance Address

Address 1: H.No: 123-1/11

Address 2: Near Westin Main Gate

City: Idhohi

Country*: United States

State: Hawaii

ZIP Code: 45678-3456

[12345 or 12345-6789 format for US]

Save Close

Note: * fields are mandatory

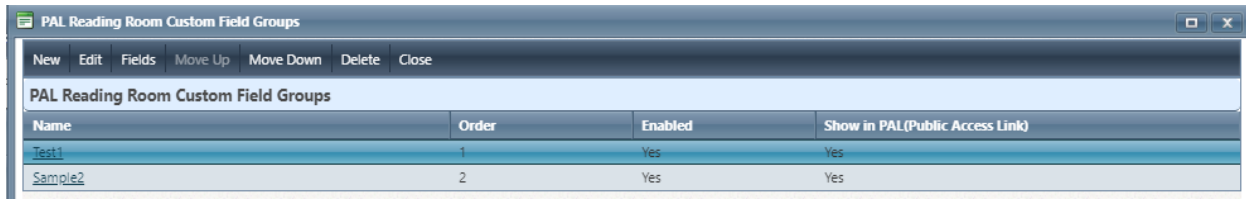
3. Click **Save**.
4. Click **OK** to retain your settings.
5. Click **OK**.
6. Repeat steps 2 through 5 for each Action Office to show in PAL, or click **Close** when Action Offices are fully configured.

2.2 Custom Fields

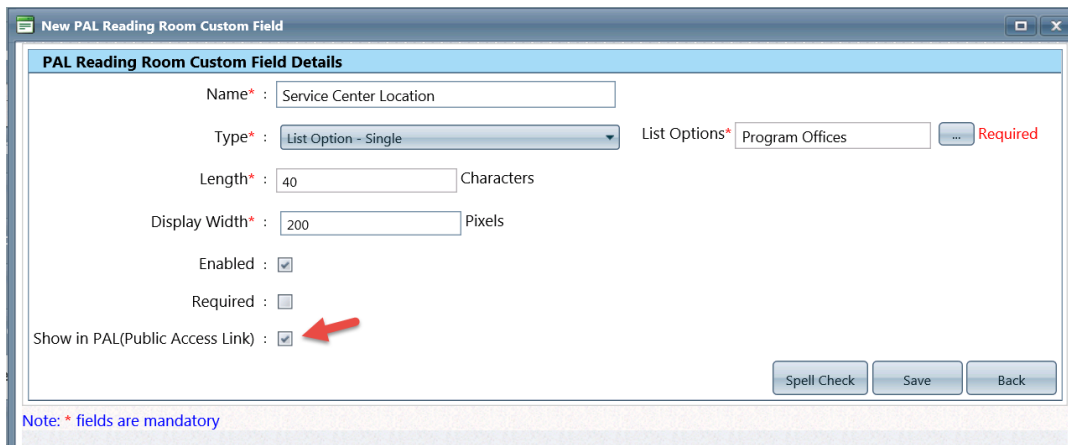
Custom Fields are user-defined fields that can be used as an index for search and retrieval of records, as filter criteria in a custom report or used to include information specific to a request, requester, or document that is not covered elsewhere in the application to avoid redundancy. By default, ATIPXpress provides built-in Custom Tabs for Request, Requester and PAL Reading Room, that can be renamed and customized.



7. Select **Administration > Document Management > PAL Reading Room Custom Fields**. The *PAL Reading Room Custom Field Groups* window appears.



8. In the list of **PAL Reading Room Custom Field Group** names, click the row of the group containing one or more field names you want to configure to Show in PAL, and then click **Fields**.
 - a. You can also create a new custom field group, or add fields to an existing custom field groups within this screen.
9. In the list of field names, click the field **Name** to configure, and then select the **Show in PAL (Public Access Link)** check box, as shown in the picture below.



(!!) Note: You can click the Move Up and Move Down arrows to configure the order of the Custom Fields that displays in PAL.

10. Click **Save**.
11. Click **OK**.
12. Repeat steps 3 through 5 for each field to configure to *Show in PAL (Public Access Link)*, or click **Close**.

2.3 Lookups

Lookups are pre-defined fields configured for most drop down lists in ATIPXpress. Of the different types of fields, the following are used in PAL:

- Appeal Sub Types
- Delivery Modes



- List Options
- Payment Modes
- Requester Prefixes
- Requester Suffixes

Within the Appeal Sub Types and Delivery Fields menu options, you can create, edit or enable lookups to appear in PAL.

(!!) Notes:

- **List Options are values used in conjunction with Custom Fields in ATIPXpress.**
- **For the purposes of these instructions, Requester Prefixes will be the type of Lookup used.**

Follow the steps below to configure Lookups for PAL:

1. Select **Administration > Lookups > Requester Prefixes**. The *Requester Prefixes* screen appears.
2. In the list of prefixes, click the **Prefix** to show in PAL, and then click the **Show in PAL (Public Access Link)** checkbox, as shown in the picture below.

3. Click **Save**.
4. Click **OK**.
5. Repeat steps 2 through 4 for each prefix you want to *Show in PAL* or click **Close**.

2.4 Request Types

ATIPXpress provides you with default request types such as ATIP, PA, or ATIP/PA. Your agency can create new request types, edit existing request types, and delete request types based on their needs.

1. Select **Administration > Request Management > Request Types**. The *Request Types* screen appears.



2. In the list of Request Type names, click the **Name** you want to configure, and then click the **Show in PAL (Public Access Link)** checkbox, as shown below.

3. Click **Save**.
4. Click **OK** to retain your modifications.
5. Repeat steps 2 through 4 for each Request Type you want to show in PAL, or click **Close**.

2.5 Requester Categories

A requester must be classified in a specific category, known as a Requester Category. The category to which a requester belongs is a qualifying factor for granting a request for waiving the fee and/or expediting a request. ATIPXpress provides default requester categories. Your agency can create new requester categories, edit an existing requester category, and delete requester categories based on their needs.

1. Select **Administration > Request Management > Requester Categories**. The *Requester Categories* screen appears.
2. In the list, click the **Name of the Requester Category** you want to configure to show in PAL.
3. Click the **Show in PAL (Public Access Link)** checkbox, and click **Save**.
4. A verification message appears. Click **OK** to retain the settings.
5. Repeat steps 2 through 4 for each additional Requester Category to show in PAL, or click **Close**.



Enabling PAL Options in ATIPXpress

Commercial Organization - Edit Requester Category

Requester Category Details

Requester Category Name* : Commercial Organization

Description : Commercial Organization

Show in PAL (Public Access Link) : ☒

Spell Check Save Cancel

Note: * fields are mandatory



3 Setting Up the PAL Application

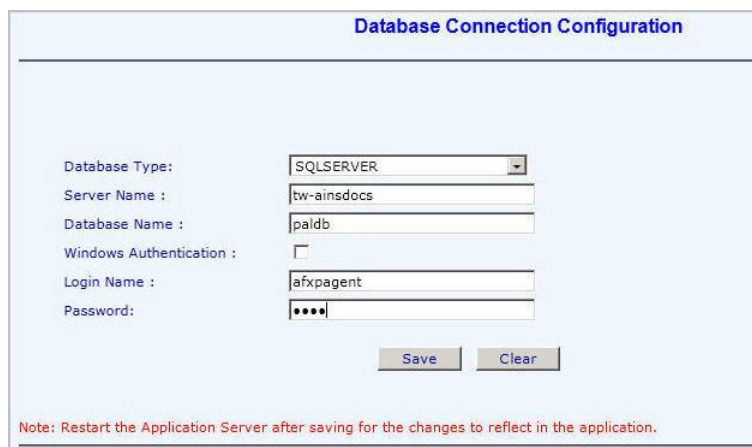
Once the PAL objects have been enabled in ATIPXpress, they are synchronized and you can begin setting up the PAL environment.

(!!) Notes:

- **Users must be a member of the Admin group in order to log into the PAL Configuration application.**
- **Users must reboot the server once the configurations are completed in order to reflect the settings in the application.**

3.1 Database Configuration

The information presented on this screen is automatically populated with data taken from the PAL installation. Updating this screen is unnecessary unless a new PAL database needs to be configured.



The screenshot shows a web-based configuration interface titled "Database Connection Configuration". It contains the following fields and controls:

- Database Type:** A dropdown menu with "SQLSERVER" selected.
- Server Name :** A text input field containing "tw-ainsdocs".
- Database Name :** A text input field containing "paldb".
- Windows Authentication :** A checkbox that is currently unchecked.
- Login Name :** A text input field containing "afxpagent".
- Password:** A text input field with masked characters (dots).
- Buttons:** "Save" and "Clear" buttons are located at the bottom right of the form area.
- Note:** A red text note at the bottom states: "Note: Restart the Application Server after saving for the changes to reflect in the application."

3.2 General Settings

The information provided on this screen is specific to your agency.



Setting Up the PAL Application

General Settings Configuration

Please complete all the required fields marked with an asterisk (*).

* Application Title:

PAL Application

* Application URL:

http://qa-fx-app09-pal:81/

Application Version:

10.7.0.3

Enterprise Hours:

9 00 AM to 5 00 PM

* Number of Records per Page:

20

* Error Log Path:

C:\Program Files\Pal

Enable SMTP Server:

☒

* SMTP Server Name/Address:

192.168.1.44

Port:

25

Enable Send Mail:

☒

508 JAWS Instruction Note:

508 Compliance Help instructions, list of shortcut keys are available under JAWS Section for PAL in the Help manual

Save

Clear

Enter general information details based on your agency's requirements as outlined in the table below.

1. Click **Save**.
2. A verification message displays. Click **OK** to retain the settings.

| Field Name | Description |
|-------------------|--|
| Application Title | The name of the PAL application as it appears in the title bar of the browser program. "PAL Application" is the default value. |
| Application URL | The web address for the PAL application. This address appears in the address bar of the browser program. |



| Field Name | Description |
|-----------------------------------|---|
| Application Version | The version of the installed application. This field is read-only and not editable. |
| Enterprise Hours | The time period (in hours) for accepting ATIP requests. Requests submitted after this period will be received the next day the office is open for business. |
| Number of Records Per Page | The number of lines a requester is able to view after a search is executed. An example is searching documents in the Reading Room. |
| Error Log Path | Select an output path for the error log file. |
| Enable SMTP Server | This option allows requesters to receive messages in PAL. When selected, you must enter the SMTP Server Name/Address and Port . |
| Enable Send Email | When selected, displays the Send Email link in the left panel of the PAL application. This link allows requesters to send a message to the contact email address for the enterprise. |
| 508 JAWS Instructions Note | A brief narrative that directs users to the location for assistance with JAWS. |
| Save | Accepts and retains the submitted information. |
| Clear | Removes information entered in the screen. |

3.3 Enterprise

The information on this screen represents the agency's mailing and contact information. Administrators can upload the agency's logo if one exists. By default, the *Enterprise Configuration* screen appears when PAL Configuration is launched.

1. Enter enterprise details, as outlined in the table below:

| Field Name | Description |
|------------------------|---|
| Enterprise Name | The identity of the agency. |
| Address | The street location of the agency. |
| City | The name of the city where the agency is located. |
| State | The name of the state where the agency is located. |
| Country | The name of the country where the agency is located. |
| Zip Code | The five or nine digit postal code for the agency. |
| Phone | The telephone number assigned to the agency. |
| Fax | The telephone number assigned to the agency's fax machine. |
| Contact Name | The name of the representative for the agency. |
| Contact Email | The electronic address for all automated email messages sent from PAL. |
| Clear Logo | Prompts the user to verify if the logo should be removed. When acknowledged by the user, the logo is removed, the field resets and the button becomes disabled. |



| Field Name | Description |
|--------------------|---|
| Select Logo | Allows the user to browse the system for an image file, uploads the file, then displays a portion of the image in the available field. The acceptable file formats are JPG, GIF or BMP. |
| Save | Accepts information entered on the screen. |
| Clear | Removes information entered on the screen. |

2. A verification message appears. Click **OK** to retain the settings.
3. Click **Save**.
4. A verification message appears. Click **OK** to retain the settings.

Enterprise Configuration
Please complete all the required fields marked with an asterisk (*).

Spell Check

* Enterprise Name: JAINS, Inc.

Address: 806 W. Diamond Ave., Suite 400

City: Gaithersburg

State: Maryland

Country: United States

Zip Code: 20878

Phone: 301-670-2300

Fax: 301-670-2841

Contact Name: Marcia Kemp

* Contact Email: mkemp@jains.com

Image Logo Path: (Max. size: 120 * 120 pixels)

Clear Logo

Select Logo

Save Clear

3.4 Modules

PAL has two modules: *Requester Interface* and *PAL Reading Room*. The *Requester Interface* allows requesters to submit requests, check the status of a request, create a profile and receive documents. The *Electronic Reading Room* allows ATIP Specialists to publish documents for searching and viewing by the public from within ATIPXpress. The *Dashboard* module allows

requesters to generate reports and graphs of data based on pre-configured queries and filtered criteria configured by the PAL administrator.

1. Enter the locations for Delivered and Electronic Reading Room Documents.
2. Click the **Enable send message to office** option, if required. This option displays the **Compose Message** link in the submitted request which allows requesters to send messages to the ATIP office.
3. Enter the web address for the *Dashboard Administration* and *Dashboard* modules.
4. Click **Save**.
5. A verification message appears. Click **OK** to retain the settings.

The screenshot shows the 'Modules Configuration' window. At the top, it says 'To enable or disable a module, use the checkbox next to it.' There are three sections, each with a checkbox and a text field:

- Requester Interface Module** (checked):
 - Location for Delivered Documents: C:\PALREADINGROOM\DOWNLOAD
 - Enable send message to office (checked)
- Electronic Reading Room Module** (checked):
 - Location for Electronic Reading Room Documents: C:\PALREADINGROOM
- Dashboard Module** (checked):
 - Administration URL: http://tw-ainsdocs:82/PXConfig/
 - Application URL: http://tw-ainsdocs:81/PX

At the bottom, there is a 'Save' button and a note: 'Note: Restart the Application Server after saving for the changes to reflect in the application.'

6. The **Dashboard Administration** link appears in the left panel of the PAL Configuration application and the **Dashboard** link appears in the *Main Menu* of the PAL application.

(!!) Note: The Dashboard option in Main Menu Links Configuration must be enabled for the link to appear in the Main Menu of the PAL application.

Setting Up the PAL Application

Database Connection
General Settings
Enterprise Modules
Security
Email Templates
Email Log
Audit Log
Requester Fields
Request Fields
Reading Room
Reading Room Documents
Display Order
Dashboard Administration
Online Payment
Main Menu Links
Layout Settings
Messages
Change Password

* Enterprise Name:
Address:

City:
State:
Country:
Zip Code:
Phone:
Fax:
Contact Name:
* Contact Email:
Image Logo Path:
(Max. size: 120 * 120 pixels)

[Agency]

Register

Sign In

Help ▾

français

Home Request Status **Dashboard** Other(P)

Home

Access to Information Act (ATIA)

We hope you will find this site informative and useful and that it will give you a better understanding of the Access to Information Act (ATIA) and its implementation at the [Agency].

Click on the links available on the left side panel to learn more about the application.

3.5 Security

Since PAL is accessed by the public sector, it is necessary to provide requesters with a secure environment. The *Security Configuration* screen allows the PAL administrator to establish a Password Policy for requesters accessing PAL information and data.

To change default values, enter the following information outlined in the table below:

| Field Name | Description |
|------------------------|--|
| Default Values | Administers the system default values and disables the Password Never Expires and User Account Inactivation options. |
| Password Never Expires | This checkbox permits passwords to not become invalid. |



| Field Name | Description |
|--|--|
| Passwords are valid for | Specifies how long (in days) the current password can be used. This field becomes disabled when the Passwords Never Expire checkbox is selected. |
| Remind User | Provides a system prompt for a specified number of days before a password is to expire and provides the user the option to change the password. This field becomes disabled when the Passwords Never Expire checkbox is selected. |
| Do not allow reuse of last | This option limits the use of previous passwords used to access PAL. |
| Password can contain up to | Sets the character length for recurring characters in a password. |
| Minimum password length | Sets the lowest number of characters a password can contain. |
| Password must contain at least (4) | Sets the number of uppercase letters, lowercase letters, special characters, and numeric characters that make up the password. |
| Display Visual verification image (CAPTCHA) after | Displays the CAPTCHA security feature during invalid user login attempts. |
| Login fails after | Sets how many times a user can unsuccessfully attempt to access the system. If the number of attempts exceeds this value, the user account is inactivated by the system. |



| Field Name | Description |
|---|---|
| Session time-out after | Sets how long a user can remain logged into ATIPXpress (in minutes) before the application terminates. The user must login to the application again to continue any activity currently in progress. |
| Alert user before Session expires for | Sets the time (in minutes) to remind the user before the session expires. The system will prompt the user when the session is to terminate and provide options to continue or end the session. |
| User Account Inactivation | Disables a user account for use in PAL. This field becomes disabled when the Password Never Expires option is selected. |
| Inactive user account after | This field is enabled if the User Account Inactivation option is selected. This field sets the number of days the account is to remain unusable in PAL. |
| Username and Password allowed to Match (partial or Full) | Allows the username and password to have some or all of the same string of characters. |
| Require Temporary Password Update after Login | Allows new users to change the temporary password after logging into PAL for the first time with the temporary password. |
| Apply Password Policy to Administrator | Employs the password policy to the PAL Administrator. |
| Save | Accepts information entered on the screen. |



| Field Name | Description |
|------------|--|
| Clear | Removes information entered on the screen. |

Security Configuration

Please complete all the required fields marked with an asterisk(*).

☒ Default values

| | |
|---|--|
| <p>Passwords never expire</p> <p>* Passwords are valid for</p> <p>* Remind user</p> <p>* Do not allow reuse of last</p> <p>* Password can contain up to</p> <p>* Minimum password length</p> <p>* Password must contain at least</p> <p>* Password must contain at least</p> <p>* Password must contain at least</p> <p>* Password must contain at least</p> <p>* Display Visual verification image(CAPTCHA) after</p> <p>* Login fails after</p> <p>* Session time-out after</p> <p>* Alert user before Session expires for</p> <p>User Account Inactivation</p> <p>Inactive user account after</p> <p>Username and Password Allowed to Match (Partial or Full)</p> <p>Require Temporary Password Update after Login</p> <p>Apply Password Policy to Administrator</p> | <p><input type="checkbox"/></p> <p><input type="text" value="90"/> days</p> <p><input type="text" value="5"/> days before password expires</p> <p><input type="text" value="12"/> passwords (including current)</p> <p><input type="text" value="2"/> repeating character(s)</p> <p><input type="text" value="8"/> characters</p> <p><input type="text" value="2"/> uppercase letter(s)</p> <p><input type="text" value="2"/> lowercase letter(s)</p> <p><input type="text" value="2"/> special character(s)</p> <p><input type="text" value="2"/> numeric character(s)</p> <p><input type="text" value="3"/> unsuccessful Sign in attempts</p> <p><input type="text" value="10"/> invalid login attempts</p> <p><input type="text" value="15"/> minutes</p> <p><input type="text" value="1"/> minutes</p> <p><input type="checkbox"/></p> <p><input type="text" value="30"/> days of inactivity</p> <p><input checked="" type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> |
|---|--|

Note: Maximum password length allowed is 16 characters.
 Total password length constitutes of uppercase, lowercase letters and special, numeric characters.

3.6 Authentication

The *Authentication* configuration allows users to enable SAML SSO authentication with Identity Provider for login, as well as form authentication using OTP. Please see the *SAML Login and Proof of Identity Configuration* manual for more information on integrating SAML SSO Authentication in PAL.

The *Authentication Configuration* is shown below:



Setting Up the PAL Application

The screenshot shows the 'Authentication Configuration' page. At the top, it says 'Authentication Configuration' in blue, followed by a red note: 'Please complete all the required fields marked with an asterisk(*).'. Below this is a section titled 'Authentication Options' with two radio buttons: 'Forms' (selected) and 'SAML SSO'. Under the 'Forms' option, there is a sub-section 'OTP Settings' containing two fields: '* OTP Notification Type' with a dropdown menu set to 'None', and '* OTP Expiry Time' with a text input set to '5'. A red note below these fields states: 'Note: Updates on Authentication Configuration may trigger the PAL application to restart automatically. If your changes are not reflected in the PAL application, then please try to restart the PAL application manually from the server.' At the bottom right of the form is a 'Save' button.

To enable login using Forms Authentication, select the **Forms** option. There are additional fields to configure *OTP Settings*, and you are required to select an **OTP Notification Type** (select **None** to disable OTP), as well as the **OTP Expiry Time** (in minutes).

To enable Login with SAML Authentication, select the **SAML SSO** option, then use the fields on this screen to complete the SAML configuration process:

The screenshot shows the 'Authentication Configuration' page with the 'SAML SSO' option selected. The 'Authentication Options' section shows 'Forms' as unselected and 'SAML SSO' as selected. Below this is a sub-section 'SAML Settings' containing a dropdown menu for 'Purpose of SAML Configuration' set to 'Sign In'. Below that is a section for 'Service Provider' with a field for '* Issuer/Entity ID/Name'.

Note: To configure the SAML SSO from PAL Configuration, the PAL configuration application must have permission to the PAL application folder with full control. If this is not applicable, use the PAL SAML Configuration Tool

See the *SAML Login and Proof of Identity Configuration* document for steps to configure PAL for SAML SSO.

3.6.1 Authentication Configuration & Identity Validation

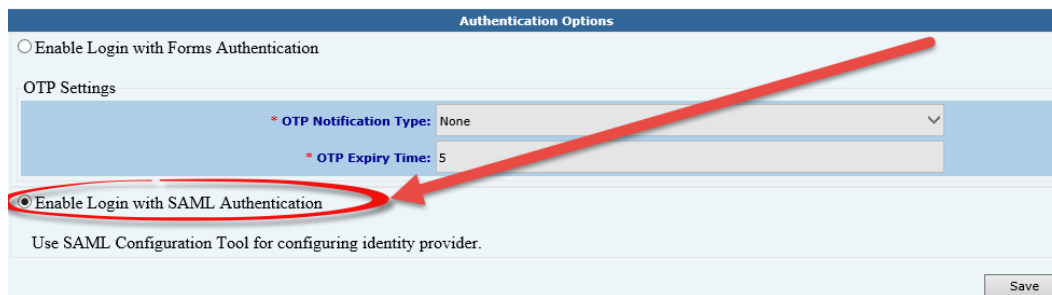
Identity Validation (i.e., Login.gov or ID.me) integration is used to authenticate a requester's proof of identity when submitting a request through PAL. There are two methods of authentication which can be utilized by AX PAL: Identity Assurance Level 1 (IAL1) and Identity



Assurance Level 2 (IAL2). IAL1 authenticates via standard Username and Password entry, whereas IAL2 leverages an additional Identity Validation Solution to provide proof of identity.

IAL1 authentication is recommended for general login to PAL to ensure requesters are not required to submit proof of identity, unless they are submitting a request type that requires it. The second level of configuration, IAL2, is enabled only when a request type requiring Proof of Identity is selected.

To configure the SAML authentication method for requesters, navigate to the **PAL Configuration > Authentication**. Within the *Authentication Options* workspace, select the **Enable Login with SAML Authentication** radio button and click **Save**.



The screenshot shows the 'Authentication Options' workspace. At the top, there is a radio button for 'Enable Login with Forms Authentication'. Below it is the 'OTP Settings' section, which includes a dropdown for 'OTP Notification Type' (set to 'None') and a text field for 'OTP Expiry Time' (set to '5'). Below the OTP settings, the 'Enable Login with SAML Authentication' radio button is selected and circled in red. A red arrow points to this button from the top right. Below the SAML option, there is a note: 'Use SAML Configuration Tool for configuring identity provider.' At the bottom right, there is a 'Save' button.

In addition to enabling the Login with SAML Authentication within PAL Configuration, the connection with the identity provider must be configured on the application server.

3.6.2 Identity Validation Options

If a request type within AX is configured to require proof of identity, requesters are forced to submit a proof of identity form. A Proof of Identity and Consent form can be found on every submitting Agency website. A hyperlink to the Agency's Proof of Identity and Consent form can be hosted within the request submission form. Per OMB M-21-04, Agencies must be willing to accept this form in electronic format as sufficient proof of identity. Once completed and saved, this authentication form can be uploaded in the *Proof of Identity* attachment workspace in the PAL Submission Form.

If the *Digital Authentication* radio button is selected, a link appears and redirects the requester to Login.gov to login with existing credentials or to create a new user profile. An IAL1 (Username and Password) login is not sufficient to authenticate a requester identity. To provide digital authentication, Login.gov will require an IAL2 profile and will assist the requester with the process of providing their user authentication information. After the requester submits their information, they receive a security code via email or authentication via phone. After successfully completing their validation, the requester is returned to the

request submission page, which now has the Proof of Identity validated and will share the validation with the agency upon request submission.

| | | | | | | |
|---|------------------------------|-----|-------------------------------------|-------------------------------------|--------------------------|--|
| Request Information (Header) | New request Information | ... | | | | |
| Description Document | Description Document | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Description | Description | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Date Range for Record Search | Date Range for Record Search | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Proof of Identity/Consent (Header) | Proof of Identity/Consent | ... | | | | |
| Proof of Identity Mode | Verification Mode | ... | | | Proof of Identity Option | Upload Attachment/C |
| Consent | Consent | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | Upload Attachment |
| Proof of Identity | Proof of Identity | ... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | Upload Attachment/Digital Authentication |
| Digital Authentication | Digital Authentication | ... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |

If one of the above Proof of Identity methods is satisfied, the system permits the requester to complete submission of a request.

After a request is received from PAL, the *Request Information* tab features the *Proof of Identity/Consent* workspace, which displays the date the requester's identity validation was received, as well as any attachments provided during request submission. If the request is received via any other submission method, the proof of identity section in AX can be manually updated with the received date and required attachments. If the required information is not provided, the AX requester can use PAL Messages, Email, and/or Letter Templates to request this required information from the requester and stop the clock until Proof of Identity validation is received.

Typically, organizations will satisfy identity requirements using Username and Password or IAL1. If an organization will only be using the application to process ATIP Requests and they do not require proof of identification, they only need to utilize IAL2.

(!!) Note: For more information about how proof of identity solutions authenticates a requesters identity or how to partner with an identity proofing solution, visit the solutions providers website (Login.gov or ID.me).

3.7 Email Templates


Certain events in PAL trigger an email notice sent to a requester or the ATIP office. These email notices are created from email templates, which represent the automated messages that are sent from PAL. Users with sufficient privileges are able to update the subject and body of the template to suit their agency's requirements.

1. Click **Email Templates**.
2. Select the type of template from the available list. For an explanation of each template, click the **Question Mark** button.
3. Make any necessary modifications to the subject or body of the template using the available tools provided by the Editor program and preset fields found on the **Insert Fields** menu.



4. Click **Save** to retain the edits to the template.

Email Templates Configuration
Please complete all the required fields marked with an asterisk(*).

Template: 

Subject*: **Insert Fields**

Body*

Dear [REQUESTER_FIRSTNAME] [REQUESTER_LASTNAME],

Option 1 : [REQUESTER_MYACCOUNT] Active

An existing profile with '[REQUESTER_EMAIL]' has been located. Therefore a temporary password has been issued and sent to the email address provided. Upon successful login it is recommended that you go to [REQUESTER_MYACCOUNT] via the left panel to review/update your personal profile since registration information was not accepted because the existing profile was located. Please check your email for this temporary password and return to [APPLICATION_URL] to login. adsasdasd

Option 2 : [REQUESTER_MYACCOUNT] Inactive

An existing profile with '[REQUESTER_EMAIL]' has been located. Therefore a temporary password has been issued and sent to the email address provided. Please check your email for this temporary password and return to [APPLICATION_URL] to login. Upon successful login it is recommended that you contact the FOIA Office at [ENTERPRISE_PHONE] to request an update to your requester profile.

Kindly change the password provided by us.

Regards,
[ENTERPRISE_NAME]

Design HTML Preview

Words: 147 Characters: 1011

Save

3.8 Email Log

The Email Log tracks messages sent from PAL and is used for reporting and administrative purposes. Administrators are able to view and print a report of all messages sent based on search criteria.

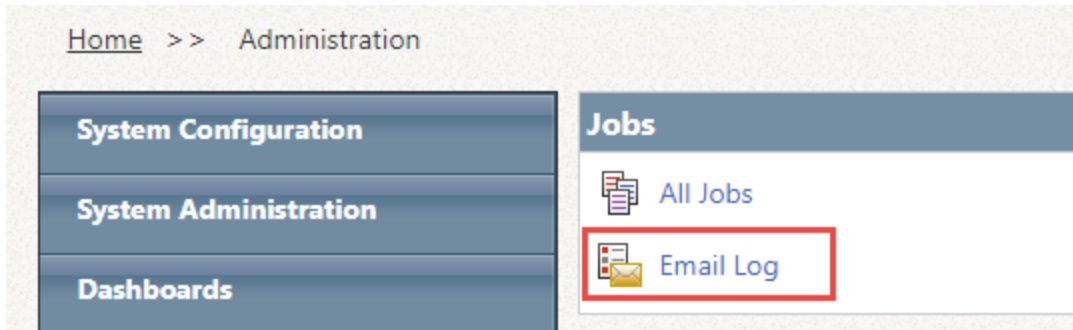
3.8.1 View & Export

Follow the steps below to view and export items from the email log:

1. Navigate to **Administration > Jobs**.
2. Click **Email Log**.



Setting Up the PAL Application



3. Enter search criteria based on the available fields, as described below the following image:

A screenshot of the 'Email Log Information' search form. The form has a light blue background. At the top, the title 'Email Log Information' is displayed in blue. Below the title, there are several search criteria fields: 'Template' (a dropdown menu with 'All' selected), 'Sent To (Email Address):' (a text input field with an asterisk), 'Requester's First Name:' (a text input field with an asterisk), 'Requester's Last Name:' (a text input field with an asterisk), and 'Status:' (a dropdown menu with 'All' selected). Below these fields, there is a 'Sent Date' section with 'From:' and 'To:' text input fields, each accompanied by a calendar icon. At the bottom of the form, there are two buttons: 'Search' and 'Clear'.

| Field | Description |
|-------------------------|--|
| Template | See logs using the specific templates used, from the drop down list. |
| Sent To (Email Address) | See emails sent to a specific email address. |
| Requester's First Name | See emails exchanged from a specific requester (using requester's first name.) |



Setting Up the PAL Application

| Field | Description |
|------------------------------|---|
| Requester's Last Name | See emails exchanged from a specific requester (using requester's last name.) |
| Status | Select an email status from the drop down list. |
| Sent Date | Use the <i>From</i> and <i>To</i> fields to narrow down log results to a specific date range. |

- Click **Search**. The system executes the search and the screen refreshes to display records that satisfied the search criteria.

Email Log Information

| Date & Time | Template | Requester's Name | Sent To | Status | Resend |
|---------------------------------------|-------------------------|------------------|----------------|---------|------------------------|
| 1/10/2014 10:19:35 AM | Create Requester in PAL | Marcia, Kemp | mkemp@ains.com | Success | Resend |
| 1/10/2014 10:19:35 AM | Password Information | Marcia, Kemp | mkemp@ains.com | Success | Resend |
| 12/23/2013 2:53:08 PM | Create Request in PAL | Dmitry, Yun | dyun@ains.com | Success | Resend |
| 12/23/2013 2:48:04 PM | Create Requester in PAL | Dmitry, Yun | dyun@ains.com | Success | Resend |
| 12/23/2013 2:48:04 PM | Password Information | Dmitry, Yun | dyun@ains.com | Success | Resend |

Page 1 of 1

Print/Export Report
☒ Print ☐ Export

Select Page Range
☒ All Pages ☐ Current Page

- Click a link in the **Date & Time** column to view the message, or double click the desired search result. The screen adjusts to display the sent message.



Setting Up the PAL Application

Email Log Detail Information

| | |
|-------------------------|---------------------------------|
| Date & Time | : 9/21/2020 10:06:42 AM |
| Requester's Name | : [REDACTED] |
| Status | : Success |
| To | : [REDACTED] |
| Subject | : Your Login Information - AINS |
| Message | : |

Dear [REDACTED]

A temporary password has been issued and sent to the email address provided. Please check your email for this temporary password and return to <http://qa-upgrade:81/> to login. If you have any previously submitted requests to AINS you will be able to view them by logging into your user account

Kindly change the password provided by us.

Regards,
AINS

6. Click **Back** to return to the previous screen or click **Print** to send a copy of the message to the local or network printer.
7. Click the **Resend** link to a corresponding message to send the message to the requester again.

| Date & Time | Template | Requester's Name | Sent To | Status | Resend |
|---------------------------------------|-------------------------|------------------|----------------|---------|------------------------|
| 1/13/2021 1:55:10 PM | Create Requester in PAL | Marcia, Kemp | mkemp@ains.com | Success | Resend |
| 1/10/2021 10:19:35 AM | Create Requester in PAL | Marcia, Kemp | mkemp@ains.com | Success | Resend |
| 1/10/2021 10:19:35 AM | Password Information | Marcia, Kemp | mkemp@ains.com | Success | Resend |
| 12/23/2020 2:53:08 PM | Create Request in PAL | Dmitry, Yun | dyun@ains.com | Success | Resend |
| 12/23/2020 2:48:04 PM | Create Requester in PAL | Dmitry, Yun | dyun@ains.com | Success | Resend |
| 12/23/2020 2:48:04 PM | Password Information | Dmitry, Yun | dyun@ains.com | Success | Resend |

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8. Click **Export** to download a copy of the report to the local or network drive using one of the available formats (Export Options radio buttons).

Print/Export Report

☐ Print
☒ **Export**

Export Options

☒ Excel
☐ Word
☐ CSV
☐ HTML

Select Page Range

☒ All Pages
☐ Current Page

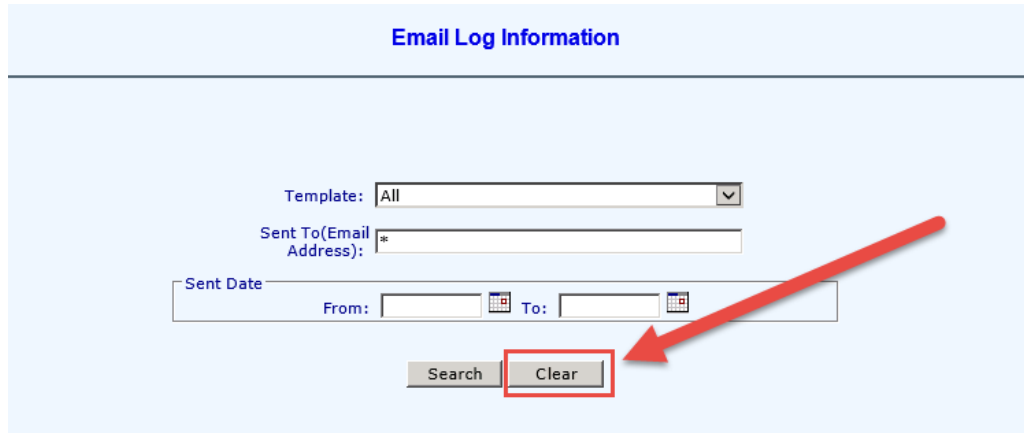


(!!) Note: Users are not able to download the Email Log if they are using a secured environment.

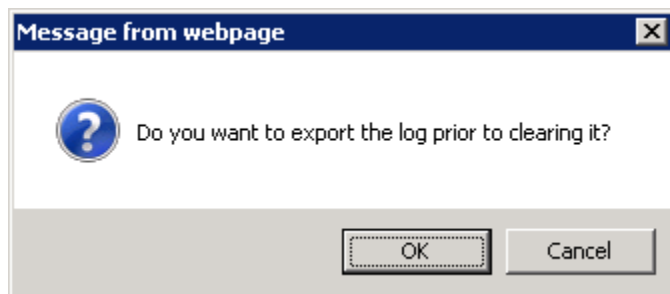
3.8.2 Clear Log

Follow the steps below the clear the email log:

1. Navigate to the *Email Log Information* screen and click **Clear**.



2. The system displays a confirmation message, asking if the user would like to export the log prior to clearing it.
 - a. To export the log, click **OK** and follow the steps as outlined in the previous section ([View & Export](#)).
 - b. Click **Cancel** to proceed without exporting.



3. After clicking **Cancel** the system displays a verification message, confirming you'd like to clear the log. Click **OK**.
4. After clicking **OK**, the log is automatically cleared. If you selected to export the log, it is automatically downloaded after starting the clear process.

3.9 Users

Provisioned PAL users are managed from the *Users* screen, as shown below:

[General Settings](#)
[Enterprise](#)
[Modules](#)
[Web API](#)
[Security](#)
[Email Templates](#)
[Email Log](#)
[Users](#)
[Audit Log](#)

[Requester Fields](#)
[Request Fields](#)
[Appeal Fields](#)
[Other Settings](#)
[Reading Room](#)

[Reading Room](#)
[Documents](#)

[Display Order](#)
[Dashboard Administration](#)

[Online Payment](#)

Users

[New](#)
[Edit](#)
[Delete](#)

| Login | First Name | Last Name | Email | Is Active? | Is Locked? |
|-------------------------|------------|-----------|------------------|------------|------------|
| admin | Admin | Admin | QA2@ains.com | Yes | No |
| cdillow | Cindy | Dillow | cdillow@ains.com | Yes | No |
| packley | Pamela | Ackley | packley@ains.com | Yes | No |
| yc | Yi | Chen | ychen@ains.com | Yes | No |
| amekala | Ambica | Mekala | amekala@ains.com | No | No |
| policy | sam | m | qa4@ains.com | Yes | No |
| tester | T | A | qa3@ains.com | Yes | No |
| User | pal | pal | qa@ains.com | Yes | No |

Administrators can use the **New**, **Edit**, and **Delete** buttons to manage PAL users.

Follow the steps below to create a new user:

1. Click **New**. The *Create User* screen appears.

Create user

Login Name :

***First Name** :

***Last Name** :

***Email** :

Phone Number :

***Password** :

2. Complete the required fields and click **Create**. The new user is created.



(!!) Note: Fields with a red asterisk (*) are mandatory and must be completed.

3.10 Audit Log

AX PAL maintains a record which tracks information for requests where payments are made, and requests are not submitted through sync. The Audit Log allows authorized users to complete audit queries based on their desired search criteria, displayed in the images below:

Audit Log Search

Activities

☒ Administrator Actions
☐ Requester Actions
☐ Requester Logins
☐ Failed Transactions

Select Audit Object

- All
- General Settings
- Enterprise
- Modules
- Web Api
- Security
- Authentication
- Email Templates
- Email Log
- Audit Log

Select Administrators(s): All

Requester Login Date Range

☒ Between Dates
☐ For the Week
☐ For the Month
☐ For the Year
☐ Year to Date

Select Date Range

From :

To :

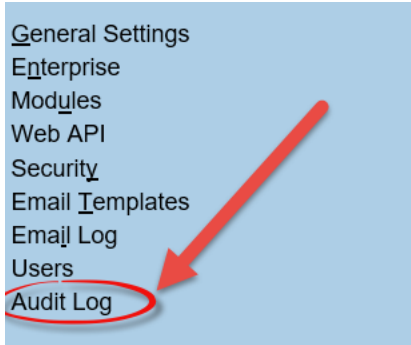
dar Year

Search

To execute an audit log search:

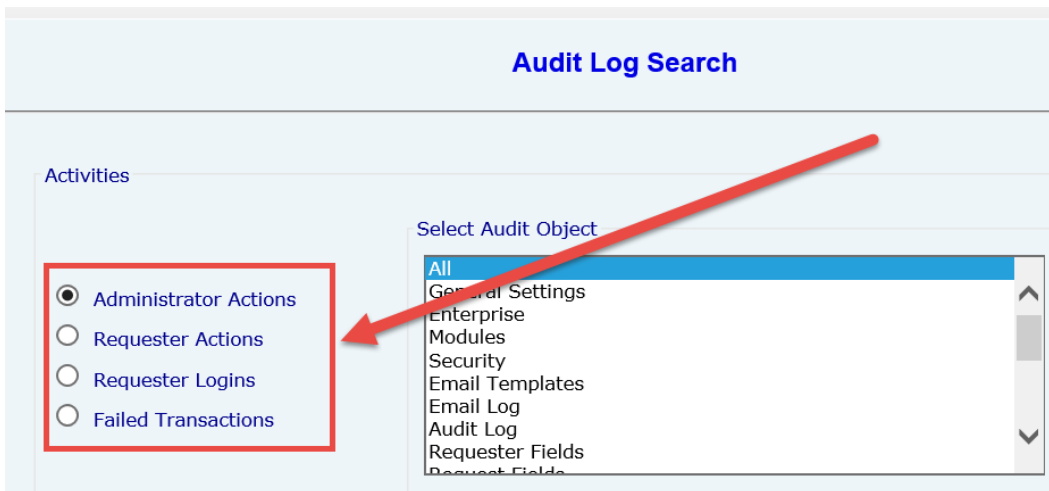
1. Login to the PAL Configuration page using the administrator account. Click **Audit Log**.

Setting Up the PAL Application



2. The *Audit Log* page appears. Select the desired **Activities** radio button.

(!!) Note: Selecting an *Activities* radio button may change the Audit Objects listed in the workspace.



3. Select the desired **Audit Object** from the list.

4. Select the **Administrator(s)** from the drop down list.

5. Select the **Requester Login Date Range** radio button.

(!!) Note: The *Requester Login Date Range* radio button selection may change the type of Date Range inputs. This procedure uses date picker fields.

Setting Up the PAL Application

Requester Login Date Range

☒ Between Dates
 ☐ For the Week
 ☐ For the Month
 ☐ For the Year
 ☐ Year to Date

Select Date Range

From :

To :

Note : Year refers to Calendar Year

Search

- Complete the **Select Date Range** inputs.
- Click **Search**. The page refreshes to display results matching the search criteria. Within the search results page you can print or export the results.

After a search has been executed, the application returns results in the format captured in the image below. The pictured search has returned search results to display the following information:

- Action Taken By
- Action Time
- Workstation
- Comments

| Audit Log Info | | | |
|--|------------------------|-------------|---|
| Action Taken By | Action Time▼ | Workstation | Comments |
| Dillow, Cindy | 11/17/2021 10:23:33 PM | 10.10.10.7 | Request '2022-FOI-00025' is Viewed. |
| Dillow, Cindy | 11/17/2021 10:21:41 PM | 10.10.10.7 | Message with subject 'RE: Proof of Identity' is sent for the Request 2022-PA-00027. |
| Dillow, Cindy | 11/17/2021 10:21:29 PM | 10.10.10.7 | Message with subject 'Proof of Identity' is read for the Request 2022-PA-00027. |
| Dillow, Cindy | 11/17/2021 10:21:21 PM | 10.10.10.7 | Request '2022-FOI-00025' is Viewed. |
| Dillow, Cindy | 11/17/2021 10:20:40 PM | 10.10.10.7 | Request '2022-FOI-00025' is Viewed. |
| Dillow, Cindy | 11/17/2021 10:20:36 PM | 10.10.10.7 | Message with subject 'entered message @ 10:20 PM' is sent for the Request 2022-FOI-00025. |
| Dillow, Cindy | 11/17/2021 10:20:02 PM | 10.10.10.7 | Message with subject 'test' is sent for the Request 2022-FOI-00025. |
| Dillow, Cindy | 11/17/2021 10:18:43 PM | 10.10.10.7 | Message with subject 'test' is sent for the Request #2022-FOI-00025. |
| Dillow, Cindy | 11/17/2021 10:18:32 PM | 10.10.10.7 | Request '2022-FOI-00025' is Viewed. |
| Dillow, Cindy | 11/17/2021 10:16:51 PM | 10.10.10.7 | Message with subject 'test' is sent for the Request #2022-FOI-00025. |
| Page 1 of 55 | | | |
| Print/Export Report <input checked="" type="radio"/> Print <input type="radio"/> Export Select Page Range <input checked="" type="radio"/> All Pages <input type="radio"/> Current Page Print Back | | | |

(!!) Note: Users are not able to download the Audit Log if using a secured environment.



3.11 Requester Fields

The *Requester Fields* screen allows administrators to control which fields are presented to a requester when creating a profile. Fields with a red asterisk (*) are mandatory and must be completed. These fields are not editable and are read-only. Fields with a drop-down list can be configured to have a standard value.

1. Click **Requester Fields**.
2. Indicate the **Required** and **Visible** fields and **Default** values based on your agency's requirements.
3. Enter **Tooltip** information, if required.

(!!) Note: Tooltip information are prompts that users can view when seeking additional information about a field or selection.

4. Click **Save**.
5. A verification message appears. Click **OK** to retain the settings.
6. Click **Refresh** to reload information on the screen.

Requester Fields Configuration
Please complete all the required fields marked with an asterisk (*).

[Spell Check](#)

| Label Name | Display Name | Tooltip | Required | Visible | Default |
|-------------------------------------|---------------------|---------|-------------------------------------|-------------------------------------|-------------------------------|
| Contact Information (Header) | Contact Information | | | | |
| Prefix | Prefix | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| * First Name | First Name | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Middle Name | Middle Name | | <input type="checkbox"/> | <input type="checkbox"/> | |
| * Last Name | Last Name | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Suffix | Suffix | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Street1 | Street1 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Street2 | Street2 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| City | City | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| State | State | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Zip Code | Zip Code | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Country | Country | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Phone | Phone | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| * E-mail Address | E-mail Address | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Organization | Organization | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Job Title | Job Title | | <input type="checkbox"/> | <input type="checkbox"/> | |
| * Default Category | Default Category | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="text" value=""/> |
| Account Information (Header) | Account Information | | | | |
| * User Name | User Name | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Hint Question | Hint Question | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Hint Answer | Hint Answer | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |



3.12 Request Fields

This screen allows administrators to control which fields are presented to a requester when creating a request. Fields with a red asterisk (*) are mandatory and must be completed to successfully submit a request. These fields are not editable and are read-only. Fields with a drop-down list can be configured to have a set of standard values.

1. Click the **Request Management** link on the left panel. The *Request Management* screen appears.

Request Fields Configuration
Please complete all the required fields marked with an asterisk (*).

Spell Check

| Label Name | Display Name | Notes | Required | Visible | Default | Display Information |
|--------------------------------------|----------------------------|-------|-------------------------------------|-------------------------------------|----------------------------------|-----------------------|
| General Information (Header) | | | | | | |
| Action Office | Action Office | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Default Office: Cteam | Action Office Code |
| Action Office Details | Action Office Instructions | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Allowed Offices: 7 items checked | Action Office Details |
| Request Type | Request Type | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | FOIA | |
| Requester Category | Requester Category | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Commercial Organiz | |
| Delivery Mode | Delivery Mode | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Download via PAL | |
| Payment Mode | Payment Mode | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Other1 | |
| Expedite Information (Header) | | | | | | |
| Expedite Requested | Expedite Requested | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Expedite Reason | Expedite Reason | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Expedite Request Status | Expedite Request Status | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Shipping Address (Header) | | | | | | |
| Street1 | Street1 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Street2 | Street2 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| City | City | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| State | State | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| State (Other) | State (Other) | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Country | Country | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Zip Code | Zip Code | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Request Information (Header) | | | | | | |
| Description Document | Description Document!1! | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| * Description | Description | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Consent | Consent | | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Proof of Identity | Proof of Identity | | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Date Range for Record Search | Date Range for Record Sea | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Fee Information (Header) | | | | | | |
| Willing to Pay All Fees | Willing to Pay All Fees | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Willing Amount | Willing Amount | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Fee Waiver Requested | Fee Waiver Requested | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Fee Waiver Request Reason | Fee Waiver Request Reason | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |

2. Use the checkboxes to indicate **Required** and **Visible** fields and select any **Default** values based on your agency's requirements for the *General Information*, *Shipping* and *Billing Addresses*, *Request*, *Appeal*, *Fee Information*, and *Other Information* sections.
3. Click the **Elipses (...)** button to enter Notes, where applicable. Notes provide a brief explanation of information to the requester.



4. Select options for the **Attachment Permissions** as outlined in the table below. PAL can accept document uploads from requesters in the formats specified, but only if the options are enabled.

Attachment Permissions

Request Description Attachment type

☒ Automatically attach request form as request letter

Allow additional attachments to be included: ☒ ☐ All Formats ☒ Specific Formats Pdf

Enable Expedite Requested Attachment: ☒ ☐ All Formats ☒ Specific Formats doc

Enable Fee Waiver Requested Attachment: ☒ ☐ All Formats ☒ Specific Formats tiff

Enable Consent Attachment: ☒ ☐ All Formats ☒ Specific Formats dotx

Enable Proof of Identity Attachment: ☒ ☒ All Formats ☐ Specific Formats

Note: 'Specific Formats' should not contain . in the formats list. Example, format for Microsoft Word should be specified as doc and not as .doc

| Field Name | Description |
|--|---|
| Automatically attach request form as a request letter | This creates an XML file as the Request Description Letter in the <i>ATIPXpress Correspondence Log</i> . When selected, reveals the Allow Additional attachments to be included option. |
| Allow Additional attachments to be included | <p>This option activates the Add Attachments link in the <i>Request Details</i> section of PAL. The document uploaded by the requester is saved as the Request Description Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type.</p> <p>Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |

| Field Name | Description |
|---|---|
| Enable Expedite Requested Attachment | <p>This option activates the Add Attachments link in the <i>Expedite Requested</i> section of PAL. The document uploaded by the requester is saved as the Expedite Description Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type. Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |
| Enable Fee Waiver Requested Attachment | <p>This option activates the Add Attachments link in the <i>Fee Waiver Requested</i> section of PAL. The document uploaded by the requester is saved as the Fee Waiver Description Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type. Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |
| Enable Consent Attachment | <p>This option activates the Add Attachments link in the <i>Consent</i> section of PAL. The document uploaded by the requester is saved as the Consent Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type. Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |
| Enable Proof of Identity Attachment | <p>This option activates the Add Attachments link in the <i>Proof of Identity</i> section of PAL. The document uploaded by the requester is saved as the Proof of Identity Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type. Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |



5. Click **Refresh** to reload the original settings.
6. Click **Save** to retain the settings. A verification message appears.
7. Click **OK** to accept the settings and close the message window.

3.13 Appeal Fields

This screen provides administrators the ability to control which fields are presented to a requester when creating an appeal. Fields with a red asterisk (*) are mandatory and must be completed to successfully submit an appeal. These fields are not editable and are read-only. Fields with a drop down list can be configured to have a set of standard values.

1. Click the **Appeal Fields** link on the left panel. The *Appeal Fields* screen appears as shown below (a sample portion of the fields are shown):

Appeal Fields Configuration
*Please complete all the required fields marked with an asterisk(*).*

Spell Check

| Label Name | Display Name | Notes | Required | Visible | Default | Display Information |
|--------------------------------------|----------------------------|-------|-------------------------------------|-------------------------------------|------------------------------------|-----------------------|
| General Information (Header) | | | | | | |
| Action Office | Action Office | ... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Default Office: Action Off | Action Office Code |
| Action Office Details | Action Office Instructions | ... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Allowed Offices: All items checked | Action Office Details |
| Appeal Type | Appeal Type | ... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Appeal | |
| Appeal Sub Type | Appeal Sub Type | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Appeal Sub Type The | |
| Requester Category | Requester Category | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Commercial Organiz | |
| Reference No. | Reference No. | ... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Delivery Mode | Delivery Mode | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Download via PAL | |
| Payment Mode | Payment Mode | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Other1 | |
| Expedite Information (Header) | | | | | | |
| Expedite Requested | Expedite Requested | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Expedite Reason | Expedite Reason | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Expedite Request Status | Expedite Request Status | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Shipping Address (Header) | | | | | | |
| Street1 | Street1 | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Street2 | Street2 | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| City | City | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| State | State | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| State (Other) | State (Other) | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Country | Country | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Zip Code | Zip Code | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Appeal Information (Header) | | | | | | |
| Description Document | Description Document | ... | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |

2. Use the checkboxes to indicate **Required** and **Visible** fields, and any **Default** values based on the agency's requirements for the *General Information*, *Shipping* and *Billing Addresses*, *Appeal*, *Fee Information*, and *Other Information* sections.

3. Click the **Elipses (...)** button to enter Notes where applicable. Notes provide a brief explanation of information to be provided by the requester.
4. Select options for **Attachment Permissions** as outlined in the table below. PAL can accept document uploads from requesters in formats specified only if the option is enabled.

Attachment Permissions

Request Description Attachment type

☒ Automatically attach request form as request letter

Allow additional attachments to be included: ☒ ☐ All Formats ☒ Specific Formats Pdf

Enable Expedite Requested Attachment: ☒ ☐ All Formats ☒ Specific Formats doc

Enable Fee Waiver Requested Attachment: ☒ ☐ All Formats ☒ Specific Formats tiff

Enable Consent Attachment: ☒ ☐ All Formats ☒ Specific Formats dotx

Enable Proof of Identity Attachment: ☒ ☒ All Formats ☐ Specific Formats

Note: 'Specific Formats' should not contain . in the formats list. Example, format for Microsoft Word should be specified as doc and not as .doc

Save Refresh

| Field Name | Description |
|--|--|
| Automatically attach request form as a request letter | This will create a XML file as the Request Description Letter in the <i>ATIPXpress Correspondence Log</i> . When selected, reveals the Allow Additional attachments to be included option. |
| Allow Additional attachments to be included | <p>This option activates the Add Attachments link in the <i>Request Details</i> section of PAL. The document uploaded by the requester will be saved as the Request Description Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type.</p> <p>Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |



| Field Name | Description |
|---|--|
| Enable Expedite Requested Attachment | <p>This option activates the Add Attachments link in the <i>Expedite Requested</i> section of PAL. The document uploaded by the requester will be saved as the Expedite Description Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type. Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |
| Enable Fee Waiver Requested Attachment | <p>This option activates the Add Attachments link in the <i>Fee Waiver Requested</i> section of PAL. The document uploaded by the requester will be saved as the Fee Waiver Description Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type. Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |
| Enable Consent Attachment | <p>This option activates the Add Attachments link in the <i>Consent</i> section of PAL. The document uploaded by the requester will be saved as the Consent Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type. Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |
| Enable Proof of Identity Attachment | <p>This option activates the Add Attachments link in the <i>Proof of Identity</i> section of PAL. The document uploaded by the requester will be saved as the Proof of Identity Letter in the <i>ATIPXpress Correspondence Log</i>.</p> <p>All Formats allows requesters to submit any file type. Specific Formats allows administrators to specify the types of files accepted from a requester.</p> |



5. Click **Refresh** to reload the original settings.
6. Click **Save** to retain the settings. A verification message appears.
7. Click **OK** to accept the settings and close the message window.

3.14 Other Settings

Some settings are shared between both Requests and Appeals submitted via PAL. Use the *Other Settings* screen to adjust these shared settings. The *Other Settings* screen contains settings Request Status Information, Payment Information and more. The *Other Settings* screen is shown below:

General Settings
Enterprise
Modules
Web API
Security
Email Templates
Email Log
Users
Audit Log

Requester Fields
Request Fields
Appeal Fields
Other Settings
Reading Room

Reading Room Documents

Display Order
Dashboard Administration

Online Payment

Main Menu Links(Alt + P)
Layout Settings
Messages

Change Password
Disclaimers
Error Log
Manuals

Release Notes
Hotfixes
Service Pack

Sign Out

Request/Appeal Fields Configuration

Please complete all the required fields marked with an asterisk(*).

[Spell Check](#)

Request Status Information

| Label Name | Display Name | Tooltip | Visible | | Width in % | |
|-------------------------|------------------------|------------------------|-------------------------------------|-------------------------------------|------------|----------|
| | | | With sign | W/O sign | With sign | W/O sign |
| Case # | Case | Case# | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | 20 |
| Received Date | Received Date | Received Date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | 10 |
| Estimated Delivery Date | Estimate Delivery Date | Estimate Delivery Date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | 10 |
| Total Invoice Amount | test | test | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | 10 |
| Request Description | Request Description | Description | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 20 | 20 |
| Fees Due | Fee Due | Fee Due | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | 10 |
| Request Status | Request status | Status | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 20 | 20 |
| Download Documents | Download Documents | Download Folder | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 10 | |
| Total | | | | | 100 | 100 |

Note: The requester will only be able to see the following columns after signing into the PAL application (Download Documents).

Payment Information

| Label Name | Display Name | Tooltip | Visible | Width in % |
|--------------------|--------------------|--------------------|-------------------------------------|------------|
| Invoice Number | Invoice No. | Invoice No. | <input checked="" type="checkbox"/> | 20 |
| Invoice Date | Invoice Date | Invoice Date | <input checked="" type="checkbox"/> | 10 |
| Invoice Amount | Invoice Amount | Invoice Amount | <input checked="" type="checkbox"/> | 10 |
| Invoice Action | Invoice Action | Invoice Action | <input checked="" type="checkbox"/> | 10 |
| Transaction Number | Transaction Number | Transaction Number | <input checked="" type="checkbox"/> | 10 |
| Paid Amount | Paid Amount | Paid Amount | <input checked="" type="checkbox"/> | 10 |
| Balance | Balance | Balance | <input checked="" type="checkbox"/> | 10 |
| Method of Payment | Method of Payment | Method of Payment | <input checked="" type="checkbox"/> | 10 |
| Transaction Date | Transaction Date | Transaction Date | <input checked="" type="checkbox"/> | 10 |
| Total | | | | 100 |

Non PAL Request Status Information

1. Select the desired options for the *Request Status Information*. This section allows administrators to control which fields are available when checking the status of a submitted request, if the requester is registered or not. Fields that are grayed-out cannot be modified and are the default fields displayed on the *Request Status* screen. The total width of the displayed fields must equal 100%.



Setting Up the PAL Application

| Request Status Information | | | | | | |
|--|------------------------|---------|-------------------------------------|-------------------------------------|----------------|---------------|
| Label Name | Display Name | Tooltip | Visible | | Width in % | |
| | | | With signin | W/O signin | With signin | W/O signin |
| Case # | Case # | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 20 | 50 |
| Received Date | Received Date | | <input type="checkbox"/> | <input type="checkbox"/> | 0 | 0 |
| Estimated Delivery Date | Estimate Delivery Date | | <input type="checkbox"/> | <input type="checkbox"/> | 0 | 0 |
| Total Invoice Amount | Total Invoice Amount | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 20 | 0 |
| Request Description | Description | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 20 | 0 |
| Fees Due | Fee Due | | <input type="checkbox"/> | <input type="checkbox"/> | 0 | 0 |
| Request Status | Status | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 20 | 50 |
| Download Documents | Download Folder | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 20 | |
| Note: The requester will only be able to see the following columns after signing into the PAL application (Request Description, Fees Due, and Download Documents). | | | | | Total | 100 |
| | | | | | | 100 |

- Indicate whether or not to **Enable Non PAL Requests Status Information**. This option allows requests submitted to the ATIP office via mail, email, or fax to be tracked online by PAL users that do not have registered profiles.

Non PAL Request Status Information
☒ Enable Non PAL Requests Status Information
Note: Requester will be able to see the Request Status information even if they are not registered with PAL.

- Indicate whether or not to display **Verification Fields while checking the Request Status information without registering**. This option allows requests submitted to the ATIP office via mail, email, or fax to be tracked online by PAL users that do not have registered profiles, by requiring the case tracking number, requester last name and characters displayed in the distorted image to ensure the request was not submitted by a computer. Non-registered users will have restricted access to fee information and responsive records.

Verification Fields while checking the Request Status information without registering
☒ Enable Last Name
☒ Enable Captcha

- Indicate whether or not to **Show Requester Details on Request Submission Form**. This option displays the *Requester Details* section with contact information of the registered requester.

Requester Information
☐ Show Requester Details on Request Submission Form

- Indicate whether to **Send Email Notification to Requester**. This option enables automated notifications sent to the requester when the request is updated to the selected status (es).

Send Email Notification to Requester
☒ Send Email Notification of Payment Due to Requester
☐ Send Email Notification to Requester when status is updated

☐ Received
☐ Assigned for Processing
☐ In Process
☐ On Hold - Need Info/Clarification
☐ On Hold - Fee Related
☐ On Hold - Other
☐ Invalid Reference Number (Appeals Only)
☐ Documents Delivered (This notification will only be delivered if documents are delivered to PAL)
☐ Closed

Note: Request Status Update Notification will be sent to the Requester when the status of the request is updated



6. Click **Refresh** to reload the original settings.
7. Click **Save** to retain the settings. A verification message appears.
8. Click **OK** to accept the settings and close the message window.

3.15 Reading Room

3.15.1 Reading Room Fields Configuration

To access documents in the reading room, requesters must first perform a search. The *Reading Room* screen contains the searchable fields requesters need to complete to retrieve documents.

1. Click **Reading Room**.
2. Indicate the **Reading Room Fields** you want to be visible in the application.
3. Enter any **Tooltip** information, if required.
4. Accept the default value for the **Number of Views Constitutes a Popular Document** or enter a value. This value represents the number of times a document is viewed before it is considered popular or a frequently requested document.
5. Indicate whether you want to **Display PAL Reading Room Search Screen** for popular documents. This option displays the search screen for the *Reading Room Popular Documents* section in the application. The search information displayed is the same as the information configured for the Reading Room. In order to view the search screen, the **Reading Room Popular Documents** label must be enabled in the *Main Menu Links Configuration* screen.
6. Indicate whether you want to **Enable Content Search**. This option displays the **Content Search** field in the reading room and popular documents search screens. This feature allows users to find a specific string of characters, words, or phrases.

Reading Room Fields Configuration

[Spell Check](#)

Reading Room Fields

| Label Name | Display Name | Tooltip | Visible |
|---------------------------|--|---------|-------------------------------------|
| Folder Name | Folder Name X | | <input checked="" type="checkbox"/> |
| Reading Room File Cabinet | Reading Room File Cabinet | | <input checked="" type="checkbox"/> |
| Published Date | Published Date | | <input checked="" type="checkbox"/> |
| Content Search | Content Search | | <input checked="" type="checkbox"/> |

Reading Room Popular Documents

* Number of Views Constitutes a Popular Document

☐ Display PAL Reading Room Search Screen

☒ Enable Content Search



- The PAL Reading Room can be configured to display custom fields in the search screen. These fields are created and activated for PAL in the ATIPXpress application.

Reading Room Custom Fields

| FieldName | Display Name | Tooltip | Required | Visible | Default |
|-------------------------|-------------------------|---------|--------------------------|-------------------------------------|---------|
| Document Location Info | Document Location Info | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Service Center Location | Service Center Location | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Keyword | Keyword | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |

Save Refresh

3.15.2 Remote Content Search

The Content Search for the PAL Reading Room can be configured to exist on a separate file repository from the application server. Follow the steps below to enable remote content search:

- Enable content search per the instructions in the previous section.
- Create a share folder (UNC path) for PAL Reading Room documents.
- Add the PAL application pool account to the UNC path created in the previous step, including *Modify* permissions.

(!!) Note: If the PAL website is running with the *Network Service* account, add the system account (domain/computer name\$) to the UNC path, including *Modify* permissions.

- Update the path in the *Reading Room* tab under *PAL Configuration*.

3.16 Reading Room Documents

3.16.1 Search Reading Room Documents

The Reading Room Documents search configuration allows you to search for documents added to the Reading Room. To search existing Reading Room documents:

- Click **Reading Room Documents**. The *Search for Documents in Reading Room* screen appears as shown below:



Setting Up the PAL Application

Search for Documents in Reading Room

[Spell Check](#)

The Access to Information Act, (R.S.C., 1985, c.A-1), requires that certain documents of interest to the general public be published electronically. [ATIA Agency] is making these documents available to the general public in electronic form.

Search for Documents in Reading Room

Refine your Search

| <input checked="" type="checkbox"/> | Reading Room File Cabinet | Description |
|-------------------------------------|---------------------------|-------------|
| <input checked="" type="checkbox"/> | PAL FCD | |

Folder Name:

Published Date: To

Content Search: ?

2. Use the fields on this screen to locate existing documents. You can refine your search using the *Refine Your Search* fields.
 - a. Select *Reading Room Filing Cabinet(s)* to search from the list.
 - b. Use the *Folder Name* field to locate a specific folder name.
 - c. Use the *Published Date* fields to search using a specific date range.
 - d. Search document content using the *Content Search* field.
3. Click **Search** to locate any documents matching the search criteria. The *Reading Room Documents* screen appears as shown in the following example:

Reading Room Documents

| | Folder Name ▼ | Reading Room File Cabinet | Published Date | Expiration Date | # Pages | Format | Added From | Popular Document? |
|--------------------------|-----------------|---------------------------|----------------|-----------------|---------|--------|------------|--------------------|
| <input type="checkbox"/> | rr desc test | PAL FCD | 05/13/2021 | - | 10 | | ATIPXpress | No |
| <input type="checkbox"/> | Foldernametrack | PAL FCD | 07/16/2021 | - | 25 | | PAL Config | No |
| <input type="checkbox"/> | AX | PAL FCD | 05/14/2021 | - | 32 | | PAL Config | No |

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

4. You can select any of the results from the list and use the buttons to add **New** documents, **Edit** the selected documents, or **Delete** the selected document.



3.16.2 Add Reading Room Documents

You have the option to create and save Reading Room document searches for later use.

1. Click **Reading Room Documents**.
2. Click **New**. The *Add Reading Room Documents* screen appears.

3. Enter the required elements outlined in the table below.
4. Click **Save** when completed.

| Field Name | Description |
|----------------------------------|--|
| Folder Name | The title given to the document. |
| Reading Room File Cabinet | Reading Room File Cabinet where the document should be uploaded. Select from the listed options. |
| Browse Document | Allows the users to locate the file from their local/network drive. The acceptable file formats are PDF, TIFF, ZIP, DOC, XLS, DOCX and XLSX. |
| Number of Pages | Indicates the size of the document (in pages). |

| Field Name | Description |
|-----------------------------|---|
| Published Date | Indicates the date the document was published to the Reading Room. Today's date is the default. |
| Show in Reading Room | Indicates if the document is available in the Reading Room. |
| Never Expires | Indicates whether or not the document remains in the Reading Room. If unselected, the Administrator is able to determine the date the document expires. |
| Comments | A brief narrative describing the document. |
| Refresh | Reloads the screen to its original settings prior to saving. |
| Back | Returns to the previous screen. |

3.17 Display Order

This screen allows administrators the ability to determine the order for **Request**, **Requester**, or **Reading Room** section headers and fields in the application.

1. Click **Display Order**.
2. Select the desired **Module** from the drop down list.
3. Accept the default option to **Configure Headers** or select **Configure Fields**.
 - a. The **Headers Display Order** list updates to display only headers based on the selected module.
 - b. The **Fields Display Order** field is revealed when the **Configure Fields** option is selected and automatically adjusts to display fields based on the selected module and header.
4. Use the **Up** and **Down** arrows to reposition the headers and/or fields.
5. Click **Refresh** to reload the screen with the default settings.
6. Click **Save** to retain the settings.



3.18 Dashboard Administration

This link launches the **Dashboard Administration** application. Please refer to the *PAL Dashboard User Manual* for further information concerning this link.

3.19 Online Payment

The online payment option is used to configure the integration between the PAL and an agencies' existing online payment solution (i.e. Pay.gov). When the *Enable Online Payment* option is checked, the drop down list includes the name of the integrated PAL online payment solution and, upon selection, displays the configuration fields required to communicate between PAL and the payment solution.

The online payment integration provides the ability for agencies to require payment prior to accepting a request submission and/or providing requesters a method of submitting payment for charges billed to them related to their record request.

In addition, the information the requester sees on their receipt (as triggered by the application) is also configured here. Follow the steps below to configure Online Payments:

(!!) Note: Each PAL integration is different, so different fields may be available for configuration purposes.

1. Click **Online Payment**.
2. Select the **Enable Online Payment** checkbox to enable the online payment option for your PAL.
3. Under the *Payment Option* drop down list, select the **Payment Option** to enable for PAL. These options are based on the integrated payment solution(s) you have connected to your ATIPXpress application.



4. After selecting an available **Payment Option**, additional configuration fields appear to configure the selected payment method.

(!!) Note: The screen below is presented as an example. The fields shown here may not apply to your online payment configuration.



Setting Up the PAL Application

Online Payment Configuration

☒ Enable Online Payment

Payment Option : NS Pay

Online Payment

| Key | Value | Description |
|----------------------|--|--|
| Language | English | Language that will be used on payment url and receipt. |
| Payment Uri* | https://payments.novascotia.dev | URL provided by Service provider where transaction occurs. (Payment Screen) |
| Confirmation Uri* | https://payments.novascotia.dev/confirm | Confirmation URL is used in complete API to commit payment |
| Secret Key* | 5e8159fda492b0744090b3e14347cc93c5261e3a | Secret Key given by Service provider to compute hash. (Do not share it with anyone.) |
| Business ID* | 6540cb736e2e4123 | The business id for NS Pay |
| Return URL * | https://qa-dev-oracle:443/app/GpsSuccessPaym | URL to redirect after successful transaction. |
| Cancel URL * | https://qa-dev-oracle:443/app/CancelPayments. | URL to redirect if user decline/cancel the transaction. |
| NS Pay Api Version * | 1.00 | NS Pay API Version i.e. 1.00 |
| Item Code * | 1 | 1 : NS FOIA Request 2 : NS FOIA Estimated Services 3 : NS FOIA Payment on Account 4 : Default Desc - NS GPS 2 Cost Code 4 |
| Item Description * | Atip/pal | Description that will be displayed on receipt from Nova Scotia. (minimum 5 characters recommended) |
| Comment * | Application fee | Comment that will be displayed on receipt from Nova Scotia. Special characters allowed: !#\$%&'()*+,-./:;@?~ %\ |

☒ **Application Fee**

| Request Type | Application Fee | Required |
|----------------------|--|-------------------------------------|
| Access Informal | 25.00 | <input type="checkbox"/> |
| Access Request | 50.00 | <input checked="" type="checkbox"/> |
| Privacy Court Action | 25 | <input type="checkbox"/> |

Payment Receipt

Information to be displayed on the Online Payment Receipt

☒ Requester Details

☒ Payment Type

☒ Request ID

☒ Payment Details

☒ Payment Status

Comment

Verdana

11px

A

B

I

U

X

X

Zoom

Design
HTML
Preview

...

Words: 2 Characters: 12

Note: Requester will be able to make a payment only when the online payment option is enabled.

Save

- After configuring the desired fields as needed, click **Save**.



3.20 Main Menu Links

This screen is used to configure the links available to the requester in the left panel.

1. Click **Main Menu Links**.
2. Click the checkboxes next to the options to enable in the *Main Menu* of the application.
3. Accept the default **Display Name and Access Key** or modify the information based on your agency's requirements. The Access Key is the keyboard combination used to select a link.
 - a. For example, <Alt> + <R> will select the **Request Status** link.



Setting Up the PAL Application

Main Menu Links Configuration

[Spell Check](#)

| Enable | Label Name | Display Name and Access Key | Menu Items | Display Order | URL | Open In |
|-------------------------------------|--------------------------------|--------------------------------|------------|------------------|----------------------------|--|
| Group Menu Items | | | | | | Add New Group Item |
| <input type="checkbox"/> | Main Menu Links | Links | | | | Delete |
| <input checked="" type="checkbox"/> | Help Menu Links | Help | | | | Delete |
| <input checked="" type="checkbox"/> | Public Reading Room | Public Reading Room | | 8 | | Delete |
| Main Menu Items | | | | | | |
| <input checked="" type="checkbox"/> | Change Password | Change Password | W | | | |
| <input checked="" type="checkbox"/> | Sign In | Sign In | I | | | |
| <input checked="" type="checkbox"/> | My Account | My Account | A | | | |
| <input checked="" type="checkbox"/> | Sign Out | Sign Out | U | | | |
| <input checked="" type="checkbox"/> | Reading Room | Reading Room | G | Public Reading R | ERR/palEleDTypes.aspx | <input type="checkbox"/> Right Panel |
| <input checked="" type="checkbox"/> | Send Mail | Send Mail | D | | | |
| <input checked="" type="checkbox"/> | Dashboard | Dashboard | | Public Reading R | | |
| <input checked="" type="checkbox"/> | Reading Room Popular Documents | Reading Room Popular Documents | E | Public Reading R | ERR/palEleDTypesvisit.aspx | <input type="checkbox"/> Right Panel |
| <input checked="" type="checkbox"/> | Home | Home | X | H | 1 | palHome.aspx <input type="checkbox"/> Right Panel |
| <input checked="" type="checkbox"/> | Reference Guide | Reference Guide | F | Links | | Request/palFOIAReqSystem.aspx <input type="checkbox"/> Right Panel |
| <input checked="" type="checkbox"/> | Other | AINS Website | P | | 3 | http://ains.com <input checked="" type="checkbox"/> New Window |
| <input checked="" type="checkbox"/> | Requests And Fees | Requests And Fees | Q | Links | | Request/palReqsFees.aspx <input type="checkbox"/> Right Panel |
| <input checked="" type="checkbox"/> | Exemption Codes | Exemption Codes | X | | 4 | palExemptCodes.aspx <input type="checkbox"/> Right Panel |
| <input checked="" type="checkbox"/> | Request Status | Check Request Status | R | | 5 | Request/palConfirmation.aspx <input type="checkbox"/> Right Panel |
| <input checked="" type="checkbox"/> | Submit Request | Submit Request | S | | 6 | |
| <input checked="" type="checkbox"/> | Submit Appeal | Submit Appeal | B | | 7 | |
| <input checked="" type="checkbox"/> | Help | Help | L | Help | | Request/palFOIAHelp.aspx <input type="checkbox"/> Right Panel |
| <input checked="" type="checkbox"/> | Contact Us | Contact Us | T | Help | | palContactUs.aspx <input type="checkbox"/> Right Panel |
| <input checked="" type="checkbox"/> | JAWS Instructions | JAWS Instructions | J | Help | | Request/palFOIAHelp.aspx <input type="checkbox"/> Right Panel |

Note : Open In option is for configuring external pages only.

: When accesskeys are updated, Help Message should be updated.

Enabling Links

Enable Request Link

☐ always

☒ only after Sign In

Enabling Sub Links (When Requester not logged in) :

☐ Sign In

☐ Register Now

☐ Submit Request with out registering

Enable Appeal Link:

☐ always

☒ only after Sign In

Enabling Sub Links (When Requester not logged in) :

☐ Sign In

☐ Register Now

☐ Submit Appeal without registering

Enable Request Status Link:

☒ always

☐ only after Sign In

Enabling Sub Links (When Requester not logged in) :

☐ Sign In

☐ Register Now

☐ Check Request Status without registering

Note: When no Sub Link is selected, default option is 'Check Request Status without registering'.

Save

Refresh

Note: The alphabets O,C,N and K are already being used as Access Keys in the PAL Application.



4. To access additional options to open a link:
 - a. Select the checkbox next to a label name. The **Open In** drop down list becomes available.
 - b. Click the drop down list and select **Right Panel** to display the link on the right panel or **New Window** to launch a new window when the link is selected.

(!!) Note: Although Administrators have the option to specify an alternate location for opening links, it is not recommended to do so. Keeping the links in the main menu makes it easier for users to navigate within the application.

3.21 Enabling Links

Administrators are able to determine whether or not a user must be registered in order to submit a request or an appeal and when the **Submit Request**, **Submit Appeal**, **Request Status** and **Appeal Status** links should appear in the application.

1. Select the desired options based on the information outlined in the table below, as per your agency's requirements.
2. Click **Refresh** to load the screen with the default settings.
3. Click **Save** to retain the updated settings.

| Field Name | Description |
|-----------------------------------|---|
| Enable Request Link | Determines when to display the Submit Request link. If Always is selected, the link displays at all times. If Only after Sign In is selected, the link displays after the user successfully completes registration. |
| Enable Appeal Link | Determines when to display the Submit Appeal link. If Always is selected, the link displays at all times. If the Only after Sign In radio button is selected, the link displays after the user successfully completes registration. |
| Enable Request Status Link | Determines when to display the Request Status link. If Always is selected, the link displays at all times. If the Only after Sign In radio button is selected, the link displays after the user successfully completes registration. |



| Field Name | Description |
|--|---|
| Enabling Sub Links (When Requester is not logged in): | This option becomes enabled if Always is selected as the preferred method to display any of the above links. Administrators can opt to have all or some of the sub links appear. By default, selecting the <i>Check Request Status without registering link</i> checkbox appears in the <i>Request/Appeal Status</i> screen if no sub links are selected. |

Enabling Links

Enable Request Link

☐ always ☒ only after Sign In

Enabling Sub Links (When Requester not logged in):

☐ Sign In ☐ Register Now ☐ Submit Request with out registering

Enable Appeal Link:

☐ always ☒ only after Sign In

Enabling Sub Links (When Requester not logged in)

☐ Sign In ☐ Register Now ☐ Submit Appeal without registering

Enable Request Status Link:

☒ always ☐ only after Sign In

Enabling Sub Links (When Requester not logged in) :

☐ Sign In ☐ Register Now ☐ Check Request Status without registering

Note: When no Sub Link is selected, default option is 'Check Request Status without registering'.

3.22 Layout Settings

This screen provides guidelines for administrators to customize the appearance of the PAL application theme. Administrators can select one of several predetermined themes, or they can customize their own theme using a custom style sheet.

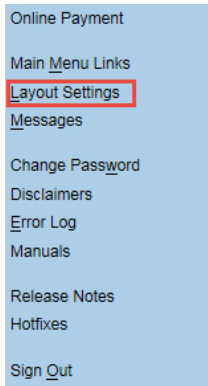
3.22.1 Standard Theme

The PAL configuration offers several out-of-the-box themes to easily select and apply. Follow the steps below to use a built-in theme.

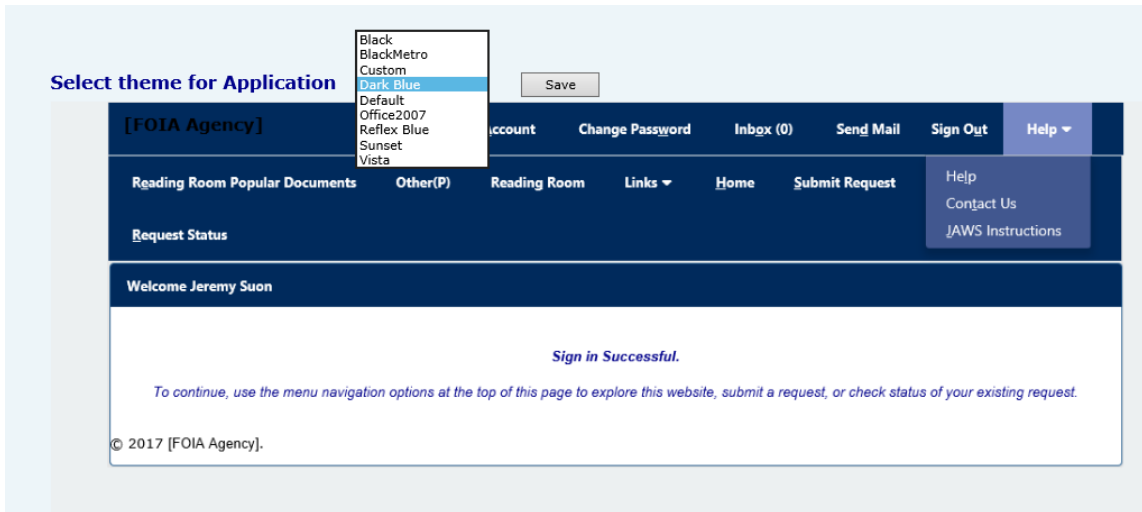
1. Click **Layout Settings**.



Setting Up the PAL Application



2. Select the theme to apply from the *Select theme for Application* drop down list.



3. If satisfied with the selected theme, click **Save** to apply the changes to the application.
4. A confirmation message displays. Click **OK**.

3.22.2 Custom Theme

You have the option to customize your own theme using a Cascading Style Sheet (CSS) file. You'll first download the *Custom.css* file, then edit the contents as needed in order to customize the look and feel of your application. Follow the steps below to design a custom PAL theme.

(!!) Note: You will need a working knowledge of CSS in order to create a custom PAL theme.

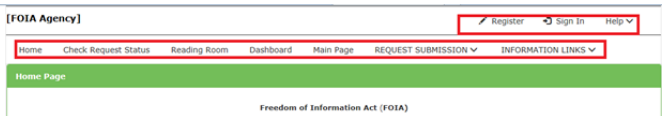
1. Click **Layout Settings**.
2. Select **Custom** from the *Select theme for Application* drop down list.
3. After selecting **Custom**, buttons will appear with options to **Save** or **Download**. Click **Download** to save the *Custom.css* file to your local drive

(!!) Note: This file must keep the name *Custom.css*. If the name is changed, PAL will not be able to read the file and apply custom settings.



- Open the Custom.css file, and edit the style sheet file as needed to apply a custom theme. You will need a working knowledge of CSS in order to fully customize the style, however a basic guide is included on the *Layout Settings* screen with examples of where and how the CSS file should be edited to produce the desired results. A sample of the *Main Menu* customization options are shown below.

Main Menu

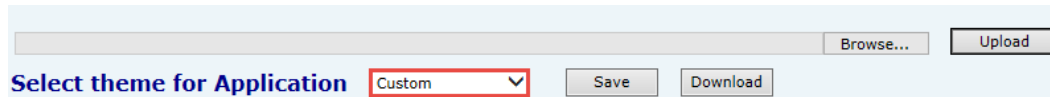


```

Default Menu (font, color and back ground color)
.menu {
font-family: "Avenir Next", Verdana, sans-serif;
font-weight: 500;
text-transform:capitalize;
font-size: 1em;
color: #333;
background-color: #fff;
border-top: 1pxsolid#333;
}

To change menu on focus (color and font)
.nav > li > a:hover, .nav > li > a:focus {
background-color: #dbe6eb;
color: #333;
}
    
```

- When you have configured your Custom.css file and are ready to apply the layout updates, navigate to **Layout Settings** and select the **Custom** theme from the *Select theme for Application* drop down list.



- Click **Browse**, and navigate to and select the **Custom.css** file to upload.
(!!) Note: This file must be named Custom.css. PAL will not accept a custom theme with any other name.
- The file path for the selected file appears. Click **Upload** to upload the custom CSS file.
(!!) Note: After a custom theme has been uploaded, you can download this custom style sheet file by clicking Download.
- Click **Save** to apply the customized theme to your PAL application.
- A confirmation message appears. Click **OK** to close this window and complete the updates to the layout settings.

3.23 Messages

Messages Configuration provides a means for administrators to customize content on various screens within the PAL application. Additionally, the header and footer can be customized to suit your agency.

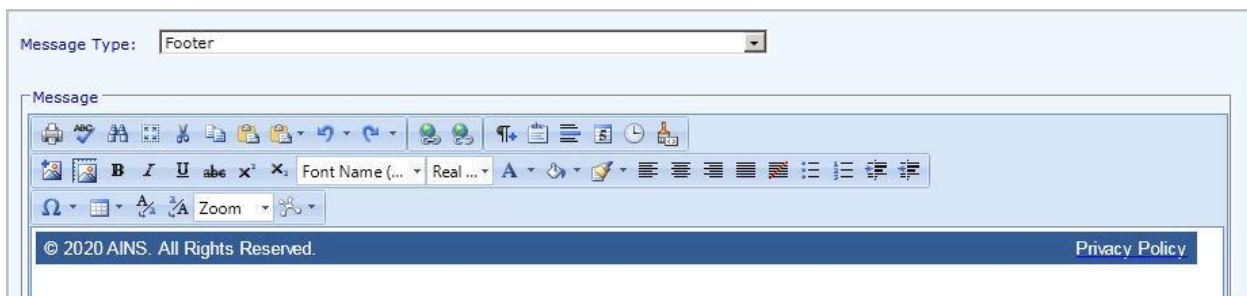
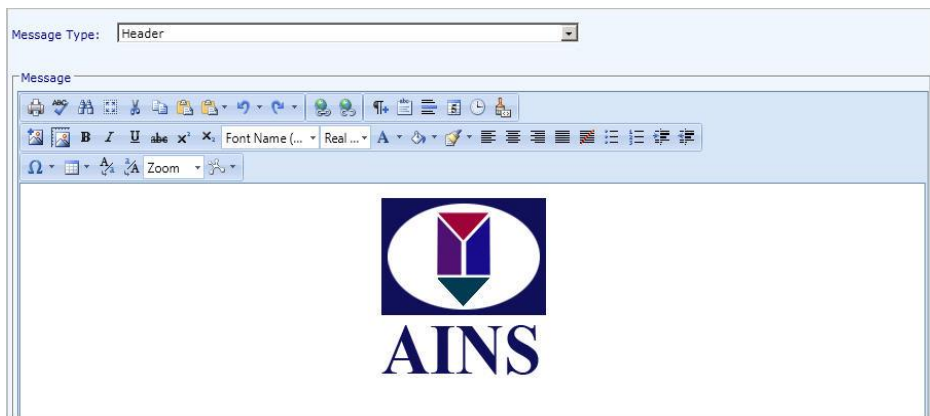
- Select a **Message Type** from the *Message Type* drop down list.
- Add or modify content based on agency requirements using the available tools provided by the Editor program.



3. Click **Save**. A verification message appears.
4. Click **OK** to accept the content and/or settings.
5. Repeat steps 1 – 4 for each message to configure.

(!!) Notes:

- The Help message displays the PAL Configuration online manual, and is used by administrators as a reference. The information on this screen is provided by OPEXUS and should not be altered.
- You must reboot the application server or reset IIS to update the content and settings reflected in the application.
- If your system is configured with more than one server, e.g. load balancing servers, make sure messages are configured on both servers.



Setting Up the PAL Application

Message Type: Contact Us [Contact Us]

Message

Please tell us about any broken links, typos, downloading or registration problems or any other web site issues that you find. To help us resolve the issue, please include the URL of the page where you found the problem.

www.ains-inc.com

Design HTML Preview

Words: 40 Characters: 238

Save

Message Type: Customize Submission Page

Message

All requests submitted through the AINS Public Access Link will be routed directly to the responding office. If you prefer to send this request via mail instead, please note the address listed below the Action Office field. Additionally, you can fax your request to 301-670-2300.

Message Type: Exemption Codes [Exemption Codes]

Message

Click the following link to learn more about Exemption Codes:

<http://www.foia.gov/faq.html#exemptions>



Setting Up the PAL Application

Message Type: Main Page [Main Page]

Message

Welcome to the AINS Public Access Website!

To begin, click the **Sign In** link on the left panel to register with this site. Once registered, you can begin submitting requests and appeals.

-OR-

If you have already registered, click on the **Request Status** or **Appeal Status** links to view the state of your submitted request or appeal.

We hope you enjoy this site!

Message Type:

Message



Read this before creating your account:

- If you have already created an account, do not create another one. Duplicate accounts will be deleted.
- If you need to change information in your account, sign into the system and click on the "My Account" link on the side menu.

Message Configuration

Message Type:

Message

Normal Verdana 12px

You will leave the government web site and will be redirected to a secure and trusted third party web site (E-xact Transaction Ltd.) where your payment will be processed. Your name, credit card number, credit card expiry date, credit card security code(CVV2) will be collected in order to process your payment



Setting Up the PAL Application

Message Type: Reading Room Popular Documents [Reading Room Popular Documents]

Message

The Freedom of Information Act, FOIA [5 USC 552(a)(2)(D)], requires that certain documents of interest to the general public be published electronically. **AINS** is making these documents available to the general public in electronic form.

This Reading Room will consist of any of the following documents based on the number of times requesters viewed the document.

- HR Manuals and Forms
- Contracts
- Proposals
- Instructional Guides
- Press Releases
- Fact Sheets
- Miscellaneous Documents

Message Type: Reading Room [Reading Room]

Message

The Freedom of Information Act, FOIA [5 USC 552(a)(2)(D)], requires that certain documents of interest to the general public be published electronically. **AINS** is making these documents available to the general public in electronic form.

The Reading Room includes the following:

- HR Manuals and Forms
- Contracts
- Proposals
- Instructional Guides
- Press Releases
- Fact Sheets
- Miscellaneous Documents

Message Type: Reference Guide [Reference Guide]

Message

Click the link below for information on how to submit a FOIA request or an Appeal.

<http://www.foia.gov/about.html>



Setting Up the PAL Application

Message Configuration

Message Type: Request Status with Sub Links Message

Message

Request Status Message

Message Type: Request/Appeal Status Note

Message

Note: Case Number must be entered exactly as provided. Example 2006-FOIA-00001

Message Type: Request/Appeal Status Note - Above Fields

Message

Please complete all required fields marked with an asterisk *

Message Type: Request/Appeal Status Note - Below Fields

Message

Note: Case Number must be entered exactly as provided. Example 2006-FOIA-00001

Message Type: Request/Appeal Status Note after Login - Above Table

Message

Click on Request # to view request details.

Message Type: Request/Appeal Status Note after Login - Below Table

Message

Click on Request # to view request details.




Setting Up the PAL Application

[illegible][illegible]

Message Type: Requests And Fees [Requests And Fees]

Message



The table below provides a brief description of the default request types that a requester can submit.

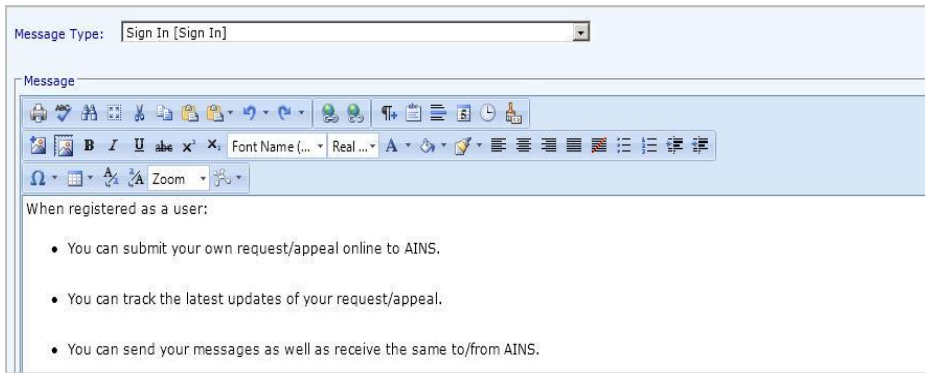
| REQUEST TYPE | DESCRIPTION |
|---------------------|---|
| Appeal | A petition to reexamine the initial request if the response is not satisfactory to the requester and/or if the requester disagrees with the amount of fees charged, withholding of information, or believes that there are additional records responsive to his request that have not been located. |
| Consultation | When an agency locates a record that contains information of interest to another agency, it will ask for the views of that other agency on the disclosability of the records before any final determination is made. |
| FOIA | A request made to an agency in accordance with the provisions stated under the Freedom of Information Act (FOIA). |
| FOIA/PA | A request or petition made by the general public in accordance with FOIA and also supported under the Privacy Act. |
| Litigation | A petition for judicial review if an appeal was not satisfied. |
| PA | A request type, under which a request is submitted in accordance with the guidelines given under the Privacy Act, is known as a PA request type. |

Fees are charged towards:

Document Reproduction: Fees charged to recover the cost of copying documents. A Requester is usually charged the actual cost of copying computer tapes, photographs and other nonstandard documents.

Search: Fees imposed to recover the costs of searching for documents that includes the time FOIA analysts spend searching for material responsive to a request.

Design HTML Preview



3.24 Change Password

There may come a time when it is necessary to change the Administrator's password. The *Change Administrator's Password* screen allows authorized users to create a new password for the PAL Configuration application.

(!!) Notes:

- The Password Policy created in the Security module must be followed in order to successfully change the password.
- Changing the password will affect access to the Dashboard Administration application.

Follow the steps below to change the Administrator password for PAL:

1. Click **Change Password**.
2. Enter the **Old Password** in the *Old Password* field.
3. Enter the **New Password** in the *New Password* field.
4. Re-enter the **New Password** in the *Confirm Password* field.
5. Click **Submit**.

3.25 Reset a Requester Password

If a requester has requested a password reset, complete the following:

| | | | | | | |
|----------------|--------------------------------|-----------------|--------------|-----------|----------------|---------------|
| [FOIA Agency] | My Account | Change Password | Inbox (0) | Send Mail | Sign Out | Help ▼ |
| Dashboard | Reading Room Popular Documents | Other(P) | Reading Room | Home | Submit Request | Submit Appeal |
| Request Status | | | | | | |

1. If you have received requester password reset request, login to the *PAL Configuration* page.
2. Login using the administrator login and password.
3. Click Reset Requesters Password. The Search Requester to Reset Password screen appears.

Reset Requester's Password

At least one field is required.

Search Requester to Reset Password

First Name:

Last Name:

Email:

Login ID:

Note: Please use wild card notation (*) to match any character(s)

4. Using the available fields, enter available search information that will help locate the desired requester.



Setting Up the PAL Application

Reset Requester's Password
At least one field is required.

Search Requester to Reset Password

First Name:

Last Name:

Email:

Login ID:

Note: Please use wild card notation (*) to match any character(s)

| First Name | Last Name | Email | Login ID | Action |
|------------|-----------|---------------------|------------------|--------------------------------------|
| Ambica | Mekala | amekala@ains.com | amekala | <input type="button" value="Reset"/> |
| Nick | Soileau | nsoileau@ains.com | nsoileau | <input type="button" value="Reset"/> |
| pradeep | sharma | psharma@ains.com | psharma@ains.com | <input type="button" value="Reset"/> |
| AMbica | me | qa1343@ains.com | testerhf2 | <input type="button" value="Reset"/> |
| Aishwarya | K | akhatwani@ains.com | aishwaryak | <input type="button" value="Reset"/> |
| Ambi | M | qa4@ains.com | fd | <input type="button" value="Reset"/> |
| sa | as | amekala6@ains.com | testedge | <input type="button" value="Reset"/> |
| Auto | Mate | mmilbourne@ains.com | mmilbourne | <input type="button" value="Reset"/> |
| Joshua | Moyer | jmoyer@ains.com | Jmoyer | <input type="button" value="Reset"/> |
| Blarmin | Shrump | jgatewood@ains.com | jgatewood | <input type="button" value="Reset"/> |

- After locating the desired requester within the search results page, click the **Reset** button in the Action column for the desired requester.

(!!) Note: You can click an entry in the search results table to highlight it.

- The screen refreshes, and the banner indicates that the password reset was successful and the desired requester will receive a password reset email. From this point the user will be prompted to reset their password information.

Reset Requester's Password
At least one field is required.

Password has been reset and sent to requester's email.

- The requester must now access their email and complete the password reset process, using their login and temporary password. If password verification questions were set up during account creation the requester will need to answer them to verify their account complete the password reset.



Dear [REDACTED]

Once you login, please change your password to protect your account details.

User Name: [REDACTED]

Password: [REDACTED]

Regards,
AINS

3.26 Disclaimers

Administrators can provide disclaimer information to notify requesters of their agency's policy for collecting personal information.

1. Click **Disclaimers**.
2. Add **Requester Privacy Disclaimer** text based on your agency's requirements using the available tools provided by the Editor program.
3. Select the position for the text to appear on the screen (**Top** or **bottom**).
4. Select which screens you want the text to appear on (**My Account, Request, and Appeal**).

Disclaimers

[Spell Check](#)

Requester Privacy Disclaimer

This privacy notice disclosed the privacy practices for the AINS Public Access Website. This privacy notice applies solely to information collected by this web site. It will notify you of the following:

1. What personally identifiable information is collected from you through the web site, how it is used and with whom it may be shared.
2. What choices are available to you regarding the use of your data.
3. The security procedures in place to protect the misuse of your information.
4. How you can correct an inaccuracies in the information.

Information Collection, Use and Sharing

AINS is the sole owner of the information collected on this site. AINS only have access to collect information that you voluntarily give us via email, form completion, or other direct contact from you. We will not sell or rent this information to anyone. We will use your information to respond to you regarding the reason you contacted us. We will not share your information with any third party.

Design HTML Preview

Words: 285 Characters: 1592

Requester Privacy Disclaimer Preferences

Display privacy disclaimer on the below pages

☐ Top

☒ bottom

☐ Check All

☒ My Account

☐ Request

☐ Appeal

5. Select the display options for the **Login Page Disclaimer** (**Banner**, **Organization Name**, or **both**). Selecting any one of these items automatically populates the **Priority Order** field.
6. Enter **Login Page Disclaimer Text** based on your agency's requirements. The **Disclaimer** option automatically appears in the **Priority Order** field once text is entered.
7. Use the **Up** or **Down** arrows to select the **Priority Order** of the items to appear on the *Login* screen.

The screenshot displays the configuration interface for the PAL Application. It is divided into two main sections: 'Login Page Disclaimer' and 'Warning Banner'.

Login Page Disclaimer Section:

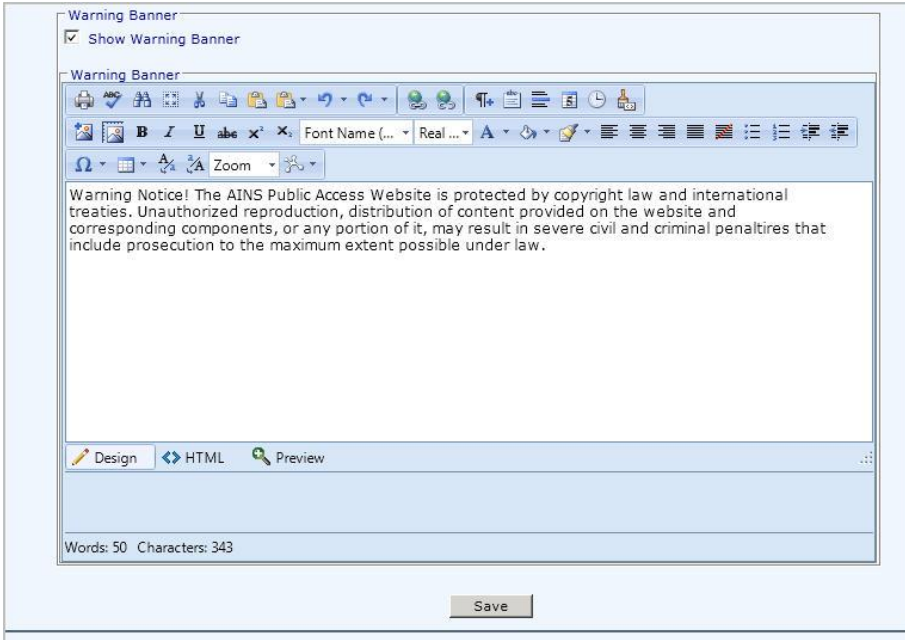
- Under 'Login Page Disclaimer', there are two checkboxes: 'Banner' and 'Organization Name'. Both are currently unchecked.
- Below these is a text area labeled 'Disclaimer Text'.
- Under 'Priority Order', there is a list box containing 'Login Details' and two arrows (up and down) for reordering.

Warning Banner Section:

- Under 'Warning Banner', there is a checkbox labeled 'Show Warning Banner' which is unchecked.
- Below this is a rich text editor. The editor's toolbar shows various formatting options. The text area contains two paragraphs of placeholder text. The first paragraph discusses criminal actions and federal regulations. The second paragraph discusses system monitoring and user consent.
- At the bottom of the editor, there are tabs for 'Design', 'HTML', and 'Preview', with 'Design' currently selected.
- At the very bottom, a status bar indicates 'Words: 248 Characters: 1688'.

8. Select the option to **Show Warning Banner**, if required.
9. If the Warning Banner is displayed, enter the **Warning Banner** text based on your agency's requirements using the Editor program.

Setting Up the PAL Application



10. Click **Save** to retain the settings.

3.27 Error Log

The Error Log provides details to help identify problems and for troubleshooting issues that may arise while using the PAL application.

1. Click **Error Log**.
2. Click **Clear** to remove the Error Log contents. Make any desired alterations to the Error Log display.
3. Click **Save** to store a copy of the Error Log to your local or network drive.



Setting Up the PAL Application

Error Log Information

```
DateTime : 1/21/2021 8:06:44 AM
System.Data.SqlClient.SqlException (0x80131904): The UPDATE statement conflicted with the FOREIGN K
The statement has been terminated.
    at System.Data.SqlClient.SqlConnection.OnError(SqlException exception, Boolean breakConnection)
    at System.Data.SqlClient.SqlInternalConnection.OnError(SqlException exception, Boolean breakConn
    at System.Data.SqlClient.TdsParser.ThrowExceptionAndWarning()
    at System.Data.SqlClient.TdsParser.Run(RunBehavior runBehavior, SqlCommand cmdHandler, SqlDataRe
    at System.Data.SqlClient.SqlCommand.RunExecuteNonQueryTds(String methodName, Boolean async)
    at System.Data.SqlClient.SqlCommand.InternalExecuteNonQuery(DbAsyncResult result, String method
    at System.Data.SqlClient.SqlCommand.ExecuteNonQuery()
    at FOIAXpress.PAL.PALLIB.DBConnection.ExecuteQuery_ReturnNothing(String sSQL, String& sErrDesc,

DateTime : 1/21/2014 8:06:44 AM
Error From WCF : InsertCustomLists :System.Exception: The UPDATE statement conflicted with the FOR
The statement has been terminated.
```

Save


Clear


© 2012 AINS Inc. All Rights Reserved.


3.28 Manuals


The information presented on this screen is the PAL Configuration online manual. Administrators can utilize this information as a reference when configuring the PAL application. This information is provided by OPEXUS and should not be altered.

Help Manuals

 [JAWS Instructions for PAL Configuration](#)

 [PAL Dashboard Administration Configuration Manual](#)

 [PAL System Configuration Manual](#)

 [Reading Room Help](#)

Note : Click on icon or filename to download



4 Sign Out

Click the **Sign Out** link on the left panel to exit PAL Configuration application and return to the login screen. A verification message appears. Click **OK** to continue signing out or **Cancel** to abort exiting the application.

(!!) Note: It is necessary to sign out and reboot the server or reset IIS in order to have the configurations reflected in PAL.



5 Release Notes

This screen provides a list of Release Notes for PAL. Release notes are communication documents shared with customers and clients of OPEXUS, and they detail the changes or enhancements made to the features of PAL. The number of documents varies depending on the type of installation performed. If you have a new installation of PAL, release notes for version 10.1 and above are displayed. However, if PAL was upgraded from one version to another, users may see earlier versions of release notes. Click the document link to open or save a copy to your local/network drive.

Release Notes

 [Release 9.0.32.0](#)

 [Release 10.0.24.0](#)

 [Release 10.1](#)

 [Release 10.2.11.0](#)

 [Release 10.3](#)

 [Release 10.4](#)

 [Release 10.5](#)

Note : Click on icon or filename to download

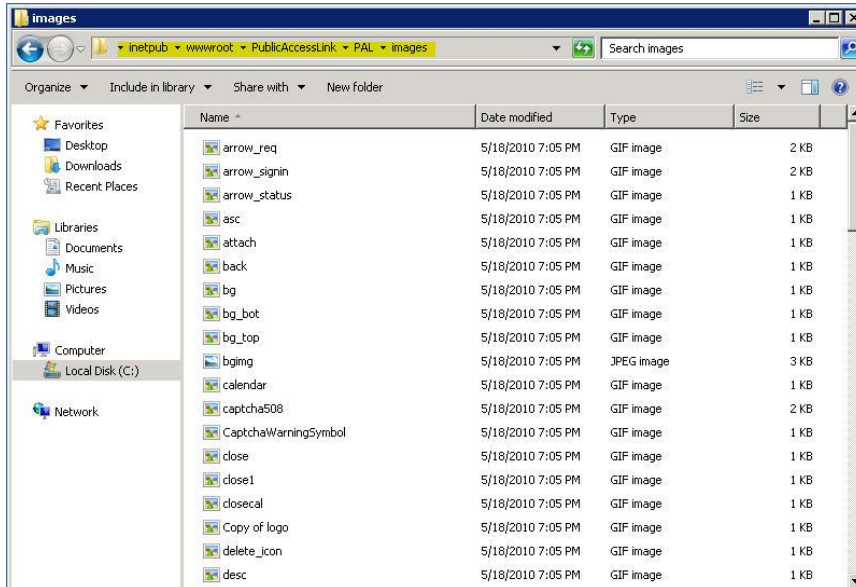
Copyright @ 2020 AINS, Inc. All rights reserved.



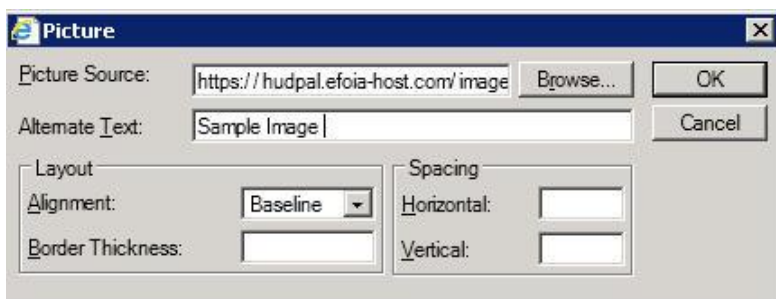
6 Inserting an Image

The instructions in this section assist administrators in the event images must be inserted into messages such as in the *Header*. The recommended file types for images are JPG or JPEG.

1. Add the image(s) to the C:\inetpub\wwwroot\PublicAccess Link\Pal\images folder.



2. Click **Add Image** within the Editor's toolbar. The *Picture* window appears.
3. Enter the URL for public use in the **Picture Source** field. (This is not the PAL Configuration URL.)
 - a. For example, <https://hudpal.eATIP-host.com>
4. Add a forward slash and the word "images".
 - a. For example, <https://hudpal.eATIP-host.com/images>
5. Add a forward slash and the name of the image to insert into a message. This must be one of the images copied into the location in Step 1.
 - a. For example, <https://hudpal.eATIP-host.com/images/testimage.jpg>.
6. Click **OK**. The image is inserted into the message.



7 Troubleshooting

| Issue | Resolution |
|--|--|
| PAL Reading Room documents published as .TIF files are not having OCR correctly performed, and the content is not returned in matching search results | <p>To resolve the issue, follow these steps.</p> <p>(!!) Note: To follow these steps, use the Local Group Policy Editor. To use the Local Group Policy Editor, you must be logged on to the computer by using an account that has administrative permissions.</p> <ul style="list-style-type: none">• Press the Windows key + R to open the <i>Run</i> window.• Type gpedit.msc, and press Enter.• Under <i>Computer Configuration</i>, expand Administrative Templates.• Expand Windows Components, expand Search, and click OCR.• Double-click Force TIFF IFilter to perform OCR for every page in a TIFF document.• In the dialog box that opens, click Enabled, and click OK.• Rebuild the Index. |

