ATIPXpress

Collaboration Admin Manual

v11.8.0

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OPEXUSTECH.COM

ATIPXpress v11.8.0 Collaboration Admin Manual

Contents

1 Introduction

Welcome to the Collaboration Portal Administration Manual. This manual provides easy reference information to help Collaboration Portal Administrators utilize the system features to best suit your organization's needs.

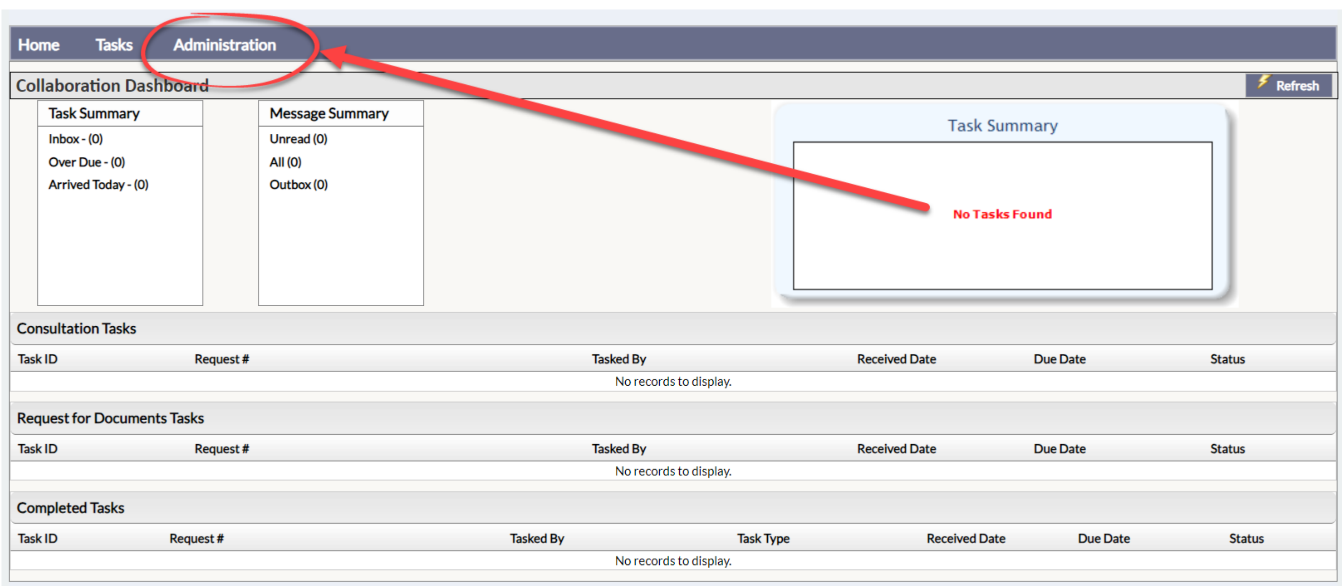
1.1 In This Manual

This manual includes the following topics:

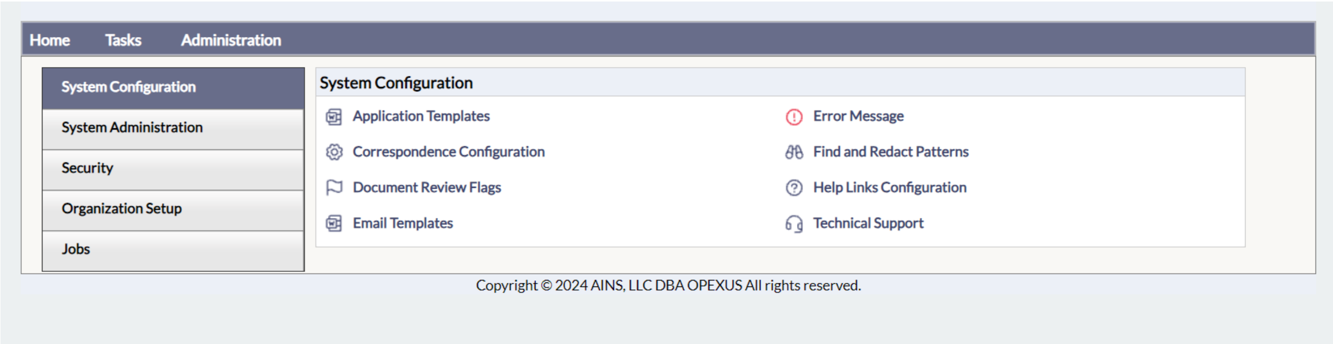
- System Configuration: Set up Portal application/email templates, error messages, Find and Redact patterns, and more
- System Administration: Adjust *Global Address List Settings*, *Scheduler Configuration*, and other system settings
- Security: Configure Portal security options
- Organization Setup: Configure enterprise-wide settings and manage users
- Jobs: View and manage *Email Log* and *Failed OCR Job* entries

1.2 Accessing Portal Administration

Portal users with Administrator access can click the *Administration* tab on their Collaboration Portal Home Screen.



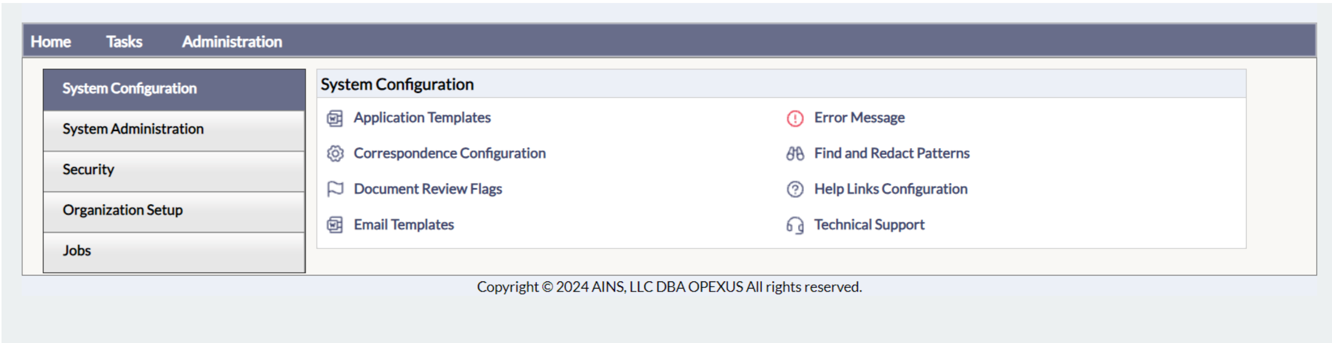
The *Administration* tab opens to the *System Configuration* screen.



Within the Administration folder, you will find *System Configuration*, *System Administration*, *Security*, *Organization Setup*, and *Jobs* configuration pages. See the following sections for details on each.

2 System Configuration

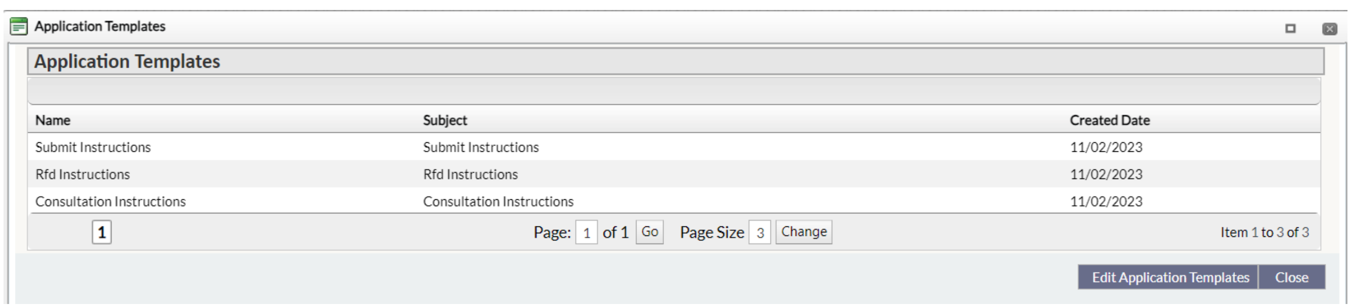
The *System Configuration* page allows Administrators to configure the topics listed below. Access *System Configuration* by navigating to **Administration > System Configuration.**



The following subsections cover each component of the *System Configuration* page.

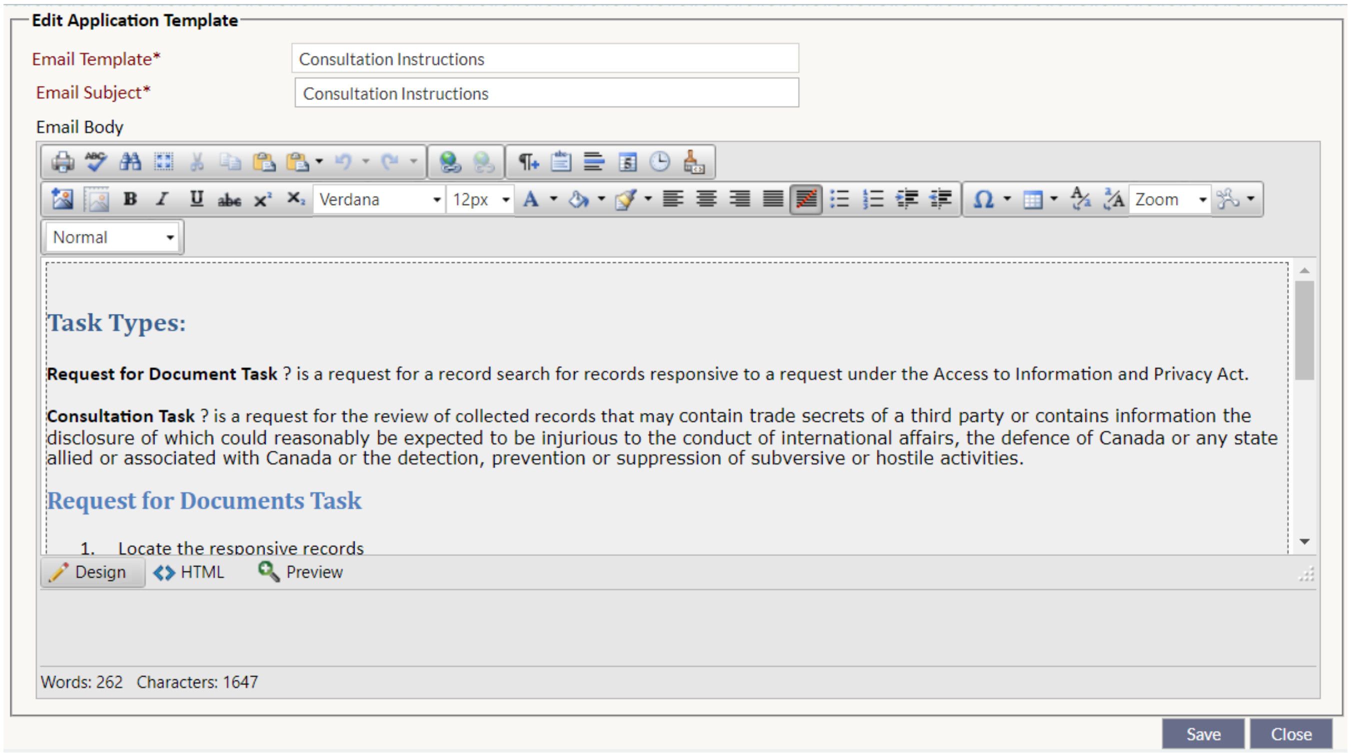
2.1 Application Templates

Open the *Application Templates* page (**Administration > System Configuration > Application Templates**) to view and edit email templates used in Collaboration Portal.



To make changes to an application template:

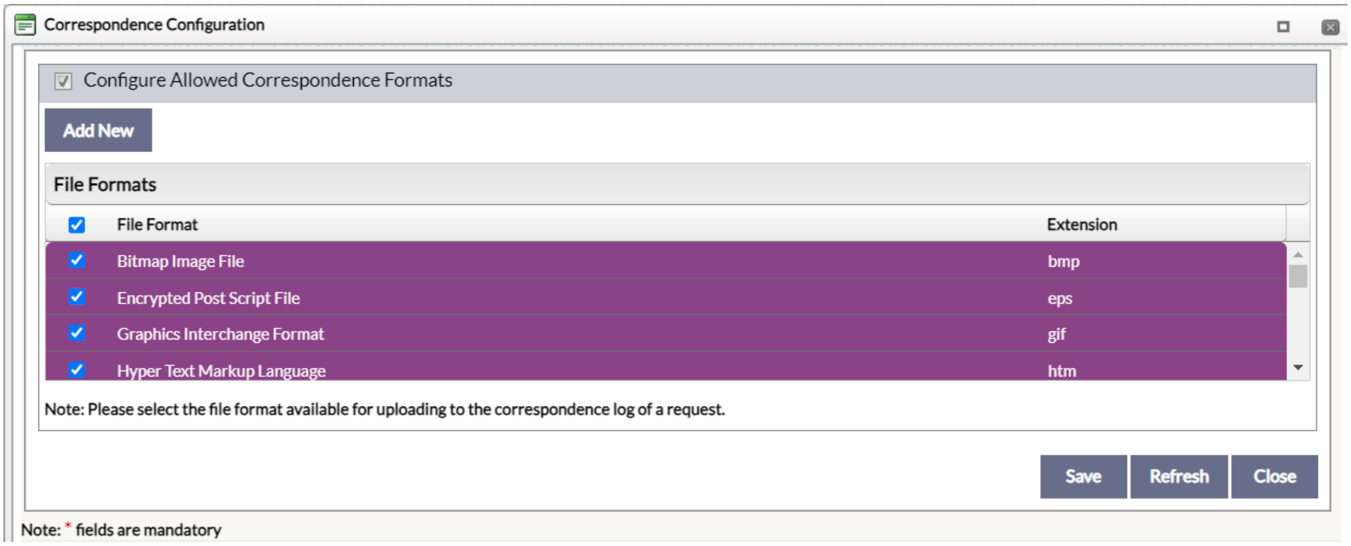
1. Select the template, then click **Edit Application Templates.**
2. The *Edit Application Template* screen appears. From here, you can rename the **Email Template** and/or set the **Email Subject.**



3. In the main text field, edit the content of the email body.
4. Make sure to click **Save** when you're finished.

2.2 Correspondence Configuration

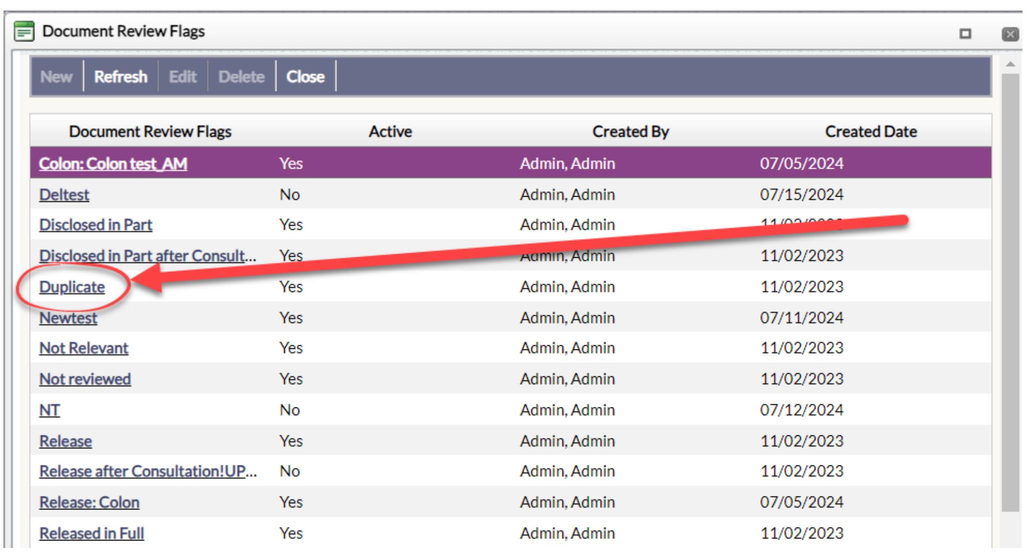
The *Correspondence Configuration* page has options to configure allowed Correspondence formats. Use the checkboxes to indicate which file formats should be available when uploading an attachment to the Correspondence Log of a request.



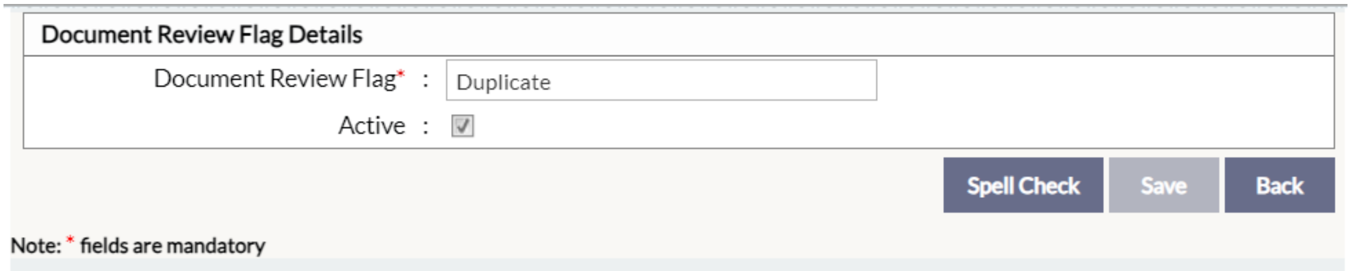
Make sure to click **Save** when you're finished making changes.

2.3 Document Review Flags

You can view the list of system Document Review Flags and add/remove flags in Administration. Navigate to **Administration > System Configuration > Document Review Flags.**



To make changes to an existing flag, click its title. The *Document Review Flag Details* screen opens. Here, you can change the flag title or mark it active/inactive using the *Active* checkbox. When you're finished, click **Save.**

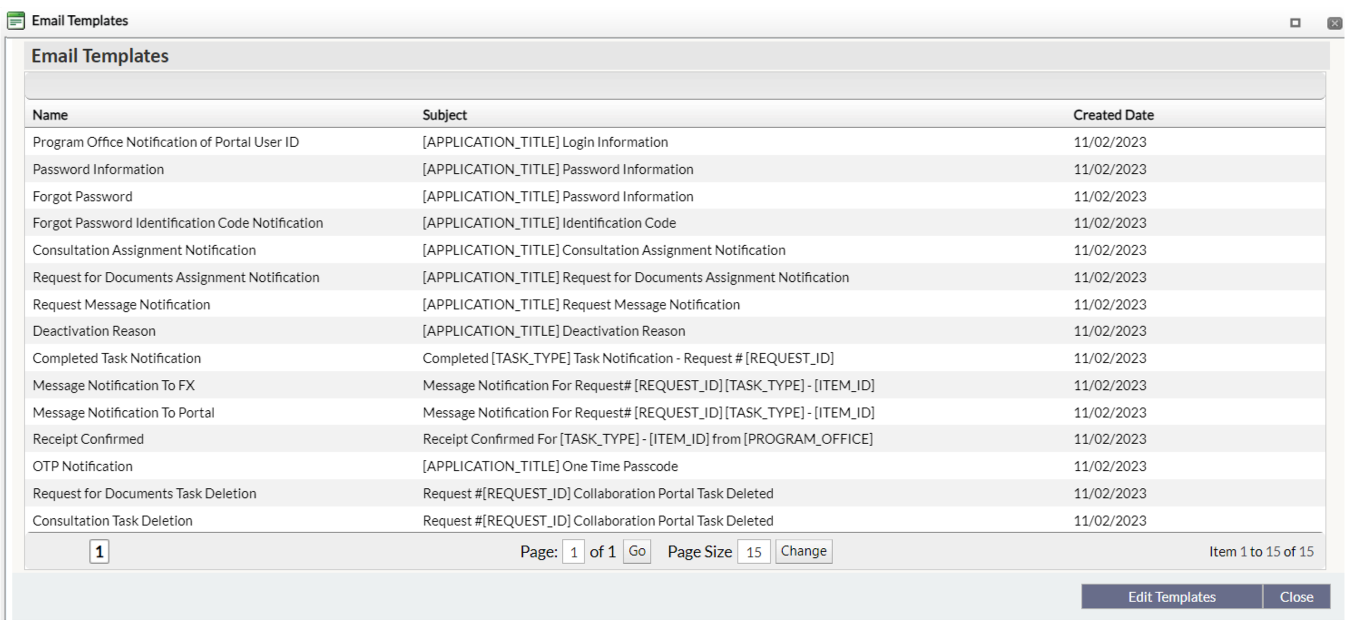


2.4 Email Templates

Collaboration Portal includes several built-in email templates to alert users when certain events occur in the system.

2.4.1 Email Template Descriptions

Open the *Email Templates* page (**Administration > System Configuration > Email Templates**) to access system email templates.



Email Templates

Email Templates

Name	Subject	Created Date
Program Office Notification of Portal User ID	[APPLICATION_TITLE] Login Information	11/02/2023
Password Information	[APPLICATION_TITLE] Password Information	11/02/2023
Forgot Password	[APPLICATION_TITLE] Password Information	11/02/2023
Forgot Password Identification Code Notification	[APPLICATION_TITLE] Identification Code	11/02/2023
Consultation Assignment Notification	[APPLICATION_TITLE] Consultation Assignment Notification	11/02/2023
Request for Documents Assignment Notification	[APPLICATION_TITLE] Request for Documents Assignment Notification	11/02/2023
Request Message Notification	[APPLICATION_TITLE] Request Message Notification	11/02/2023
Deactivation Reason	[APPLICATION_TITLE] Deactivation Reason	11/02/2023
Completed Task Notification	Completed [TASK_TYPE] Task Notification - Request # [REQUEST_ID]	11/02/2023
Message Notification To FX	Message Notification For Request# [REQUEST_ID] [TASK_TYPE] - [ITEM_ID]	11/02/2023
Message Notification To Portal	Message Notification For Request# [REQUEST_ID] [TASK_TYPE] - [ITEM_ID]	11/02/2023
Receipt Confirmed	Receipt Confirmed For [TASK_TYPE] - [ITEM_ID] from [PROGRAM_OFFICE]	11/02/2023
OTP Notification	[APPLICATION_TITLE] One Time Passcode	11/02/2023
Request for Documents Task Deletion	Request #[REQUEST_ID] Collaboration Portal Task Deleted	11/02/2023
Consultation Task Deletion	Request #[REQUEST_ID] Collaboration Portal Task Deleted	11/02/2023

1 Page: 1 of 1 Go Page Size 15 Change Item 1 to 15 of 15

Edit Templates Close

Template	Description
Program Office Notification of Portal User ID	Notification sent to the Program Office contact when an account is created for that office; includes the user login ID.

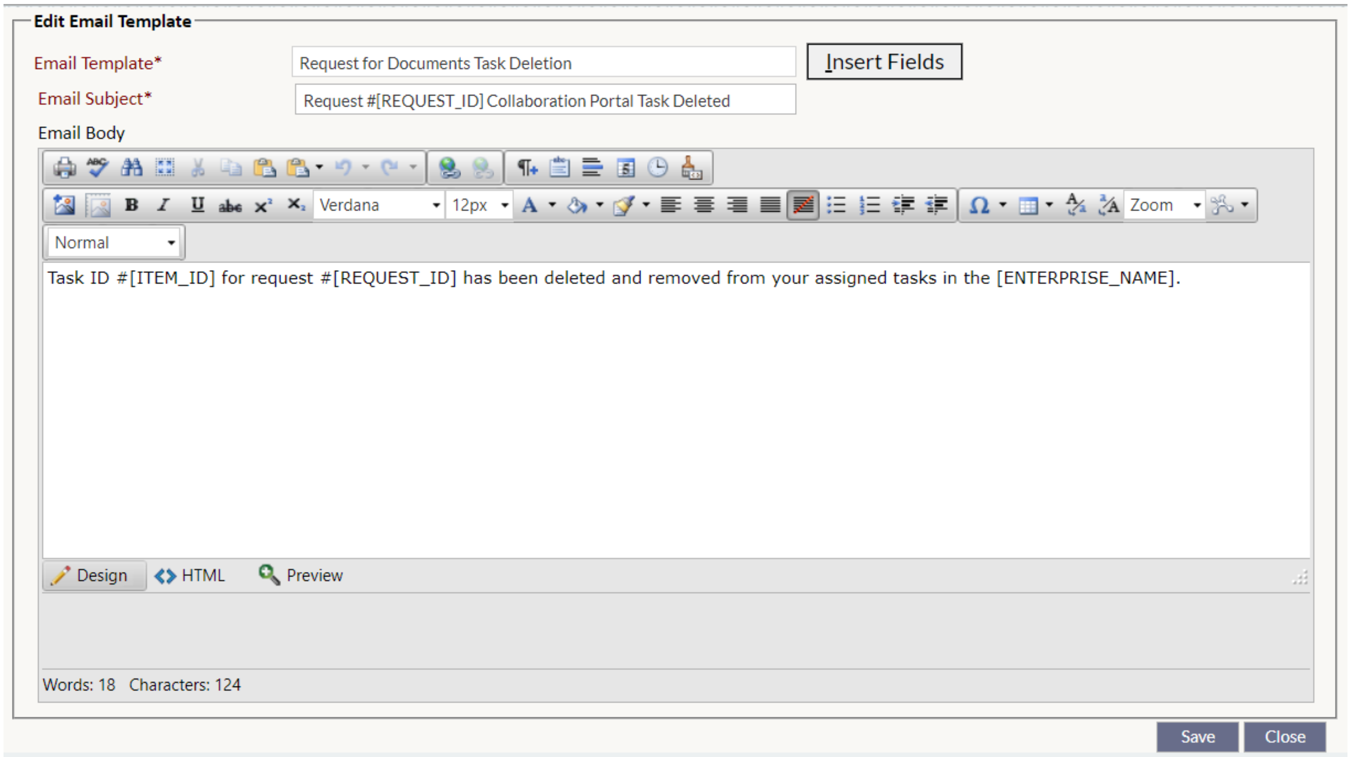
Template	Description
Password Information	Notification sent to the Program Office contact when an account is created for that office; includes the login password.
Forgot Password	When a portal user forgets their password, this notification is sent with a temporary password.
Forgot Password Identification Code Notification	A security token provided with a Forgot Password request. The code is only valid during the current session.
Consultation Assignment Notification	Notification sent to the Program Office contact when a consultation assignment is sent to the portal.
Request for Documents Assignment Notification	Notification sent to the Program Office contact when a request for documents assignment is sent to the portal.
Request Message Notification	Notification sent relating to request messages.
Deactivated Reason	When a user account is deactivated, this message is sent to their email stating the reason for the deactivation.
Completed Task Notification	Notification sent when a task is completed in the portal.
Message Notification to AX	Notification sent to AX when a message is logged on a request.
Message Notification to Portal	Message sent to portal user email when a message is sent to the portal from ATIPXpress.

Template	Description
Receipt Confirmed	Notification sent to the originating office when a request is received in the portal.
OTP Notification	Notification sent when a user requests a one-time passcode.
Request for Documents Task Deletion	Message sent to user when a document is removed from their assigned RFD Tasks.
Consultation Task Deletion	Message sent to user when a document is removed from their assigned Consultation Tasks.

2.4.2 Edit an Existing Email Template

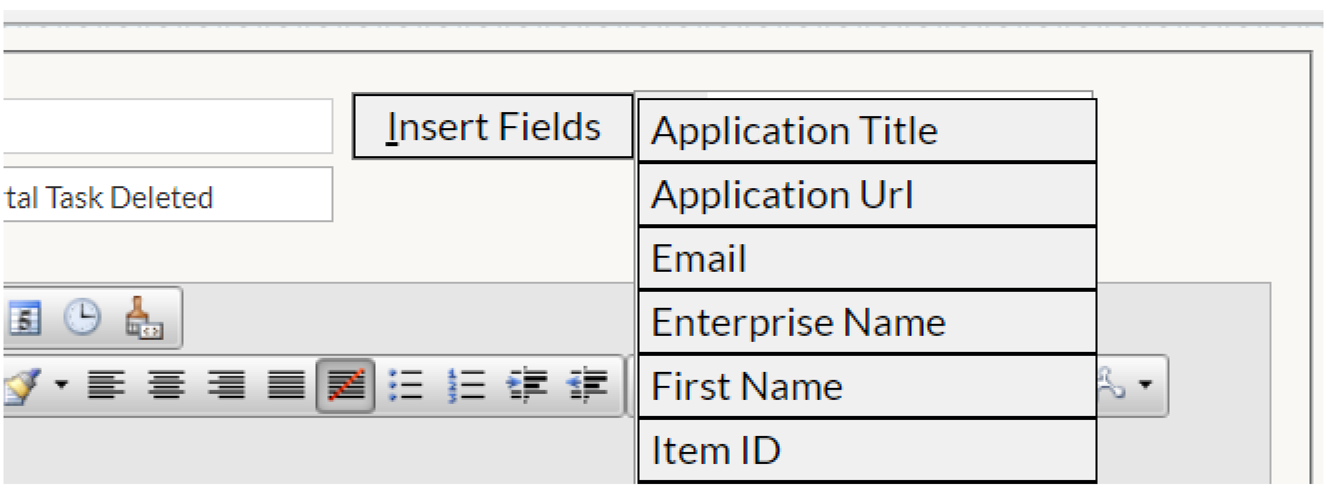
To make changes to an email template:

1. Select the template, then click **Edit Templates.**
2. The *Edit Email Template* screen appears. From here, you can rename the **Email Template** and/or set the **Email Subject.**



3. In the main text field, you can edit the content of the email body.

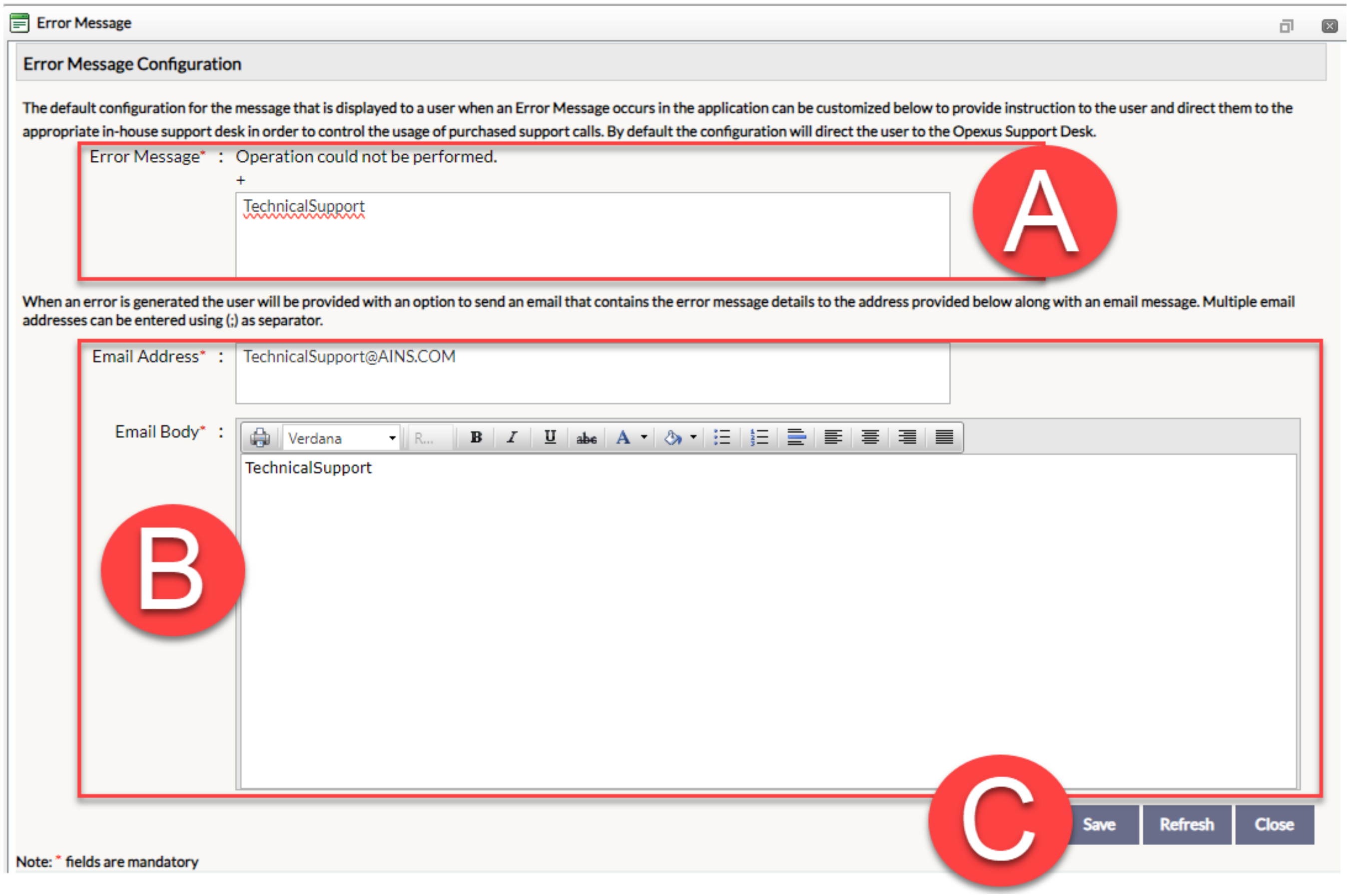
Note: Click Insert Fields to add a field that will auto-populate based on the request data, such as the Request ID or Sender Last Name.



4. Click **Save** when you're finished.

2.5 Error Message

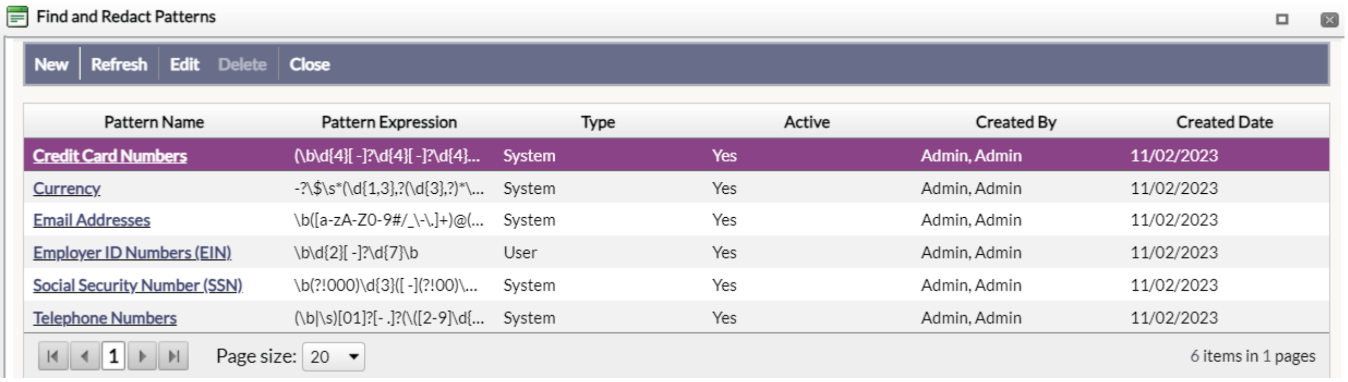
You can customize the text that appears when a Collaboration Portal user encounters an error. Navigate to **Administration > System Configuration > Error Message.** The *Error Message Configuration* screen opens.



1. Enter the message you'd like to appear along with the system error message in the **(A) Error Message** field.
2. In the **(B) Email Address** and **Email Body** fields, enter the email address(es) that should receive error messages from the system and the message content.
3. When you're finished, click **(C) Save.**

2.6 Find and Redact Patterns

Review and edit the Find and Redact Patterns used by Collaboration Portal in the *Find and Redact Patterns* page of the Administration folder.

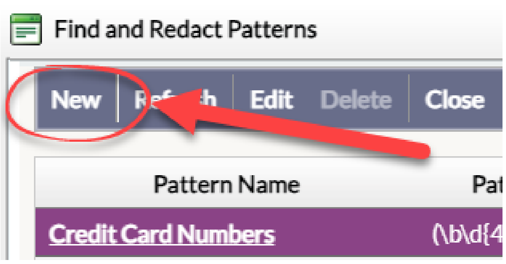


Pattern Name	Pattern Expression	Type	Active	Created By	Created Date
Credit Card Numbers	(\b\d{4}[-]?\d{4}[-]?\d{4}...	System	Yes	Admin, Admin	11/02/2023
Currency	-?\$\s*(\d{1,3},?(\d{3},?)*\...	System	Yes	Admin, Admin	11/02/2023
Email Addresses	\b([a-zA-Z0-9#/_\-\.]+)@(...	System	Yes	Admin, Admin	11/02/2023
Employer ID Numbers (EIN)	\b\d{2}[-]?\d{7}\b	User	Yes	Admin, Admin	11/02/2023
Social Security Number (SSN)	\b(?!000)\d{3}([-](?!00)\...	System	Yes	Admin, Admin	11/02/2023
Telephone Numbers	(\b|\s)[01]?[- .]?(\([2-9]\d{...	System	Yes	Admin, Admin	11/02/2023

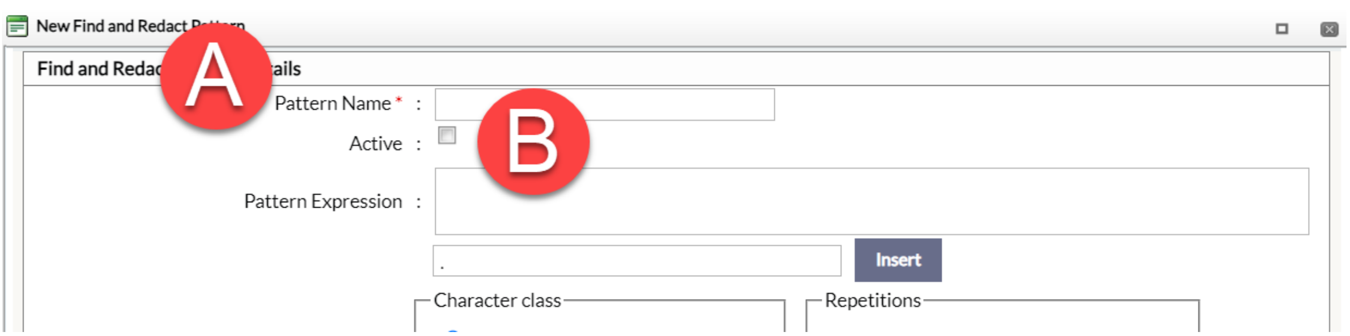
2.6.1 Create a Find and Redact Pattern Link

To create a new pattern, navigate to **Administration > System Configuration > Find and Redact Patterns.**

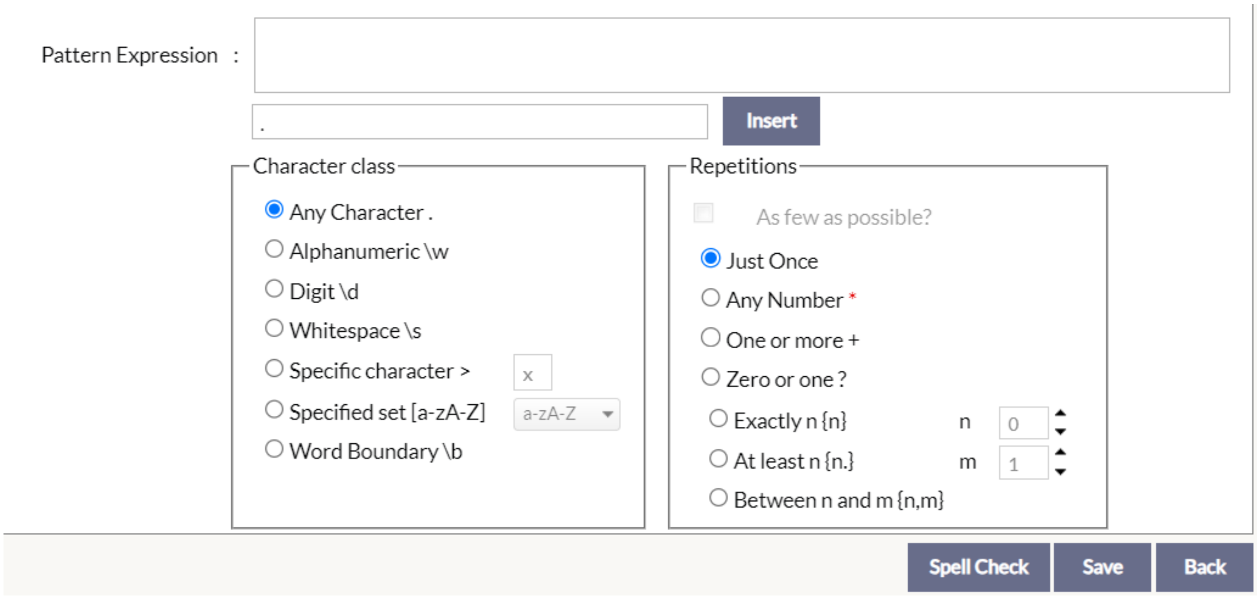
1. Click **New.**



2. The *New Find and Redact Pattern* window appears. Enter the **(A) Pattern Name.** Click the **(B) Active** checkbox if applicable.



3. Next, configure the **Pattern Expression.** Use the radio buttons to select a **Character class** and **Repetitions,** then click **Insert** to add the character.

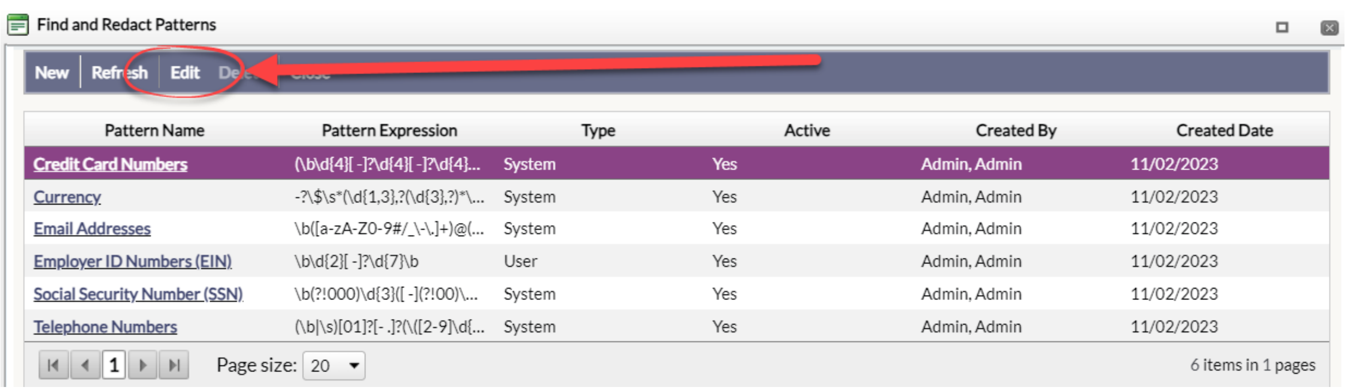


4. When you're finished, click **Save.**

2.6.2 Edit an Existing Find and Redact Pattern

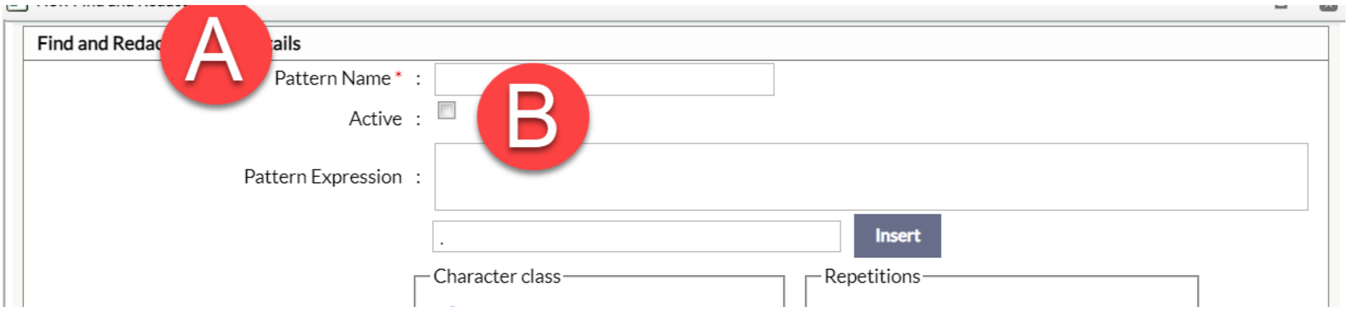
To edit an existing Find and Redact Pattern, navigate to **Administration > System Configuration > Find and Redact Patterns.**

1. Select the pattern you'd like to change, then click **Edit.**

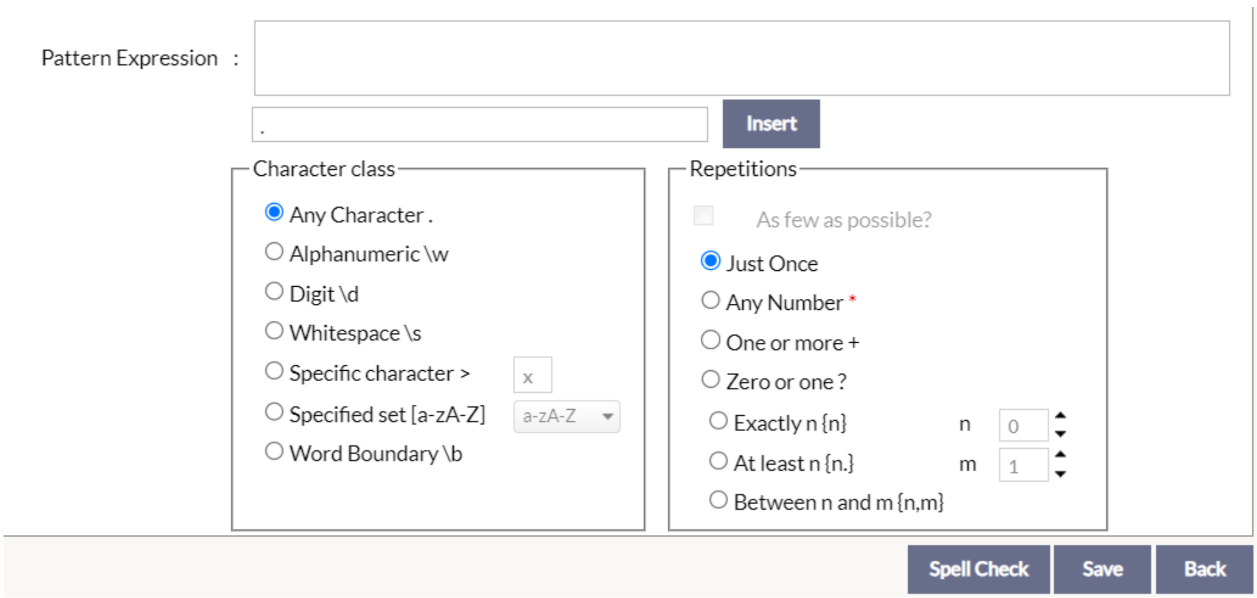


Pattern Name	Pattern Expression	Type	Active	Created By	Created Date
Credit Card Numbers	(\b\d{4}[-]?\d{4}[-]?\d{4}...	System	Yes	Admin, Admin	11/02/2023
Currency	-?\$\s*(\d{1,3},?(\d{3},?)*\...	System	Yes	Admin, Admin	11/02/2023
Email Addresses	\b([a-zA-Z0-9#/_\-\.]+)@(...	System	Yes	Admin, Admin	11/02/2023
Employer ID Numbers (EIN)	\b\d{2}[-]?\d{7}\b	User	Yes	Admin, Admin	11/02/2023
Social Security Number (SSN)	\b(?!000)\d{3}([-](?!00)\...	System	Yes	Admin, Admin	11/02/2023
Telephone Numbers	(\b|\s)[01]?[- .]?(\([2-9]\d{...	System	Yes	Admin, Admin	11/02/2023

2. The *New Find and Redact Pattern* window appears. Enter the **(A) Pattern Name.** Click the **(B) Active** checkbox if applicable.



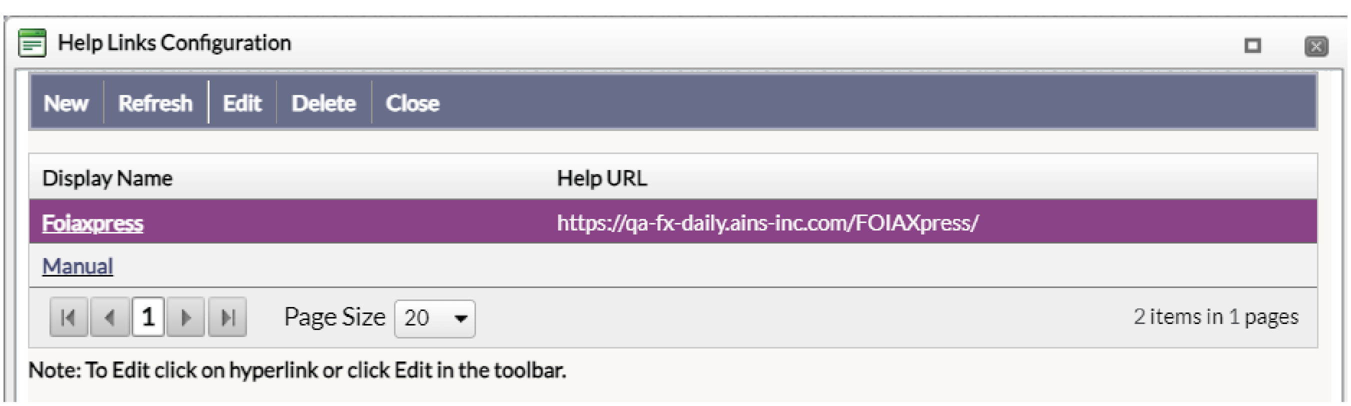
3. Next, configure the **Pattern Expression.** Use the radio buttons to select a **Character class** and **Repetitions,** then click **Insert** to add the character.



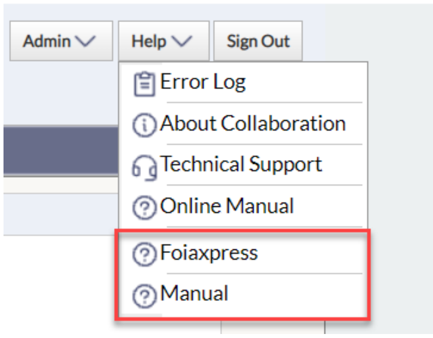
4. When you're finished, click **Save.**

2.7 Help Links Configuration

The *Help Links Configuration* page is where you can create and edit help links.



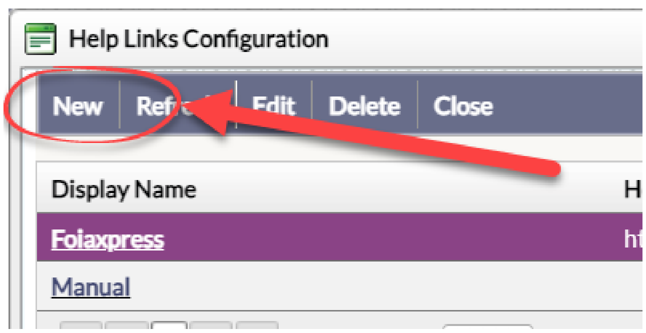
Help links are the options available in the application *Help* drop-down menu, as shown below.



2.7.1 Create a New Help Link

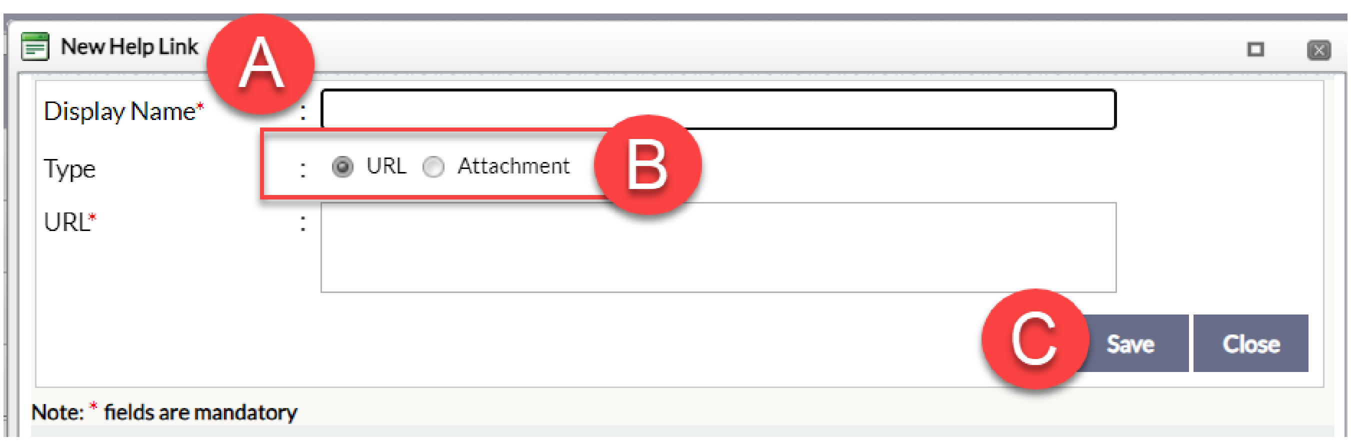
To create a new help link, navigate to **Administration > System Configuration > Help Links Configuration.**

1. Click **New.**



2. The *New Help Link* window appears. Enter a **(A) Display Name,** the text that will appear in the drop-down menu. Then, select a **(B) Type,** either URL or Attachment. Depending on your selection, you will be prompted to add the URL or attach the file.

Note: You can only add PDFs as help link attachments.

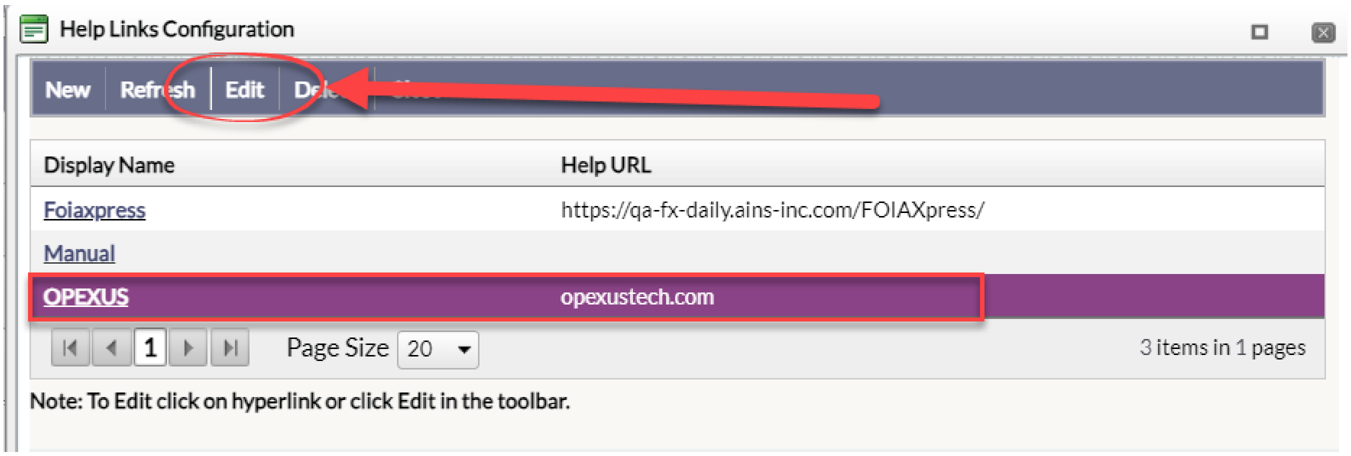


3. When you're finished, click **(C) Save** to create the new help link. Once you've closed out of the window and refreshed the application, the help link will appear in the *Help* drop-down menu.

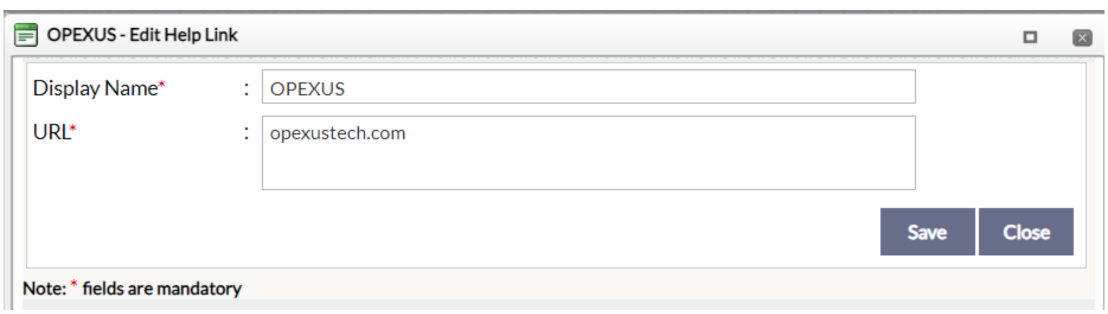
2.7.2 Edit an Existing Help Link

To edit an existing help link, navigate to **Administration > System Configuration > Help Links Configuration.**

4. Select the help link you'd like to change, then click **Edit.**



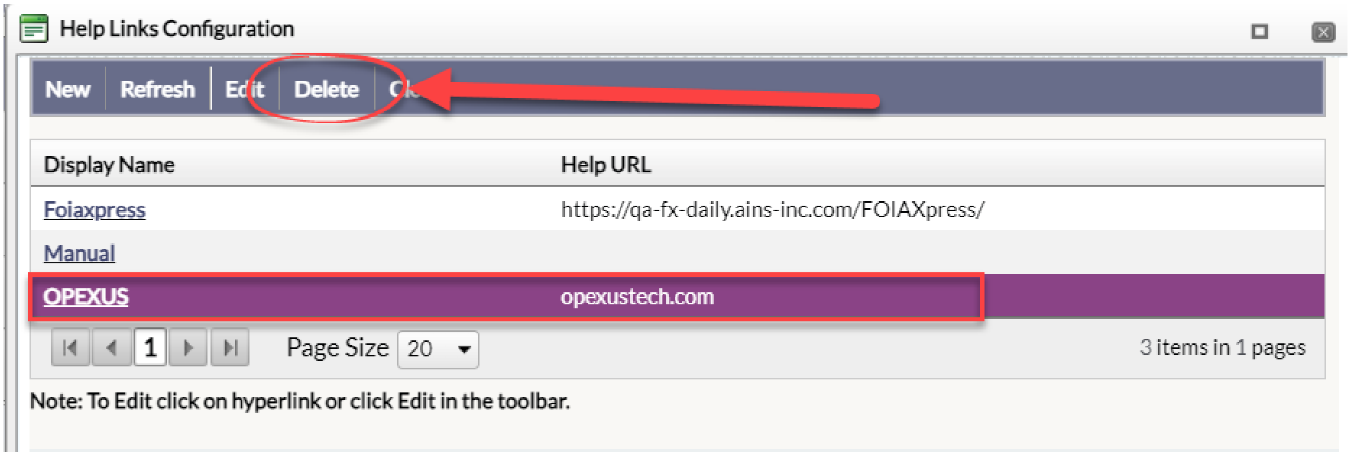
5. The *Edit Help Link* window appears and you can make changes to the Display Name and URL/Attachment. Click **Save** when you're finished.



2.7.3 Remove a Help Link

To delete a help link, navigate to **Administration > System Configuration > Help Links Configuration.**

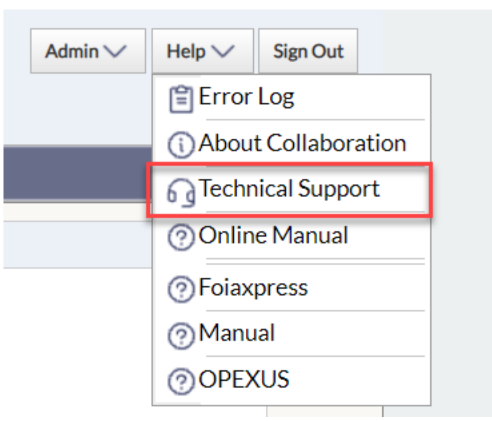
1. Select the help link you'd like to remove, then click **Delete.**



2. Click **OK** in the confirmation box. The list of help links will refresh, and the deleted link will be removed from the drop-down menu.

2.8 Technical Support

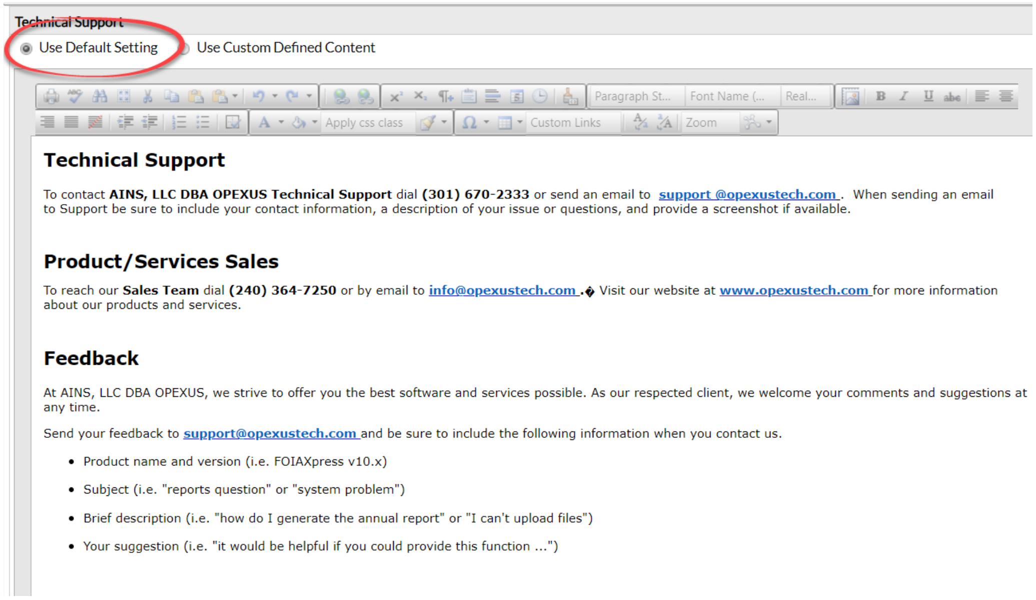
On the *Technical Support* page, Admin users can customize the Technical Support Link found on the Collaboration Portal Home Page, shown below.



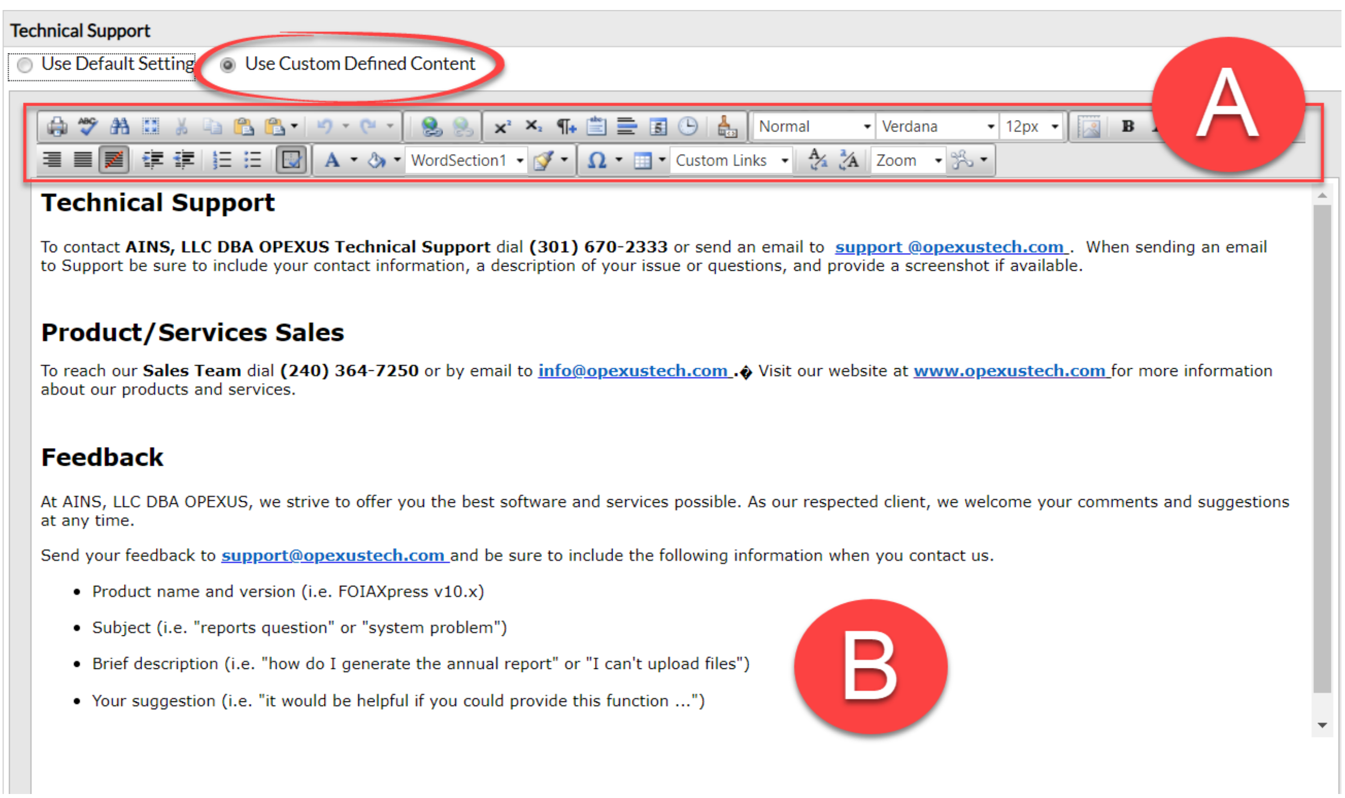
The Technical Support page details can be modified if you'd like to instruct users to call your agency administrator, rather than OPEXUS support.

Note: OPEXUS technical support is dependent on your agency maintaining active software maintenance and customer support agreements. Support agreements are required for responding to "how-to" questions and customer premise infrastructure-related issues. Maintenance agreements are required for software version updates, service releases and software-related issues.

The application includes a default Technical Support template setting, shown below.



If you'd like to modify the content, select the **Use Custom Defined Content** radio button.

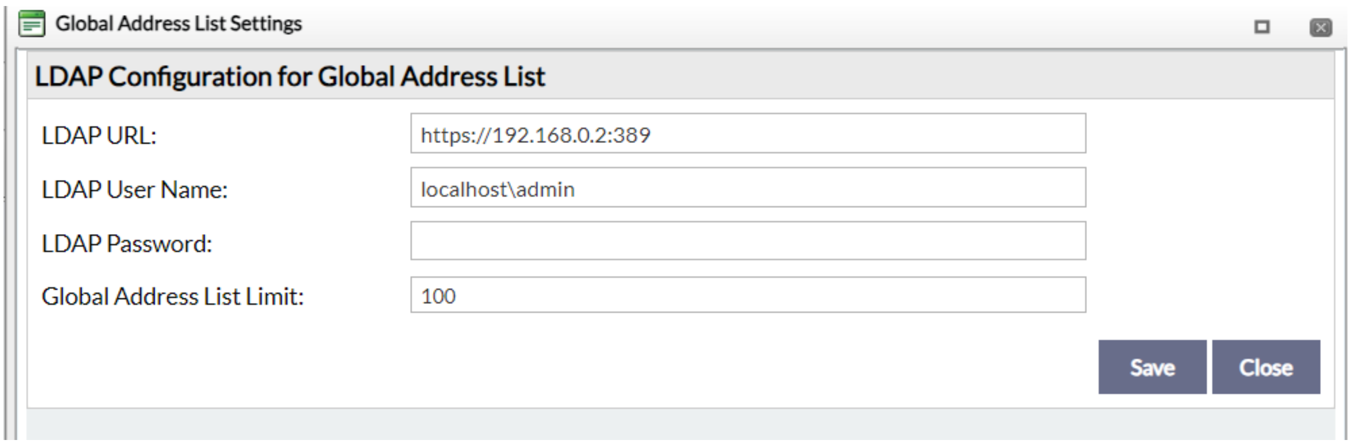


You can use the **(A) toolbar** to edit the **(B) page content.** When you're finished making changes, be sure to click **Save** at the bottom of the page.

3 System Administration

3.1 Global Address List Settings

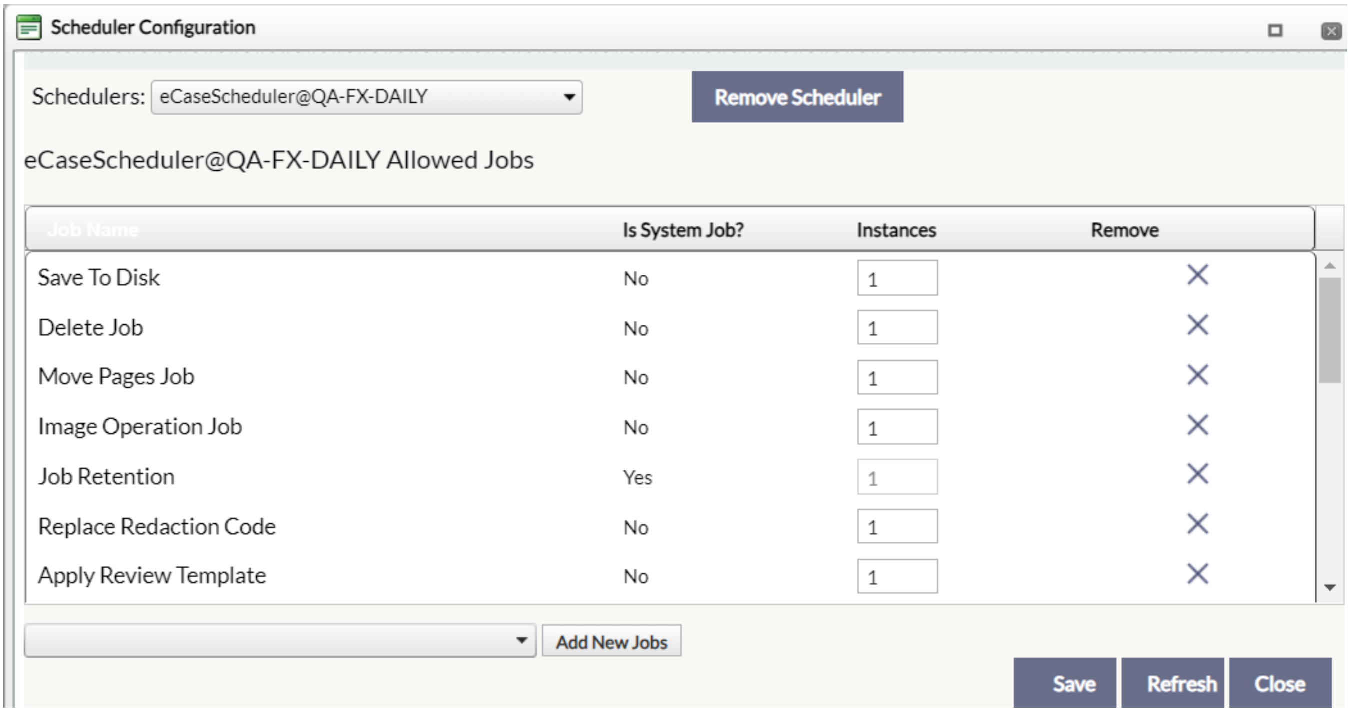
The *Global Address List Settings* page (**Administration > System Administration > Global Address List Settings**) includes fields related to LDAP configuration. You can configure the **LDAP URL, LDAP User Name, LDAP Password,** and **Global Address List Limit.** When you're finished making changes, click **Save.**



3.2 Scheduler Configuration

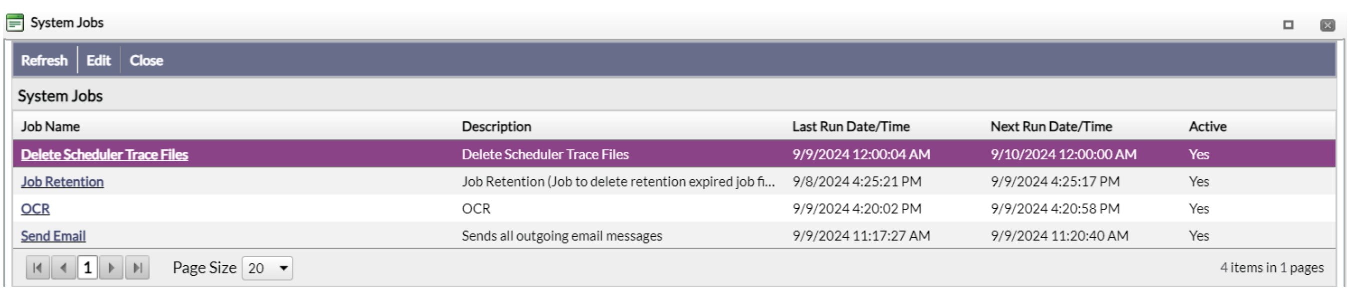
On the *Scheduler Configuration* page, you can view and edit scheduler jobs. Click the X (**Remove** column) to remove the job from the system. To add a job back to the system, use the drop-down menu and click **Add New Jobs.** You can also change the number of **Instances.**

When you're finished making changes, click **Save.**

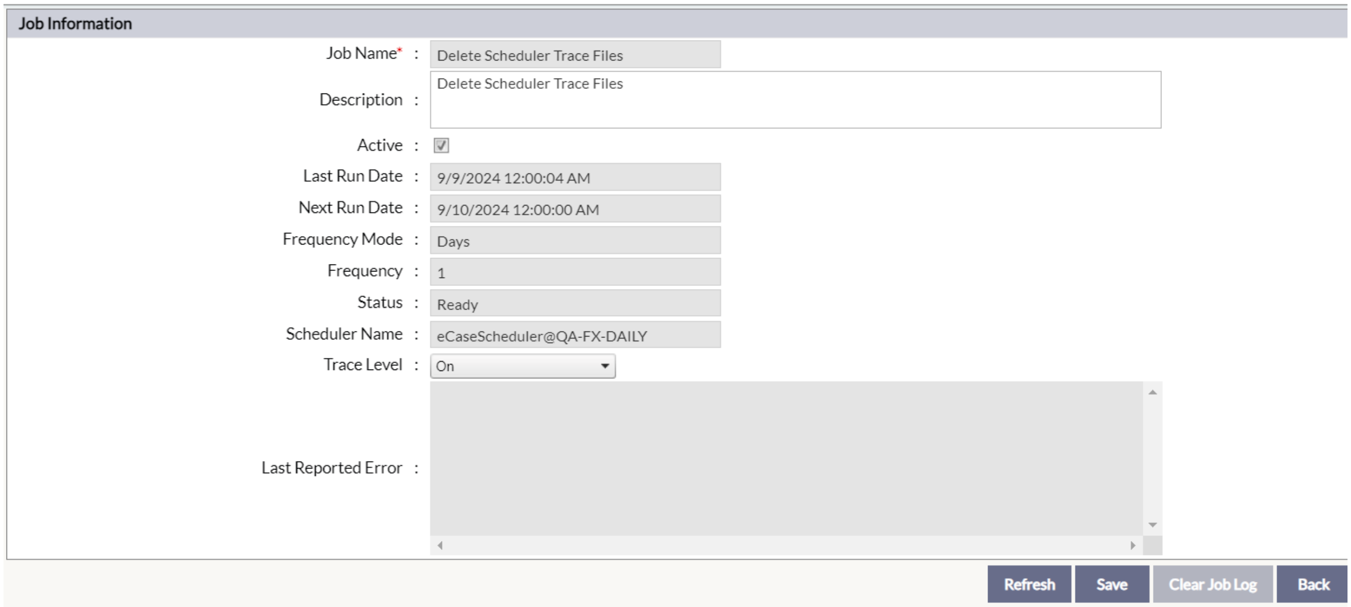


3.3 System Jobs

Administrators can view system jobs on the *System Jobs* page (**Administration > System Administration > System Jobs**).



To edit a system job, click the *Job Name* or select the job you'd like to edit and click **Edit.** The *Job Information* page opens, where you can customize certain job details including the description.

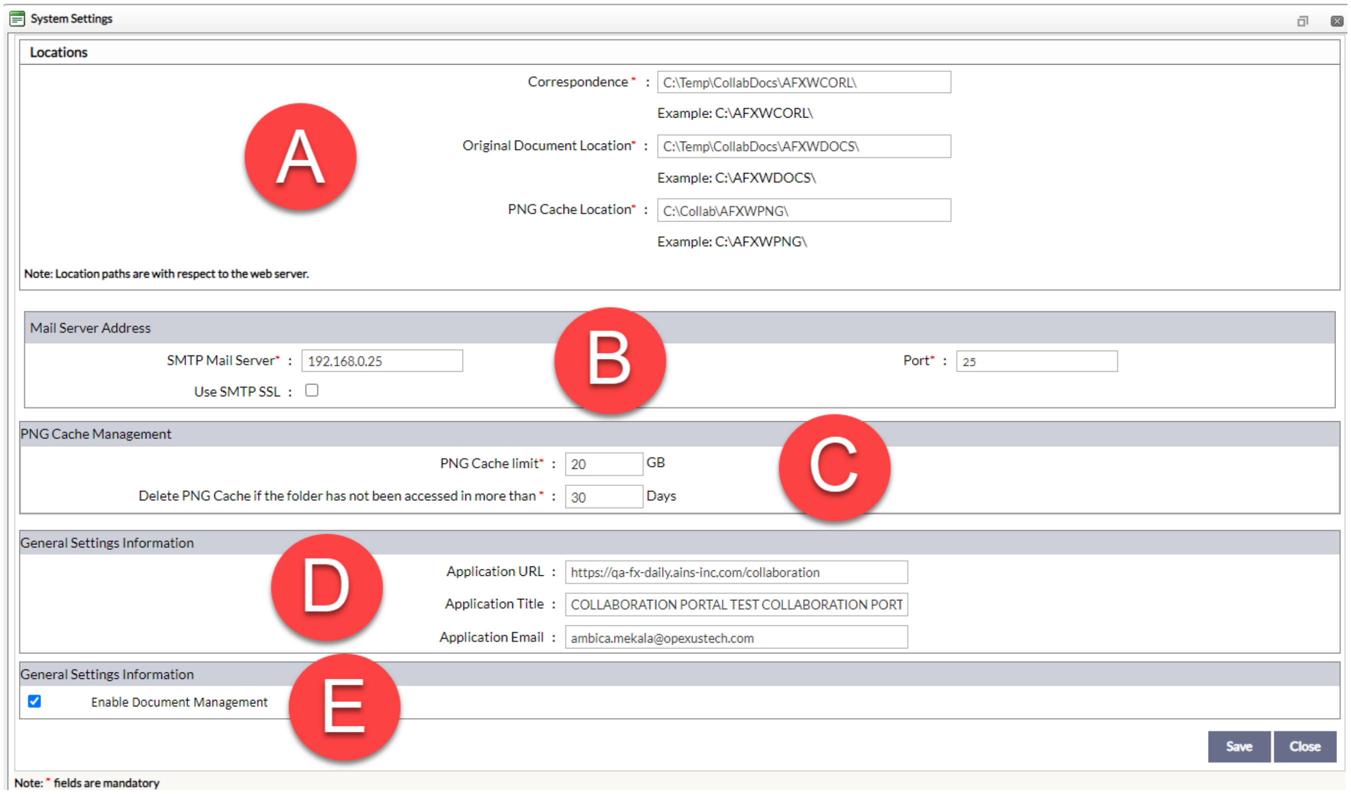


Make sure to click **Save** when your edits are finished.

3.4 System Settings

The *System Settings* page of Administration contains miscellaneous system configurations including SMTP settings, the application URL, and more.

The following table includes a description of each section. After you've made changes, make sure to click **Save.**



Ref	Name	Description
A	Locations	Configure a disk location for storing and retrieving *Correspondence*, *Documents*, and *Temp* files.
B	Mail Server Address	Provide the *SMTP Mail Server* address, and the *Port* number for your email server.
C	PNG Cache Management	Set the *PNG Cache Limit*, measured in gigabytes, and the frequency (measured in days) at which the PNG Cache is cleared if not accessed.

Ref	Name	Description
D	General Settings Information	Configure the *Application URL*, *Application Title*, and *Application Email* as needed for your organization. **Note: If configured for HTTPS on the ATIPXpress Administration side, this application URL must also be configured for HTTPS.**
E	General Settings Information – Document Management	Check this box to enable Document Management.

4 Security

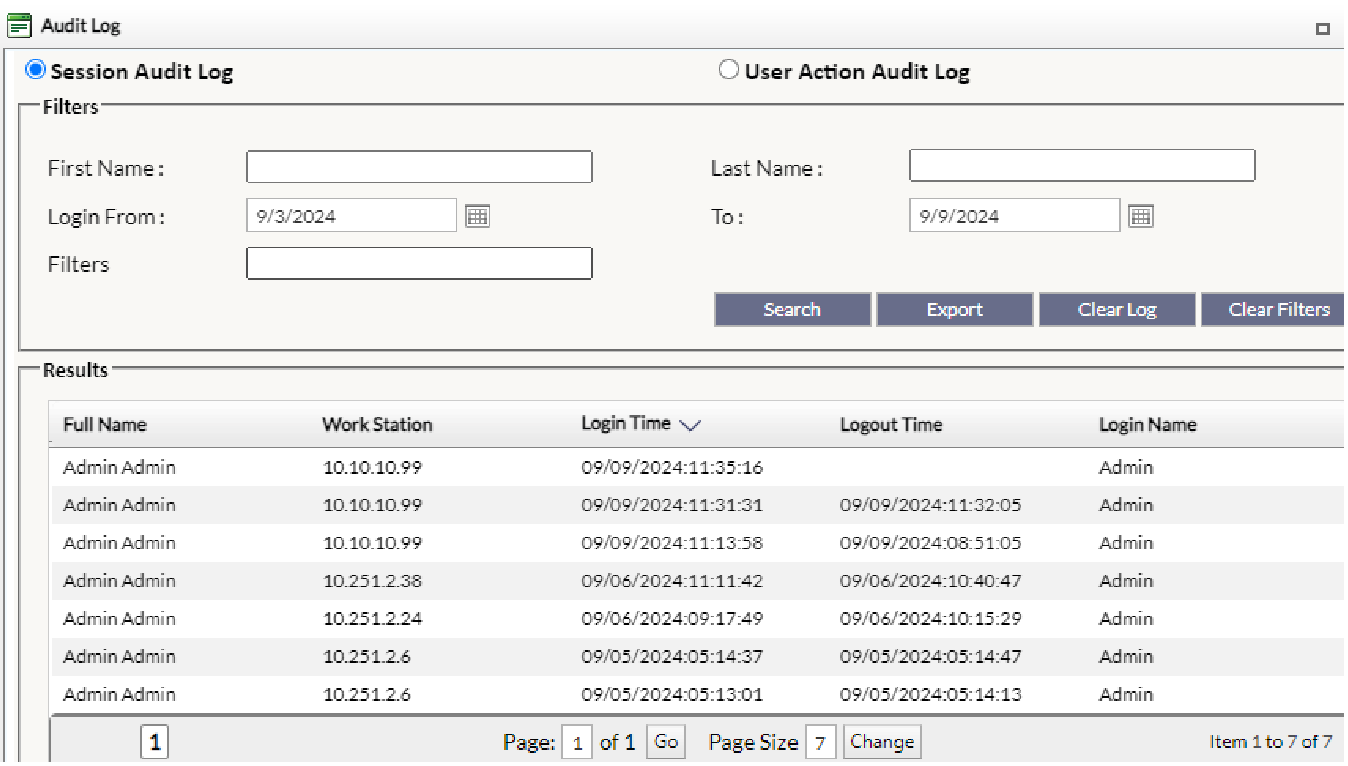
The *Security* page allows administrators to manage the system security settings. To access the page, navigate to **Administration > Security**.

4.1 Audit Log

In the *Audit Log* section (**Administration > Security > Audit Log**), administrators can access two Audit Logs: session and user action. Each is described in the following subsections.

4.1.1 Session Audit Log

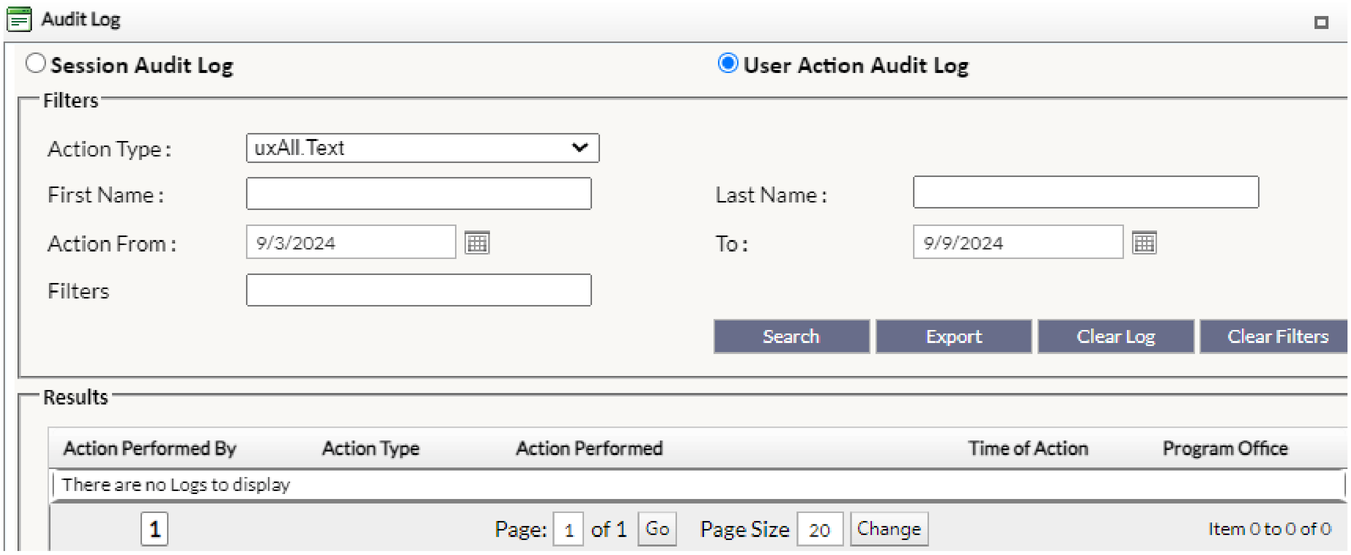
The session audit log logs all user sessions, including the IP of the workstation where the portal was accessed and the access times. To view the *Session Audit Log*, navigate to **Administration > Audit Log(s)**.



Use the *Filters* to search for users using the *First Name*, *Last Name*, or *Login From* dates, then click **Search** to display matching results.

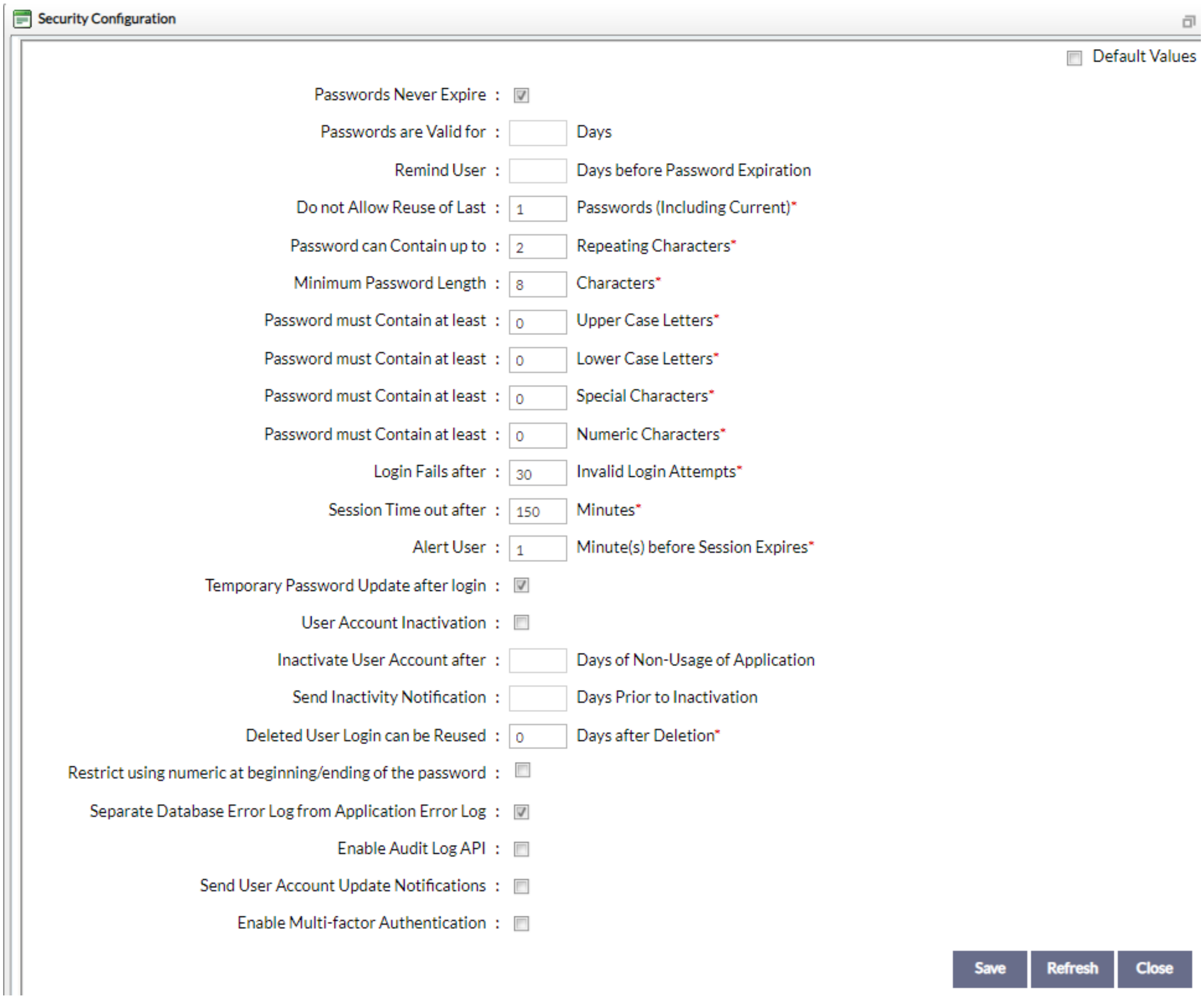
4.1.2 User Action Log

The user audit log tracks user actions in the application. To view the *User Audit Log*, navigate to **Administration > Audit Log(s)**.



4.2 Security Configuration

The *Security Configuration* page includes various settings related to logins, session timeouts, and other application security features. The following table outlines each of the fields. Be sure to click **Save** after making changes to this screen.



Field	Description
Passwords Never Expire	Select this checkbox to prevent user passwords from ever expiring.
Passwords are valid for X days	Enter the number of days a user's password is valid before expiration.

Field	Description
Remind user X days before password expiration	Enter the number of days before the user's password expires that they should be reminded to reset their password.
Do not allow reuse of last X passwords (including current)	Enter a number of previous passwords to disallow reuse of when changing a password.
Passwords can contain up to X repeating characters	Enter the maximum number of repeating characters allowed in user passwords.
Minimum password length	Enter the minimum length required for user passwords in characters.
Password must contain at least X uppercase letters	Enter the minimum number of uppercase characters required in the password.
Password must contain at least X lowercase letters	Enter the minimum number of lowercase characters required in the password.
Password must contain at least X special characters	Enter the minimum number of special characters required in the password.
Password must contain at least X numeric characters	Enter the minimum number of numeric characters required in the password.
Login fails after X invalid login attempts	Enter the maximum number of unsuccessful logins a user is allowed before their user account is locked.

Field	Description
Session time-out after X minutes	Enter in minutes the time a user can be inactive in their current session before the session times out and the user is logged out.
Alert user X minutes before session expires	Enter in minutes the amount of time before session termination that the user receives a timeout alert.
Require Temporary Password Update after login	Select this checkbox to require any user logging in with a temporary password to update their password after login.
User Account Inactivation	Checked to denote an inactive user.
Inactivate user account after X days of inactivity	Enter the number of days a user account is inactive before it is formally inactivated in the system.
Send inactivity notification X days prior to inactivation	Enter in days the amount of time before inactivation that a user should receive an inactivity notification email.
Deleted user login can be reused X days after deletion	Enter the time period (in days) after which a deleted user's login can be reused.
Restrict using numeric at beginning/end of the password	Check this to restrict use of numbers at the beginning and end of Collaboration Portal passwords.
Separate Database Error Log from Application Error Log	Check this box to separate the Database Error Log from the Application Error Log.

Field	Description
Enable Audit Log API	Check this box to enable Audit Log API.
Send User Account Update Notifications	Check this box to enable user account notifications. When checked, another field appears where you can include the email address(es) to receive these notifications.
Enable Multi-factor Authentication	Check this box to enable multi-factor authentication (MFA). When checked, a drop-down field appears where you can select a notification type.
OTP expires in X minutes	Enter the number of minutes the OTP will be active before expiration.

5 Organization Setup

You can make changes to user accounts, configure organization information, and more on the *Organization Setup* tab in Administration.

5.1 Enterprise

On the *Enterprise* page (**Administration > Organization Setup > Enterprise**) you can update organization contact details, customize the appearance of the Collaboration Portal, and set certain system messages.

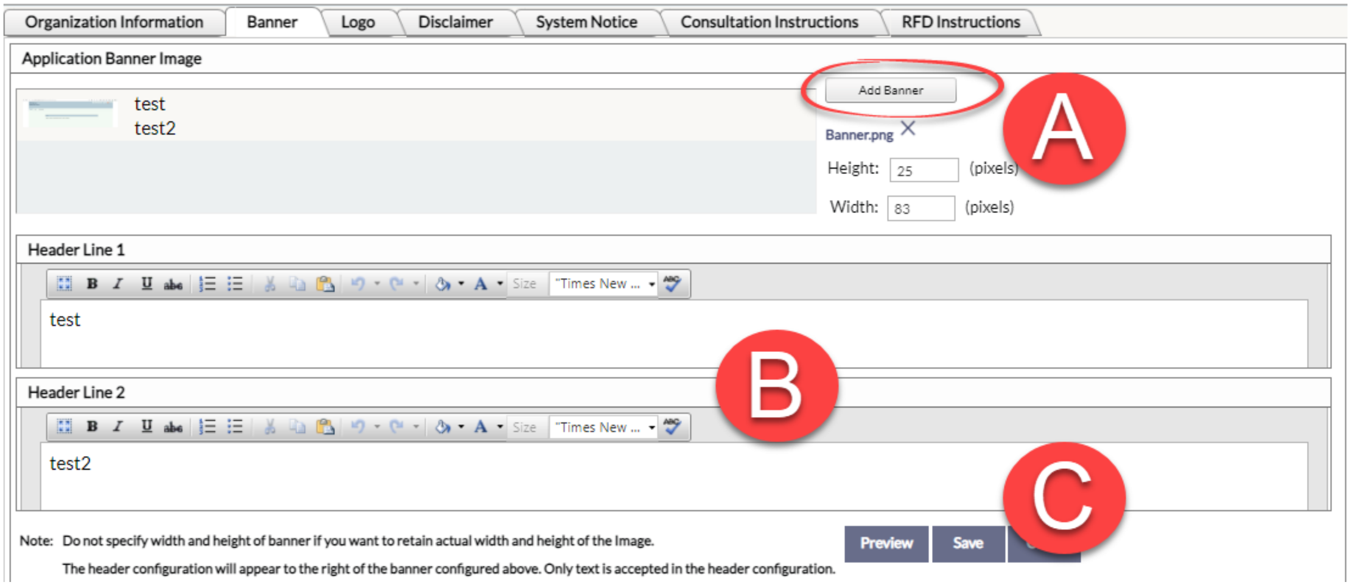
The Enterprise tab is split into a few sections, described in the following subsections.

5.1.1 Organization Information

Here, you can update your organization's contact information and addresses. Make sure to click **Save** before closing.

5.1.2 Banner

You can add a banner and some header text on the *Banner* tab. They will display in the top left corner of the Collaboration Portal.

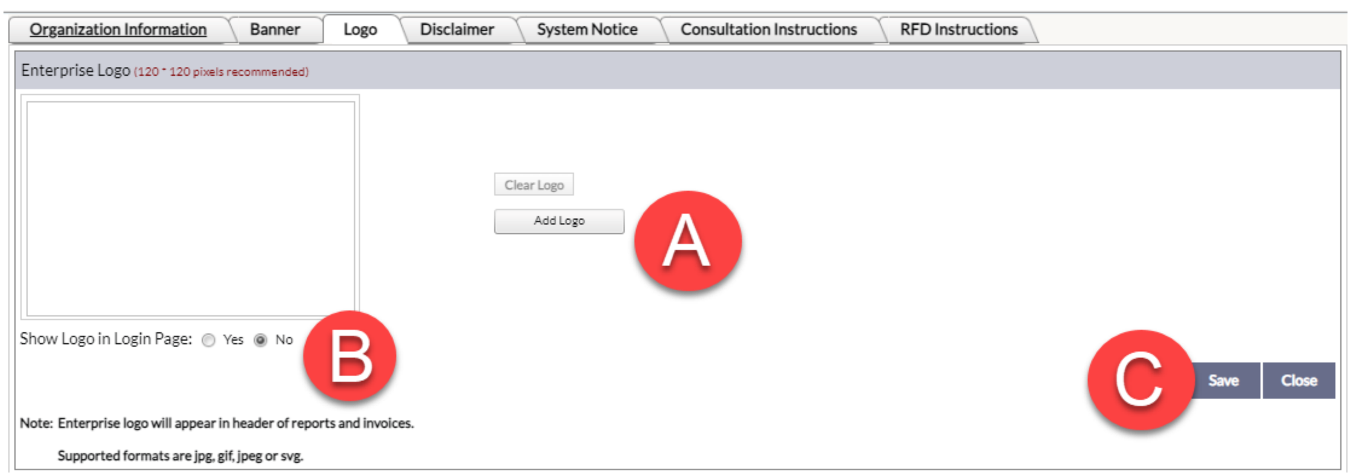


To add a banner image, click **(A) Add Banner** and upload your file. To add header text, use the **(B) Header Line** fields.

When you're finished making changes, click **(C) Save.**

5.1.3 Logo

Use the *Logo* tab to add a logo to Report headers, invoices, and the Collaboration Portal login page.



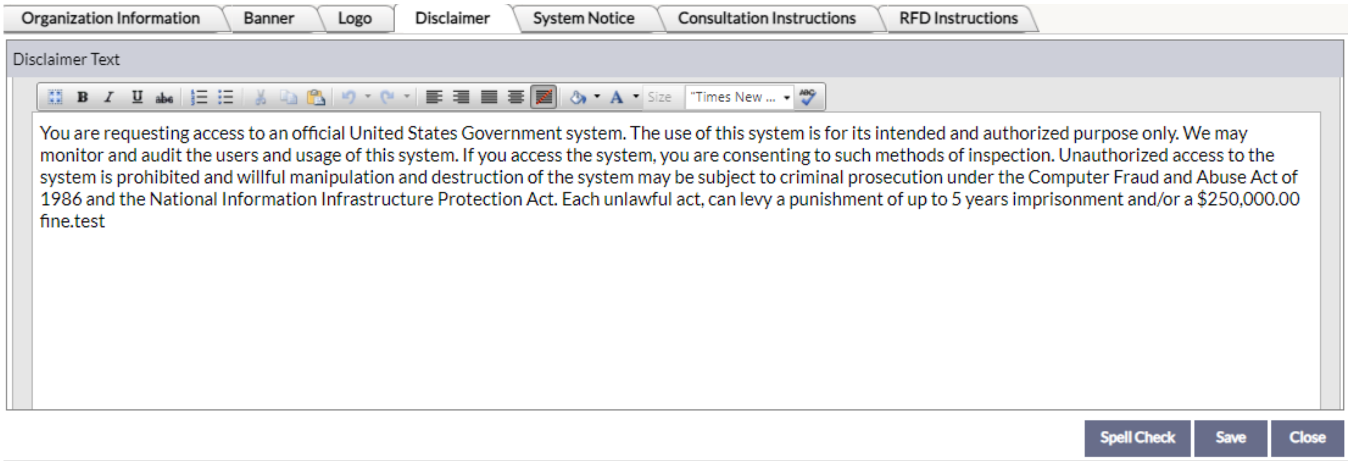
Click **(A) Add logo** to upload your image. You can also use the **(B) radio buttons** to select whether you'd like the logo to appear on the Login page. When you're finished, click **(C) Save.**

Notes:

- **Recommended logo dimensions are 120 x 120.**
- **Supported file formats are .jpg, .gif, .jpeg, and .svg.**

5.1.4 Disclaimer

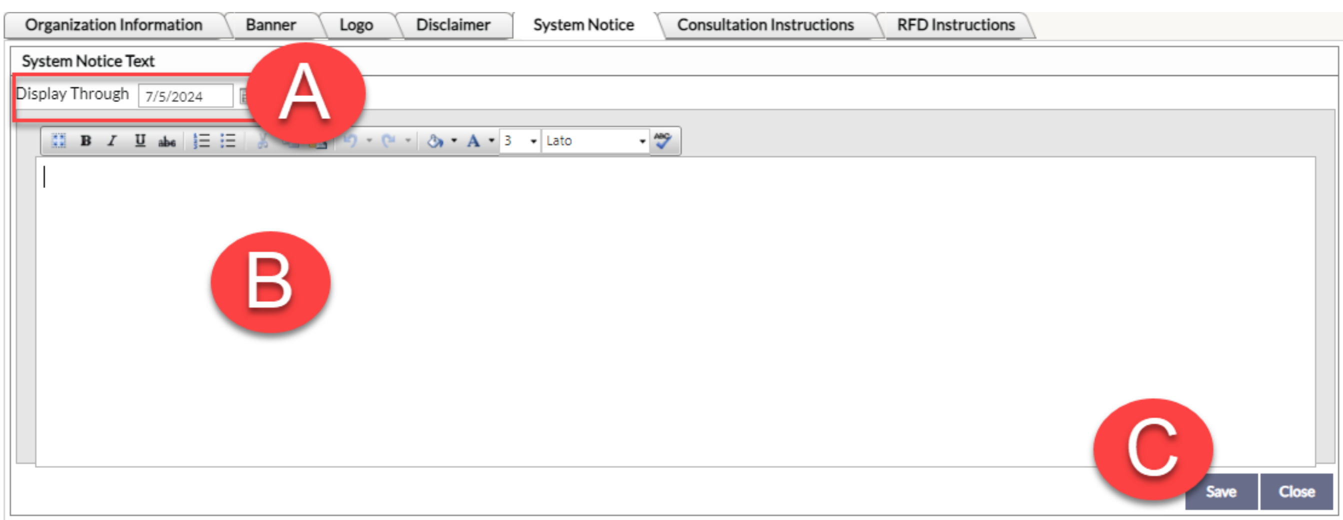
Edit the disclaimer that appears when users first access the Collaboration Portal on the *Disclaimer* page. Click **Save** when you're finished making changes.



5.1.5 System Notice

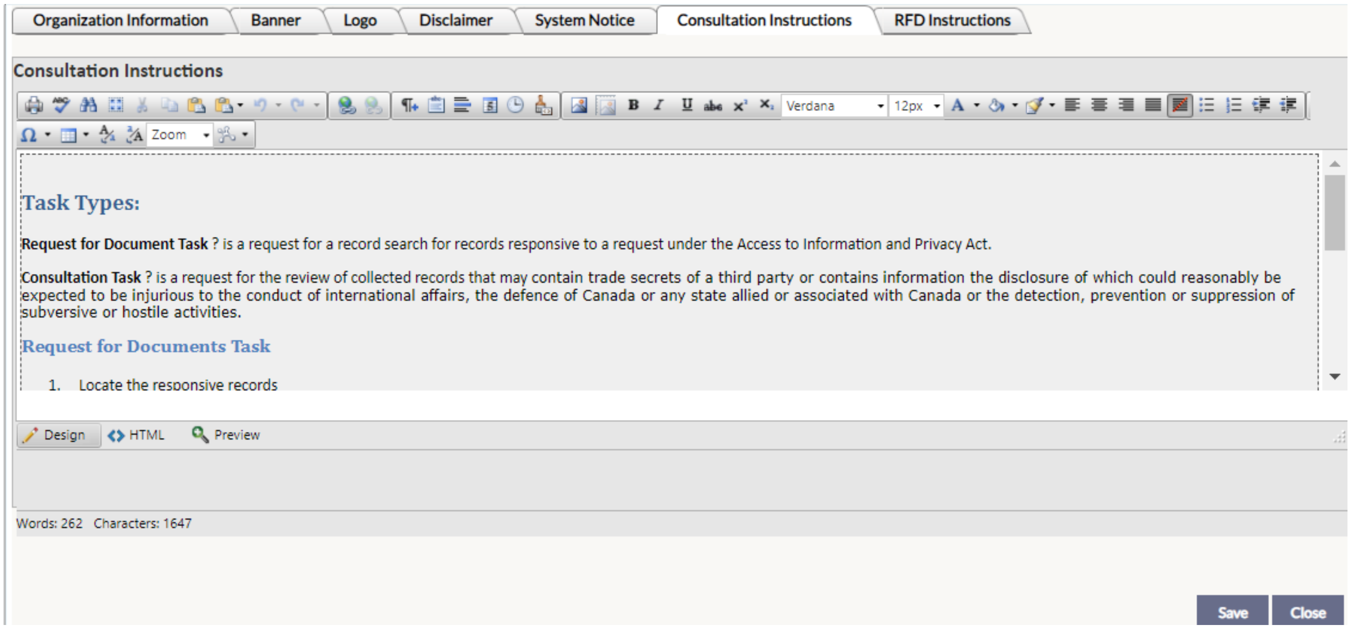
If you need to display a system-wide notice, such as to alert users about a scheduled maintenance outage, you can configure it on the *System Notice* tab.

First, set the date you'd like the message to **(A) Display Through**. Then, enter the **(B) message content** in the text box. When you're done, click **(C) Save.**



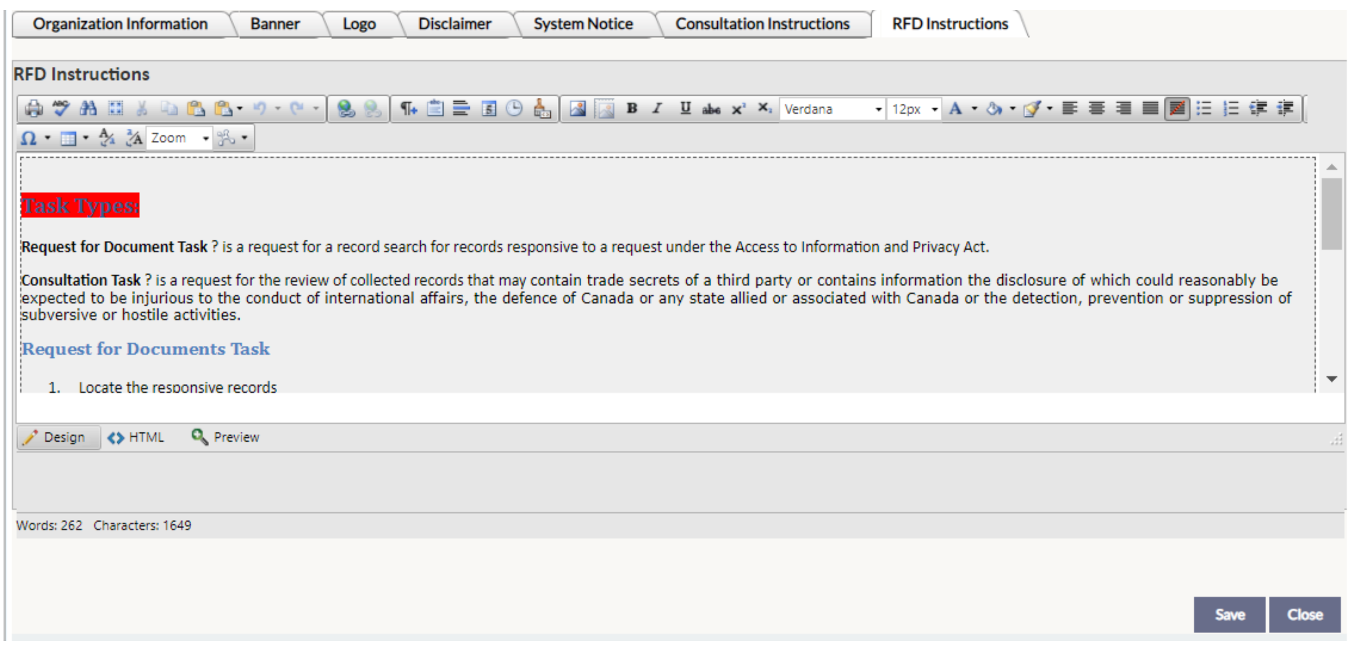
5.1.6 Consultation Instructions

On the *Consultation Instructions* tab, you can configure the text that appears on Consultations. Make sure to click **Save** when you're done.



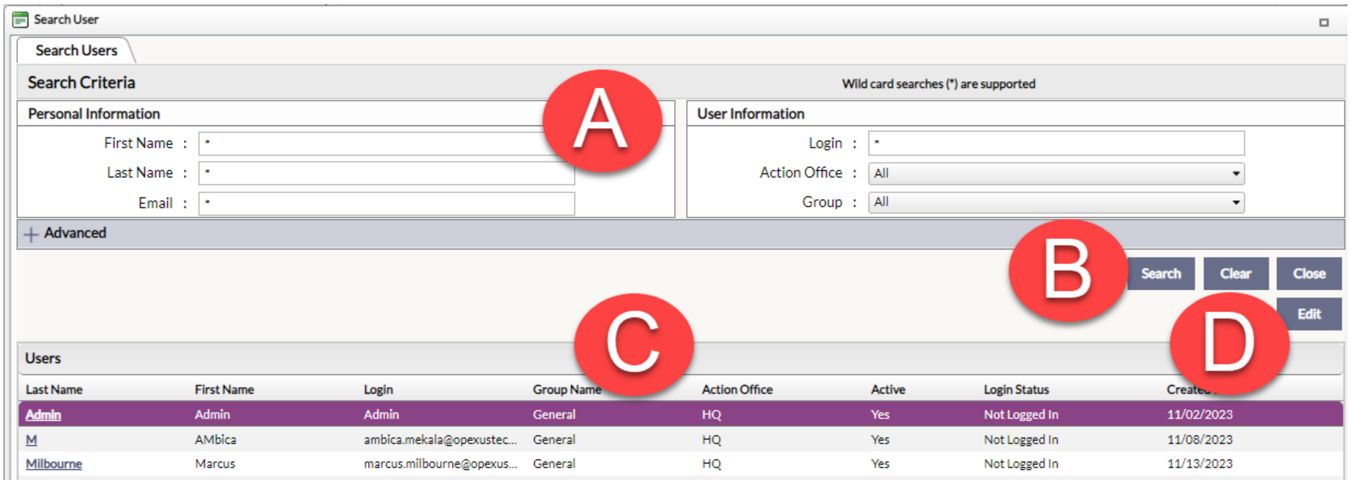
5.1.7 RFD Instructions

Lastly, on the *RFD Instructions* tab, you can configure the text that appears when making a Request for Documents in Collaboration Portal. Make sure to click **Save** when you're done.



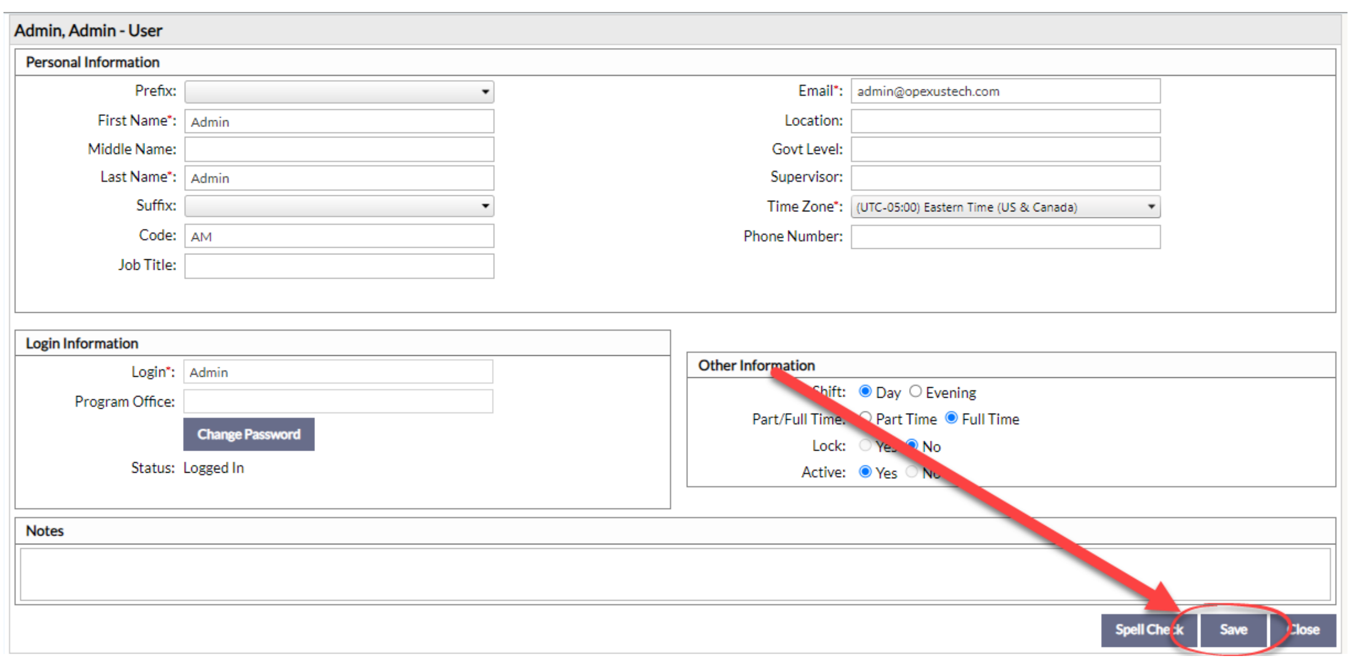
5.2 Users

On the *Users* page (**Administration > Organization Setup > Users**) you can view and manage Collaboration Portal accounts.



To search for specific user, enter **(A) Search Criteria**, then click **(B) Search**. The search results will display in the **(C) Users** list.

To edit a user account, click the Last Name in the list, or select the user and click **(D) Edit.** The *Edit User* page opens where you can add/change/remove the user's account details, including their personal information and login. Click **Save.**

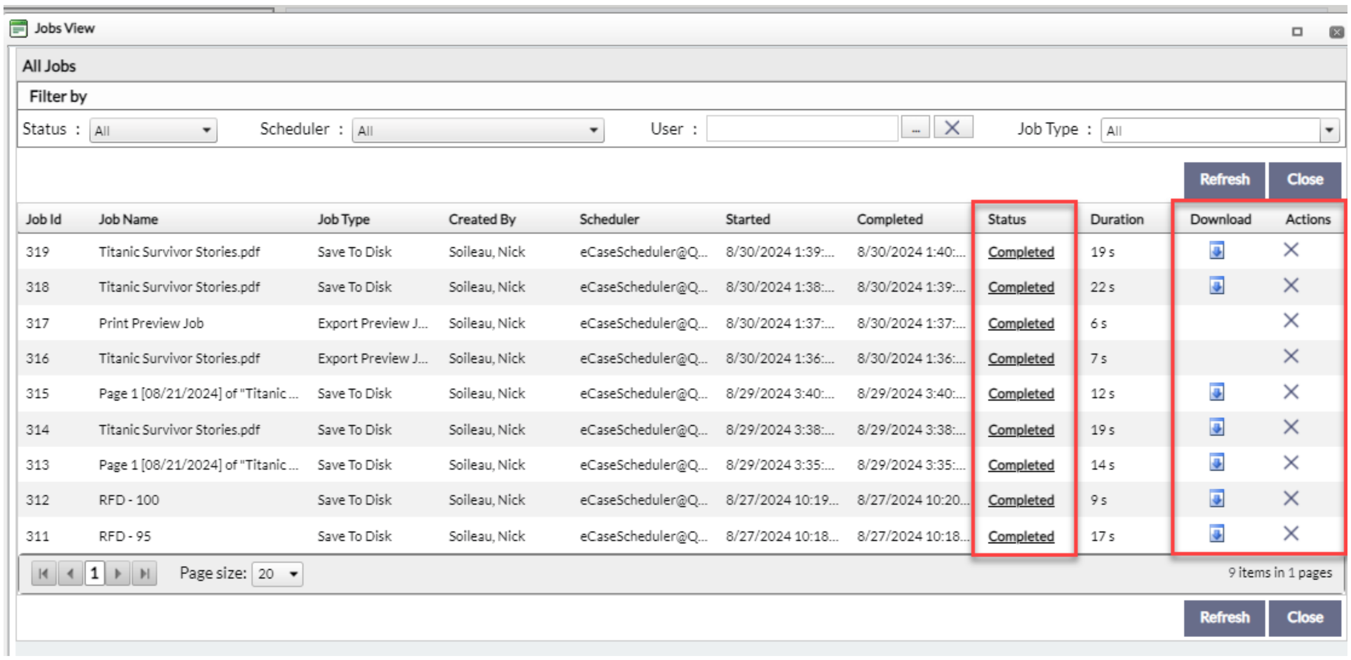


6 Jobs

Administrators can access Collaboration Portal jobs via **Administration > Jobs.** This includes Find and Redact jobs, Save to Disk jobs, Add Documents jobs, and more.

6.1 All Jobs

Navigate to **Administration > Jobs > All Jobs** to view a full list of Collaboration Portal jobs.

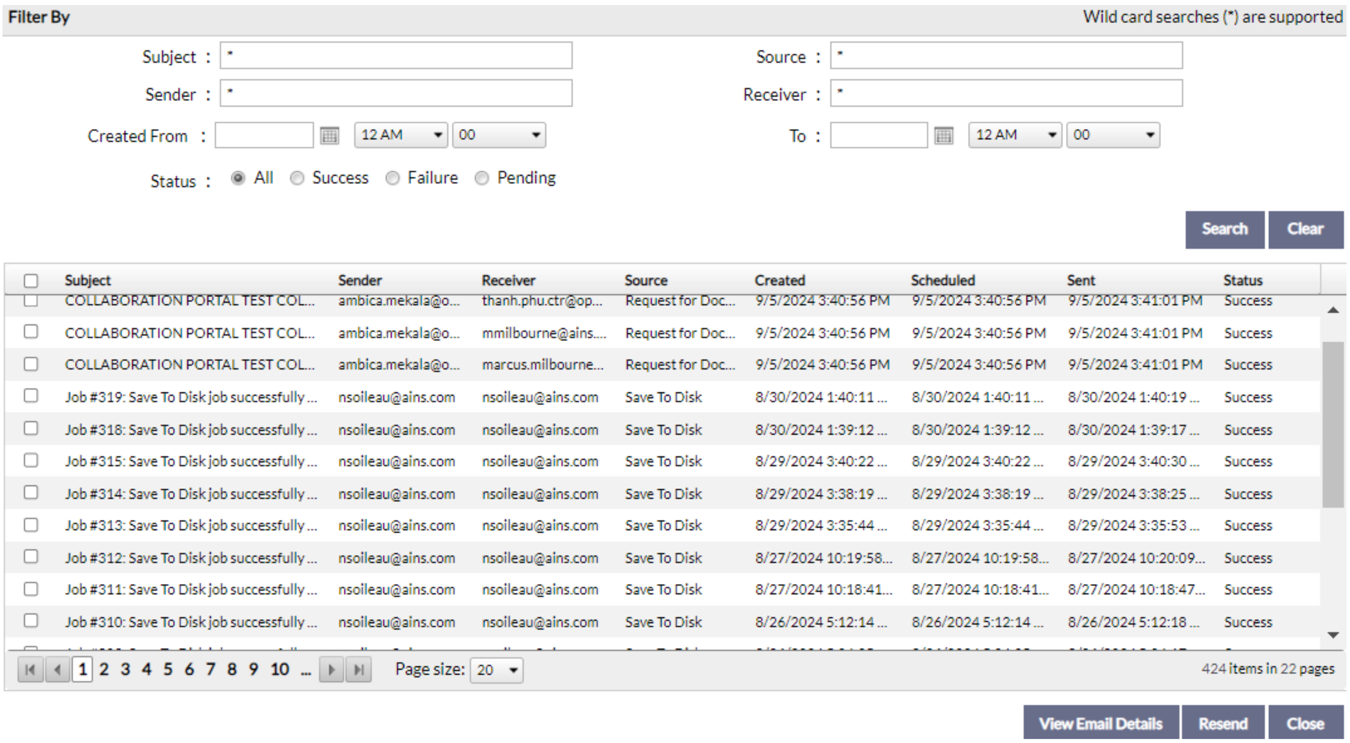


Job Id	Job Name	Job Type	Created By	Scheduler	Started	Completed	Status	Duration	Download	Actions
319	Titanic Survivor Stories.pdf	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/30/2024 1:39:...	8/30/2024 1:40:...	Completed	19 s		
318	Titanic Survivor Stories.pdf	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/30/2024 1:38:...	8/30/2024 1:39:...	Completed	22 s		
317	Print Preview Job	Export Preview J...	Soileau, Nick	eCaseScheduler@Q...	8/30/2024 1:37:...	8/30/2024 1:37:...	Completed	6 s		
316	Titanic Survivor Stories.pdf	Export Preview J...	Soileau, Nick	eCaseScheduler@Q...	8/30/2024 1:36:...	8/30/2024 1:36:...	Completed	7 s		
315	Page 1 [08/21/2024] of "Titanic ...	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/29/2024 3:40:...	8/29/2024 3:40:...	Completed	12 s		
314	Titanic Survivor Stories.pdf	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/29/2024 3:38:...	8/29/2024 3:38:...	Completed	19 s		
313	Page 1 [08/21/2024] of "Titanic ...	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/29/2024 3:35:...	8/29/2024 3:35:...	Completed	14 s		
312	RFD - 100	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/27/2024 10:19...	8/27/2024 10:20...	Completed	9 s		
311	RFD - 95	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/27/2024 10:18...	8/27/2024 10:18...	Completed	17 s		

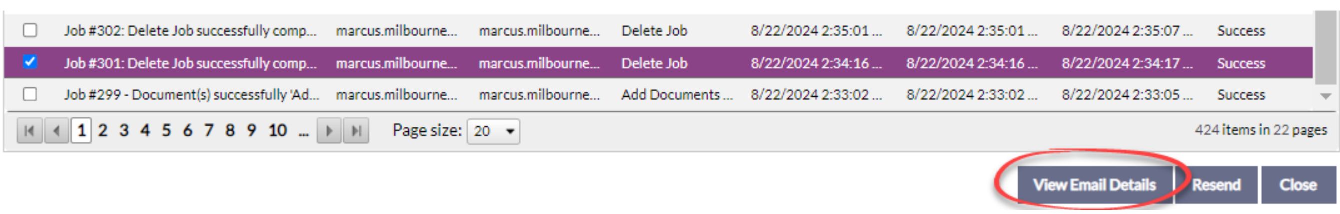
You can use the Filter options to narrow the results to only include specific status, scheduler, user, and/or job type. After entering your filter criteria, click **Refresh.** Click the **Status** line to view further details about the job. You can also download a job's files (when applicable), or remove it from the list.

6.2 Email Log

For a full list of Collaboration Portal emails, you can navigate to **Administration > Jobs > Email Log.** You can use the Filters to limit the results to a specific subject, sender, receiver, etc. Click **Seach** to update the list based on your filter.



To learn more about a specific email, select the email from the list and click **View Email Details.**



6.3 Failed OCR Jobs

The last page in the *Jobs* Administration tab is *Failed OCR Jobs*. Here, Administrators can view a list of failed OCR jobs and retry them if needed.