

# ATIPXpress

## Collaboration Release Notes

v11.8.0

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# ATIPXpress v11.8.0 Collaboration Release Notes

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# 1 Collaboration Portal 11.8.0

## 1.1 Important Note on 11.8.0 Upgrades

We've made significant changes to the deployment process for Collaboration v11.8.0. These changes apply to new and upgrading customers.

The inputs.json file used for previous installations CANNOT be used to upgrade to v11.8.0. There is a new file for this deployment included in the installation package. You must use this new file for the upgrade; however, you can copy data over from a previously used file to the new one as needed.

If your organization is using the new Document Management features, a few additional configuration steps are required. You'll need to manually create and configure the PNG cache location (**Administration > System Administration > System Settings**), and add all the required system jobs to the scheduler (**Administration > System Administration > Scheduler Configuration**).

## 1.2 Collaboration Portal Installation

*ID# 72975*

We've made changes to the Collaboration Portal installation for v11.8.0. Review the Collaboration Deployment Manual for details on changes to look out for when installing Collaboration.



## 1.3 What's New in Collaboration for 11.8.0?

We're working to enhance the Collaboration Portal, with significant changes for v11.8.0. These changes are evident from the first time you access the Collaboration Portal link, with a new login screen:



But that's only the start. The biggest upgrade for 11.8.0 is the addition of Document Management to the Collaboration features list. With Document Management, Collaboration users have access to the same DM tools enjoyed by ATIPXpress users, including creating and managing the document tree, review and redaction capabilities, review flags, comments and annotations: everything needed to comprehensively review documentation. Providing these features dramatically expands the Collaboration toolkit, enabling you and your collaborators to effectively and efficiently manage documentation tasks.

Beyond DM, we revamped the Administration side of Collaboration to match the ATIPXpress user experience. Layout, navigation, and menus are now consistent between ATIPXpress Administration and Collaboration Administration, providing a more fluid and seamless experience for Admins.

Read on for details on each of these new features and enhancements.



## 2 Document Management

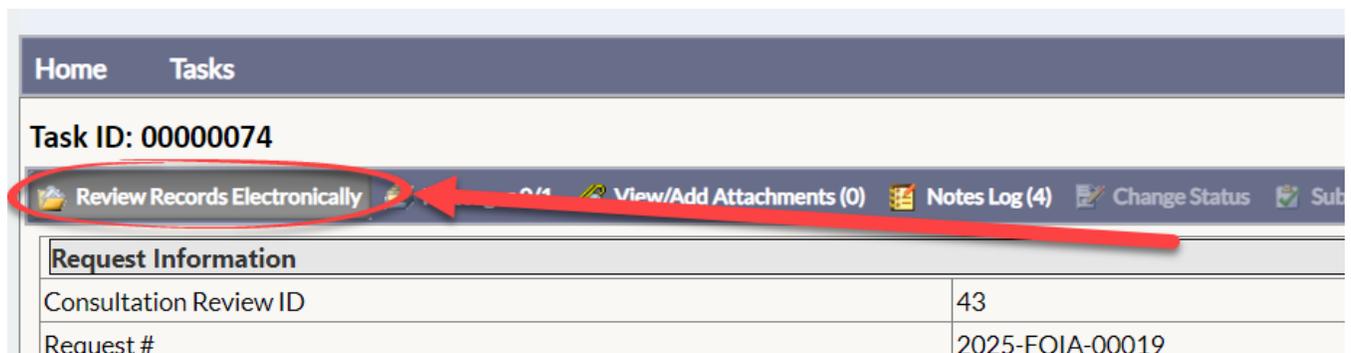
ID# 69640, 76474

New for v11.8.0, we've integrated Document Management capability into the Collaboration Portal. This addition enables Collaboration users to upload and manage documents directly within the Collaboration Portal rather than utilizing a third-party site.

Portal users tasked with completing Consultations can now manage folders and document uploads within Document Management, while assigned Requests for Documents tasks can use DM to add documents to folders, then review, annotate, redact, and flag these documents before sending the RFD back to ATIPXpress. By expanding the availability of this toolset, Collaboration users are enabled to create comprehensively constructed and reviewed response packages for both Consultations and RFDs.

### 2.1 Consultations

Document Management enables enhanced folder management and simplified document review for Consultation requests. When a Collaboration Portal user receives a Consultation task, they have the option to **Review Records Electronically**.



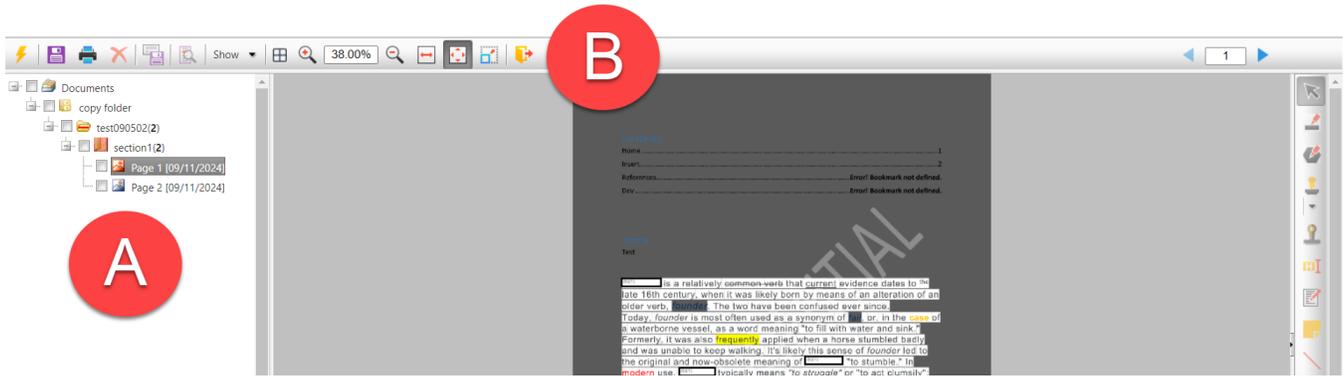
The screenshot shows a web interface with a navigation bar containing 'Home' and 'Tasks'. Below the navigation bar, the task ID '00000074' is displayed. A toolbar contains several buttons: 'Review Records Electronically' (circled in red), 'View/Add Attachments (0)', 'Notes Log (4)', 'Change Status', and 'Sub'. Below the toolbar is a table with the following data:

Request Information	
Consultation Review ID	43
Request #	2025-FOIA-00019

This opens the Document Management interface as shown below. From here, Collab users can navigate through folder(s) in the **(A) document tree** and review each document/page. There are also options in the **(B) toolbar** to change up the page view and navigate the document. Once the documents are reviewed, users can return to the Task page and submit the completed task



back to the requester.



## 2.2 Request for Documents

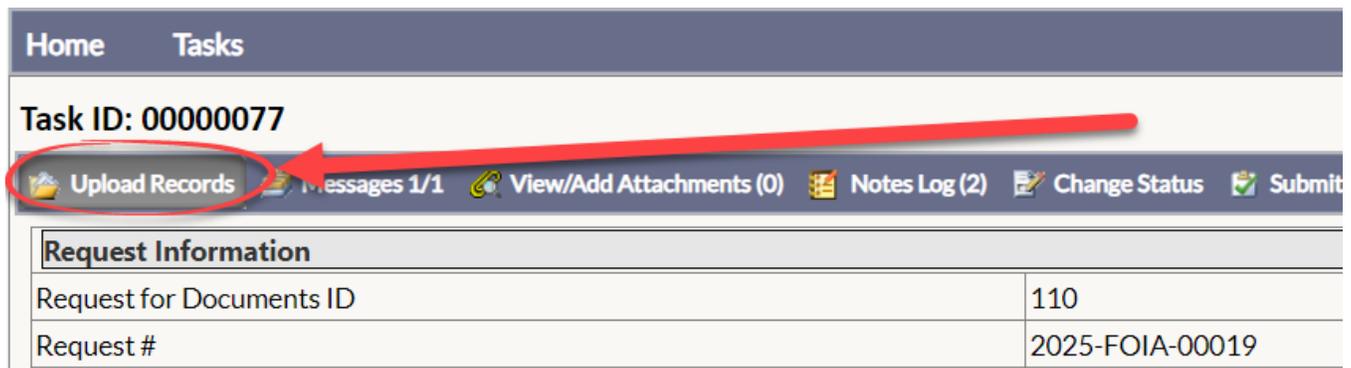
In addition to the functionality provided for Consultations, Document Management adds even more capability for processing Requests for Document tasks. With DM, Collaboration users can add documents, manage document folders, and make redactions, comments, and annotations.

ATIPXpress users requiring records from an external source can send a Request for Documents (RFD) through the Collaboration Portal. The RFD recipient can then log into the Collaboration Portal to upload, review, and redact responsive documents using Document Management. See the following sections for details on the added capabilities.

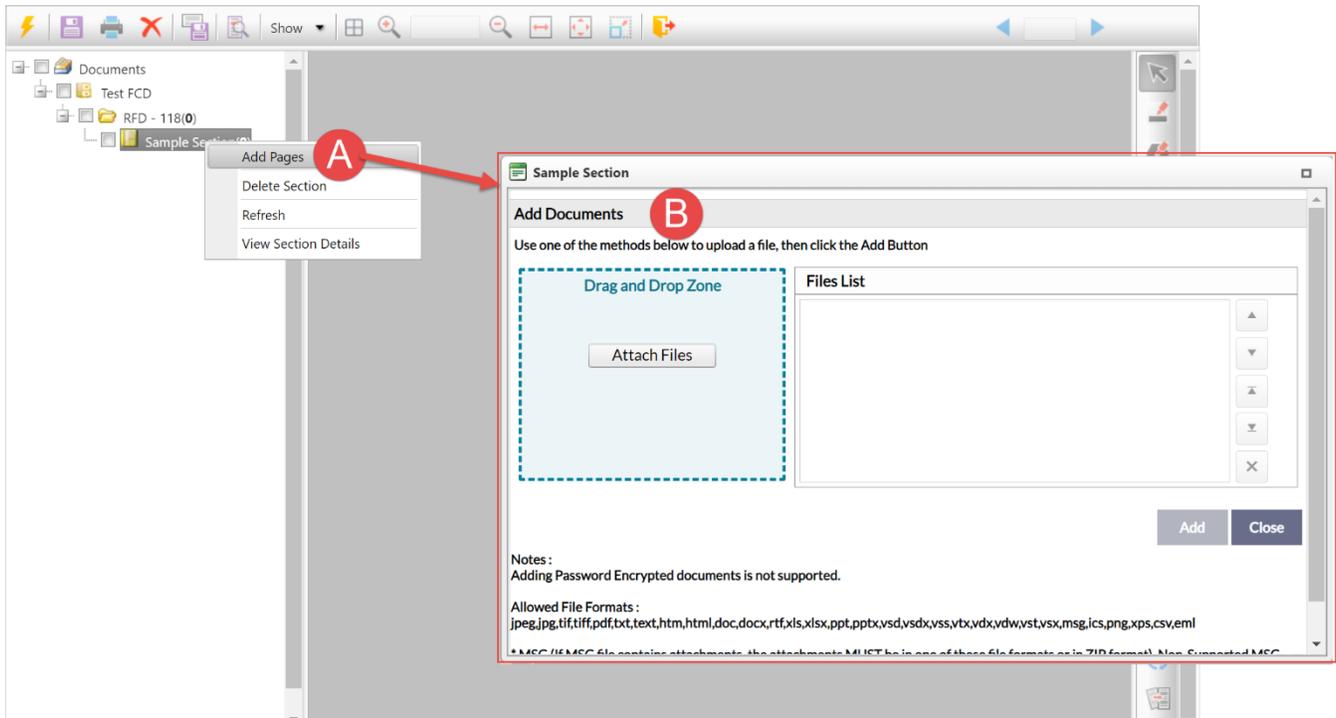
### 2.2.1 Uploading Records

ID# 78736

You'll access DM from within an assigned RFD task. Open an RFD task, then click the new **Upload Records** button to open DM for that task:



The Document Management interface opens in a new tab. Use the document tree in the left panel to navigate between folders, sections, and pages. You can Create a new section by right-clicking on a folder and clicking **Add Section**.



Once you've established the document file structure, upload documents by right-clicking on a section and selecting (A) **Add Pages** to open the (B) **Add Documents** screen, where you can add documents to DM for this RFD.

### 2.2.2 Document Redactions and Review Objects

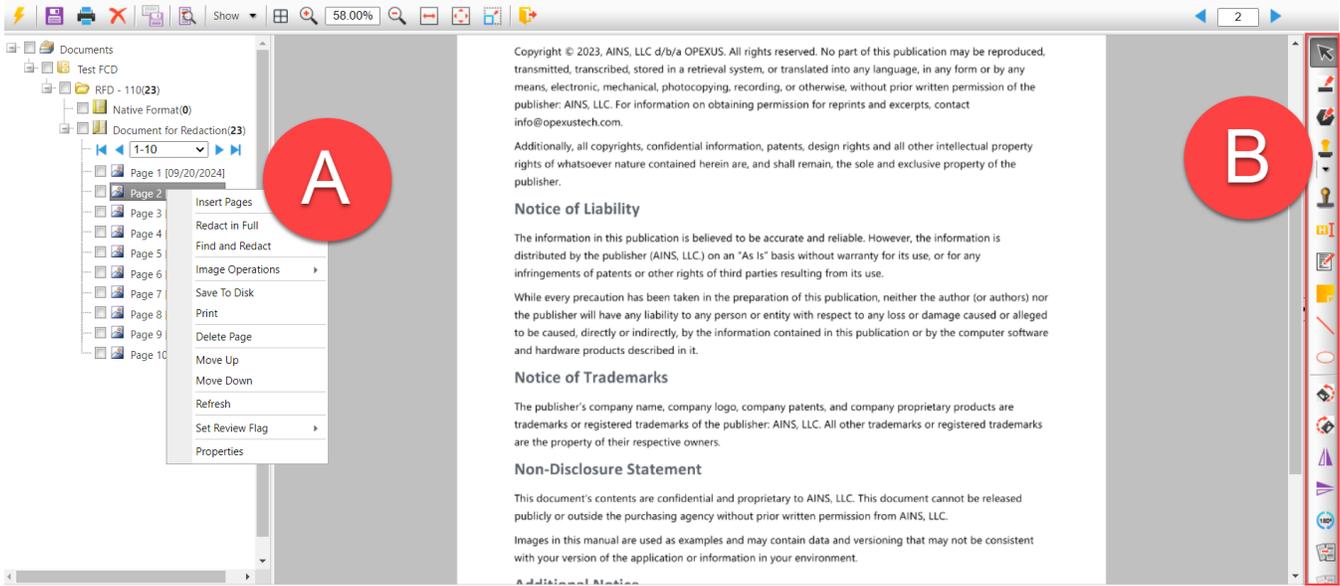
*ID# 70230, 76471, 76979*

Users can also add redactions to RFD files using Document Management's review, annotation, and redaction tools, to maintain separate review layers with distinct review and redaction objects, and to "pin" review objects before they are returned to the requester, ensuring the redactions cannot be removed or edited.

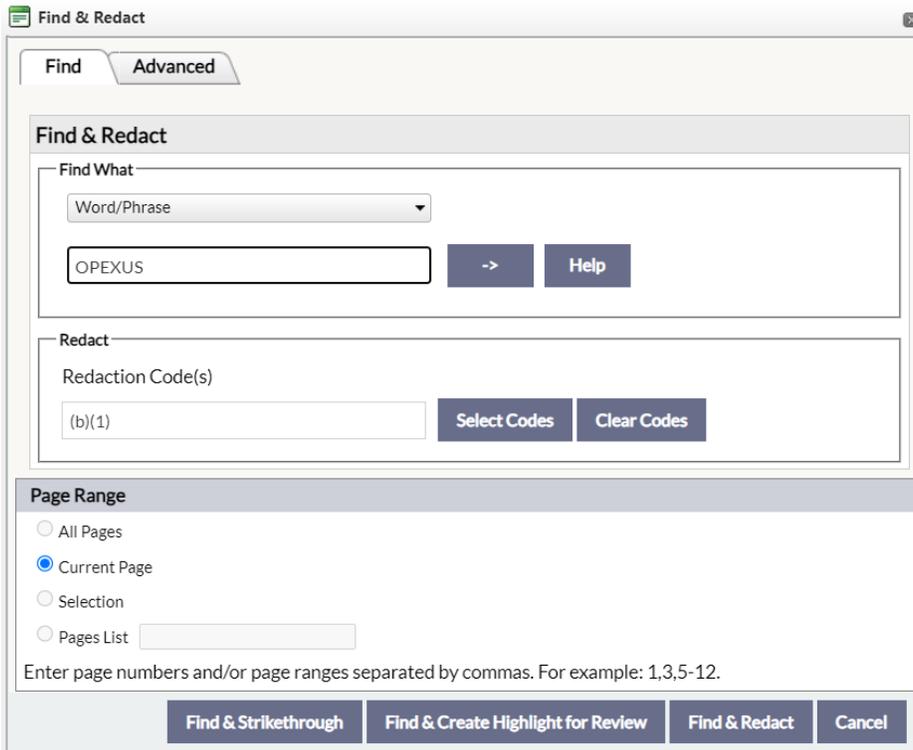
There are two approaches to applying redactions in Collaboration DM. You can right click a page and select from the (A) **menu**, including **Find and Redact** and **Redact in Full**. You can also manually apply redactions or other review objects to the current page using the (B) **toolbar**.



# Document Management



The **Redact in Full** option redacts the entire page. To redact specific content within a page, such as email addresses, words/phrases, or telephone numbers, use the **Find and Redact** feature:



Document Management also includes the ability to replace redaction codes in bulk. To find and replace redaction codes, right-click on any folder with redactions and select **Find and Replace Redaction Codes** from the menu:



**Replace Redaction Codes**

Page Range

All Pages  
 Selection  
 Page List

Enter page numbers and/or page ranges separated by commas. For example: 1,3,5-12.

---

Find and Replace Redaction Code\*

Find What:  ... X

Remove Selected Code

Replace With:  ... X

## 2.2.3 Review Actions Report for Redaction Layer

ID# 76726

You can also view a Review Actions Report for each reaction layer applied to documents in DM, including the folder/section, page number, user, date, and action. To open the report, right click on any folder with redactions and select **Review Layers**. Select a layer from the list then click **Review Actions** to view the Review Actions Report for that layer. It includes a list of what was changed, where, when, and by who. You can also export or print a Review Actions Report as needed:

Document Review Actions Report - COLLABORATION PORTAL TEST COLLABORATION PORTAL TESTCOLLABORATION PORTAL TESTCOLLA...

OPEXUS  
xd  
Aruba

**Report Date** :09/20/2024  
**Time** :3:17 PM

[Document Review Actions Report](#)

**Folder Name :** RFD - 110  
**Review Layer Name :** Shannon PO - RFD - 110 - RFD Id: 110

Folder/Section	Page	Created By	Created Date	Action
RFD - 110	2	Admin, Admin	9/20/2024 12:22:23 PM	Redaction Changed



## 2.2.4 Pin Review Objects Before Sending to Collaboration

ID# 78944

We've added the ability to "pin" review objects applied to documents when ATIPXpress users send documents to Collaboration. "Pinned" objects hide the content behind them making this content hidden from Collaboration users, useful for restricting confidential information that you don't want to share with collaborators. On the *Send/Save Documents for Consultation* screen, the **Pin certain objects for the recipients** button is checked by default:

Pin certain objects for the recipients ⓘ

<input checked="" type="checkbox"/> Comments Box	<input checked="" type="checkbox"/> Ellipse	<input checked="" type="checkbox"/> Straight Line
<input checked="" type="checkbox"/> Highlight	<input checked="" type="checkbox"/> Stamp	<input checked="" type="checkbox"/> Sticky Note

When Collaboration Portal user opens a document with pinned objects, they are unable to view the content behind these objects. Pinning redactions helps to protecting sensitive information during the collaboration process.

**Note: Collaboration users can edit and move these existing objects from DM, however the content behind these objects is hidden when the objects are locked.**

## 2.3 Read Only Mode for Submitted Tasks

ID# 76407

When a task is sent from Collaboration back to ATIPXpress, the documents are locked into read-only mode in the Collaboration Portal. Collab users are not able to modify or redact documents after submitting the task, however they can still view, print, and save the documents.

## 2.4 Sync Review Flags

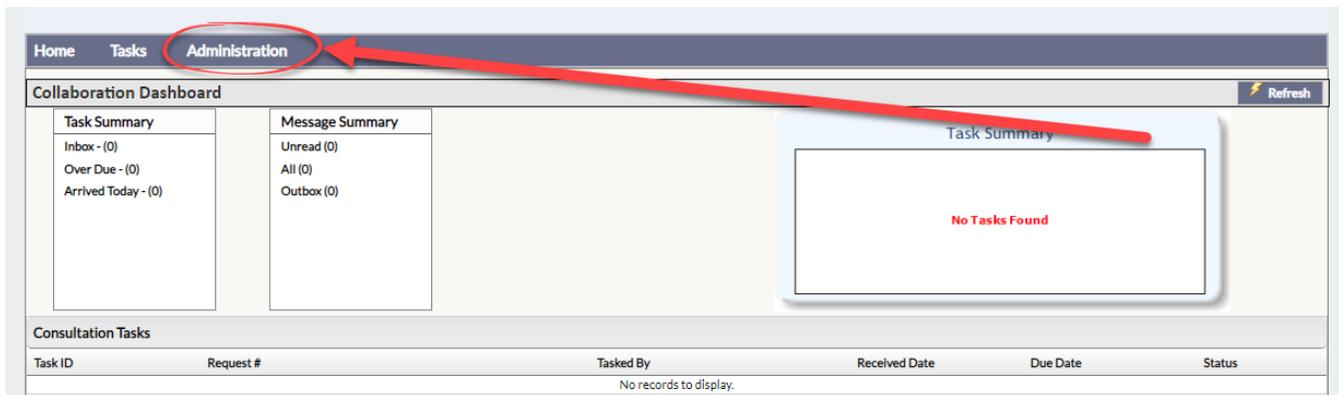
ID# 77182

Review flags applied in Collaboration DM are preserved, along with review layer data, when the documents are synced back to ATIPXpress.



# 3 Collaboration Portal Administration

The Collaboration Portal Administration folder has been completely redesigned and modernized. Now, it looks and functions similarly to the ATIPXpress Administration page. Administrators have access to an **Administration** tab in their Collaboration Portal environment.



The **Administration** folder opens to the *System Configuration* page. You can navigate through the different Admin **(A)** pages and click into each **(B)** subpage.



In addition to design enhancements, 11.8.0 includes new configuration options as described in the following sections.

## 3.1 Consultation and RFD Instruction Configuration

ID# 70560

You can now modify **Consultation Instructions** and **RFD Instructions** by navigating to **Administration > Organization Setup > Enterprise**. These instructions display when the Collaboration user opens DM for either a Consultation or RFD task:



## Collaboration Portal Administration

The screenshot shows a web browser window titled "Enterprise" with several tabs: "Organization Information", "Banner", "Logo", "Disclaimer", "System Notice", "Consultation Instructions", and "RFD Instructions". The "Consultation Instructions" tab is active. The page content includes a heading "Task Types:" followed by two paragraphs of text. The first paragraph defines a "Request for Document Task" as a request for a record search under the Access to Information and Privacy Act. The second paragraph defines a "Consultation Task" as a request for the review of collected records that may contain trade secrets or information whose disclosure could be injurious to international affairs, the defence of Canada, or the detection, prevention, or suppression of subversive or hostile activities. Below the text is a section titled "Request for Documents Task" with a numbered list: "1. Locate the responsive records". At the bottom of the page, there are "Save" and "Close" buttons. A status bar at the bottom left indicates "Words: 262 Characters: 1647".

## 3.2 System Settings

ID# 73413

The **System Settings** page (**Administration > System Administration > System Settings**) has additional options, including **General Settings** fields and a **Document Management Settings** checkbox, where Administrators can enable Document Management in their agency's environment.

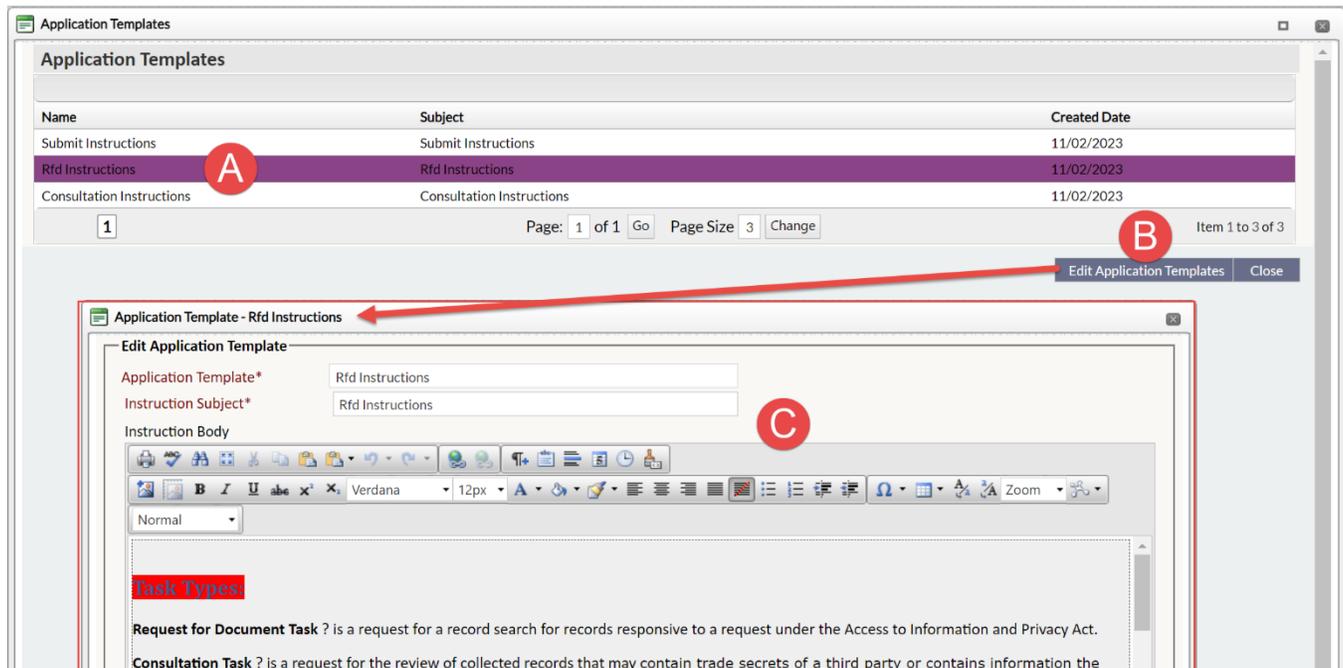
The screenshot shows the "System Settings" page in the Enterprise system. The page is divided into several sections: "Locations", "Mail Server Address", "PNG Cache Management", and "General Settings Information". The "Locations" section contains three fields: "Correspondence\*" with value "C:\Temp\CollabDocs\AFXWCORL\", "Original Document Location\*" with value "C:\Temp\CollabDocs\AFXWDOCS\", and "PNG Cache Location\*" with value "C:\Collab\AFXWPNG\". Below these fields is a note: "Note: Location paths are with respect to the web server." The "Mail Server Address" section contains "SMTP Mail Server\*" with value "192.168.0.25" and "Port\*" with value "25". The "PNG Cache Management" section contains "PNG Cache limit\*" with value "20" GB and "Delete PNG Cache If the folder has not been accessed in more than\*" with value "30" Days. The "General Settings Information" section contains "Application URL" with value "https://qa-fx-daily.ains-inc.com/collaboration", "Application Title" with value "COLLABORATION PORTAL TEST COLLABORATION PORT", and "Application Email" with value "ambica.mekala@opexustech.com". At the bottom of the page, there is a checkbox labeled "Enable Document Management" which is checked. "Save" and "Close" buttons are located at the bottom right.



### 3.3 Application and Email Templates

ID# 73427

We've added two new subpages under **Administration > System Configuration: Application Templates** and **Email Templates**. On these pages, Administrators can edit Application and Email templates, respectively. Select the **(A) template** you'd like to edit, then click the **(B) Edit** button. The **(C) Edit Template** page opens, where Administrators can edit the template name, subject, and body text:



### 3.4 Search Users

ID# 73421

We've also updated the **Users** page (**Administration > Organization Setup > Users**). Here, you can view Collaboration Portal accounts, search for specific users, and edit account information.



Last Name	First Name	Login	Group Name	Action Office	Active	Login Status	Created Date
Admin	Admin	Admin	General	HQ	Yes	Not Logged In	11/02/2023
M	AMBICA	ambica.mekala@opexustec...	General	HQ	Yes	Not Logged In	11/08/2023
Milbourne	Marcus	marcus.milbourne@opexus...	General	HQ	Yes	Not Logged In	11/13/2023

### 3.5 Session Audit Log

ID# 73426

The *Audit Log* is now available under **Administration > Security > Audit Log**. On this page, administrators can access two different Audit Logs using the radio buttons at the top of the screen.

- The *Session Audit Log* provides details on user sessions, like log in and out time, and workstation.
- The *User Action Audit Log* gives details on user actions including task views, message views, and task submissions, including who did what, and when

Action Performed By	Action Type	Action Performed	Time of Action	Program Office
Marcus Milbourne	Task Viewed	Task with ID: 00000088 (Request for Documents)...	09/24/2024:01:3...	PO-Thanh-Marcus
Marcus Milbourne	Task Viewed	Task with ID: 00000069 (Consultations) has been ...	09/24/2024:01:3...	PO-Thanh-Marcus

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 Bug Fixes

We've corrected the following bugs in v11.8.0:

ID	Description
<b>69742</b>	Addressed a bug in which non-Admin users were able to access the Administration folder in Collaboration Portal via the Administration URL.
<b>76259</b>	Resolved a bug in which non-Admin users could access Email Log details.

