

ATIPXpress

Collaboration User Manual

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ATIPXpress 11.8.0 Collaboration User Manual

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1 Introduction

1.1 About ATIPXpress Collaboration

Welcome to the ATIPXpress Collaboration User Manual. ATIPXpress (FX) Collaboration provides a platform for ATIPXpress users to work together on requests with others outside the primary ATIPXpress application to collaborate on Requests for Documents (RFDs) and Consultation reviews. This document provides instructions for ATIPXpress Collaboration users, including an overview of the Collaboration UI, and steps to collaborating on document requests and reviews, and other Collaboration features.

1.2 How to Use this Manual

This manual focuses on the Portal user experience, with instructions for receiving and fulfilling tasks, and utilizing the tools available to make collaboration effective. It includes topics for:

- Accessing the Collaboration Portal
- Request for Document (RFD) Tasks
- Consultation Tasks
- Sending Messages Using the Portal
- Using Attachments in Tasks
- Notes Log

1.3 Typography

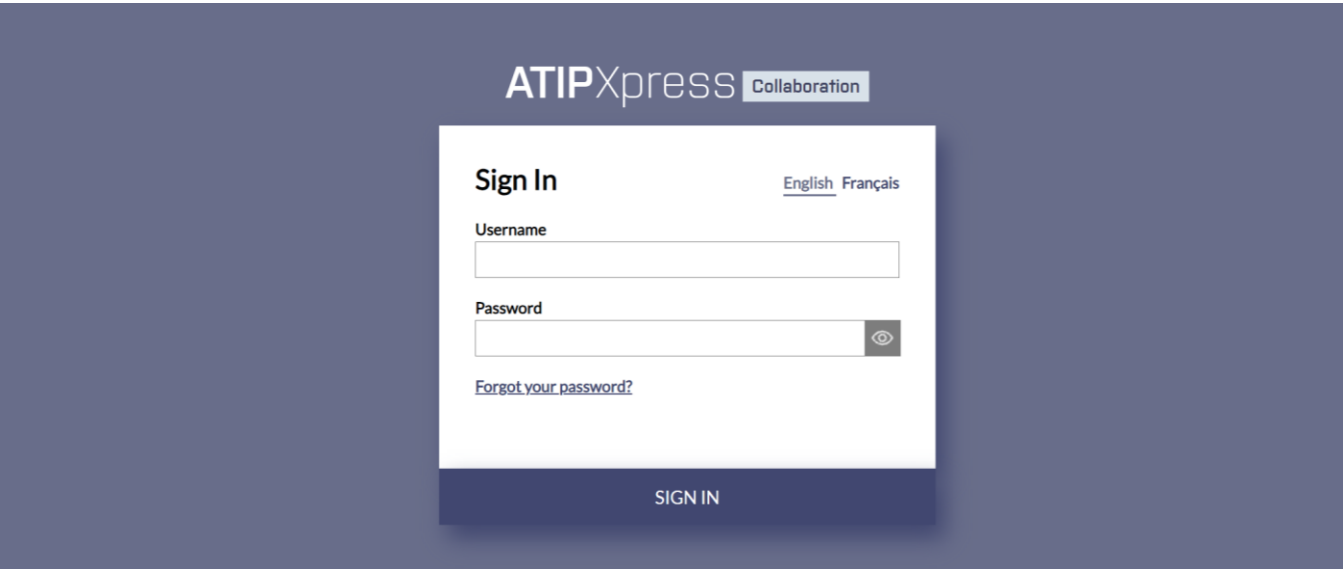
The following formatting conventions are used in this manual to highlight important information:

- *Italicized* text indicates a location, for example a particular *Folder*, *Tab*, or *Window*.
- **Bold** text indicates a specific user action, such as clicking a **button**.
- **Red** text is used in *Notes* to bring attention to **crucial information**.

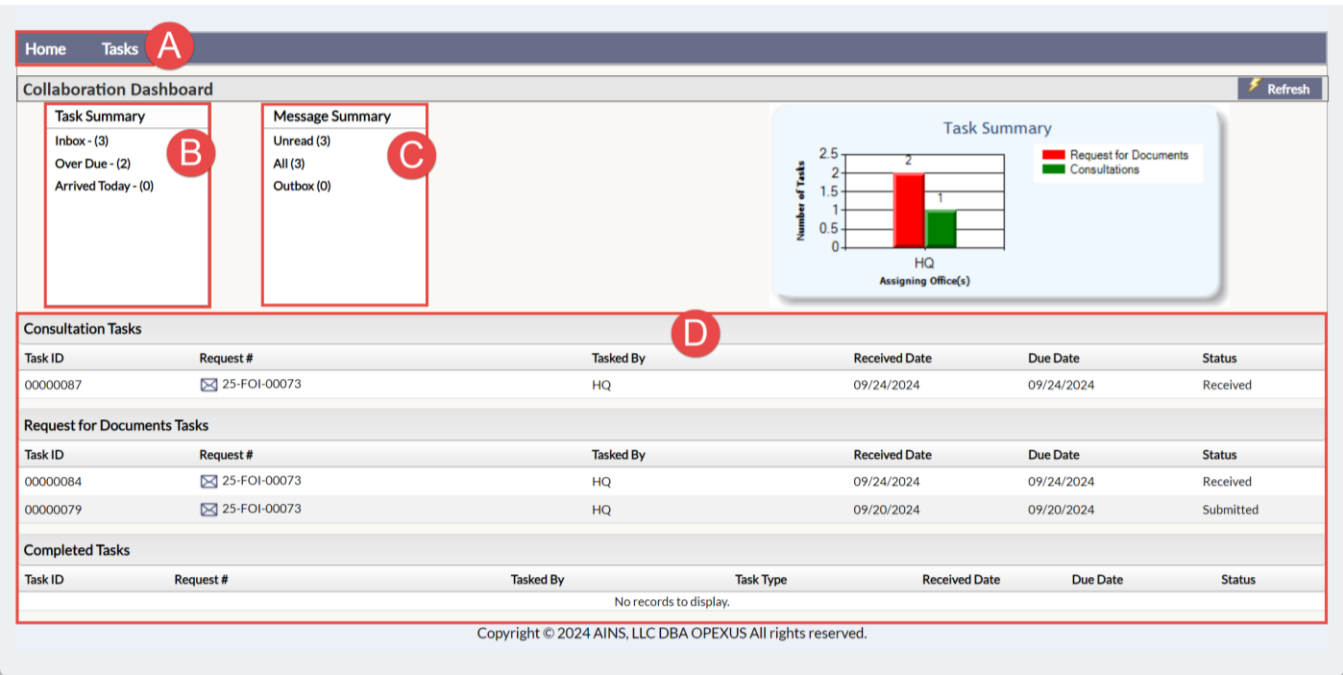


2 Accessing ATIPXpress Collaboration

When your Collaboration account has been created by your Administrator, you will receive an email with login instructions. An example login screen is shown below:



To access Collaboration, provide your email address (the one associated with Collaboration, where you received the initial email) as well as your password, then click **Sign In**. After signing in, the *Collaboration Dashboard* appears:



The main areas of the Dashboard are described in the following table:



Ref	Element	Description
A	Tabs	The dashboard contains two tabs: the main <i>Home</i> tab and the <i>Tasks</i> tab, which consolidates all your current tasks into one location.
B	Task Summary	The <i>Task Summary</i> widget provides links to your Inbox , Overdue tasks, and tasks that Arrived Today .
C	Message Summary	The <i>Message Summary</i> widget provides quick links to Unread messages, All your messages, and your Outbox .
D	Tasks	Ongoing <i>Consultation Tasks</i> and <i>Request for Document Tasks</i> are listed here. There is also a list of your <i>Completed Tasks</i> .

The next sections provide steps to complete Request for Documents Tasks and Consultation Tasks.

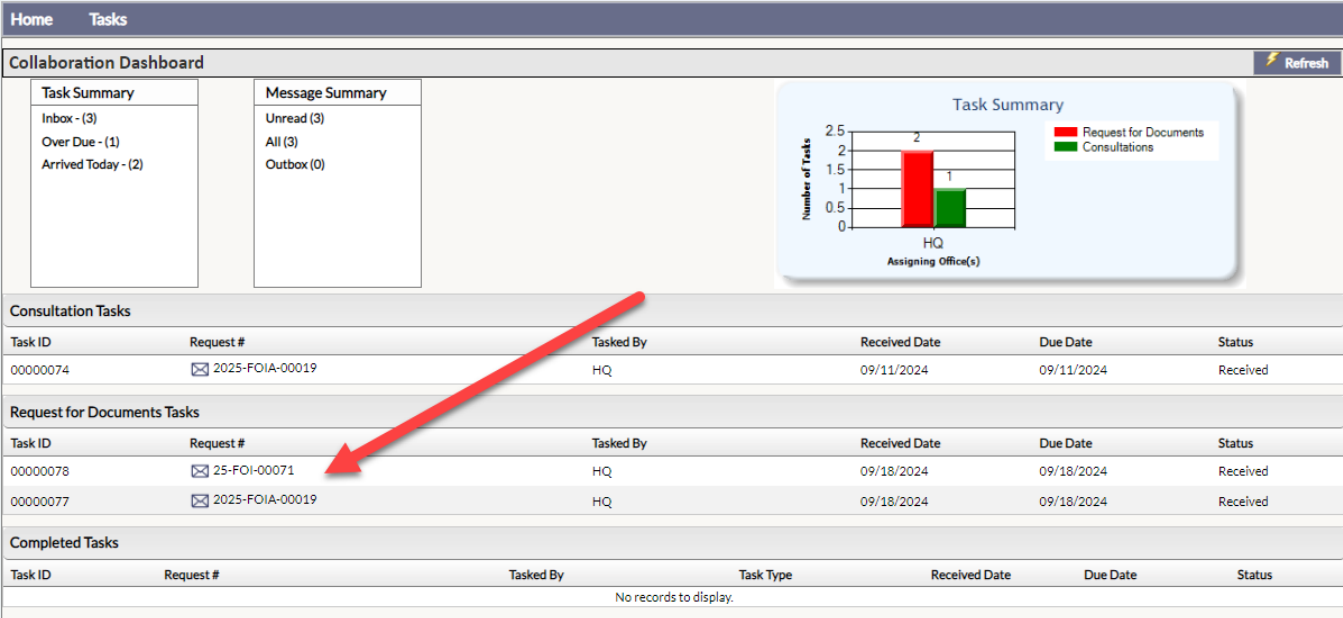


3 Request for Documents Tasks

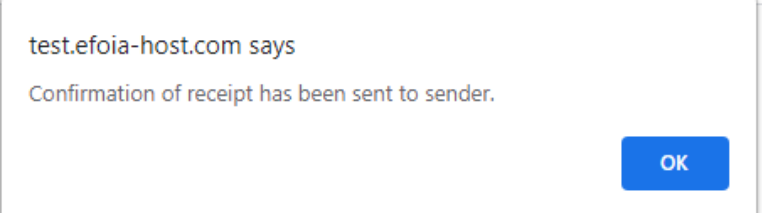
3.1 Accessing a Request for Documents Task

After you log in to FX Collaboration, there are a few indicators that a new request is waiting for you. New tasks arrive in your *Task Summary*, as an unread message in your *Message Summary*, and in your *Request for Document Tasks* list.

In this example, we'll double click the request listed in the *Request for Documents Tasks* list.



When you access a request for the first time, a pop up appears letting you know that confirmation of receipt has been sent to the person who made the RFD:



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



Request for Documents Tasks

Home Tasks	
Task ID: 00000078	
Upload Records Messages 1/1 View/Add Attachments (0) Notes Log (1) Change Status Submit Completed Task Back	
Request Information	
Request for Documents ID	111
Request #	25-FOI-00071
Status	Received
Received Date	09/18/2024
Task Due Date	09/18/2024
Request Type	FOIA
Request Description	Request for documents
Sender Information	
First Name	Shannon
Last Name	Murphy
Email	shannon.murphy@opexustech.com
Tasked By	HQ
Phone Number	-
Comments	-

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The *Task Details* page includes all the information provided by the user who sent the RFD. In the next section, we'll cover each of the available actions on this page.

3.2 Request for Documents Task Dashboard

There are a variety of actions you can take on the *Task Details* page using the task toolbar. They are described in the following sections.

Task ID: 00000084	
Upload Records Messages 1/1 View/Add Attachments (0) Notes Log (2) Change Status Submit Completed Task Back	
Request Information	
Request for Documents ID	118
Request #	25-FOI-00073
Status	Received
Received Date	09/24/2024
Task Due Date	09/24/2024
Request Type	FOIA
Request Description	Date: September 19, 2024 To: FOIA Officer U.S. Department of Environmental Protection 123 Freedom Street Washington, D.C. 20001 Subject: Freedom of Information Act Request Dear FOIA Officer, Pursuant to the Freedom of Information Act, 5 U.S.C. § 552, I am requesting access to any and all records from January 1, 2020, to the present regarding: Internal communications, reports, or studies related to the environmental impact of the proposed Green River Dam project in Jefferson County, Colorado. Correspondence between the U.S. Department of Environmental Protection and private contractors involved in the construction of the Green River Dam. Any assessments, memos, or recommendations concerning the dam's effect on local wildlife habitats, particularly endangered species. Documentation on any public comments or hearings held in relation to the environmental review process for this project. I am willing to pay any reasonable fees incurred in the processing of this request. However, if the cost

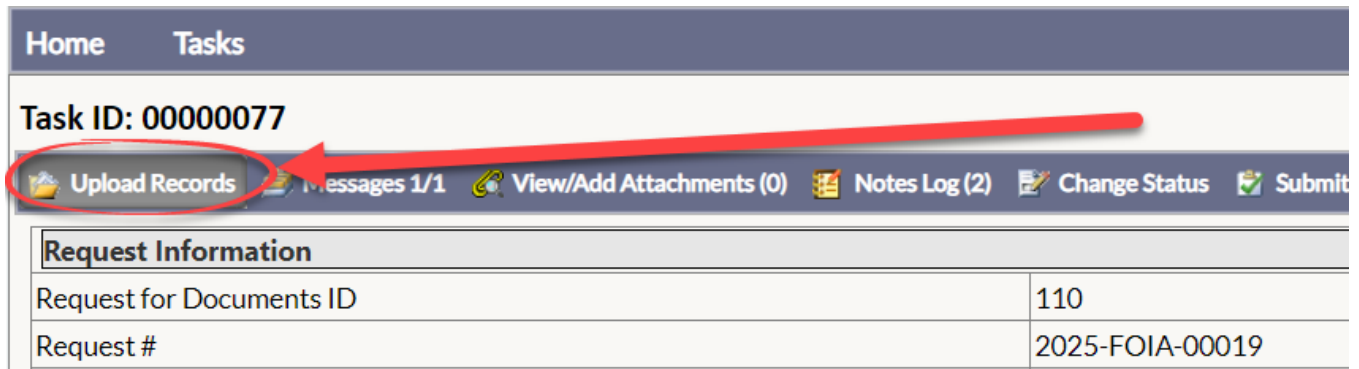
3.2.1 Upload Records

You can upload documents, add redactions, and more, directly from the Collaboration when processing a Request for Documents.

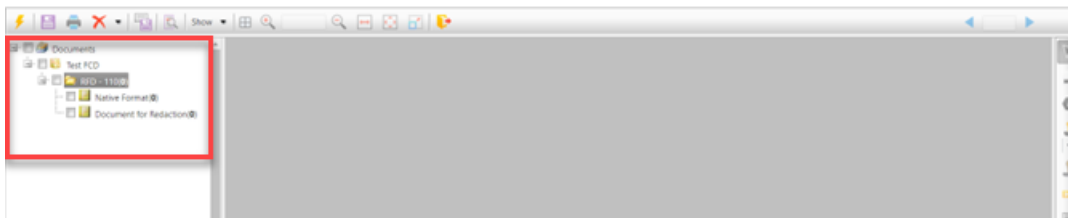


Note: Make sure you have all files you'd like to submit to the RFD ready at this point. You cannot upload additional documents to the request later.

1. To add documents to the RFD, click **Upload Records** from the toolbar.

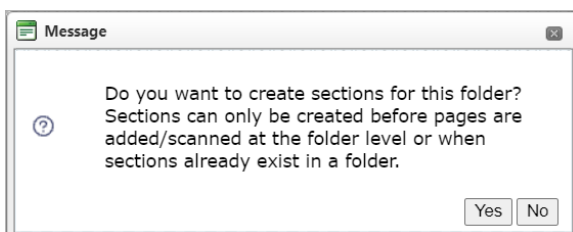


2. The Document Management interface opens in a new tab, as shown below. The document tree on the left side panel is used to navigate between folders, sections, and pages.



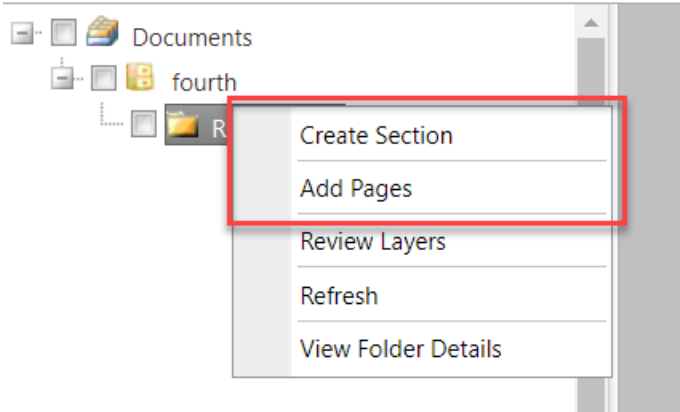
3. Determine whether you'd like to create **Sections** to organize the pages within the folder. Sections allow you to segment the documents within a folder.

Note: If you'd like to create sections in the folder, you must do so before adding pages.



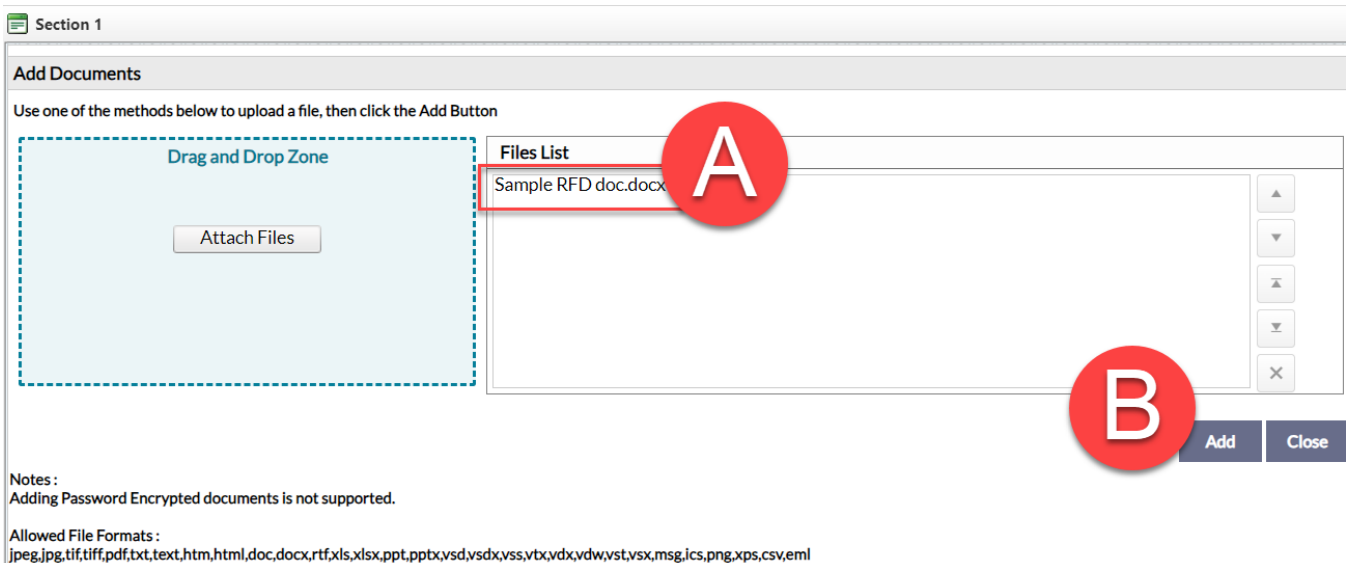
- a. To add a new section, right click on a folder and click **Create Section**. Then, right click on the new section and click **Add Pages**.

Request for Documents Tasks

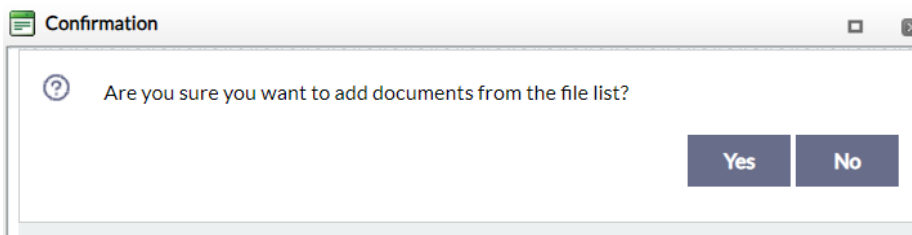


- b. If you do not want to create sections in the folder, you can add pages directly to a folder by right clicking on the folder and clicking **Add Pages**.
4. After clicking Add Pages, the *Add Documents* screen appears, prompting you to upload the requested documents. You can pull files from your desktop into the *Drag and Drop Zone* or click **Attach Files** to browse your computer's files. As you add files, they will display in the **(A) Files List**. When you've uploaded all the requested files, click **(B) Add**.

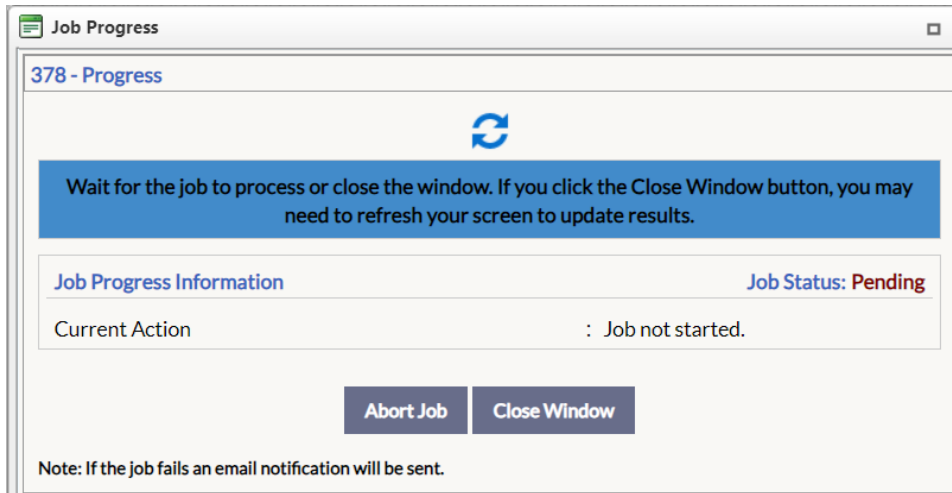
Note: You must add all files for the RFD at this point. You cannot go back and add more files later.



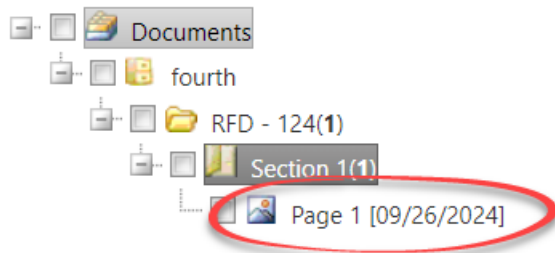
5. Click **Yes** on the confirmation box.



6. The *Job Progress* window appears, displaying the status of your document upload.



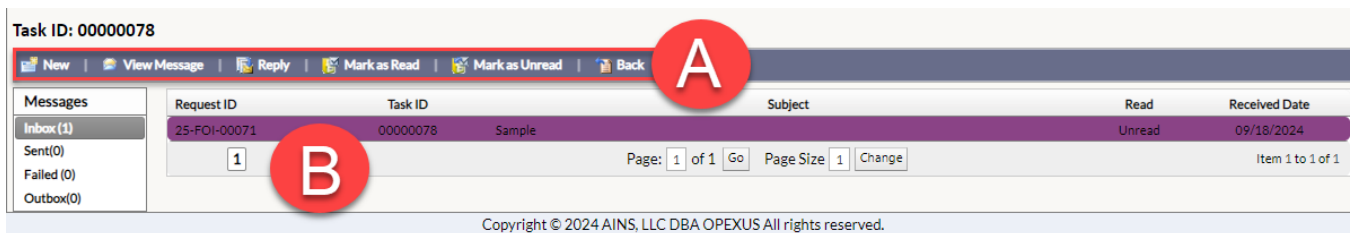
7. Once the job completes, the pages appear in the document tree:



8. There are additional options to review and redact these records before completing this RFD. See the *Document Management* section for more details.

3.2.2 View & Send Messages

Click **Messages** from the task toolbar to open the *Messages* page. From here, you can use the **(A) message toolbar** to send a new message or send a reply to the user who sent you the Request for Documents. You can also view the **(B) list** of all received, sent, failed, and outbox messages.



Double click on a message from the list to view details.

Task Id : 00000078

Message

Subject :
Sample

Body :
Request for Documents for Request # '25-FOI-00071'. Due Date: 09/18/2024.

Attachments :
No Attachments Found.

Close

For detailed instructions on sending messages in Collaboration, visit section 5: *Messages*.

3.2.3 View/Add Attachments

Click **View/Add Attachments** to upload documents to the RFD in addition to the responsive documents you uploaded in section 3.2.1: *Upload Records*. You can also view any attachments included with this original request from this page. For detailed instructions on Attachments in Collaboration, visit section 6: *Using Attachments in Tasks*.

3.2.4 RFD Notes Log

The *Notes* page lets you view all notes on this task. This includes both automated notes on system processes, as well as any notes added manually using the Add Note option.

Notes Log - Request For Documents

Task ID: 00000078

Notes Log

Action	Comments	Created Date
Receipt Confirmed	Task Receipt Confirmed	09/18/2024:12:49:33
Request for Documents Received	-	09/18/2024:12:40:11

Page: of 1
Page Size
Item 1 to 2 of 2



3.2.5 Change Status

Use the *Change Status* feature to track progress on this task. This status is internal to the Collaboration and is not reported back to the requester.

Update Task Status - Request For Documents Information

Task ID: 00000077

Task Status

Status	Accepted
Notes*	Accepted
	Rejected
	Need Additional Info
	In Process
	Cost Estimate Sent

Save Close

If for whatever reason you cannot fulfill the request, select **Rejected**, otherwise select **Accepted**. Provide **Notes** (required regardless of the status you select), then click **Save**.

3.3 Completing a Request for Documents Task

Once you've finished uploading and processing the documents to fulfill the RFD and are ready to complete the task, use the **Submit Completed Task** feature. Follow the steps below to submit a completed task.

1. In Collaboration, open the *Request For Document Task* that you are ready to complete.
2. On the *Tasks* tab toolbar, click **Submit Completed Task**:



Request for Documents Tasks

Home Tasks

Task ID: 00000078

Upload Records Messages 0/1 View/Add Attachments (0) Notes Log (2) Change Status Submit Completed Task Back

Request Information

Request for Documents ID	111
Request #	25-FOI-00071
Status	Received
Received Date	09/18/2024

3. After clicking **Submit Completed Task**, the *Request ID* screen appears as shown below.

Request ID # 25-FOI-00071

To : Shannon Murphy

Subject : 25-FOI-00071 - Request for Documents Response

Body :

Words: 0 Characters: 0

Attachments:

Browse and Add from My Computer :

Select Attachments from the Task Attachments List to be Submitted with this Task :

☐	Attachment Name	Size	Date Created	View/DownLoad
☐	Quick Reference Guide.docx	929.27 KB	09/18/2024	

- On this screen, provide the *Subject* and *Body* for the message that accompanies the completed Request.
- In the *Attachments* field, use the **Select** button to upload documents to include with the completed request, or you can select attachments already added to the task to include in the response package.
- When you're ready to submit the task back to the requester, click **Submit Task**.
- A pop up message appears. Click **OK** to dismiss the message.
- The *Tasks* tab refreshes, with the *Status* updated to *Submitted*.



Request for Documents Tasks

[Home](#) [Tasks](#)

Task ID: 00000078

[Upload Records](#) [Messages 0/1](#) [View/Add Attachments \(1\)](#) [Notes Log \(3\)](#) [Change Status](#) [Submit Completed Task](#) [Back](#)

Request Information	
Request for Documents ID	111
Request #	25-FOI-00071
Status	Submitted
Received Date	09/18/2024
Task Due Date	09/18/2024
Request Type	FOIA
Request Description	Request for documents

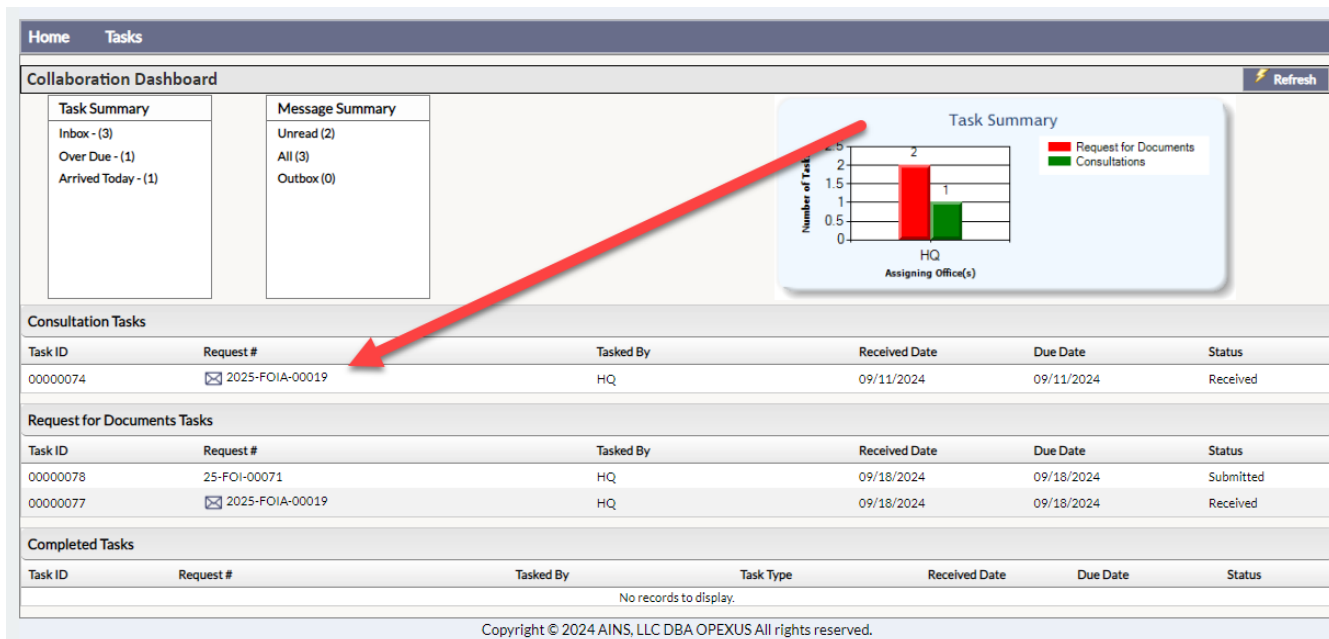


4 Consultation Tasks

4.1 Responding to a Consultation Task

When you've received a Consultation Task, it will appear in the *Consultation Tasks* list on your Collaboration *Home* tab. Follow the steps below to receive the documents and complete the task.

1. Locate the new **Consultation Task** in the list and double click it.



2. A pop-up appears informing that the sender has been notified that you opened the task. Click **OK** to dismiss this message.
3. The *Tasks* tab appears as shown below. First, you'll want to read the requester's message. Click **Messages** from the task toolbar.



Consultation Tasks

Home Tasks

Task ID: 00000074

Review Records Electronically Messages 1/1 Attachments (0) Notes Log (2) Change Status Submit Completed Task Back

Request Information	
Consultation Review ID	43
Request #	2025-FOIA-00019
Status	Received
Received Date	09/11/2024
Task Due Date	09/11/2024
Request Type	FOIA/PA
Request Description	EDR testing ticket 73386

Sender Information	
First Name	Admin
Last Name	Admin
Email	admin@opexustech.com
Tasked By	HQ
Phone Number	-
Comments	-

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

Task ID: 00000074

New View Message

Messages	Request ID	Task ID	Subject	Read	Received Date
Inbox (1)	2025-FOIA-00019	00000074	Autosave Memo	Unread	09/11/2024
Sent(0)	Page: 1 of 1 Go Page Size 1 Change Item 1 to 1 of 1				
Failed (0)					
Outbox(0)					

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5. Review the details of the consultation request, then click **Close**.

Task Id : 00000074

Message

Subject :
Autosave Memo

Body :
test

Attachments :
No Attachments Found.

Close

6. The *Status* of the message updates to *Read*. Click **Back** in the task toolbar to return to the *Task Details* page.



- You can now opt to *Accept* or *Reject* this request. Click **Change Status** in the task toolbar. The *Update Task Status* page opens, where you can mark the request as **Accepted** or **Rejected**:

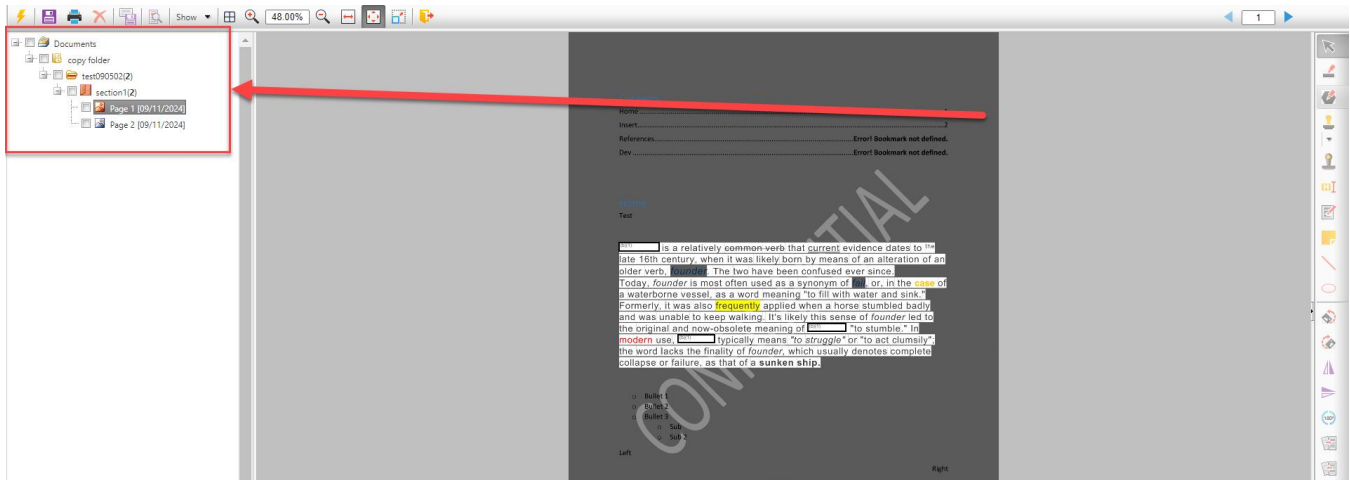
Note: There are also options to select *Need Additional Info*, *In Process*, and *Cost Estimate Sent*.

- If for whatever reason you cannot fulfill the request, select **Rejected**, otherwise select **Accepted**. Provide **Notes** (which are required regardless of the status you select), then click **Save**. In this example, we will accept the request.
- The status updates to *Accepted*. Next, click **Review Records Electronically** in the task toolbar. This allows you to access the materials provided for your review in Document Management.

Request Information	
Consultation Review ID	43
Request #	2025-FOIA-00019
Status	Accepted
Received Date	09/11/2024
Task Due Date	09/11/2024
Request Type	FOIA/PA
Request Description	FOIR testing ticket 73386

- The Document Management interface opens (see the *Document Management* section for details), as shown below. From here, you can navigate through folder(s) in the left hand **document tree** panel and review each document/page.

Consultation Tasks



11. Use the **toolbar** to adjust your page view and save the file.



- Save** or **Print** the document.
- Zoom** in or out of the page.
- Exit** the Document Management window.

Note: You can also hover over each toolbar icon to view a Tooltip with more information.

12. Once you've reviewed the documents, you can close the Document Management window and return to the Task page to submit the completed task back to the requester. See section 4.2 for instructions on completing a consultation task.

4.2 Completing a Consultation Task

When you've completed the consultation review assigned to you in Collaboration, follow the steps below to submit the completed task.

- In Collaboration, open the *Collaboration Task* that you are ready to complete.
- From the task toolbar, click **Submit Completed Task**:



Consultation Tasks

Home Tasks

Task ID: 00000074

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

Request Information	
Consultation Review ID	43
Request #	2025-FOIA-00019
Status	Accepted
Received Date	09/11/2024
Task Due Date	09/11/2024
Request Type	FOIA/PA
Request Description	END testing ticket 73386

- After clicking **Submit Completed Task**, the *Request ID* screen appears as shown below. On this screen, provide the *Subject* and *Body* for the message that will accompany the completed Request.

Request ID # 2025-FOIA-00019

To: Admin Admin

Subject: 2025-FOIA-00019 - Consultation Response

Body:

Words: 0 Characters: 0

Attachments:

Browse and Add from My Computer:

Select Attachments from the Task Attachments List to be Submitted with this Task:

☐	Attachment Name	Size	Date Created	View/Download
There are no Help Links to display				

- In the *Attachments* field, use the **Select** button to upload documents to include with the completed request, or you can select attachments already added to the task to include in the response package.
- When you're ready to submit the task back to the requester, click **Submit Task**.
- A pop up message appears. Click **OK** to dismiss the message.
- The *Tasks* tab refreshes, with the *Status* updated to *Submitted*.



Consultation Tasks

Task ID: 00000074

Review Records Electronically Messages 0/1 View/Add Attachments (0) Notes Log (4) Change Status Submit Completed Task Back

Request Information

Consultation Review ID	43
Request #	2025-FOIA-00019
Status	Submitted
Received Date	09/11/2024
Task Due Date	09/11/2024
Request Type	FOIA/PA
Request Description	EDR testing ticket 73386

Sender Information

First Name	Admin
Last Name	Admin

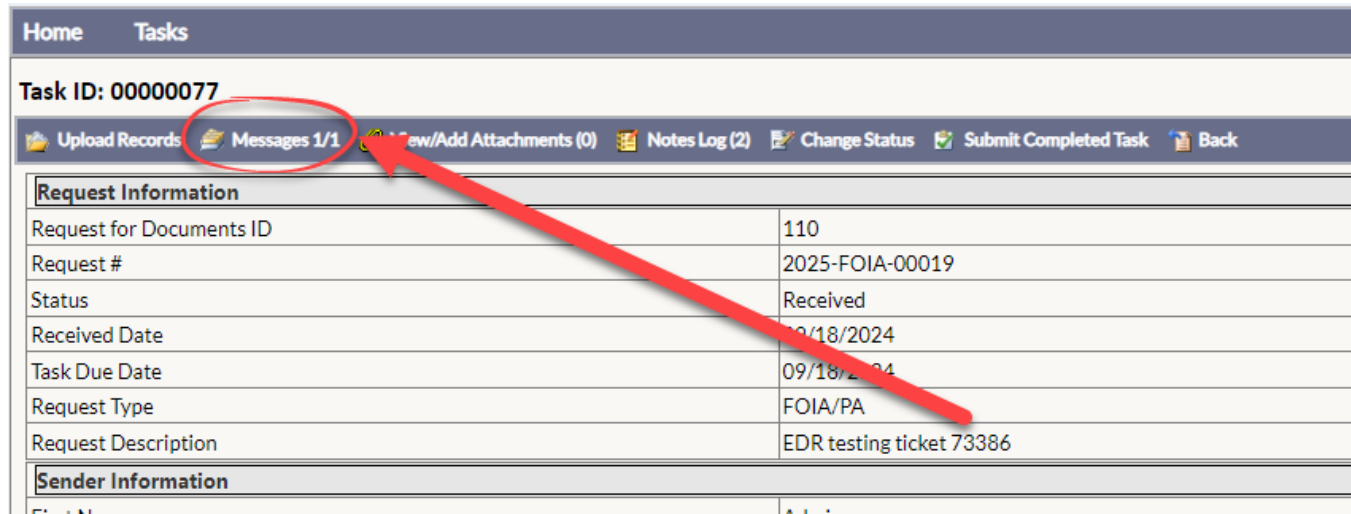


5 Messages

You can use FX Collaboration to communicate with the requester, share attachments, and update the status of the request. Follow the steps below to use the *Messages* feature:

Note: The process is the same for both Requests for Documents and Consultation Tasks.

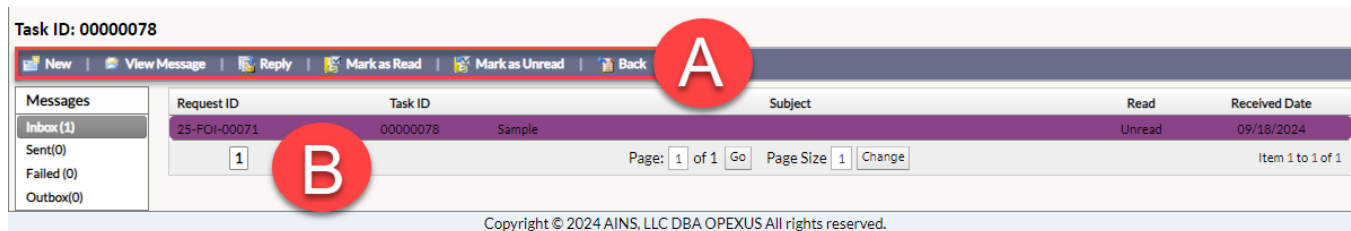
1. Open the task whose requester you'd like to contact. Click **Messages**:



Request Information	
Request for Documents ID	110
Request #	2025-FOIA-00019
Status	Received
Received Date	09/18/2024
Task Due Date	09/18/2024
Request Type	FOIA/PA
Request Description	EDR testing ticket 73386

Sender Information	

2. The *Messages* screen includes an **(A) action** toolbar and a **(B) list** of all messages associated with this task:



Request ID	Task ID	Subject	Read	Received Date
25-FOI-00071	00000078	Sample	Unread	09/18/2024

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

3. You can select a message from the list and click to **View Message** to open it, click **Reply** to reply to the selected message, or toggle the *Read* status for the selected message by clicking **Mark as Read** or **Mark as Unread**.
4. From this page, you can also start a new message thread with the requester. Click **New** from the toolbar. The *New Message* screen appears as shown below:



Messages

Request ID # 2025-FOIA-00019 - Message

To : Admin Admin

Subject : Request ID # 2025-FOIA-00019 - Message

Body :

Attachments:

Browse and Add from My Computer :

Select Attachments from the Task Attachments List to be Submitted with this Task :

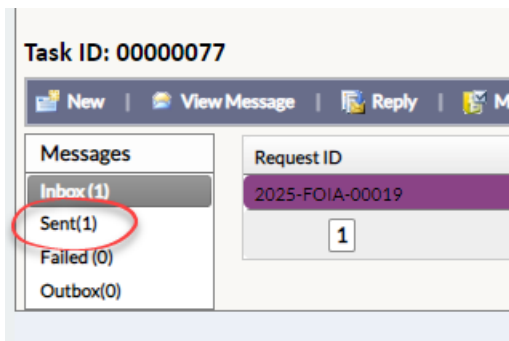
	Attachment Name	Size	Date Created	View/Download
☐				

There are no Help Links to display

5. First enter a (A) *Subject*, fill in the message (B) *Body*, and add any (C) *Attachments* if needed.

Note: While you can attach documents to a message from this page, you should upload responsive documents as part of the request completion process. See the *Request for Documents Tasks* section to learn how to submit responsive documents.

6. When you're ready to send the message to the requester, click (D) **Send Message**. The message will appear right away in the *Outbox*, then move into the *Sent* messages list once it has processed:



Note: If an error occurs while sending the message, it will appear under the *Failed* messages list.

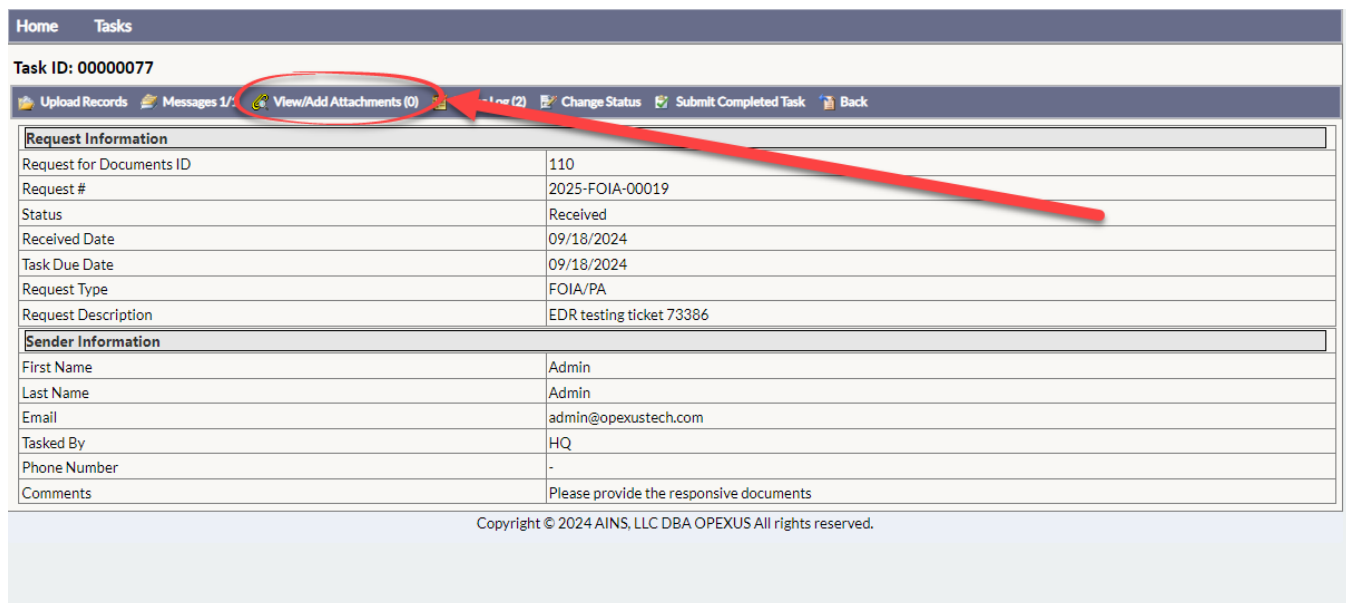


6 Attachments

You'll likely need to add attachments at some point during the task, whether it's a requested document, an email, or another file that will provide context to the requester. Collaboration has a few tools to make it simple to add and manage attachments.

Note: The process is the same for both Requests for Documents and Consultation Tasks.

1. Open any *Task*. Click **View/Add Attachments**:



The screenshot shows a web application interface for managing tasks. At the top, there's a navigation bar with 'Home' and 'Tasks'. Below it, the 'Task ID: 00000077' is displayed. A toolbar contains several icons and labels: 'Upload Records', 'Messages 1/1', 'View/Add Attachments (0)' (circled in red), '1 of 2', 'Change Status', 'Submit Completed Task', and 'Back'. A red arrow points from the circled button to the 'Request Information' section below. The 'Request Information' section is a table with the following data:

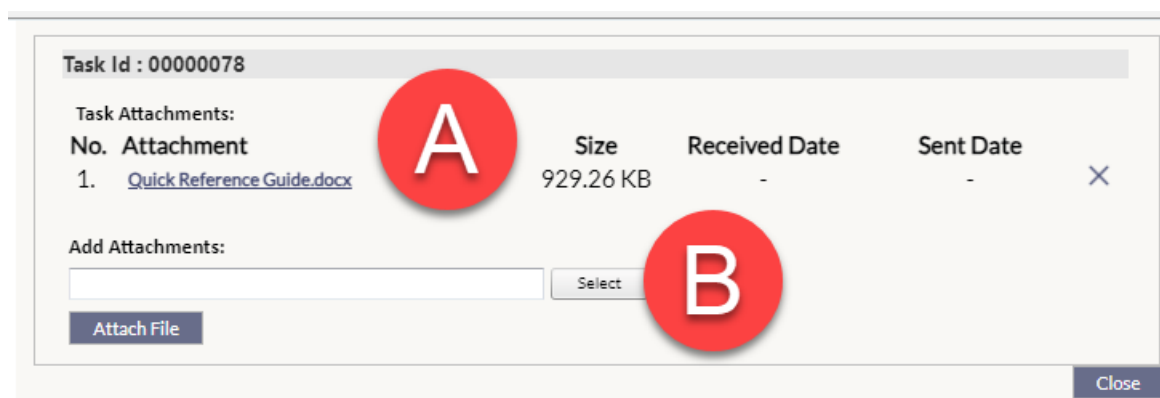
Request Information	
Request for Documents ID	110
Request #	2025-FOIA-00019
Status	Received
Received Date	09/18/2024
Task Due Date	09/18/2024
Request Type	FOIA/PA
Request Description	EDR testing ticket 73386

Below this is the 'Sender Information' section, also a table:

Sender Information	
First Name	Admin
Last Name	Admin
Email	admin@opexustech.com
Tasked By	HQ
Phone Number	-
Comments	Please provide the responsive documents

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2. The *Attachments* screen appears. Included here are a **(A)** *Task Attachments* list with all current attachments (if any), and the option to **(B)** *Add Attachments*:



The screenshot shows a modal window titled 'Task Id : 00000078'. It contains two main sections. The first section, labeled 'Task Attachments:', has a table with columns 'No.', 'Attachment', 'Size', 'Received Date', and 'Sent Date'. A red circle with the letter 'A' is placed over the table. The table contains one row: '1. Quick Reference Guide.docx', '929.26 KB', '-', and '-'. The second section, labeled 'Add Attachments:', has a text input field, a 'Select' button, and an 'Attach File' button. A red circle with the letter 'B' is placed over the 'Add Attachments' section. A 'Close' button is at the bottom right.

3. Use the file navigator to select the document you'd like to upload. Your file will appear under the Add Attachments bar. Click **Attach File** to attach it to the RFD.



Attachments

Attachments - Request For Documents

Task Id : 00000078

Task Attachments:
No Attachments Found.

Add Attachments:

Quick Reference Guide.... x Remove

Attach File

Close

- The screen will refresh, and the *Task Attachments* list will now include the file.

Attachments - Request For Documents

Task Id : 00000078

Task Attachments:

No.	Attachment	Size	Received Date	Sent Date
1.	Quick Reference Guide.docx	929.26 KB	-	-

Add Attachments:

Attach File

Close

- Repeat this process until you've uploaded all the files you'd like to attach to the task. You can also click the **X** next to any attachment to remove it from the Task.
- When you're finished, click **Close** to return to the *Task Details* page.



7 Notes Log

Both Requests for Documents and Consultation Tasks include a *Notes Log* to document actions taken on these tasks. You can access the *Notes Log* from within a *Task* by click the **Notes Log** as shown in the following example:

HomeTasks

Task ID: 00000077

Upload Records

Messages 1/1

View/Add Attachments (0)

Notes Log (2)

Change Status

Submit Completed Task

Back

Request Information

Request for Documents ID	110
Request #	2025-FOIA-00019
Status	Received
Received Date	09/18/2024
Task Due Date	09/18/2024
Request Type	FOIA/PA
Request Description	EDR testing ticket 73386

Sender Information

First Name	Admin
Last Name	Admin
Email	admin@opexustech.com
Tasked By	HQ
Phone Number	-
Comments	Please provide the responsive documents

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The *Notes Log* appears as shown below. This screen includes a (A) *Notes Log* with the actions taken in filling this request. There are also several (B) **Actions** you can take on the log.

Notes Log - Request For Documents

Task ID: 00000077

Add Note

Edit Note

View Note

Print Notes

Close

Notes Log

Action	Comments	Created Date
Receipt Confirmed	Task Receipt Confirmed	09/18/2024:09:41:05
Request for Documents Received	-	09/18/2024:09:40:45

1

Page: 1 of 1

Go

Page Size 2

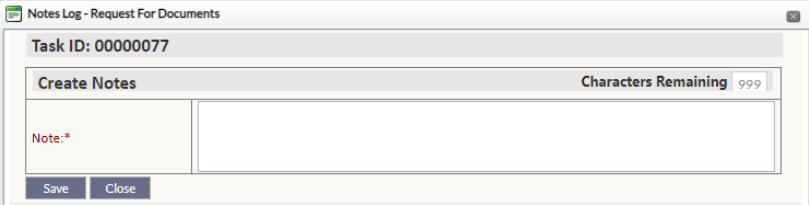
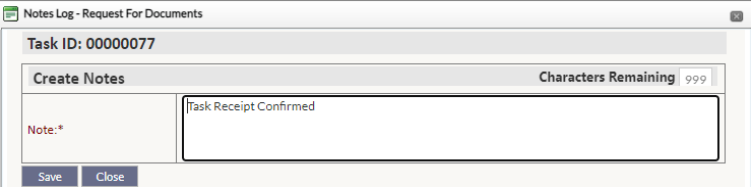
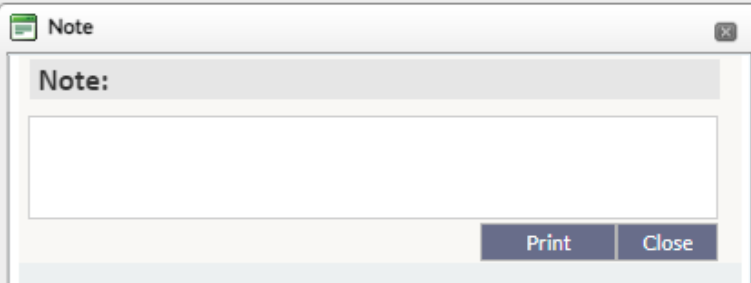
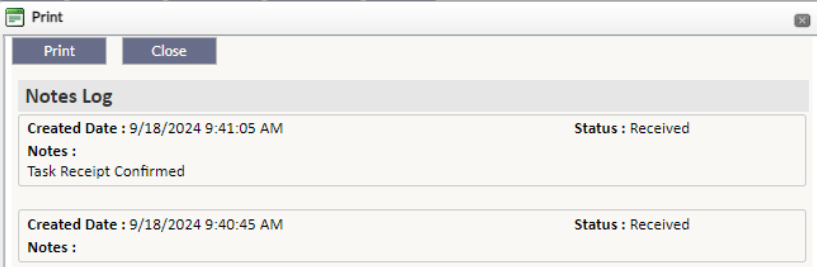
Change

Item 1 to 2 of 2

You can take actions on notes by selecting a note from the (A) *Log* and selecting an (B) **Action**. These are described below:



Notes Log

Action	Description	Image
Add Note	Click Add Note to manually add a note to the log. Add comments in the <i>Note</i> field, then click Save to save the note in the log	
Edit Note	Select a note from the list and click Edit Note to edit the content. Click Save to save any changes you make.	
View Note	Select a note from the list and click View Note to view the note contents.	
Print Notes	View all notes in a printable list. Click Print to send the list to a connected printer.	
Close	Click Close to close the <i>Notes Log</i> .	N/A



8 Document Management

Once you've uploaded pages to the RFD task, you can add annotations and/or redactions to the pages. **Redactions** obscure information that is protected from release. **Annotations** are review objects like highlights, notes, stamps, which can aid in document review. In this section we highlight a few of the features in DM for Collaboration.

For full details on ATIPXpress Document Management, see the [ATIPXpress User Manual](#). Note that the linked manual described functionality that is not available to you as a Collaboration user.

8.1 Document Management Interface

The screenshot displays the ATIPXpress Document Management Interface. The interface is divided into several sections:

- Top Bar:** Contains various icons for document management, a search bar, and a zoom level of 62.00%.
- Left Panel (A):** Shows a hierarchical view of documents. The structure is: Documents > Test FCD > RFD - 118(20) > Sample Section(20). Below this, a list of pages is shown, each with a thumbnail and a date: Page 1 [09/24/2024], Page 2 [09/24/2024], Page 3 [09/24/2024], Page 4 [09/24/2024], Page 5 [09/24/2024], Page 6 [09/24/2024], Page 7 [09/24/2024], Page 8 [09/24/2024], Page 9 [09/24/2024], and Page 10 [09/24/2024].
- Center Panel (B):** Displays a task list for "FOIA/Press Lab 5: Add Responsive Documents to the Request Folder". The tasks are as follows:

Step	Task	Complete?
9	Click Add Folder(s).	☐
10	Click OK.	☐
11	Close the Job Progress window.	☐
12	Close the Document Management window.	☐
13	The status of your request updates to Documents Added.	☐

Below the task list, there is a section titled "Perform Final Actions" with the following tasks:

Step	Task	Complete?
1	Click Next (Next Action), select "Final Actions" from the Select Action drop-down menu, then click Perform Action.	☐
2	Depending on the Exemption Codes used, they may be listed under the Exemption/Exclusion Codes Applied section.	☐
3	The Reportable Disposition will reflect the exemptions applied.	☐
4	Leave the Disposition Accepted Date as today's date.	☐
- Right Panel (D):** A vertical toolbar containing various icons for document management, including a magnifying glass, a document, a folder, a trash can, a refresh icon, a search icon, a list icon, a print icon, a share icon, a lock icon, a key icon, a document with a checkmark, a document with a red X, a document with a red circle, a document with a red triangle, a document with a red square, a document with a red diamond, a document with a red circle, a document with a red triangle, a document with a red square, and a document with a red diamond.

At the bottom of the interface, the status bar shows "Ready.", the GUID "00000000220", and the user name "John, Gatewood".



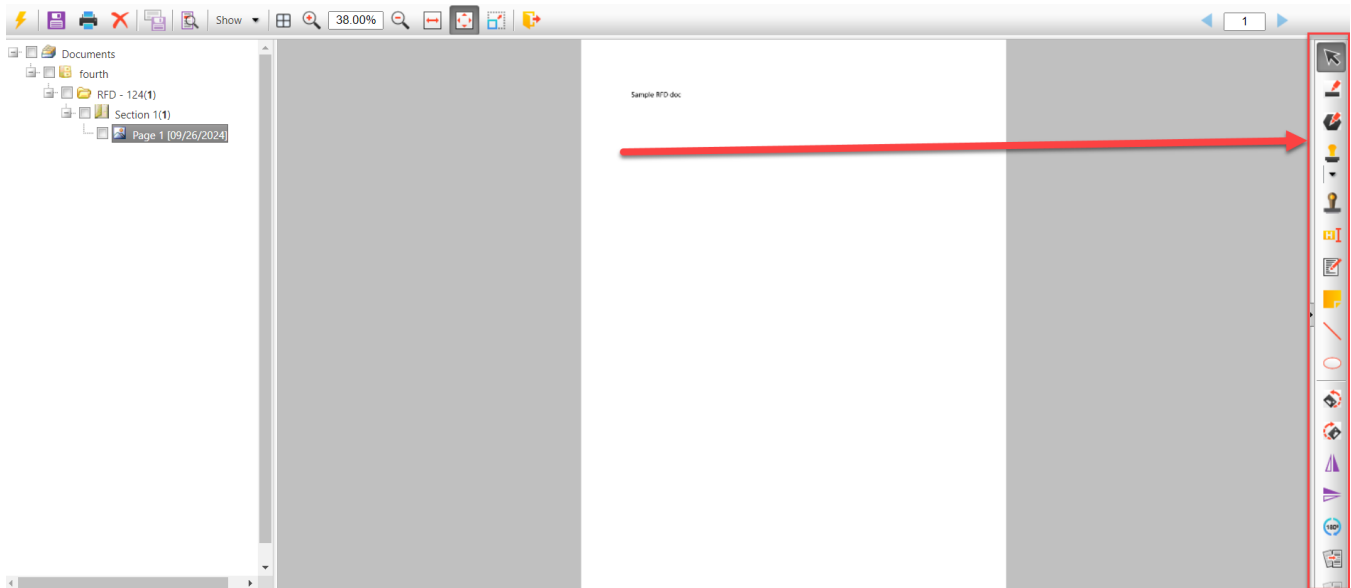
Area	Description
A	The Document Tree is where you can view (and define, depending on your permissions) the structure of the document set. Navigate through the File Cabinet Drawer , Folders , Sections , and the Pages that compose the folders. You can also right click at each level to view additional review and management options, depending on both the type of task, object selected, and your permissions.
B	Documents appear in the Reading Panel . You can adjust your view of the documents here, as well as perform some of the many review actions available on the
C	The Page Toolbar has options to change your view of the documents, as well as some document management options (like the Save button, that's here).
D	Review Objects let you apply manual redactions, stamps, sticky notes, highlights, and other tools that help you complete a comprehensive Collaboration review.

8.2 Review Objects

In Document Management, you can use one of many available **Review Objects** available on the right-hand side of the window.



Document Management



The following table outlines each toolbar item:

Note: You can also hover over each toolbar icon to view a Tooltip with more information.

Task	Description	Toolbar Icon
Object selection	Select objects such as lines, folders, pages, and buttons.	
Redact	Redact sensitive information using a rectangular shape.	
Polygon redact	Redact (or hide) sensitive information by drawing a shape in any way you choose.	
Select stamp	Opens a menu where you can select a stamp to mark the document with messages such as Draft, Approved, Official, Top Secret, Checked, and other messages.	
Dynamic stamp	Stamps that contain single select, text, and date fields that need to be populated prior to placement in a document.	



Task	Description	Toolbar Icon
Highlight	Identify specific text by highlighting it in yellow.	
Comments	Type comments on the document.	
Sticky notes	Add sticky notes to the document.	
Shape tools	Add lines, circles, or ellipses to the document.	
Rotate tools	Rotate the page left or right.	
Flip tools	Flip the page horizontally/vertically.	
Deskew/Undo Deskew	Adjust slightly askew images. This is used when scanned pages are askew in the display. You can also reverse the deskew action.	

8.3 Find and Redact

Use the **Find and Redact** feature to locate and redact specific content and automatically apply redactions to any matching text. You can use find at redact at the folder, section, or individual



page level. To use find and redact, select the area in the document tree you want to search, then right click and select **Find and Redact**:

Find & Redact

Find Advanced

Find & Redact

Find What

Word/Phrase

OPEXUS -> Help

Redact

Redaction Code(s)

(b)(1) Select Codes Clear Codes

Page Range

☐ All Pages
☒ Current Page
☐ Selection
☐ Pages List

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

Find & Strikethrough Find & Create Highlight for Review Find & Redact Cancel

You can use the *Find What* dropdown menu to search for specific content or PII, as shown below:

Find What

Word/Phrase

Credit Card Numbers

Currency

Email Addresses

Employer ID Numbers (EIN)

Social Security Number (SSN)

Telephone Numbers

Word/Phrase

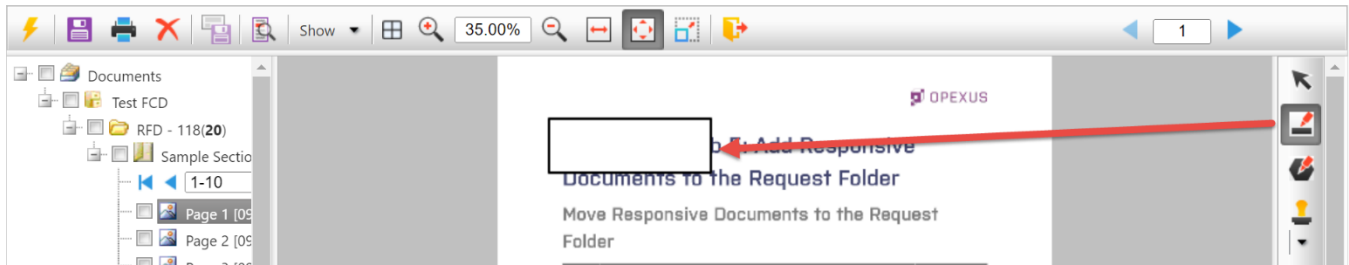
Select the *Page Range* to apply redactions then select a button for the action you'd like to apply.

8.4 Apply Redactions

You can manually apply redactions and other review objects on the right toolbar, then clicking to apply in the review panel. In this example we'll draw a Redaction:



Document Management



Because we applied a redaction, the *Select Redaction Codes* screen appears where we'll have to select a code to apply. Select from the list (or use the filters to search) then click **Select Redaction Codes** to apply the selected code to the redaction.