

ATIPXpress

Sending Requests to Collaboration

v11.8.0

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ATIPXpress v11.8.0 Sending Requests to Collaboration

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1 Introduction

1.1 About Collaboration

The ATIPXpress Collaboration Portal provides a platform for AX users to work together on requests with others outside their ATIPXpress environment, easily collaborating on requests for documents and document reviews.

This document provides instructions for ATIPXpress users to work in the Collaboration Portal. The following topics are covered in this section:

- *Requests for Documents*: Details on sending and completing a Request for Documents in the ATIPXpress application.
- *Consultation Reviews*: How to send documents for consultation review using Collaboration.
- *Correspondence*: Sending and receiving messages from the Collaboration Portal.

1.2 Typography

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

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



2 Requests for Documents

2.1 Sending a Request for Documents

One of the main uses for the Collaboration Portal is to request documents from a source who does not have access to ATIPXpress. Follow the steps below to submit a Request for Documents to a contact using the Collaboration Portal.

1. Open a request that has been assigned. Requests that have not yet been assigned are not eligible for RFDs.
2. Select **(A) Request for Documents** from the left-hand navigation, then click **(B) New**:

Home Requesters ▾ Requests ▾ Document Management ▾ Administration Reports Request # [Search]

Home >> 24-FOI-00007 - Request

FOIA - Request: 24-FOI-00007 Remaining Days: 20 Status: Assigned Next

Request Information

Assign Users

Set Perfect Status

Correspondence

Request for Documents (0/0)

Electronic Document Review (0/0)

Request for Documents

Action ID	Location(s) Referred	Sent By	Sent Date	Due Date	Completed Date	Status
There are no Request for Document records.						

Page size: 20 0 items in 1 pages

New Action View Delete Messages(0/0) Send Email/Reminder Send Reminder by Print Action(s) Log

The *New Request for Documents* screen, as shown below, opens. In the following sections, we'll cover how to fill out each section.

New Request for Documents - HQ-rtes-25-00006

New Request for Documents - Step 1 New Request for Documents - Step 2

Request for Documents mode : Send via Email/Save

Request for Documents Information

Request Date * : 10/4/2024

Comments : [Text Area] Spell Check

Note: If including an Empty ADX File with the Request for Documents the Comments entered will be included in the file for the recipients review otherwise the comment is kept for internal purposes only.

Due Date * : 10/4/2024 Add Reminder

Priority : [Dropdown]

2.1.1 Request for Documents Mode/Information

On the *New Request for Documents* screen, locate the *Request for Documents mode* field and select **Send via Collaboration Portal**.



Requests for Documents

New Request for Documents - Step 1

Request for Documents mode: **Send via Collaboration Portal** File Cabinet Drawer:

Request for Documents Information: **Send via Email/Save**

Request Date: 10/7/2024

Comments:

Due Date: 10/7/2024 ☐ Add Reminder

Priority:

Spell Check

Note: If including an Empty ADX File with the Request for Documents the Comments entered will be included in the file for the recipients review otherwise the comment is kept for internal purposes only.

Send To: Offices of Primary Interest **Add Offices of Primary Interest**

Action Office	Offices of Primary Interest	Contact Name	Phone	Contact Address	Email	Has RX?	RFD Provider	Actions
---------------	-----------------------------	--------------	-------	-----------------	-------	---------	--------------	---------

Next, use the *File Cabinet Drawer* field to select the folder in ATIPXpress where you'd like the documents to be delivered.

New Request for Documents - Step 2

File Cabinet Drawer:

- CFCD (26)
- copy folder (164)
- fcd 2 (22)

You can also include *Comments*, update the *Request Date* and *Due Date*, and set a *Priority* level in this section.

2.1.2 Select an Office of Primary Interest

The next step is to select the Office of Primary Interest that you're sending the request to. In the *Send to: Offices of Primary Interest* section, click **Add Offices of Primary Interest**.

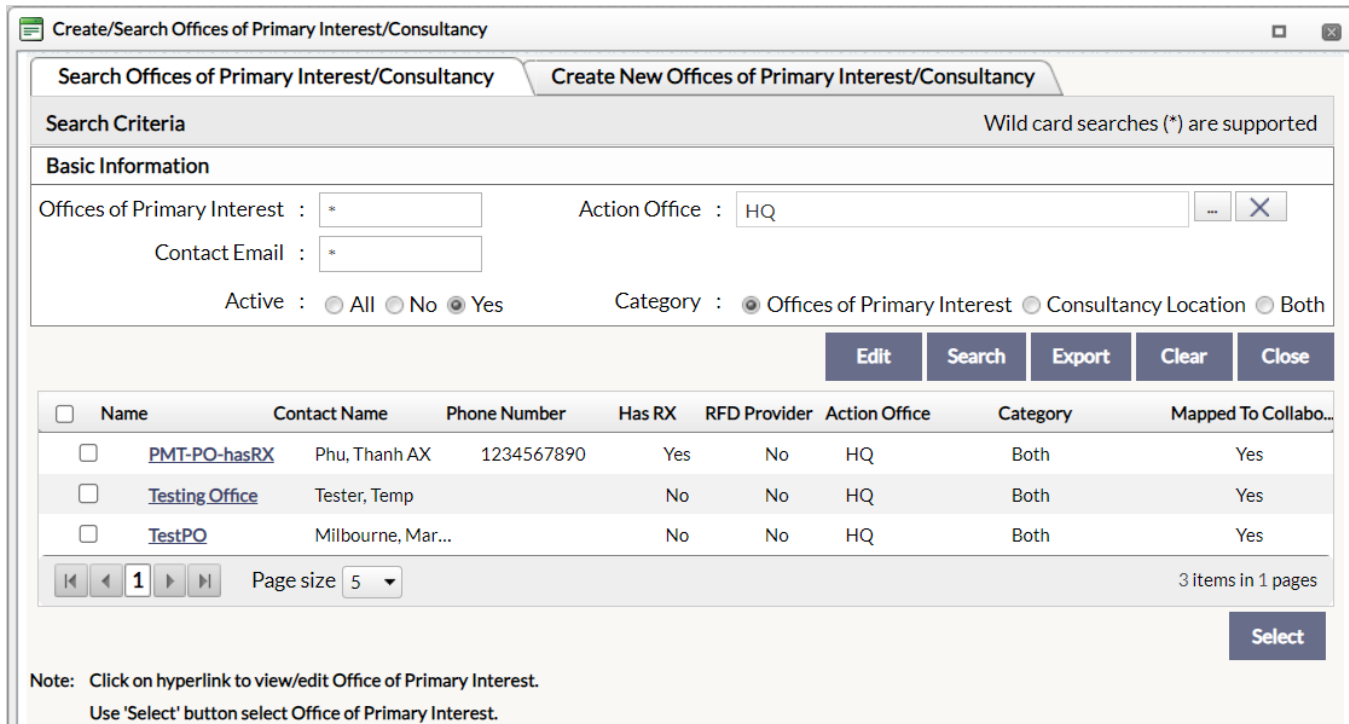
Send To: Offices of Primary Interest **Add Offices of Primary Interest**

Action Office	Offices of Primary Interest	Contact Name	Phone	Contact Address	Email	Has RX?	RFD Pro	Action
There are no offices selected.								

The *Create/Search Offices of Primary Interest/Consultancy* screen appears as shown below:



Requests for Documents



Create/Search Offices of Primary Interest/Consultancy

Search Offices of Primary Interest/Consultancy Create New Offices of Primary Interest/Consultancy

Search Criteria Wild card searches (*) are supported

Basic Information

Offices of Primary Interest : * Action Office : HQ

Contact Email : *

Active : ☐ All ☐ No ☒ Yes Category : ☒ Offices of Primary Interest ☐ Consultancy Location ☐ Both

Edit Search Export Clear Close

<input type="checkbox"/>	Name	Contact Name	Phone Number	Has RX	RFD Provider	Action Office	Category	Mapped To Collabo...
<input type="checkbox"/>	PMT-PO-hasRX	Phu, Thanh AX	1234567890	Yes	No	HQ	Both	Yes
<input type="checkbox"/>	Testing Office	Tester, Temp		No	No	HQ	Both	Yes
<input type="checkbox"/>	TestPO	Milbourne, Mar...		No	No	HQ	Both	Yes

Page size 5 3 items in 1 pages

Select

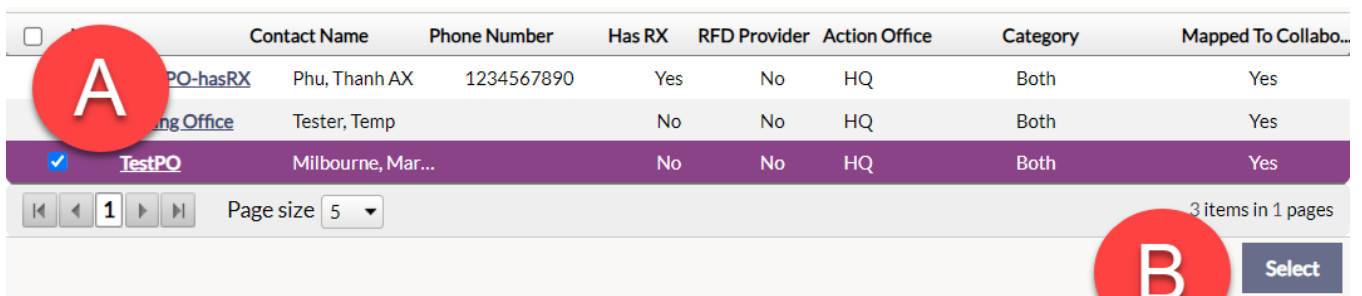
Note: Click on hyperlink to view/edit Office of Primary Interest.
Use 'Select' button select Office of Primary Interest.

Here, you can search for and select from existing Offices of Primary Interest/Consultancies, or create a new Offices/Consultancy.

Note: You can add multiple Offices of Primary Interest/Consultancies if needed.

2.1.2.1 Select an Existing Office of Primary Interest/Consultancy

To select an existing Office of Primary Interest/Consultancy, locate it in the list and select the **(A)** checkbox next to its *Name*. Then, click **(B) Select** to add it to the RFD.



<input type="checkbox"/>	Name	Contact Name	Phone Number	Has RX	RFD Provider	Action Office	Category	Mapped To Collabo...
<input type="checkbox"/>	PMT-PO-hasRX	Phu, Thanh AX	1234567890	Yes	No	HQ	Both	Yes
<input type="checkbox"/>	Testing Office	Tester, Temp		No	No	HQ	Both	Yes
<input checked="" type="checkbox"/>	TestPO	Milbourne, Mar...		No	No	HQ	Both	Yes

Page size 5 3 items in 1 pages

Select

The *Offices of Primary Interest* list will refresh with your selection(s). When you're finished adding Offices/Consultancies, click **Next** to move on:



Requests for Documents

Send To : Offices of Primary Interest							Add Offices of Primary Interest	
Action Office	Offices of Primary Interest	Contact Name	Phone	Contact Address	Email	Has RX?	RFD Provi	Action:
HQ	TestPO	Milbourne, Marcus			mmilbourne@ains...	No	No	X

Next

2.1.2.2 Create a New Office of Primary Interest/Consultancy

To create a new Office of Primary Interest/Consultancy, click the (A) **Create New Offices of Primary Interest/Consultancy** tab.

A

Search Offices of Primary Interest/Consultancy

Create New Offices of Primary Interest/Consultancy

Create New Offices of Primary Interest/Consultancy

Category

☒ Offices of Primary Interest
 ☐ Consultancy Location
 ☐ Both

Offices of Primary Interest/Consultancy Information

Office of Primary Interest/Consultancy*:

Action Office*:

☒ Active
 ☐ Has RX
 ☐ Records Provider

Other Information

Cc Name:

Cc Email:

[Use ';' to separate mail addresses]

Contact Information

Prefix:

Title:

First Name*:

Last Name*:

Contact Emails:

[Use ';' to separate mail addresses]

Phone Number:

Alternate Phone Number:

Language of Communication*:

ID Number:

Organization:

Address 1:

Address 2:

City:

Country*:

State:

ZIP Code:

☐ Collaboration Access Portal

Save

Close

Note: * fields are mandatory

In the *Category* section, indicate whether it is an Office of Primary Interest, Consultancy, or Both. Then, fill out the applicable fields in the *Offices of Primary Interest/Consultancy Information* section, including the Office/Consultancy title and Action Office. You should also include some *Contact Information*, including the Office/Consultancy point of contact's *First Name*, *Last Name*, and *Country*.

Note: You must select the (C) Collaboration Access Portal checkbox for the Office of Primary Interest/Consultancy to receive the RFD via Collaboration Portal.



When you're finished, click **(D) Save**.

The *Offices of Primary Interest* list will refresh with your selection(s). When you're finished adding Offices/Consultancies, click **Next** to move on:

Send To : Offices of Primary Interest						Add Offices of Primary Interest		
Action Office	Offices of Primary Interest	Contact Name	Phone	Contact Address	Email	Has RX?	RFD Provider	Action
HQ	TestPO	Milbourne, Marcus			mmilbourne@ains...	No	No	

Next

2.1.3 Configure and Send the Message

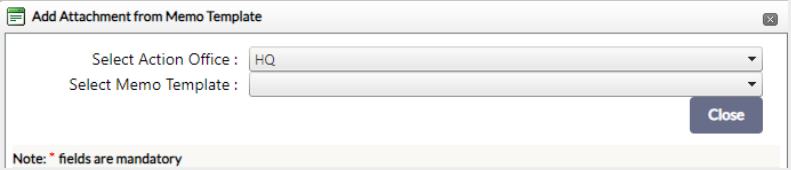
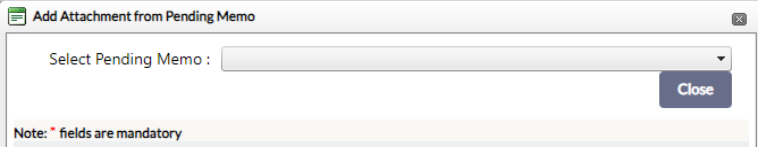
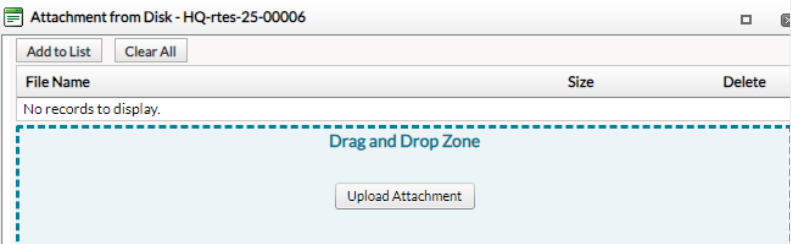
After you've clicked Next, the *New Request for Documents* screen will move to step 2.

New Request for Documents - Step 1		New Request for Documents - Step 2	
Attachments to RFD			
Add From Memo Template Pending Memo (0) Disk Correspondence Log Invoice Log			
	Source	Size	Delete Replace
There are no attachments			
Message Options			
From Email Type*: <input checked="" type="radio"/> User Email <input type="radio"/> User Action Office Email <input type="radio"/> Other Email			
From*: <input type="text" value="shannon.murphy@opexustech.com"/>			
Template: <div style="border: 1px solid #ccc; background-color: #fff; padding: 2px; width: 100%;">Select Email Template ▼</div>			
Subject*: <input style="width: 100%;" type="text"/>			
To*: <div style="border: 1px solid #ccc; background-color: #fff; padding: 2px; width: 100%;">shannon.murphy@opexustech.com</div>			
<div style="border: 1px solid #ccc; margin-top: 5px; padding: 5px;"> Lato 2 B I U abc A- [Link icon] [List icons] [Table icon] [Fullscreen icon] </div> <div style="margin-top: 5px; padding: 5px;">Request for Documents for Request # 'HQ-rtes-25-00006'; Due Date: 10/04/2024.</div>			

1. First, you can use the **Attachments** menu to share any relevant documents with the RFD recipient, such as the original request letter for context.

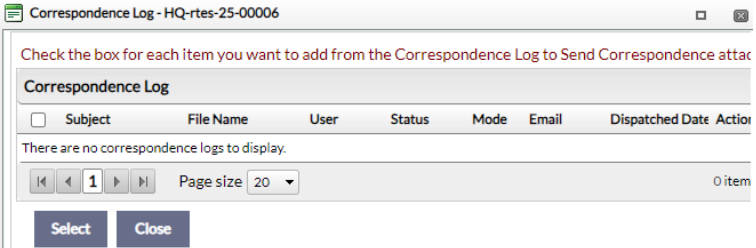
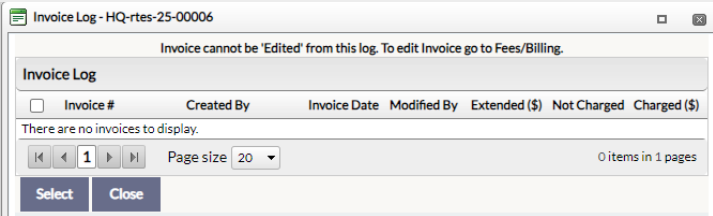
Attachments to RFD	
Add From	
Memo Template	
Pending Memo (0)	
Disk	
Correspondence Log	
Invoice Log	

Requests for Documents

Action	Description	Image
Memo Template	Select an Action Office and a Memo Template. You'll have the option to customize the template if needed.	
Pending Memo	If a pending memo is available, you can select it from the drop-down list and customize it.	
Disk	Use the <i>Drag and Drop</i> zone or click Upload Attachment to upload a file from your computer. When you're done, click Add to List .	



Requests for Documents

Action	Description	Image
Correspondence Log	Select an item from the Correspondence Log, then click Select to add it to the RFD.	
Invoice Log	Select an invoice from the Invoice Log, then click Select to add it to the RFD.	 <p>Note: You cannot edit the Invoice at this step. To edit an invoice before sending it with the RFD, navigate to the Fees/Billing section in ATIPXpress.</p>

- After adding an attachment using any of these methods, the *Attachments to RFD* list will update with your attachment(s).

New Request for Documents - Step 1

New Request for Documents - Step 2

Attachments to RFD

Add From



Memo Template

Pending Memo (0)

Disk

Correspondence Log

Invoice Log

Name	Source	Size	Delete	Replace
New for audit.docx	Template	5.27 KB	✕	
Audit Document.docx	Disk	45.84 KB	✕	

Message Options

From Email Type:

☐ User Email

☐ User Action Offline Email

☐ Other Email

- Next, configure the message the RFD recipient will receive with the request in the Collaboration Portal. First add a **Subject** for the message. You can also edit the **(B) message body** as needed.



Requests for Documents

Message Options

From Email Type*: ☒ User Email ☐ User Action Office Email ☐ Other Email

From*: shannon.murphy@opexustech.com

Template: Select Email Template

Subject*: New for audit - HQ-rtes-25-00006

To*: shannon.murphy@opexustech.com

Request for Documents for Request # 'HQ-rtes-25-00006': Due Date: 10/04/2024.

Previous Send Message

- When you're ready to submit the request, click **(C) Send Message**. A pop up message appears to confirm sending the RFD. Click **OK** to continue.
- The *Job Progress* window will appear. You can wait on this screen until the job is complete, or you can click **Close Window**.

Note: If the job fails, you'll receive an email notification.

Job Progress

4846 - Progress

Wait for the job to process or close the window. If you click the Close Window button, you may need to refresh your screen to update results.

Job Progress Information Job Status: Pending

Current Action : Job not started.

Close Window

Note: If the job fails an email notification will be sent.

- The *Request for Documents* screen refreshes with the new RFD included on the list.

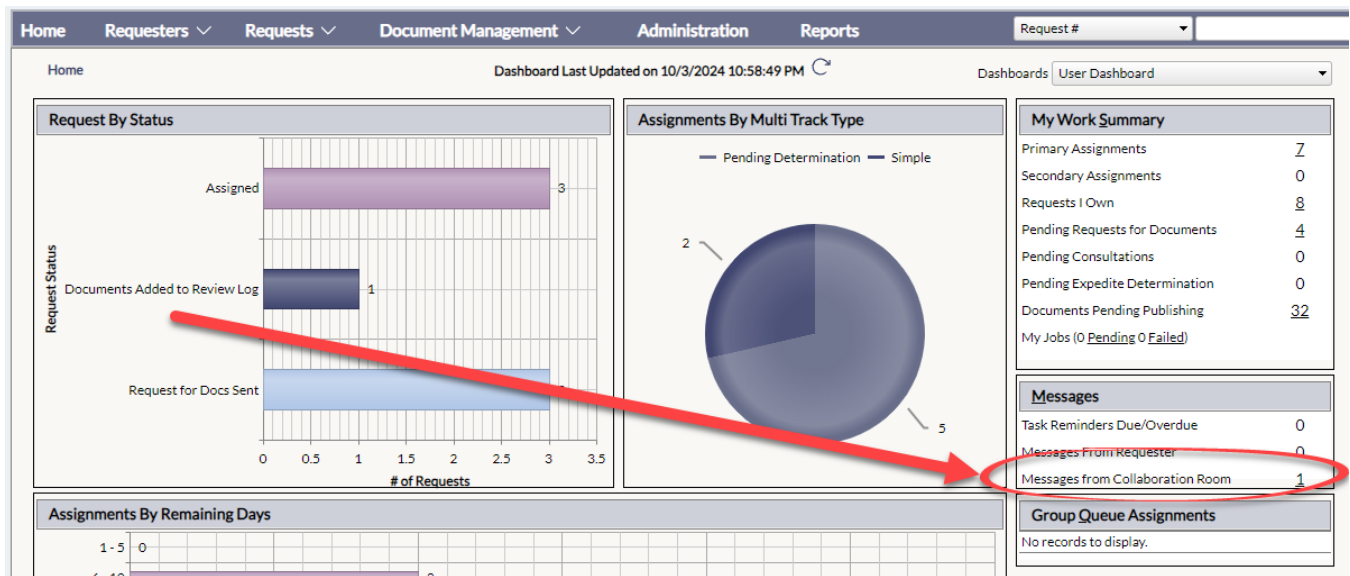


Request for Documents						
Action ID	Location(s) Referred	Sent By	Sent Date	Due Date	Completed Date	Status
111	Shannon PO (shannon.murphy@opexustech.com)	Collaboration	09/18/2024	09/18/2...		Request for Docum...
<div> <div>1</div> <div>Page size: 20</div> <div>1 items in 1 pages</div> </div>						
New	Take Action	View	Delete	Messages (0/1)	Send Email/Reminder	Send Reminder by Print
Action(s) Log						

2.2 Receiving Responses from Collaboration

When you receive a response to your RFD from a collaborator, the easiest point of access is via your *Messages* on the Home Page. Follow the steps below to receive records provided from the portal.

1. Click **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages.



2. The *Collaboration Messages* screen appears as shown below. Click the message you'd like to open, then click **View Message**.

Collaboration Messages					
Subject	Requester	Subject	Message	Received Date	Program Office
25-FOI-00071	Requester, Non PAL	25-FOI-00071 - Request for Docu...		9/18/2024	Shannon PO
<div> <div>1</div> <div>Page Size: 20</div> <div>1 items in 1 pages</div> </div>					
<div> <div>Refresh</div> <div>Print</div> <div>Print All</div> <div>Export</div> <div>View Message</div> <div>Reply</div> <div>Mark as Read</div> <div>Go To Request</div> </div>					

3. The *Message from Collaboration* screen displays the message contents. You'll see the message subject, body text, and, most importantly, the RFD documents in the *Attachments* list.



Requests for Documents

Message from Collaboration

Message Details

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

Body:

Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 Quick Reference Guide.docx	929.26 KB	Yes	No

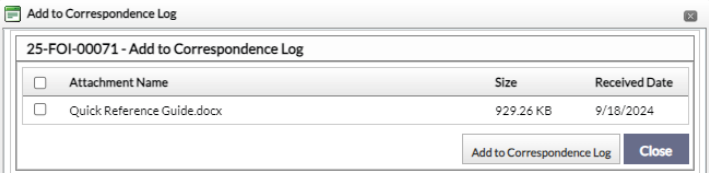
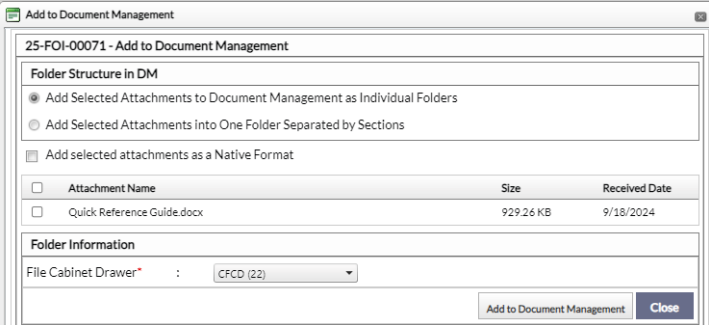
[Add to Review Log](#)
[Add to Correspondence Log](#)
[Add to Document Management](#)
[Close](#)

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

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



Requests for Documents

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

- Once you've moved the attachments, the action is reflected on the *Message Details* screen as shown below:



Requests for Documents

Message from Collaboration

Message Details

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

Body:

Attachments:

	File Size	Added To Correspondence Log	Added To Document Mgmt
1 Quick Reference Guide.docx	929.26 KB	Yes	No

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

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

Home Requesters Requests Document Management Administration Reports Request#

Home >> Collab Messages

Collaboration Messages

Subject	Requester	Subject	Message	Received Date	Program Office
25-FOI-00071	Requester, Non PAL	25-FOI-00071 - Request for Docume...		9/18/2024	Shannon PO

Page Size: 20

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

7. Click (A) **Request for Documents**, then select the request you just completed and click (B) **Take Action**:

Home >> Collab Messages >> 25-FOI-00071 - Request

FOIA - Request: 25-FOI-00071 Remaining Days: 20 Status: Documents Added to Review Log Next

Request Information

Assign Users

Set Perfect Status

Correspondence

A Request for Documents (0/1)

Add/Search/View Documents (1/0)

Fees/Billing

Request for Documents

Action ID	Location(s) Referred	Sent By	Sent Date	Due Date	Completed Date	Status
111	Shannon PO (shannon.murphy@opexustech.com)	Collaboration	09/18/2024	09/18/2...		Message or Submis...

Page size: 20

B New Take Action delete Messages (1/2) Send Email/Reminder Send Reminder by Print Action(s) Log

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



Requests for Documents

Request For Documents Action - FOIAExpress

New Action - Request for Documents -111

Location : Shannon PO (shannon.murphy@opexustech.com)

Action Date* : 9/18/2024

Status : **Completed**

Comments :
Denied in Full
Direct Reply
Documents Located
Granted in Full
Granted in Part
Message or Submission Received
No Documents Located
No Relevant Info
Other
Over Due
Partial Documents Found
Referral
Request for Documents Pending
Request for Documents Sent
Request on Hold
Request Withdrawn
Search Complete
Sent Reminder by Email
Sent Reminder by Print
Status Check

Due Date* :
Attach File
Print Barcode

Attachment :
Drop Zone

Save Cancel

Note: * fields are mandatory

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

Due Date* : 9/18/2024

☒ Completed

Completed Date* : 10/3/2024

10. Click **Save** to save the action. The status updates to *Completed*, and the RFD will update on Collaboration Portal to let the portal user know the task is complete.

Request for Documents						
Action ID	Location(s) Referred	Sent By	Sent Date	Completed Date	Status	
111	Shannon PO (shannon.murphy@opexustech.com)	Collaboration	09/18/2024	09/18/2024	09/18/2024	Completed

Page size: 20 1 items in 1 pages

New Take Action View Delete Messages(0/0) Send Email/Reminder Send Reminder by Print Action(s) Log

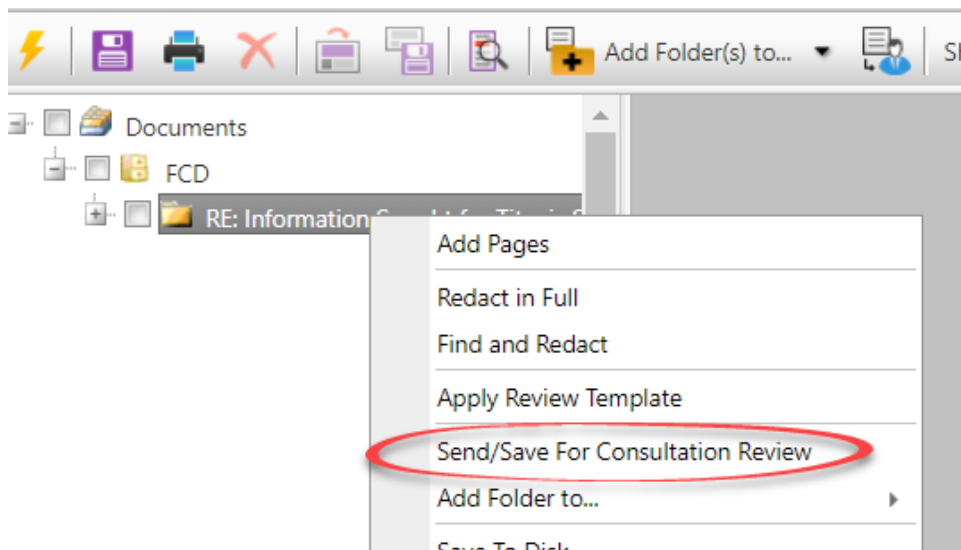


3 Consultation Reviews

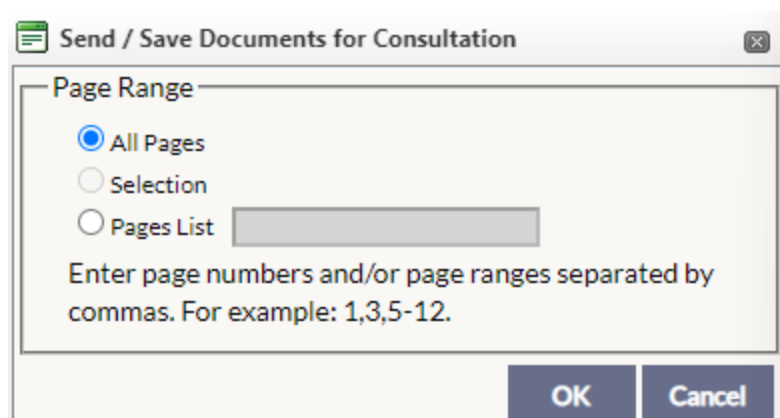
3.1 Send Documents for Consultation Review

Another use for the Collaboration Portal is to send documents for Consultation Review to a collaborator who does not have access to ATIPXpress. Follow the steps below to send documents for consultation via the Collaboration Portal:

1. First, navigate to the folder with the document(s) you'd like to send and open it in Document Management. Once you're in Document Management, locate the document/folder in the document tree and load any review layer you'd like to include.
2. Right click the document/folder and click **Send/Save for Consultation Review**:



3. Next, select the page range you'd like to include. You can select **All Pages**, or include a **Pages List**. Then, click **OK**.



4. The *Send/Save Documents for Consultation* screen opens. First, under *Consultation Type*, you must select **Send via Collaboration Room**. This ensures the request is sent to the portal for consultation review:

Send/Save Documents for Consultation

Consultation Contact

Consultation Type: **Send via Collaboration Room**

Review Information

Request ID: [Field]

Review Due Date *: 10/19/2023 [Calendar Icon]

Comments: [Text Area]

☐ Add Reminder

Task: [Dropdown]

Include Document Review Flags: All [Dropdown]

Reviewers Information

Include Co: ☐ Include Co

Select a M: [Field]

Include Review: ☐ Comment, ☐ Highlight

5. To associate this consultation with a Request, click the **lookup** button.

Review Information

Request ID: HQ-rtes-25-00006 [lookup] [X]

Review Due Date *: 10/19/2023 [Calendar Icon]

- a. To locate a specific request, fill out the **Search Criteria**, then click **Search**. To view a list of all requests, click **Search** without filling out the criteria fields.

Consultation Reviews

Requests View [Search]

Requests Wild card searches (*) are supported

Search Criteria

Request # : Action Office : ... X

Request Type : Request Status :

Requester : ... X Request Owner : ... X

Description : ?

— Advanced

	AND	Field	Operator	Value
X	AND	Requester First Name	=	<input type="text"/>
X	AND	Requester Last Name	=	<input type="text"/>
X	AND	Requester Organization	=	<input type="text"/>

[Add new filter](#)

+ Custom Fields Custom Fields that are common across the selected Request Types are displayed

- b. Scroll down to view the *Requests* list. Select the (A) request you want to associate with the consultation, then click (B) **Select**.

Requests View [Search]

Request #	Request Type	Requester	Primary User	Received Date	Target Date	Remaining Days	Request Status
HQ-rtes-25-00...	requesttst	Geary, Scott	Murphy, Shannon	10/03/2024	11/01/2024	19	Assigned
HQ-rtes-25-00...	requesttst	Geary, Scott	Murphy, Shannon	10/03/2024	11/01/2024	19	Assigned
HQ-rtes-25-00...	requesttst	Geary, Scott	Murphy, Shannon	10/02/2024	10/31/2024	18	Request...
HQ-rtes-25-00...	requesttst	Geary, Scott	Murphy, Shannon	09/26/2024	10/25/2024	14	Request...
HQ-rtes-25-00...	requesttst	Geary, Scott	Murphy, Shannon	09/26/2024	10/25/2024	14	Request...
2025-CON-000...	Consultation	Requester, Non ...	Murphy, Shannon	09/18/2024	10/17/2024	8	Assigned
25-FOI-00071	FOIA	Requester, Non ...	Murphy, Shannon	09/18/2024	10/17/2024	8	Docume...

Page Size 20 s in 1 pages

6. The page will refresh to the *Send/Save Documents for Consultation* page, with the **Request ID** populated.



Consultation Reviews

Send/Save Documents for Consultation

Consultation Contact

Consultation Type: Send via Collaboration Room

Redaction is e
Any changes t

Review Information

Request ID: HQ-rtes-25-00006

Review Due Date *: 10/4/2024

Comments:

☐ Include Correspondence

☐ Select a Memo

7. Now, you can continue filling out the remaining fields. You can opt to include document review flags.

Include Document Review Flags *: ☐ All

☐ Not reviewed

☐ Release after Consultation

8. In the *Reviewers Information* section, select an eligible **Consultation Location**.

Reviewers Information

Location(s) Referred: * HQ NAME

Program Office Name: * Search

Create Consultation Location

<input type="checkbox"/>	Consultation Location	Contact Name	Phone Number	Email
<input type="checkbox"/>	EricPO	S, Erick		
<input type="checkbox"/>	HQ PO	M, AMbica		amekala@ains.com
<input checked="" type="checkbox"/>	John PO	Gatewood, John		john.gatewood@opexustech.com
<input type="checkbox"/>	New PO	Test, Test		nsoileau@ains.com
<input type="checkbox"/>	OPXQA	Gandham, Sailendra	301-670-2300	

9. Under *Email Template*, use the drop-down menu to select a template for the consultation message.

Email

Email Template: email extension

Customize

- a. If you'd like to make edits to the template, click **Customize**. You'll be able to customize the email *Subject* and *Body* on the *Customize Email Template* page.



Customize Email Template

Subject* memo

Email Body*

text

Save Cancel

Note: * fields are mandatory

b. When you're finished editing the template, click **Save**.

10. If the documents you're sending contain redactions, you can pin review objects to hide sensitive information from collaborators. Use the *Pin certain objects for the recipients* section to select which type(s) of review objects you'd like to lock.

Note: Locking notes, comments, ellipses, or opaque redactions will hide the content underneath these objects if moved when reviewed in Collaboration.

☒ 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

11. Next, you can configure the *Redactions Fill Mode*. Use the drop-down menu to select how the redactions are displayed in Collaboration Portal, including opaque, translucent, or transparent. You can also use the checkboxes to hide codes and/or redaction borders.

Redactions

Fill Mode: Original ⓘ

☒ Hide Codes ☒ Hide Redaction Borders

12. Once you've configured all applicable details on the *Send/Save Documents for Consultation* screen, click **OK** to continue.



Consultation Reviews

Reviewers Information

Location(s) Referred: * HQ NAME

Program Office Name: *

<input type="checkbox"/>	Consultation Location	Contact Name	Phone Number	Email
<input type="checkbox"/>	EricPO	S, Erick		
<input type="checkbox"/>	HQ PO	M, AMbica		amekala@ains.com
<input checked="" type="checkbox"/>	John PO	Gatewood, John		john.gatewood@opexustech.com
<input type="checkbox"/>	New PO	Test, Test		nsoileau@ains.com
<input type="checkbox"/>	OPXQA	Gandham, Sailendra	301-670-2300	

Email

Email Template: Autosave Memo

☒ Pin certain objects for the recipients ¹

☒ Comments Box ☒ Ellipse ☒ Screenshot Line

☒ Highlight ☒ Stamp ☒ Sticky Note

Redactions

Fill Mode: Original


☒ Hide Codes ☒ Hide Redaction Borders

13. The *Job Progress* window will appear. You can wait on this screen until the job is complete, or you can click **Close Window**.

Note: If the job fails, you'll receive an email notification.

Job Progress

4846 - Progress



Wait for the job to process or close the window. If you click the Close Window button, you may need to refresh your screen to update results.

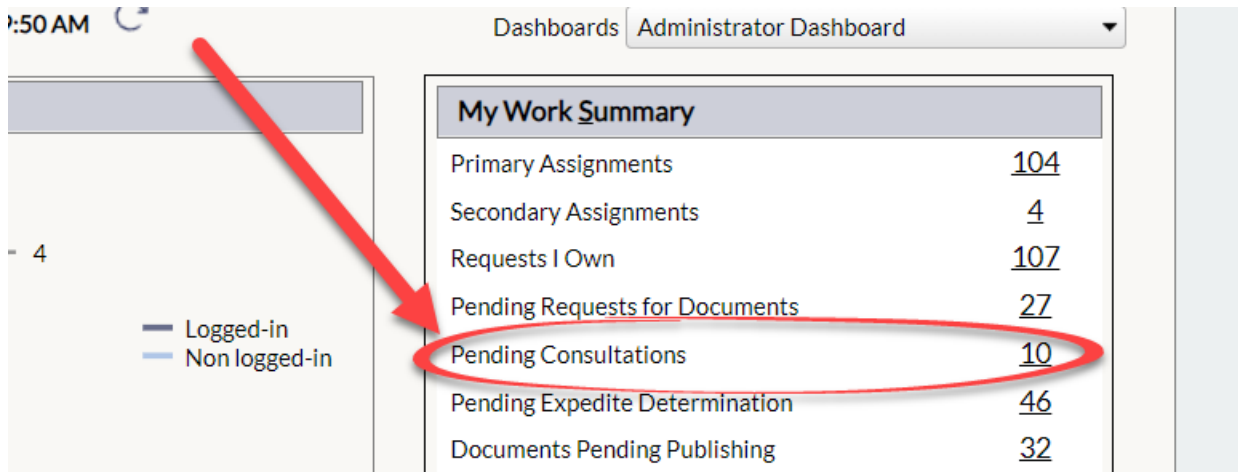
Job Progress Information Job Status: Pending

Current Action : Job not started.

Note: If the job fails an email notification will be sent.

14. When the job is finished processing, the consultation is sent to the portal. You can view the consultation from the *My Work Summary* section of the Home Page by clicking **Pending Consultations**:





9:50 AM

Dashboards Administrator Dashboard

My Work Summary

Primary Assignments	104
Secondary Assignments	4
Requests I Own	107
Pending Requests for Documents	27
Pending Consultations	10
Pending Expedite Determination	46
Documents Pending Publishing	32

4

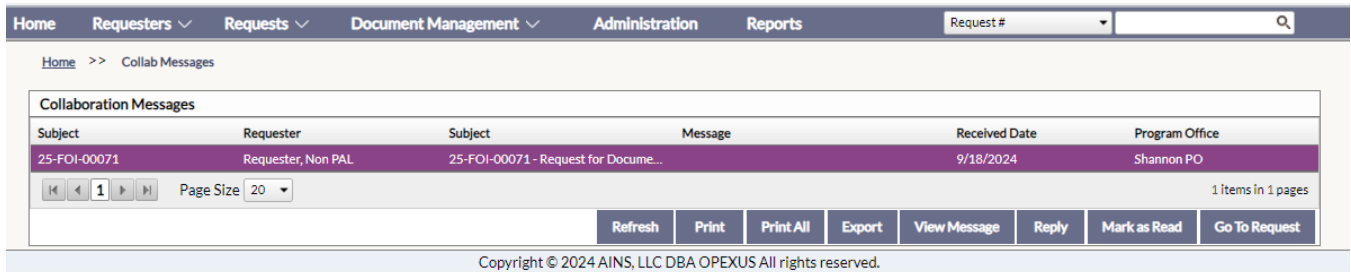
— Logged-in
— Non logged-in

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

3.2 Receiving a Consultation Review

When you receive a response to a consultation review sent via the Collaboration Portal, the easiest point of access is via your *Messages* on the Home Page. Follow the steps below to receive records provided from the portal.

1. Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:



Home Requesters Requests Document Management Administration Reports Request #

Home >> Collab Messages

Collaboration Messages

Subject	Requester	Subject	Message	Received Date	Program Office
25-FOI-00071	Requester, Non PAL	25-FOI-00071 - Request for Docume...		9/18/2024	Shannon PO

Page Size 20 1 Items in 1 pages

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

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2. Select the new message and click **View Message**:

Consultation Reviews

Message from Collaboration

Message Details

Subject : 25-FOI-00024 - Consultation Response

Body:

test

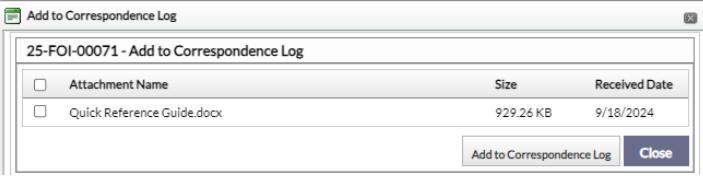
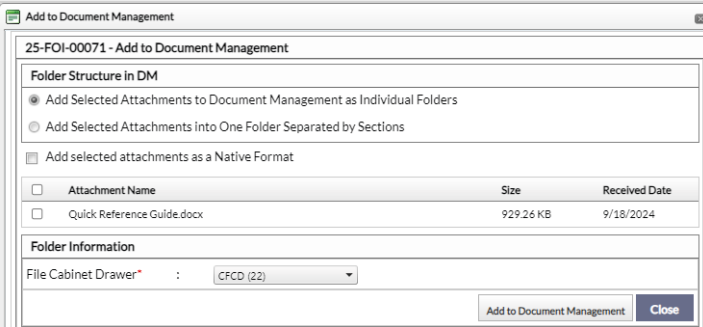
Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 'Document for Redaction' of 'RFD - 56'.pdf	51.65 KB	No	No

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

Action	Description	Image						
Add to Review Log	<p>Add the attachments to the Review Log of the request for further processing.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	<p>The 'Add to Review Log' dialog box shows the following options:</p> <ul style="list-style-type: none"> Folder Structure in DM: <ul style="list-style-type: none"> <input checked="" type="radio"/> Add Selected Attachments to Document Management as Individual Folders <input type="radio"/> Add Selected Attachments into One Folder Separated by Sections <input type="checkbox"/> Add selected attachments as a Native Format Attachment List: <table border="1"> <thead> <tr> <th>Attachment Name</th> <th>Size</th> <th>Received Date</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Quick Reference Guide.docx</td> <td>929.26 KB</td> <td>9/18/2024</td> </tr> </tbody> </table> Folder Information: <p>File Cabinet Drawer* : CFCD (22)</p> <p>Buttons: <input type="button" value="Add to Review Log"/> <input type="button" value="Close"/></p>	Attachment Name	Size	Received Date	<input type="checkbox"/> Quick Reference Guide.docx	929.26 KB	9/18/2024
Attachment Name	Size	Received Date						
<input type="checkbox"/> Quick Reference Guide.docx	929.26 KB	9/18/2024						



Consultation Reviews

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

- Once you've moved the attachments, the action is reflected on the *Message Details* screen as shown below:



Consultation Reviews

Message from Collaboration

Message Details

Subject : 25-FOI-00024 - Consultation Response

Body:

test

Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1. 'Document for Redaction' of 'RFD - 56'.pdf	51.65 KB	Yes	No

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

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

9:50 AM

Dashboards Administrator Dashboard

My Work Summary

Primary Assignments	<u>104</u>
Secondary Assignments	<u>4</u>
Requests I Own	<u>107</u>
Pending Requests for Documents	<u>27</u>
Pending Consultations	<u>10</u>
Pending Expedite Determination	<u>46</u>
Documents Pending Publishing	<u>32</u>

4

— Logged-in
— Non logged-in

6. Select the request you just completed and click **Take Action**:



Consultation Reviews

Admin, Admin/26	HQ PO	25-FOI-00029	07/16/2024	07/16/2024
Admin, Admin/11	HQ PO	25-FOI-00024	07/08/2024	07/08/2024
Admin, Admin/8	HQ PO	HQ-t112-25-00001	06/26/2024	06/26/2024
Admin, Admin/4	HQ PO	2024-APP-00004	01/29/2024	01/29/2024
Admin, Admin/3	HQ PO	24-FOI-00057	01/29/2024	01/29/2024

Page Size 10

View Details

Delete

Take Action

Messages

Send Reminder by Email

Send Reminder by Print

- On the *Take Action* screen, under *Status* select **Review Complete**.
- Check the **Completed** checkbox and enter the **Completed Date**.

FOIAXpress

New Action - Consultation Review Log -11

Location : HQ PO

Action Date* : 9/19/2024

Status* : Review Complete

Import

Comments :

Due Date* : 7/8/2024

☒ Completed

Completed Date* : 9/19/2024

Attachment :

Drag and Drop Zone

Attach File

Print Barcode

Save

Cancel

Note: * fields are mandatory

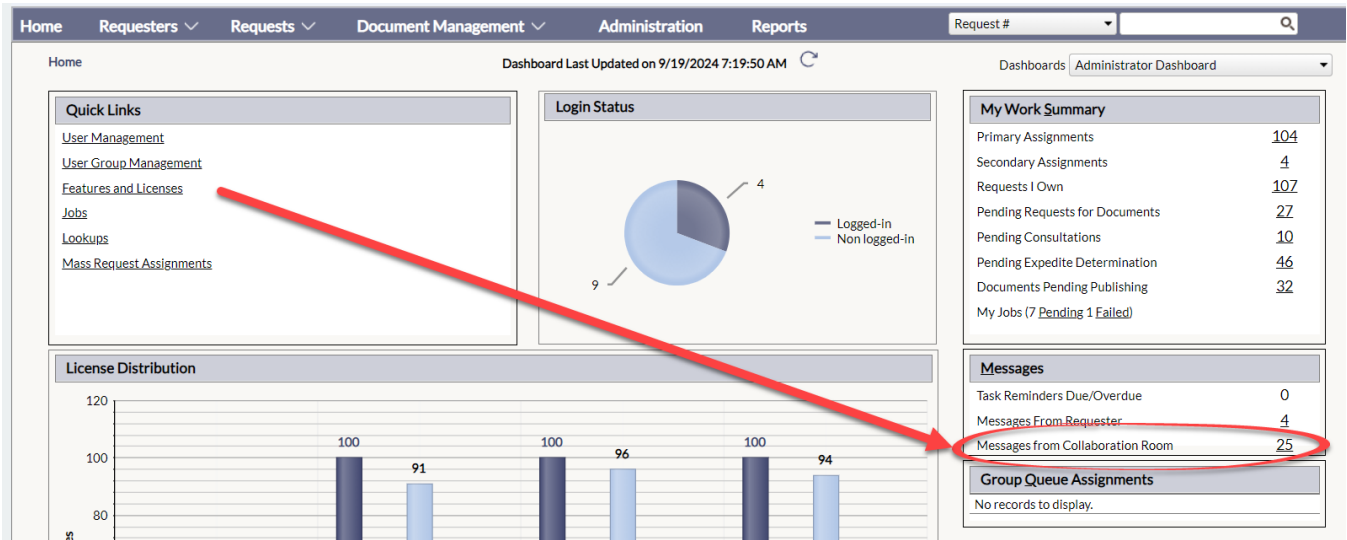
- Click **Save** to save the action.

28

4 Correspondence

You can use the *Messages* feature to communicate with Portal users. Keep an eye on the *Messages* widget on the Home Page, where you can view **Messages from Collaboration Room**.

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



- 2. The *Collaboration Messages* screen appears as shown below. The screen includes a (A) list of messages received from the Collaboration Portal, as well as (B) Actions you can take on the messages.

Collaboration Messages					
Subject	Requester	Subject	Message	Received Date	Program Office
2025-FOIA-00019	Solano, Erick	2025-FOIA-00019 - Consultation Res...		9/18/2024	John PO
2025-FOIA-00019	Solano, Erick	Request ID # 2025-FOIA-00019 - Me...	sample	9/18/2024	John PO
2025-APP-00004	PALtest, Appeal	2025-APP-00004 - Request for Docu...	tu	8/8/2024	HQ PO
25-FOI-00039	Bug, Juan	25-FOI-00039 - Request for Docume...	Test	7/24/2024	HQ PO
25-FOI-00039	Bug, Juan	25-FOI-00039 - Request for Docume...	test	7/24/2024	HQ PO
2025-APP-00004	Appeal	2025-APP-00004 - Request for Docu...		7/18/2024	HQ PO
25-FOI-00038		25-FOI-00038 - Request for Docume...	Test	7/18/2024	HQ PO
25-FOI-00039		25-FOI-00039 - Request for Docume...		7/17/2024	HQ PO
25-FOI-00038		25-FOI-00038 - Request for Docume...		7/17/2024	HQ PO
25-FOI-00029		25-FOI-00029 - Response		7/17/2024	HQ PO

A

B

1 2 3

Page Size 10

25 items in 3 pages

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

4.1 View Message Details

To view contents and details of a message, select it from the list and click **View Message**:



Correspondence

The screenshot shows a window titled "Message from Collaboration". Inside, there's a "Message Details" section with "Subject : 25-FOI-00024 - Consultation Response" and "Body: test". Below this is an "Attachments:" section showing one file: "1. 'Document for Redaction' of 'RFD - 56'.pdf" with a "File Size" of "51.65 KB". To the right of the attachment list are three buttons: "Add to Review Log", "Add to Correspondence Log", and "Add to Document Management", each with a red circle containing a letter (A, B, C, D respectively). A "Close" button is at the bottom right.

The *Message Details* includes the message *Subject* and *Body*. If the message includes any (A) *Attachments*, you can (B) **Add to Review Log**, (C) **Add to Correspondence Log**, or (D) **Add to Document Management**.

4.2 Reply to a Message

To respond to the Portal message, select your message from the list and click **Reply**.

The (A) *Original Message* is present in the top portion of the screen. Enter your response in the *Compose Message* fields, providing both the (B) **Subject** and (C) **Body**, as well as (optionally) any *Attachments*. When you're ready to send it, click (D) **Send**:

The screenshot shows the "Message from Collaboration" window with two main sections. The "Original Message" section at the top shows "Subject : 25-FOI-00024 - Consultation Response" and "Body : test", with a red circle 'A' next to it. Below is the "Compose Message" section. It has a "Subject*" field with a "Re:" label and a red circle 'B' next to it. The "Body*" field is a large text area with a red circle 'C' next to it. Below the body field is an "Attachment :" section with "Attach From Disk" and a "Select" button. Below that is an "OR" label and a link "Attach from Request Correspondence Log". At the bottom right of the compose section are "Send" and "Back" buttons, with a red circle 'D' next to the "Send" button. A note at the bottom left says "Note: * fields are mandatory".

