

# FOIAXpress

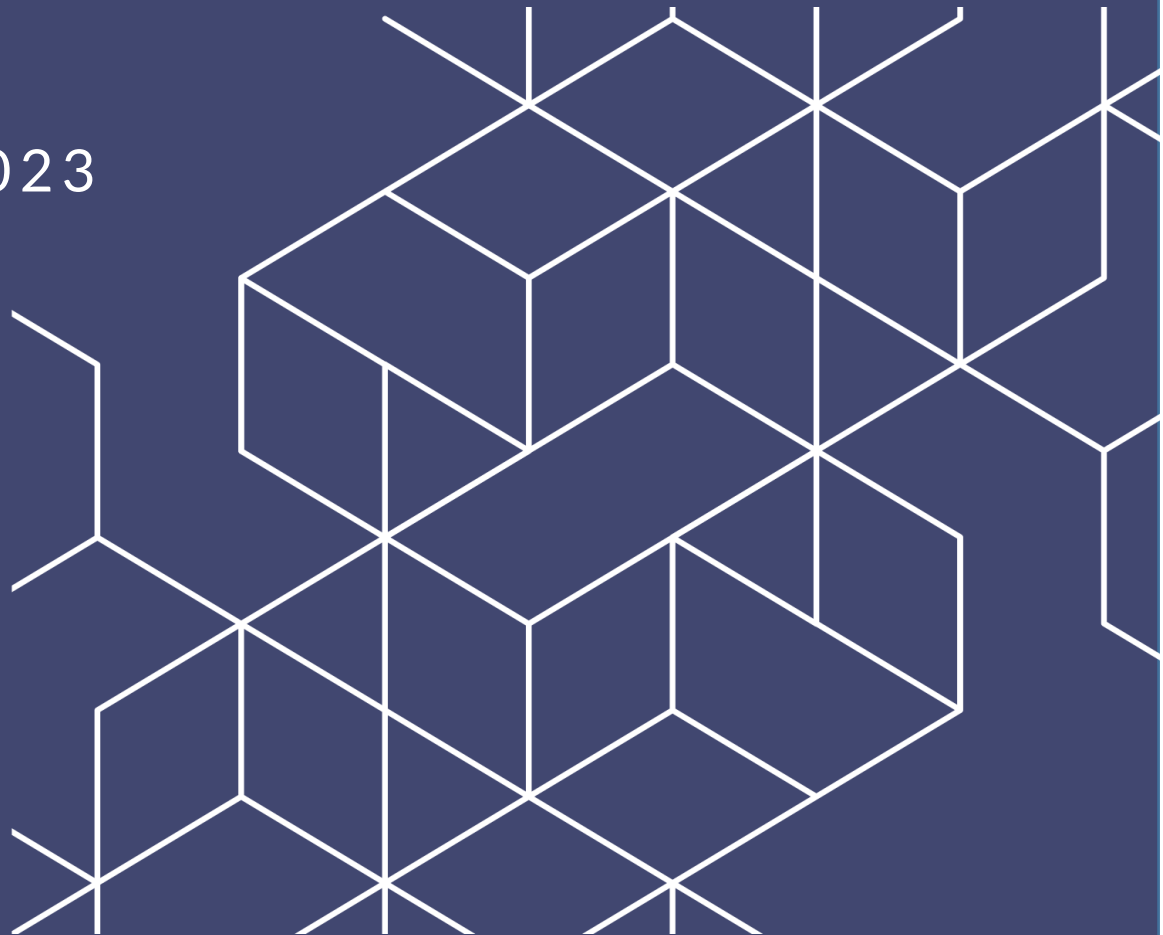


OPEXUS

## Collaboration Portal Admin Manual

v11.1.0

March 2023



# FX 11.1.0 Collaboration Portal Admin Manual

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# 1 Introduction

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

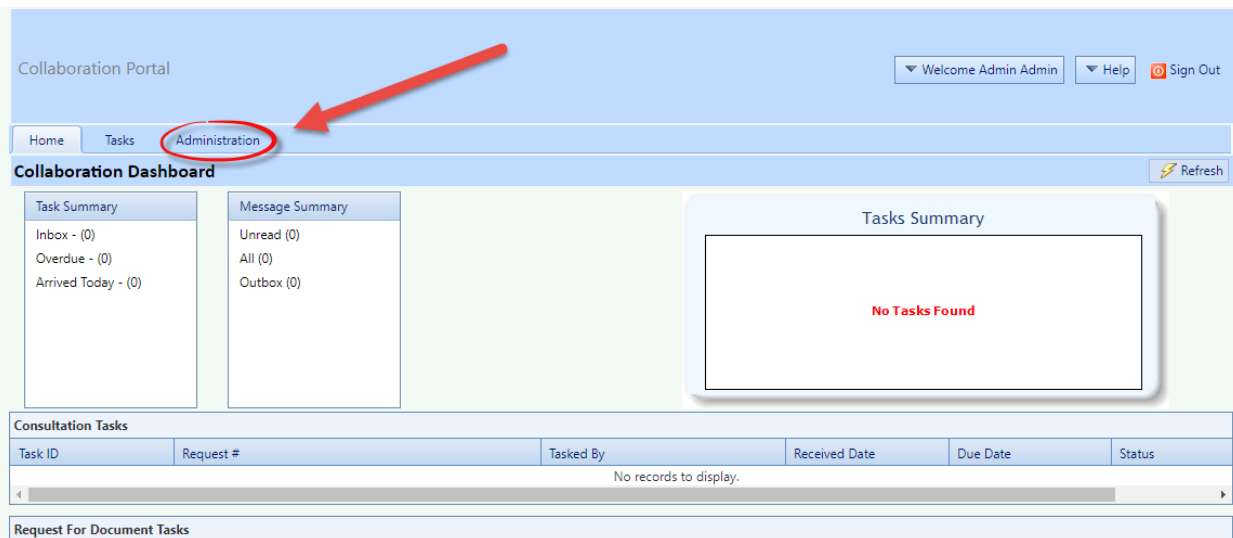
## 1.1 In This Manual

In this manual we'll discuss the following topics:

- General Administration: *General* portal configuration, and managing the portal UI through the *Application Template*
- User Management: Manage Portal users
- Security Management: Configure the Portal security options
- Email Template: View and edit system email templates
- Email Logs: Manage the system email logs
- Audit Logs: System actions are tracked in the audit log

## 1.2 Accessing Portal Administration

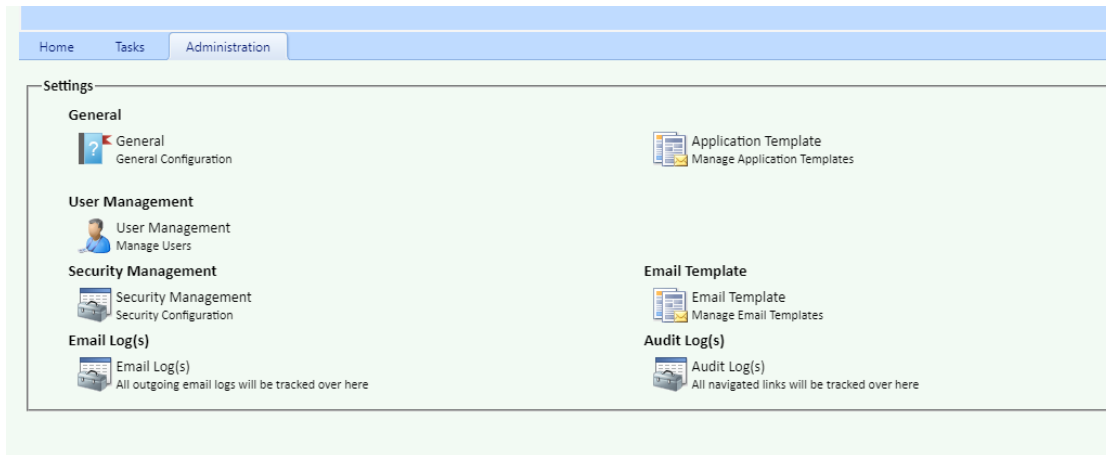
Portal users with Administrator access have an additional *Administration* tab available from the portal Home Screen. Click the **Administration** tab to access the system *Settings* screen.



The *Administration* tab is shown below. Select an option to view those configuration settings.



## Introduction



Each topic is covered in a separate section of this manual. See the following sections for details on each configuration page.

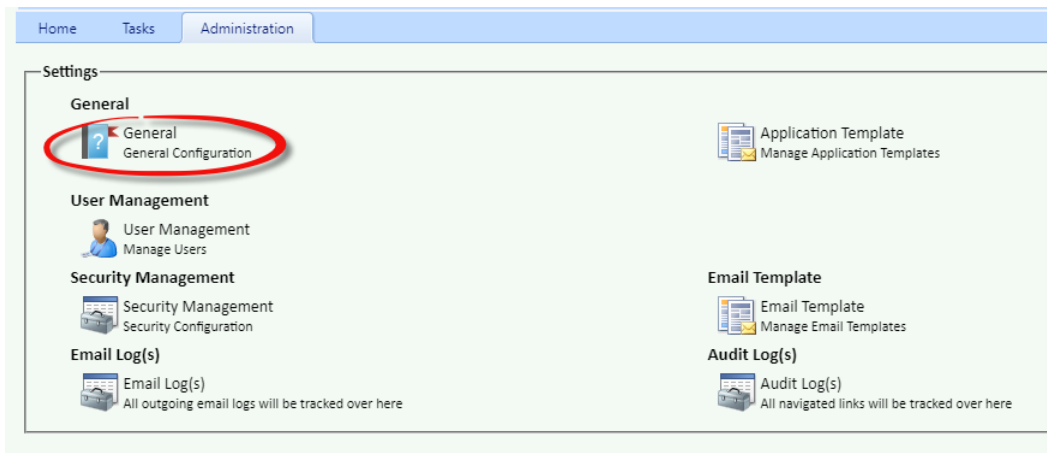


## 2 General Administration

*General* settings include the *General Configuration* and options for managing the *Application Template*.

### 2.1 General

To access the *General* settings page, navigate to the **Administration** tab, then click **General**:



General Configuration is divided into six *Tabs*. Select a (A) **Tab** to view the (B) Configuration options (*General* is shown in this example). Each tab is described in the following subsections.

A screenshot of the 'General' configuration page. The 'General' tab is selected and highlighted with a red box and a red circle labeled 'A'. The 'General' section is highlighted with a red box and a red circle labeled 'B'. The page contains several input fields for configuration. The 'Enterprise Details' section includes fields for 'Enterprise Name\*' (OPEXUS), 'Contact Name\*' (Ambica Mekala), 'Contact Email\*' (ambica.mekala@opexustec), 'Phone Number', and 'Fax'. The 'Locations' section includes fields for 'Correspondence\*' (C:\Collab\AFXWCORL\), 'Documents\*' (C:\Collab\AFXWDOCS\), and 'Temp\*' (C:\AFXWTMPL\). A 'Mail Server Address' field is partially visible at the bottom.

## 2.1.1 General Tab

To access *General*/configuration (Enterprise Details, Locations, Mail Server Address, General Settings Information, and Document Management Settings), click the **Administration** tab, then click **General**. The *General*/tab displays as shown below:

The screenshot shows the 'General' configuration window with the following sections and fields:

- Enterprise Details (A):** Includes fields for Enterprise Name\* (OPEXUS), Contact Name\* (Ambica Mekala), Contact Email\* (ambica.mekala@opexustech), Phone Number, and Fax.
- Locations (B):** Includes fields for Correspondence\* (C:\Collab\AF\XWCORL\), Documents\* (C:\Collab\AF\XWDOCS\), and Temp\* (C:\AF\XWTEMP\).
- Mail Server Address (C):** Includes fields for SMTP Mail Server\* (192.168.0.25), Port\* (25), and a checkbox for Use SMTP SSL.
- General Settings Information (D):** Includes fields for Application URL\* (https://192.168.3.104/collaboration), Application Title\* (Collaboration Portal), and Application Email\* (ambica.mekala@opexustech.com).
- Document Management Settings (E):** Includes a checkbox for Enable Document Management.

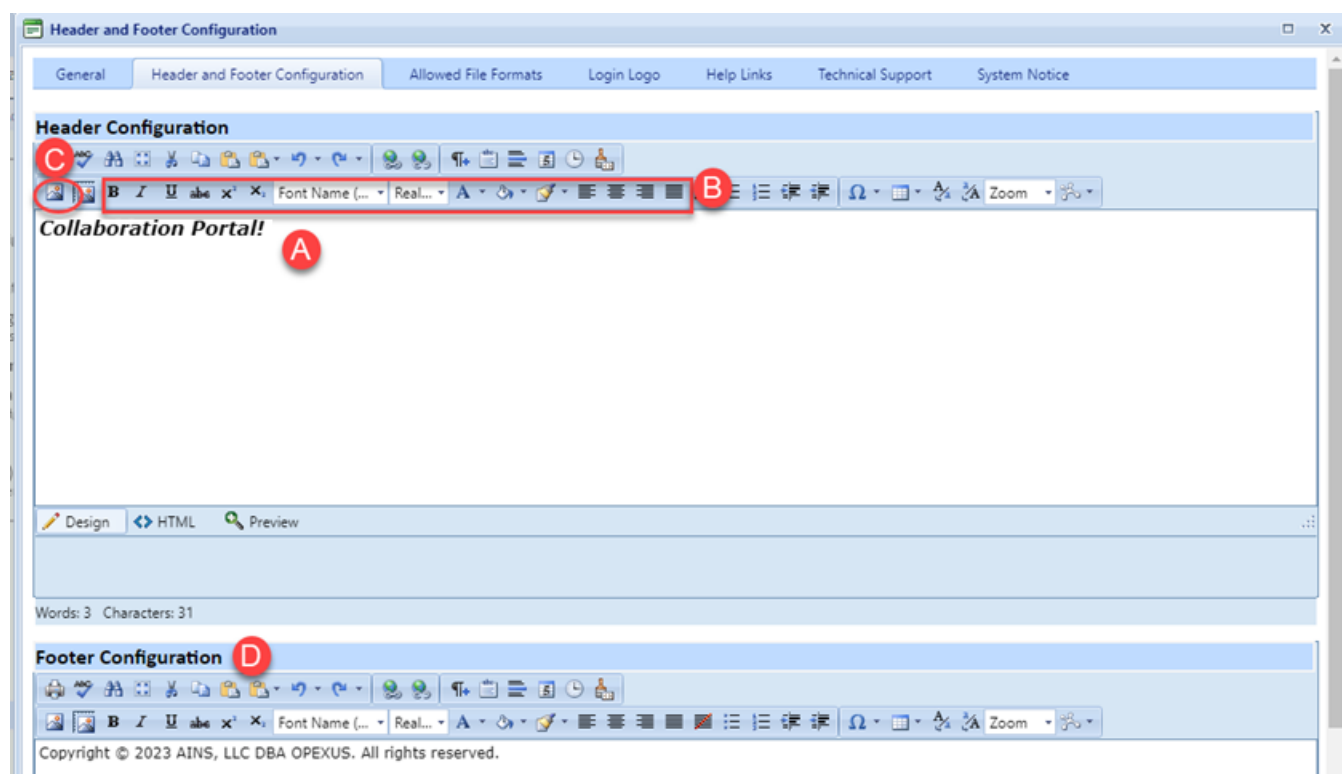
The fields are described in the following table. Click **Save** to save any changes on this tab.

Ref	Title	Description
A	Enterprise Details	Configure the Enterprise details, including the <i>Enterprise Name</i> , <i>Contact Name</i> , and <i>Contact Email</i> information.
B	Locations	Configure a disk location for storing and retrieving <i>Correspondence</i> , <i>Documents</i> , and <i>Temp</i> files.
C	Mail Server Address	Provide the <i>SMTP Mail Server</i> address, and the <i>Port</i> number for your email server.
D	General Settings Information	Configure the <i>Application URL</i> , <i>Application Title</i> , and <i>Application Email</i> as needed for your organization.

Ref	Title	Description
E	Document Management Settings	Enable Document Management for users.

## 2.1.2 Header and Footer Configuration

To access *Header and Footer Configuration*, navigate to **Administration > General**, then select the **Header and Footer Configuration** tab. The *Header Configuration* displays as shown below:

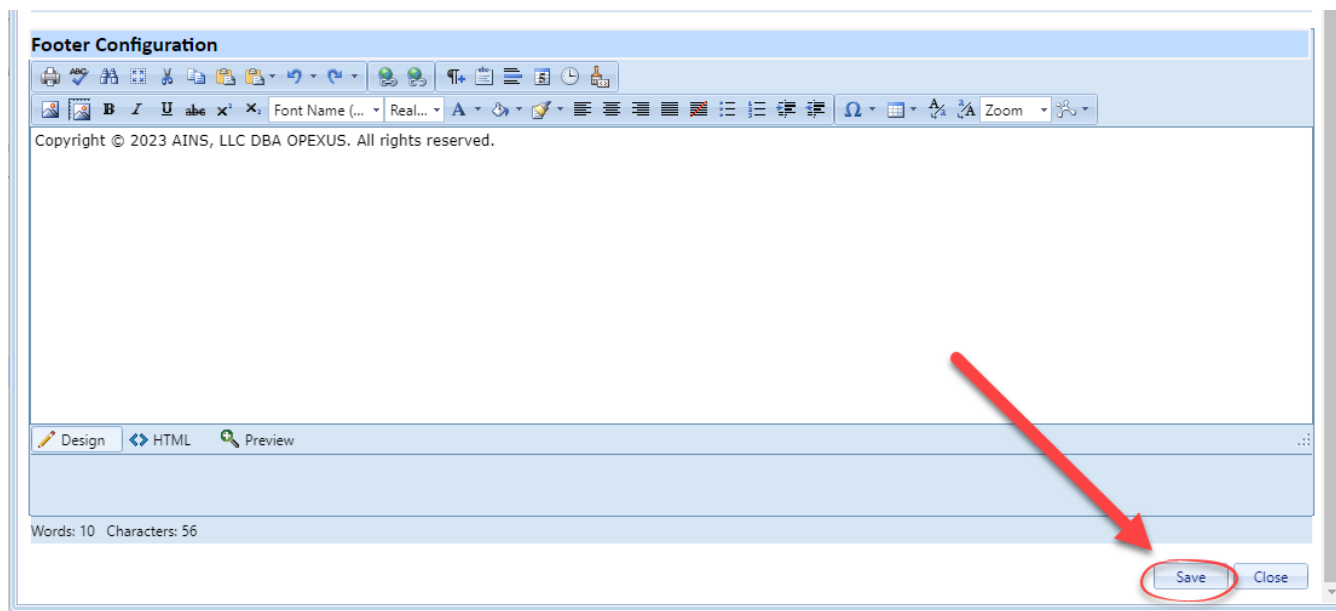


Edit the text to display in the application *Header* in the (A) *Header Configuration* field. You can format the text using the (B) *Text Controls*. Alternatively, use the (C) **Image** button to add a custom image for the header.

Scroll down to view the (D) **Footer Configuration**. Configure the footer as needed using the same options available in the *Header Configuration* above. Click **Save** to save any changes on this tab.

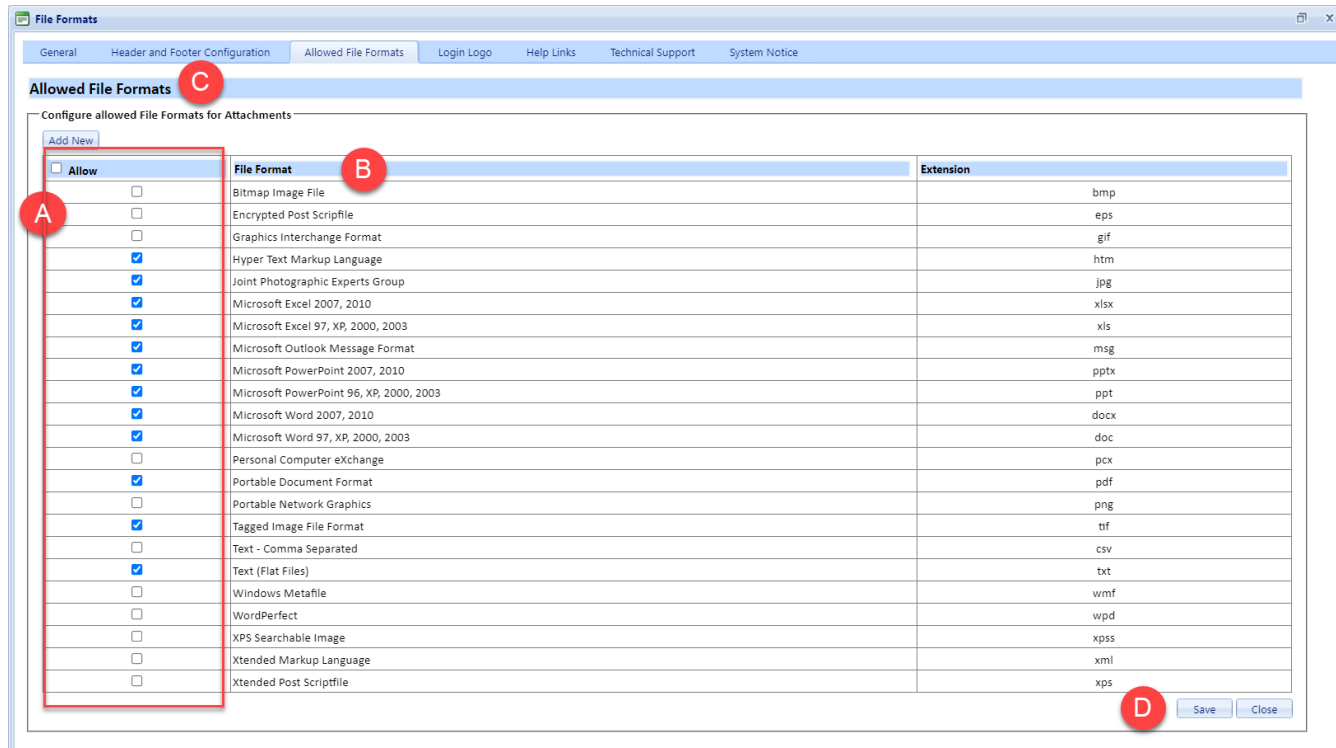






## 2.1.3 Allowed File Formats

You can configure which file types are allowed as attachments in the Collaboration Portal. To access *Allowed File Formats* configuration, navigate to **Administration > General**, then select the **Allowed File Formats** tab. The *Allowed File Formats* screen displays as shown below:



Select the (A) *checkboxes* beside the (B) *File Formats* you'd like to allow in the collaboration portal (click the **Allow** checkbox to select **All** formats). There is also the option to (C) **Add New** file formats if needed. Click (D) **Save** to save any changes to the selections on this page.

If you click **Add New** to add a new allowed format, fields appear for capturing the details as shown below:

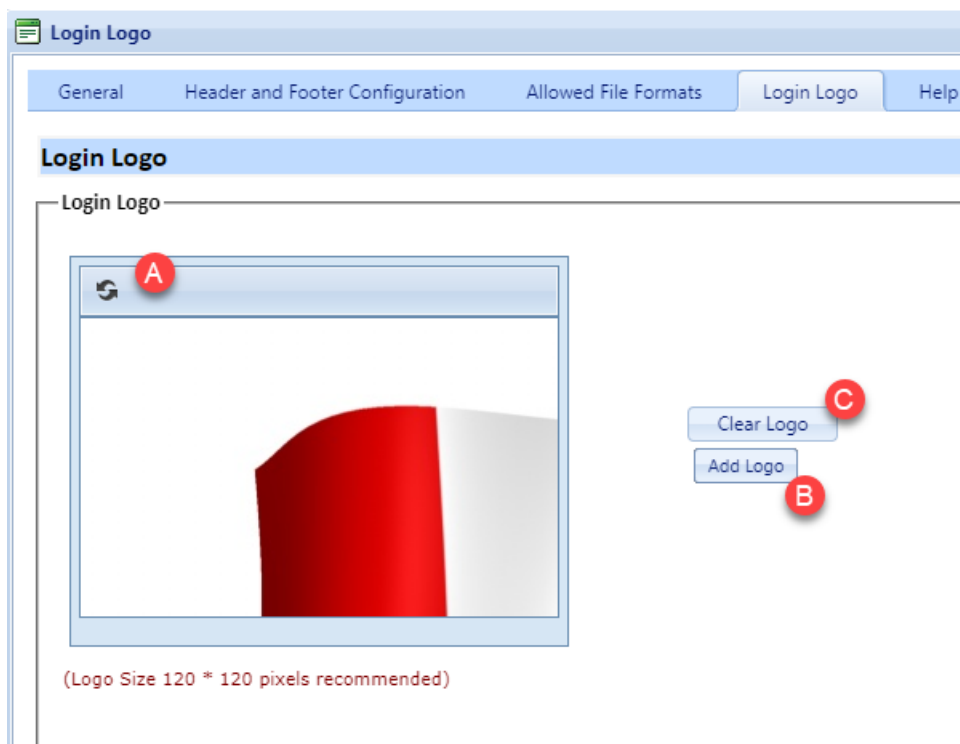


The form shows a blue button labeled "Add New" on the left. To its right is a red circle with the letter "A" above a text input field labeled "File Format". Further right is another red circle with the letter "B" above a text input field labeled "Extension". To the right of the "Extension" field is a red circle with the letter "C" above a blue button labeled "Save". A blue button labeled "Cancel" is located to the right of the "Save" button.

Enter a (A) *File Format* name and the file (B) *Extension*, then click (C) **Save** to save the new format.

## 2.1.4 Login Logo

You can configure the logo that appears on the Collaboration Portal login screen. To view or edit the *Login Logo*, navigate to **Administration > General**, then click the **Login Logo** tab. The *Login Logo* screen appears as shown below:



The screenshot shows a web application window titled "Login Logo". It has a navigation bar with tabs: "General", "Header and Footer Configuration", "Allowed File Formats", "Login Logo" (which is selected), and "Help". Below the tabs is a section titled "Login Logo". Inside this section is a large image grid labeled "Login Logo" with a red circle "A" next to a refresh icon. The grid displays a red and white abstract logo. To the right of the grid are two buttons: "Clear Logo" (with a red circle "C" next to it) and "Add Logo" (with a red circle "B" next to it). Below the grid, a note states "(Logo Size 120 \* 120 pixels recommended)".

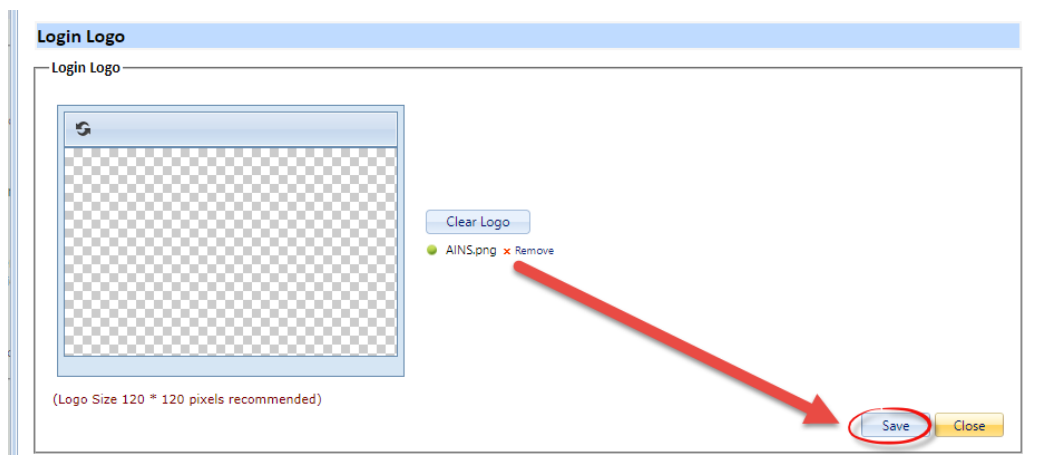
The current logo, if any, appears in the (A) **image grid**. There are also options to (B) **Add Logo** and (C) **Clear Logo** to clear the current logo.



To add a logo or switch the current logo, click **Add Logo**. An explorer window appears. Locate the logo file and click **Open** to add it. Only .png, .jpg, and .gif files are accepted for logo images.

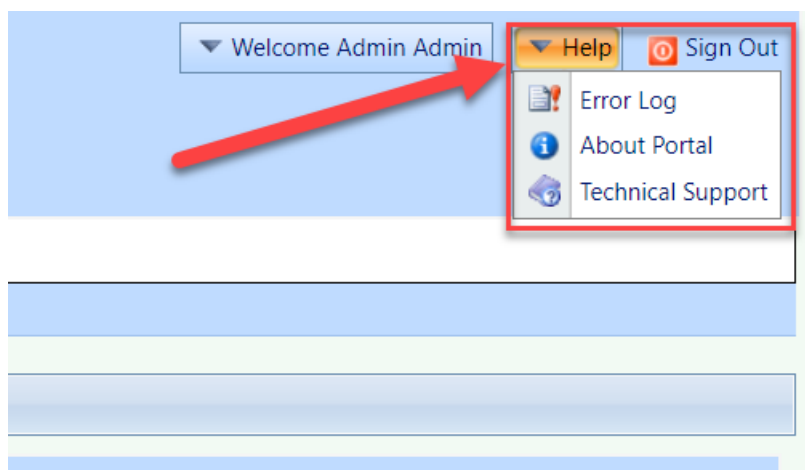
**(!!) Note: Recommend logo dimensions are 120 x 120.**

The *Login Logo* screen refreshes with the logo file name present. Click **Save** to save the logo:



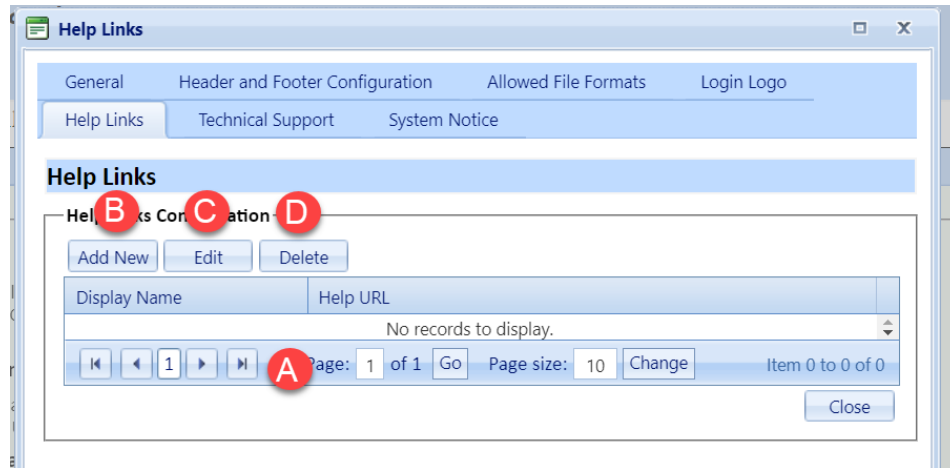
## 2.1.5 Help Links

*Help Links* configuration allows you to add custom links under the *Help* menu in the Collaboration Portal:



To configure *Help Links*, navigate to **Administration > General** then click the **Help Links** tab. A sample tab is shown below:





Existing *Help Links* (if any) are included in the (A) *Help Links* list. There are also options to (B) **Add New** help links, (C) **Edit** an existing link, or (D) **Delete** a link.

To add a new help link:

1. Click **Add New**. Fields appear to capture the new help link.

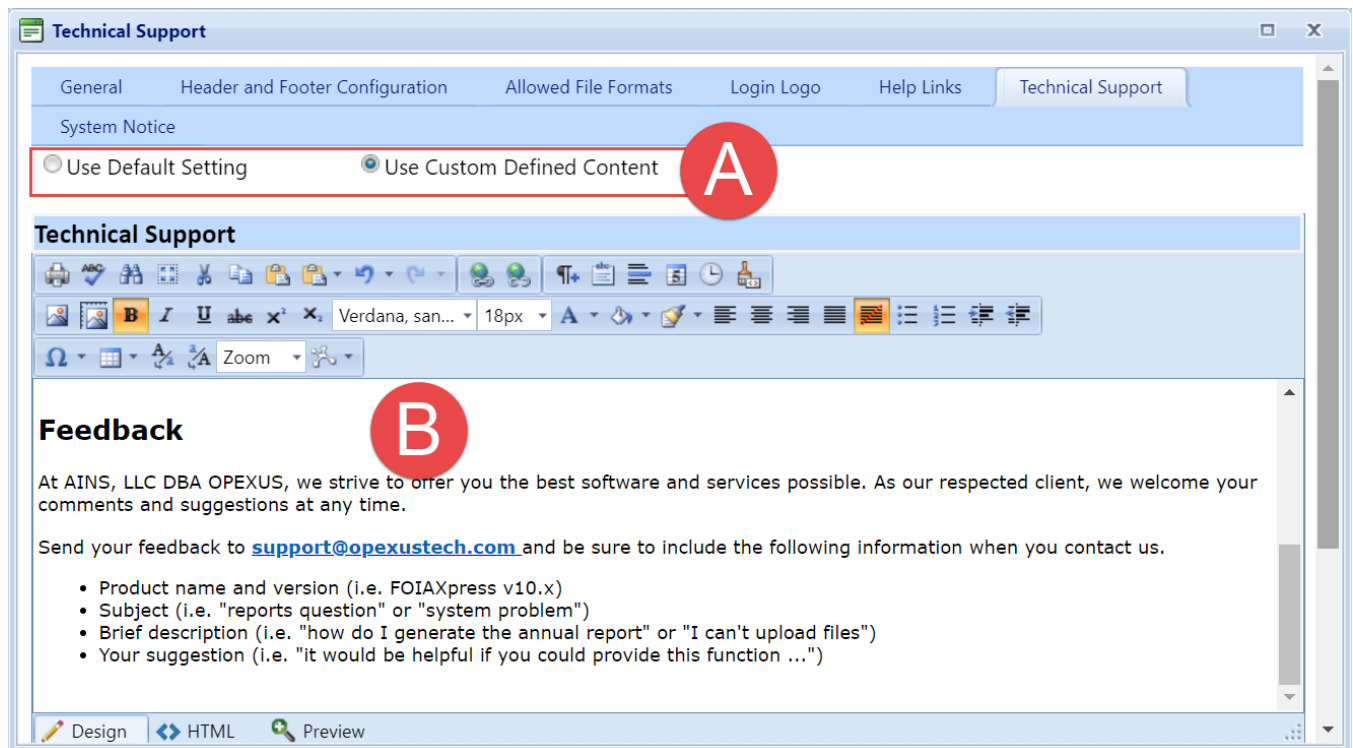
2. Provide the *Display Name* for the link, as it will appear in the *Help* menu.
3. Select whether the Help Link is a **URL** or **Attachment**.
4. If you selected **URL** in step 3, provide the help link URL in the *URL* field.
5. If you selected **Attachment** in step 3, click **Add** in the *Attachment* field to add the attachment.

6. When you've configured the new help link, click **Save** to add it to the list.

## 2.1.6 Technical Support

The Technical Support configuration allows administrators to customize the text that appears when users visit the Technical Support page (**Help > Technical Support**).

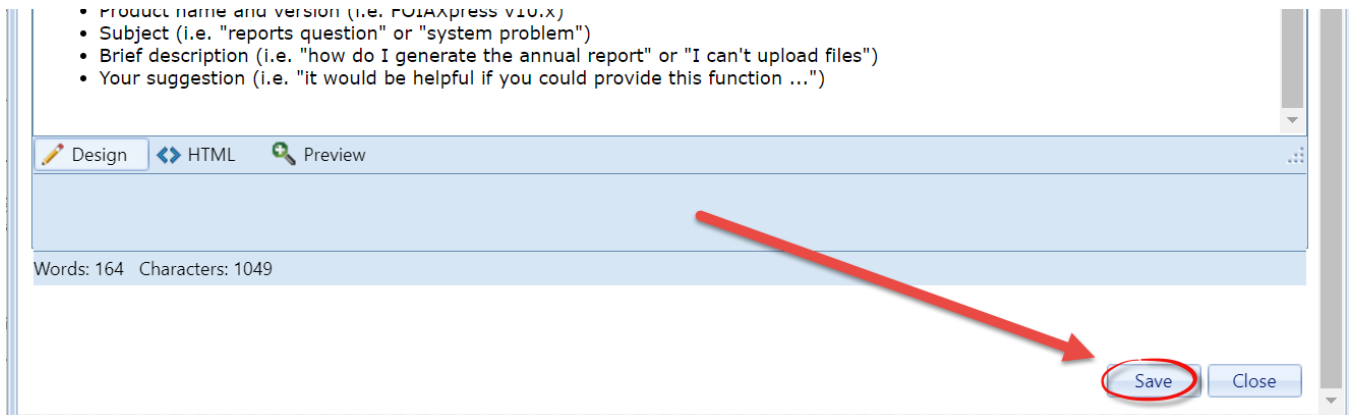
First, use the (A) Settings selections to determine if you'd like to use the default technical support information (pointing users to contact OPEXUS Support). If not, you have the option to use custom technical support details. To customize the Technical Support page, select the **Use Custom Defined Content** radio button. After selecting this button, the (B) Rich Text Editor becomes available, allowing you to edit the technical support details.



To retain any changes made to this screen, scroll to the bottom of the window, and click **Save**:



## General Administration



- Product name and version (i.e. FOIApress v10.x)
- Subject (i.e. "reports question" or "system problem")
- Brief description (i.e. "how do I generate the annual report" or "I can't upload files")
- Your suggestion (i.e. "It would be helpful if you could provide this function ...")

Design HTML Preview

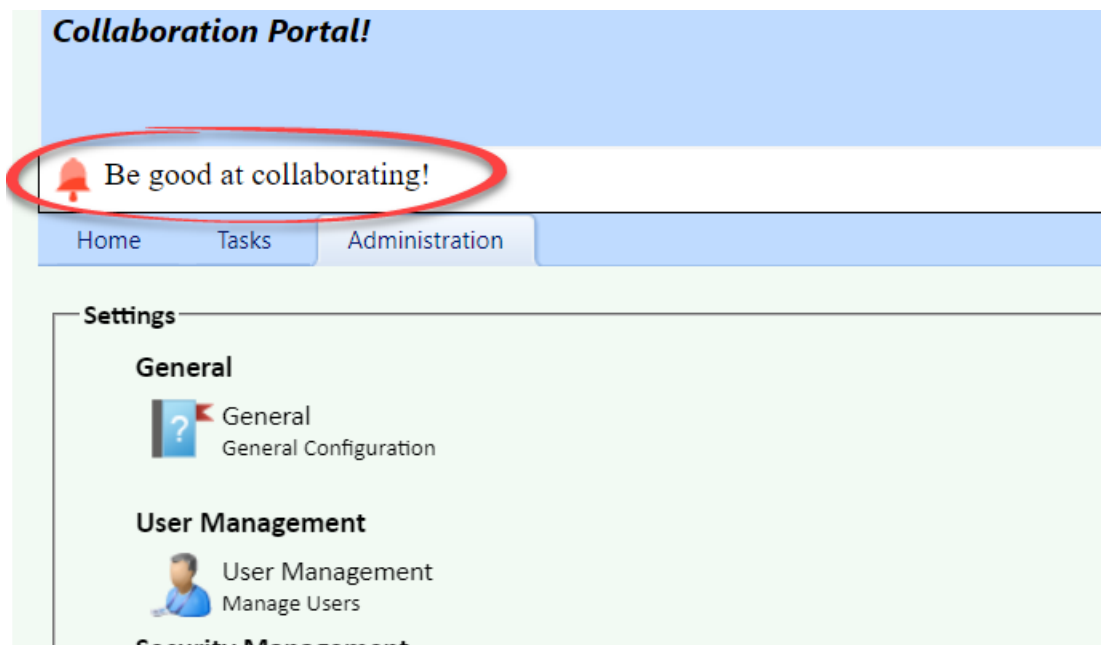
Words: 164 Characters: 1049

Save Close

### 2.1.7 System Notice

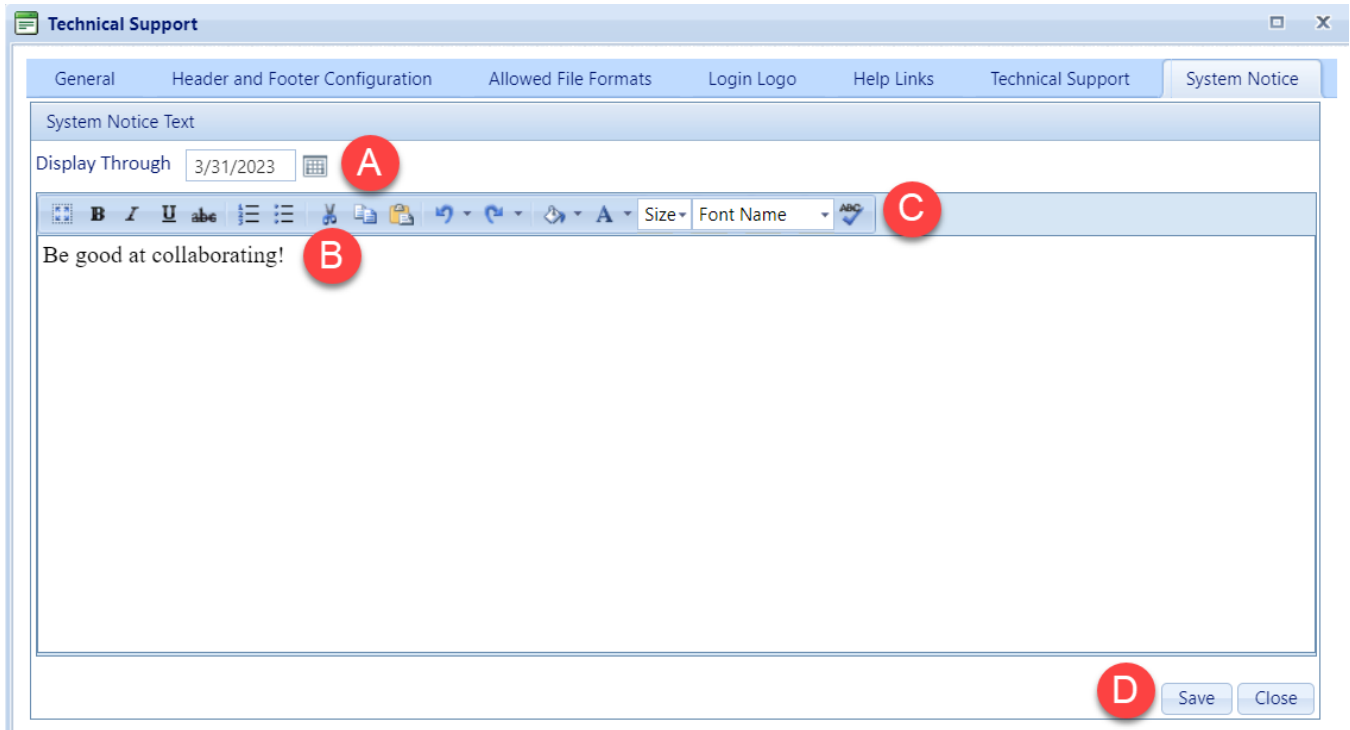
*System Notice* allows you to set a custom system-wide notification. It is typically used to alert users to planned outages or other updates.

The notice displays as a static bar on the dashboard, as pictured below:



To configure a *System Notice*, navigate to **Administration > General** then click the **System Notice** tab.



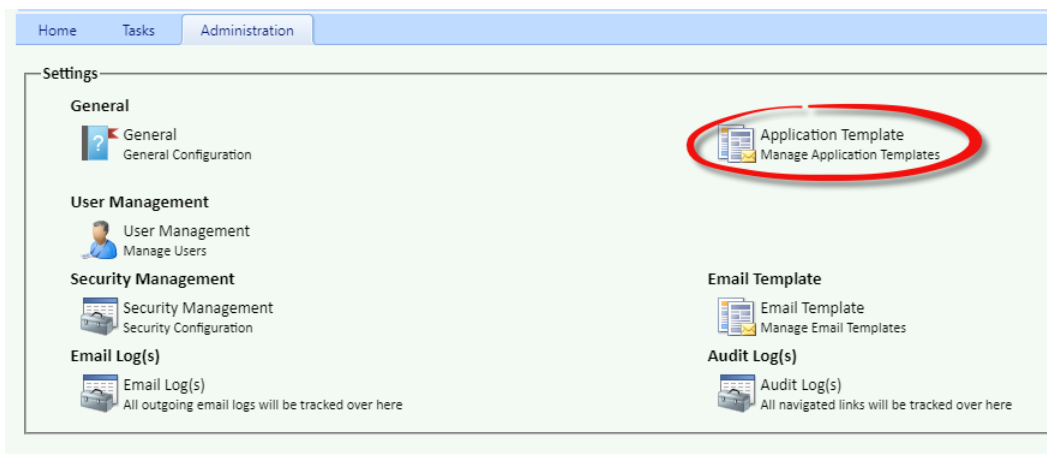


First, set the **(A) Display Through** date. Input the text in the **(B) System Notice Text** field, then edit the text using the **(C) text controls**. Click **(D) Save** to set the notice.

## 2.2 Application Template

The Collaboration Portal contains preexisting application templates that you can manage and customize. These templates can then be used to communicate specific types of information.

To access the *Application Template* settings page, navigate to the **Administration** tab, then click **Application Template**:



The *Application Template* screen is shown below:



Home	Tasks	Administration
<a href="#">Edit Application Template</a>   <a href="#">Back</a>		
Application Templates		
Name	Subject	Created Date
Submit Instructions	Submit Instructions	03/03/2023
Disclaimer Configuration	Disclaimer Configuration	03/03/2023
Consultation Instructions	Rfd Instructions	03/03/2023
Rfd Instructions	Rfd Instructions	03/03/2023
Page: 1 of 1 Go Page size: 4 Change Item 1 to 4 of 4		

## 2.2.1 About Application Templates

The Application Template options are described in the following table:

Name	Description
<b>Submit Instructions</b>	Set custom instructions for submitting documents via the Collaboration Portal.
<b>Disclaimer Configuration</b>	<p>Configure the disclaimer that displays on the Collaboration Portal login screen.</p> <p><b>(!!) Note: Disclaimer Configuration provides options to display the disclaimer either Above or Below the login window:</b></p> <div> <div> Edit Application Template </div> <div> <div>Application Template</div> <div>Disclaimer Configuration</div> <div>Instruction Subject</div> <div>Disclaimer Configuration</div> <div>Display</div> <div> <input checked="" type="radio"/> Above <input type="radio"/> Below </div> <div>Login Window</div> </div> </div>
<b>Consultation Instructions</b>	Set custom instructions for the collaborator to view when they receive a Consultation Task.
<b>Rfd Instructions</b>	Set custom instructions for the collaborator to view when they receive a Request for Documents Task.





## 2.2.2 Editing Application Templates

To edit an application template, navigate to **Administration > Application Templates**. Next, select a **Template** from the *Application Templates* list and click **Edit Application Template** to view and edit the *Application Template* details, as shown in the following example:

Application Template - Submit Instructions

— Edit Application Template —

Application Template

Instruction Subject

Instruction Body

Design HTML Preview

Words: 0 Characters: 0

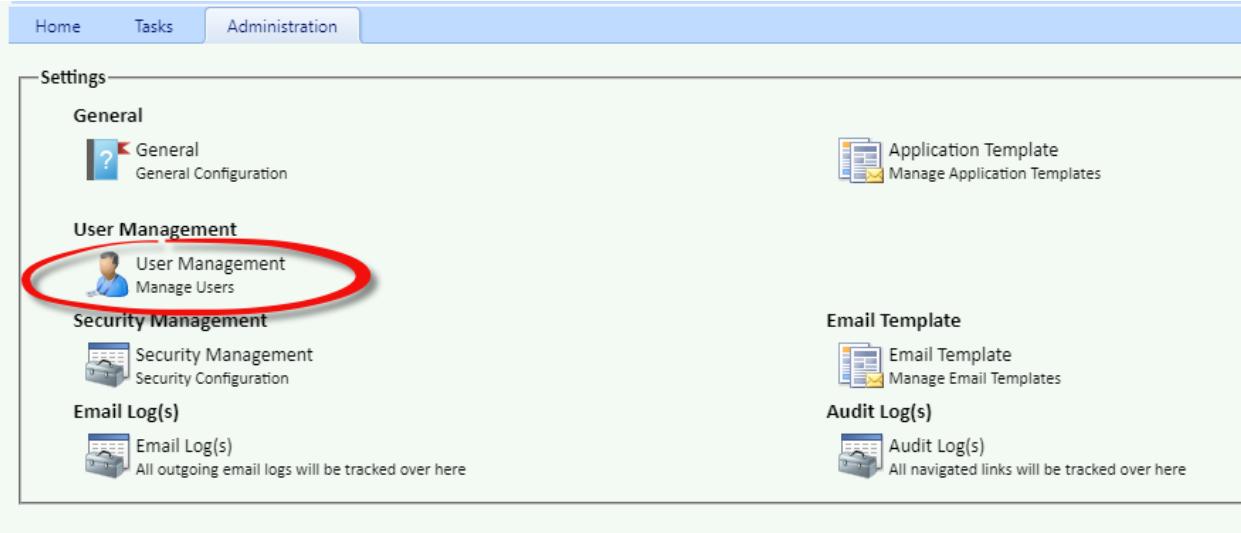
Save Close

The *Instruction Subject* field can be edited if needed. Use the *Instruction Body* field to provide instructions on the stated *Instruction Subject*. You can also use the text editing tools to format the instructions to your specifications.

When you've configured the application template as needed, click **Save** to save the template.

### 3 User Management

*User Management* configuration allows you to view and edit personal information for portal users. To access User Management, navigate to **Administration > User Management**:



The *Users* screen appears as shown below with all portal users listed.

The screenshot shows the 'Users' screen with a table of portal users. The table has columns for Last Name, First Name, Login, Active, Login Status, and Created Date. The first row is highlighted in orange. Below the table is a pagination bar showing 'Page: 1 of 1 Go' and 'Page size: 7 Change'.

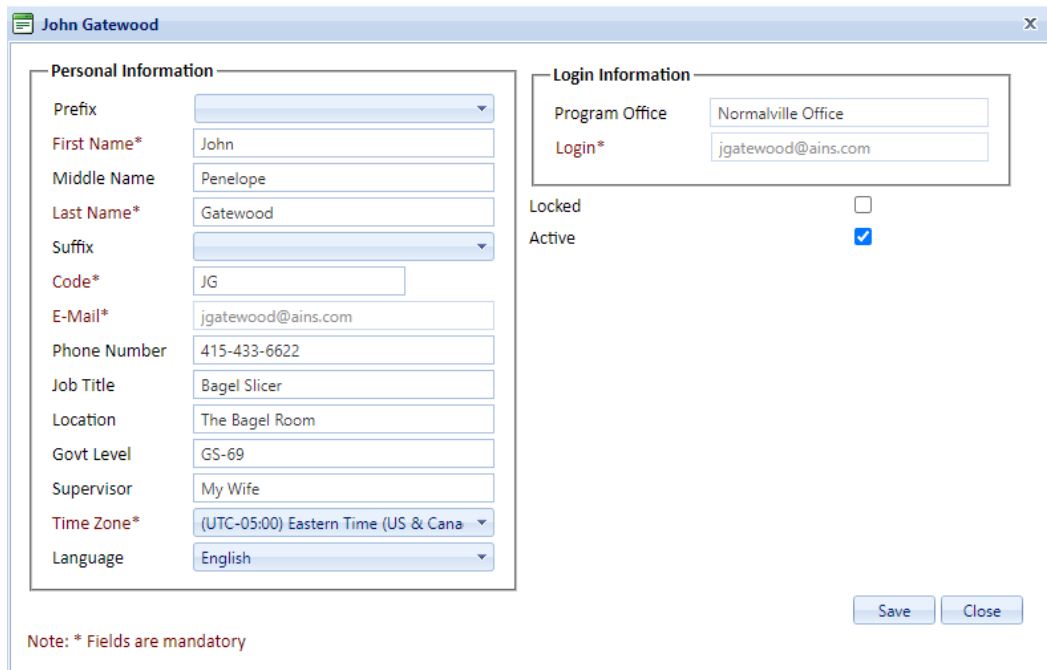
Last Name	First Name	Login	Active	Login Status	Created Date
Admin	Admin	Admin	Yes	Not Logged In	03/18/2020
Lindsay	Emily	elindsay@ai...	Yes	Not Logged In	04/28/2020
test	test	bgarver@ain...	Yes	Not Logged In	05/05/2020
Ige	Caroline	cige@ains.c...	Yes	Not Logged In	05/15/2020
Winstead	David	wdwinstead...	Yes	Not Logged In	05/15/2020
Smith	Denise	dsmith@tva...	Yes	Not Logged In	06/02/2020
Gatewood	John	jgatewood@...	Yes	Not Logged In	06/08/2020

Page: 1 of 1 Go Page size: 7 Change Item 1 to 7 of 7

Select a **User** from the list then click **Edit User** to view and edit the user's details:



## User Management



The screenshot shows a web application window titled "John Gatewood" with a close button (X) in the top right corner. The window is divided into two main sections: "Personal Information" and "Login Information".

**Personal Information:**

- Prefix: (Dropdown menu)
- First Name\*: John
- Middle Name: Penelope
- Last Name\*: Gatewood
- Suffix: (Dropdown menu)
- Code\*: JG
- E-Mail\*: jgatewood@ains.com
- Phone Number: 415-433-6622
- Job Title: Bagel Slicer
- Location: The Bagel Room
- Govt Level: GS-69
- Supervisor: My Wife
- Time Zone\*: (UTC-05:00) Eastern Time (US & Cana)
- Language: English

**Login Information:**

- Program Office: Normalville Office
- Login\*: jgatewood@ains.com

Below the "Login Information" section, there are two checkboxes:

- Locked: ☐
- Active: ☒

At the bottom right of the form, there are two buttons: "Save" and "Close".

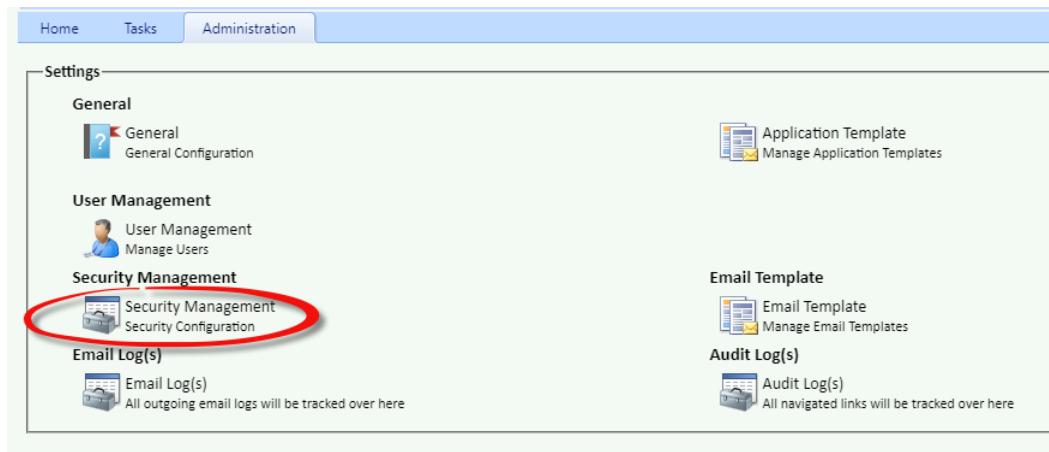
**Note:** \* Fields are mandatory

In addition to editing the personal details, you can mark the user as **Locked** and **Active**. If you make any changes, click **Save** to save these changes.



## 4 Security Management

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



The *Security Configuration* screen is shown below:



## Security Management

Field	Description
Default values	: <input checked="" type="checkbox"/>
Passwords never expire	: <input type="checkbox"/>
Passwords are valid for*	: 90 days
Remind user*	: 5 days before password expires
Do not allow reuse of last*	: 12 passwords (including current)
Password can contain up to*	: 2 repeating character(s)
Minimum password length*	: 8 characters
Password must contain at least*	: 2 uppercase letter(s)
Password must contain at least*	: 2 lowercase letter(s)
Password must contain at least*	: 2 special character(s)
Password must contain at least*	: 2 numeric character(s)
Require Temporary Password Update after Login	: <input checked="" type="checkbox"/>
Login fails after*	: 5 invalid login attempts
User Account Inactivation	: <input checked="" type="checkbox"/>
Inactive user account after*	: 30 days of inactivity
Session time-out after*	: 20 minutes
Alert user before Session expires for*	: 5 minutes
OTP notification type	: None
OTP expires in	: 5 minutes

Use these fields to configure the security settings, as described below. Click **Save** to retain any changes made to the security settings.

Field	Description
<b>Default values</b>	Select this checkbox to apply the default system values for all <i>Security Configuration</i> screens.
<b>Passwords never expire</b>	Select this checkbox to prevent user passwords from ever expiring.
<b>Passwords are valid for X days</b>	Enter the number of days a user's password is valid before expiration.



Field	Description
<b>Remind user X days before password expires</b>	Enter the number of days before the user's password expires that they should be reminded to reset their password.
<b>Do not allow reuse of last X passwords (including current)</b>	Enter a number of previous passwords to disallow reuse of when changing a password.
<b>Passwords can contain up to X repeating characters</b>	Enter the maximum number of repeating characters allowable in user passwords.
<b>Minimum password length X characters</b>	Enter the minimum length required for user passwords in characters.
<b>Password must contain at least X uppercase letters</b>	Enter the minimum number of uppercase characters required in the password.
<b>Password must contain at least X lowercase letters</b>	Enter the minimum number of lowercase characters required in the password.
<b>Password must contain at least X special characters</b>	Enter the minimum number of special characters required in the password.
<b>Password must contain at least X numeric characters</b>	Enter the minimum number of numeric characters required in the password.
<b>Require Temporary Password Update after Login</b>	Select this checkbox to require any user logging in with a temporary password to update their password after login.



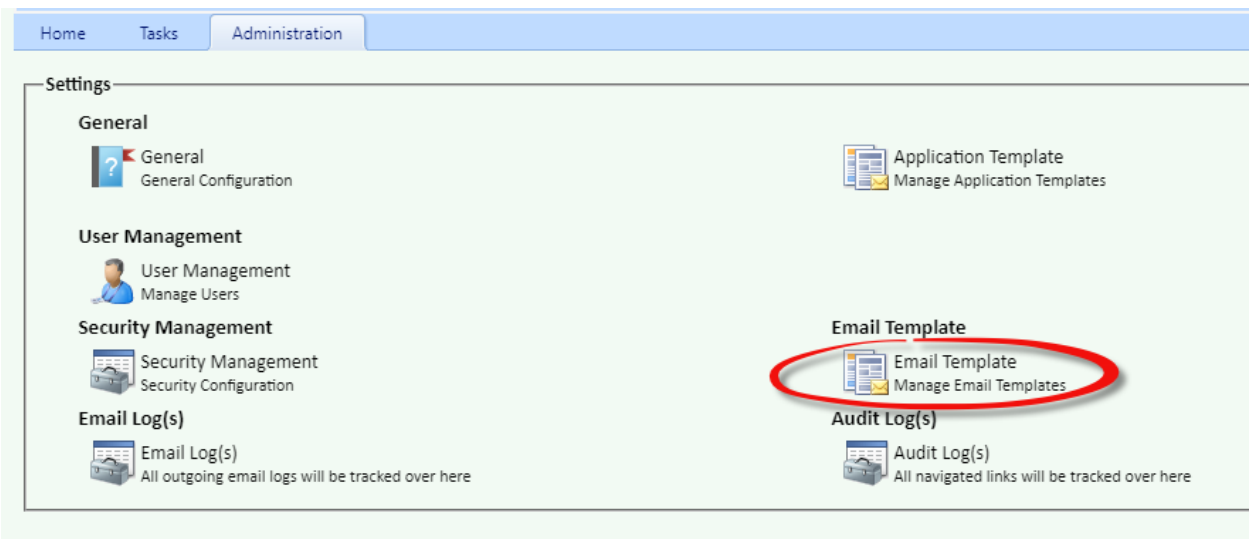
Field	Description
<b>Login fails after X invalid login attempts</b>	Enter the maximum number of tries a user is allowed to attempt to log in unsuccessfully before that user account is locked.
<b>User Account Inactivation</b>	Checked to denote an inactive user.
<b>Inactivate user account after X days of inactivity</b>	Enter the number of days a user account is inactive before it is formally inactivated in the system.
<b>Session time-out after X minutes</b>	Enter in minutes the length of time a user can be inactive in their current session before the session times out and the user is logged out.
<b>Alert user before Session expires for X minutes</b>	Enter in minutes how long before the session auto-terminates the user is alerted that the session will be terminated.
<b>OTP notification type</b>	Select a notification type from the drop-down menu.
<b>OTP expires in X minutes</b>	Enter the number of minutes the OTP will be active before expiration.

# 5 Email Template

The Collaboration Portal includes several built-in email templates to alert users when certain events occur in the system. This section includes information on accessing these templates, brief descriptions of the available templates, and steps to edit these templates to better suit your organization’s needs.

## 5.1 Email Template Configuration

To access *Email Template* configuration, navigate to **Administration > Email Template**:





The *Email Templates* list appears as shown below. These templates are described in the following table.





## Email Templates

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

 Edit Template | 
  Back

### Email Templates

Name	Subject	Created Date
Program Office Notification of Portal User ID	[APPLICATION_TITLE] Login Information	03/03/2023
Password Information	[APPLICATION_TITLE] Password Information	03/03/2023
Forgot Password	[APPLICATION_TITLE] Password Information	03/03/2023
Forgot Password Identification Code Notificati...	[APPLICATION_TITLE] Identification Code	03/03/2023
Consultation Assignment Notification	[APPLICATION_TITLE] Consultation Assignmen...	03/03/2023
Request for Documents Assignment Notificati...	[APPLICATION_TITLE] Request for Documents ...	03/03/2023
Request Message Notification	[APPLICATION_TITLE] Request Message Notifi...	03/03/2023
Deactivation Reason	[APPLICATION_TITLE] Deactivation Reason	03/03/2023
Completed Task Notification	Completed [TASK_TYPE] Task Notification - Re...	03/03/2023
Message Notification To FX	Message Notification For Request# [REQUEST...	03/03/2023
Message Notification To Portal	Message Notification For Request# [REQUEST...	03/03/2023
Receipt Confirmed	Receipt Confirmed For [TASK_TYPE] - [ITEM_ID...	03/03/2023
OTP Notification	[APPLICATION_TITLE] One Time Passcode	03/03/2023
Request for Documents Task Deletion	Request #[REQUEST_ID] Collaboration Portal T...	03/03/2023
Consultation Task Deletion	Request #[REQUEST_ID] Collaboration Portal T...	03/03/2023

1

Page: 1 of 1 [Go](#)

Page size: 15 [Change](#)

Item 1 to 15 of 15

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Template	Description
<b>Program Office Notification of Portal User ID</b>	Notification sent to the Program Office contact when an account is created for that office; includes the user login ID.
<b>Password Information</b>	Notification sent to the Program Office contact when an account is created for that office; includes the login password.
<b>Forgot Password</b>	When a portal user forgets their password, this notification is sent with a temporary password.



## Email Templates

Template	Description
<b>Forgot Password Identification Code Notification</b>	A security token provided with a Forgot Password request. The code is only valid during the current session.
<b>Consultation Assignment Notification</b>	Notification sent to the Program Office contact when a consultation assignment is sent to the portal.
<b>Request for Documents Assignment Notification</b>	Notification sent to the Program Office contact when a request for documents assignment is sent to the portal.
<b>Request Message Notification</b>	Notification sent relating to request messages.
<b>Deactivated Reason</b>	When a user account is deactivated, this message is sent to their email stating the reason for the deactivation.
<b>Completed Task Notification</b>	Notification sent when a task is completed in the portal.
<b>Message Notification to FX</b>	Notification sent to FX when a message is logged on a request.
<b>Message Notification to Portal</b>	Message sent to portal user email when a message is sent to the portal from FOIAXpress.
<b>Receipt Confirmed</b>	Notification sent to the originating office when a request is received in the portal.
<b>OTP Notification</b>	Notification sent when a user requests a one-time passcode.



Template	Description
<b>Request for Documents Task Deletion</b>	Message sent to user when a document is removed from their assigned Rfd Tasks.
<b>Consultation Task Deletion</b>	Message sent to user when a document is removed from their assigned Consultation Tasks.

Follow the steps in the *Edit an Email Template* section to customize the templates for your organization's use.

## 5.2 Edit an Email Template

To edit an existing Email Template:

1. Navigate to **Administration > Email Template**.
2. Select an existing **Email Template**, then click **Edit Template**:

The screenshot shows the 'Email Templates' administration interface. At the top, there are tabs for 'Home', 'Tasks', and 'Administration'. Below these, there are buttons for 'Edit Template' (circled in red) and 'Back'. The main content area is titled 'Email Templates' and contains a table with the following data:

Name	Subject	Created Date
Program Office Notification of Portal User ID	[APPLICATION_TITLE] Login Information	03/18/2020
Password Information	[APPLICATION_TITLE] Password Information	03/18/2020
Forgot Password	[APPLICATION_TITLE] Password Information	03/18/2020
Forgot Password Identification Code Notification	[APPLICATION_TITLE] Identification Code	03/18/2020
Consultation Assignment Notification	[APPLICATION_TITLE] Consultation Assignment Notification	03/18/2020
Request for Documents Assignment Notification	[APPLICATION_TITLE] Request for Documents Assignment N...	03/18/2020

3. The template appears as shown in the following example.

## Email Templates

The screenshot shows the 'Email Template - Password Information' editor. At the top, there's a title bar. Below it, a section labeled '-Edit Email Template-' contains two input fields: 'Email Template\*' with the value 'Password Information' and 'Email Subject\*' with the value '[APPLICATION\_TITLE] Password Information'. An 'Insert Fields' button is to the right. Below these is the 'Email Body' section, which features a rich text editor toolbar with various icons for text formatting, alignment, and insertion. The email body text reads: 'Dear [FIRST\_NAME] [LAST\_NAME],', 'An account has been created in the [APPLICATION\_TITLE] for [PROGRAM\_OFFICE].The user id was issued and sent in a separate notification to the email address provided.', 'Temporary Password: [USER\_PASSWORD]', 'Please check your email for the user id notification and return to [APPLICATION\_URL] to login to the portal. Be sure to update your temporary password to protect your account details.', and 'Thank You, [ENTERPRISE\_NAME]'. At the bottom of the editor, there are tabs for 'Design', 'HTML', and 'Preview', with 'Design' currently selected. A status bar at the very bottom indicates 'Words: 64 Characters: 421'. On the right side of the window, there are 'Save' and 'Close' buttons.

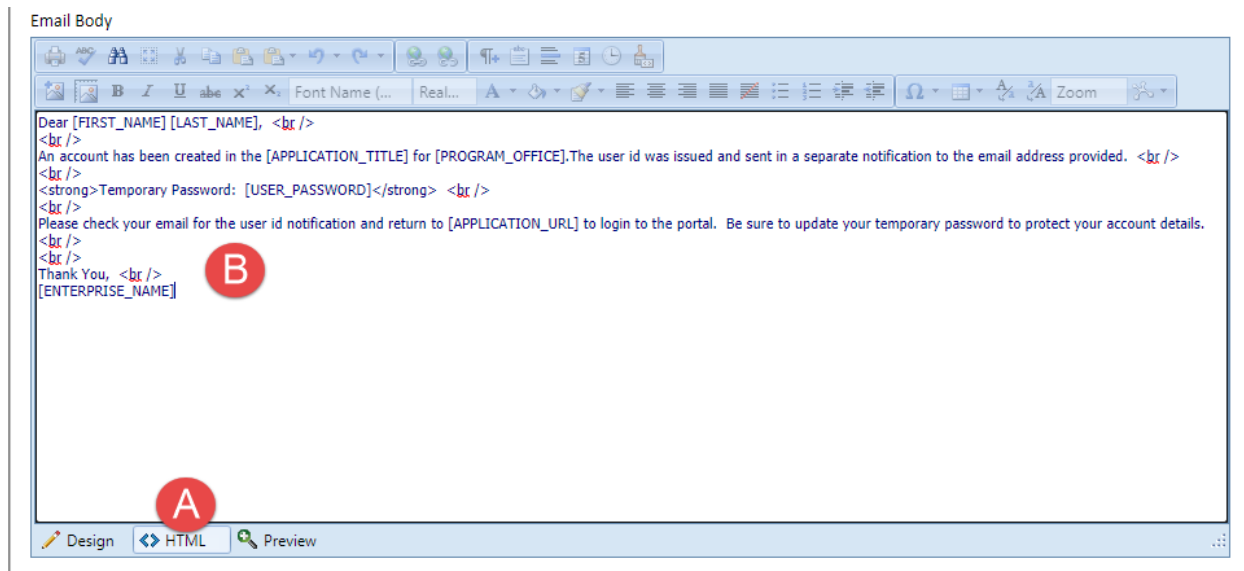
4. Edit the template as needed using the editing tools available. These mirror the template editing tools available in FOIAXpress. Refer to the FOIAXpress User Manual content on Email Templates for details:

This screenshot is a close-up of the 'Email Body' editor. A red rectangular box highlights the rich text editor toolbar at the top of the editing area. The toolbar contains numerous icons for text formatting (bold, italic, underline, text color, background color), alignment (left, center, right, justified), and other functions like bulleted list, numbered list, link, unlink, and zoom. Below the toolbar, the email body text is visible, including the salutation 'Dear [FIRST\_NAME] [LAST\_NAME],', the account creation message, the temporary password '[USER\_PASSWORD]', the login instructions, and the sign-off 'Thank You, [ENTERPRISE\_NAME]'. At the bottom, the 'Design', 'HTML', and 'Preview' tabs are visible, with 'Design' being the active tab.

5. There are also options to view this template in the **HTML** editor view. Click (A) HTML to view the email in (B) HTML:



## Email Templates



6. Click **Save** to save any changes made to the template.

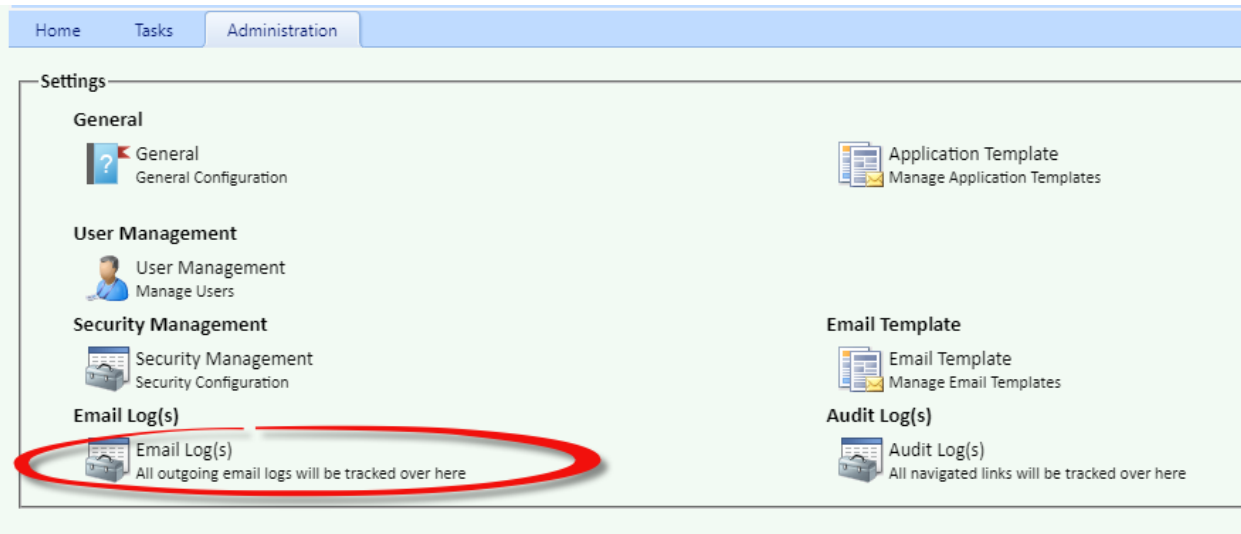


## 6 Email Log(s)

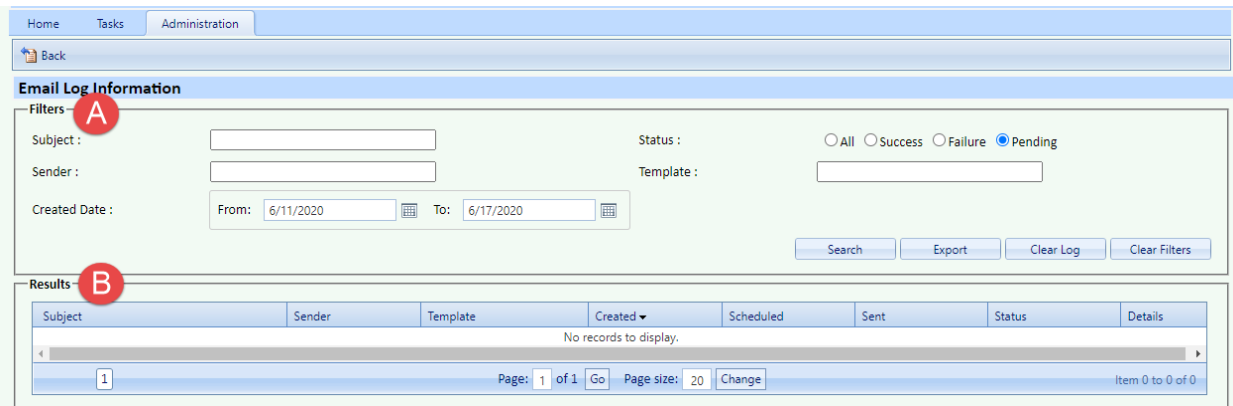
You can use the *Email Log(s)* to monitor email activity in the Collaboration Portal. Use search and filtering options to locate specific messages or a range of messages.

### 6.1 Accessing the Email Log

To access *Email Log(s)*, navigate to **Administration > Email Log(s)**:



The *Email Log Information* screen appears as shown below. Use the (A) *Filters* to locate messages, which display in the (B) *Results* list:



## 6.2 Search and Filter Emails

Use the *Filter* options to locate messages using the various message attributes, such as *Status* or *Created Date*. The *Filters* fields are shown below and described in the following table.

**Email Log Information**

**Filters**

Subject :

Sender :

Created Date : From:  To:

Status : ☒ All ☐ Success ☐ Failure ☐ Pending

Template :

Field	Description
<b>Subject</b>	Text appearing in the <i>Subject</i> line of the message.
<b>Sender</b>	Email address of the message <i>Sender</i> .
<b>Created Date</b>	Use the <i>From</i> and <i>To</i> fields to select a date range when the message was created.
<b>Status</b>	Select the message <i>Status</i> . Options are <b>All</b> , <b>Success</b> , <b>Failure</b> , and <b>Pending</b> .
<b>Template</b>	Enter the <i>Template Name</i> in this field to locate messages using that template.

Click **Search** to locate results matching the filters. Sample search results are shown below:



## Email Log (s)

Home Tasks Administration

Back

### Email Log Information

Filters

Subject :

Sender :











Created Date : From: 4/5/2020 To: 6/17/2020

Status : ☒ All ☐ Success ☐ Failure ☐ Pending

Template :

Search Export Clear Log Clear Filters

### Results

Subject	Sender	Template	Created	Scheduled	Sent	Status	Details
Completed Consultation Task Notification ...	jgatewood@ains.com	Completed Task Notification	06/09/2020	06/09/2020	06/09/2020	Success	
Completed Consultation Task Notification ...	jgatewood@ains.com	Completed Task Notification	06/09/2020	06/09/2020	06/09/2020	Success	
Completed Request for Documents Task N...	jgatewood@ains.com	Completed Task Notification	06/09/2020	06/09/2020	06/09/2020	Success	
Completed Request for Documents Task N...	cige@ains.com	Completed Task Notification	05/29/2020	05/29/2020	05/29/2020	Success	
Completed Request for Documents Task N...	cige@ains.com	Completed Task Notification	05/29/2020	05/29/2020	05/29/2020	Success	
Completed Request for Documents Task N...	cige@ains.com	Completed Task Notification	05/29/2020	05/29/2020	05/29/2020	Success	
Completed Request for Documents Task N...	cige@ains.com	Completed Task Notification	05/29/2020	05/29/2020	05/29/2020	Success	
Completed Request for Documents Task N...	cige@ains.com	Completed Task Notification	05/29/2020	05/29/2020	05/29/2020	Success	
Completed Request for Documents Task N...	cige@ains.com	Completed Task Notification	05/29/2020	05/29/2020	05/29/2020	Success	
Completed Request for Documents Task N...	elindsay@ains.com	Completed Task Notification	05/22/2020	05/22/2020		Failure	

Page: 1 of 1 Go Page size: 9 Change Item 1 to 9 of 9

See the next section to view actions you can take on the *Email Log*.

## 6.3 Email Log Actions

The following *Actions* are available on the *Email Log*:

Home Tasks Administration

Back

### Email Log Information

Filters

Subject :

Sender :



Created Date : From: 4/5/2020 To: 6/17/2020

Status : ☒ All ☐ Success ☐ Failure ☐ Pending

Template :

Search **B** Export **C** Clear Log **D** Clear Filters

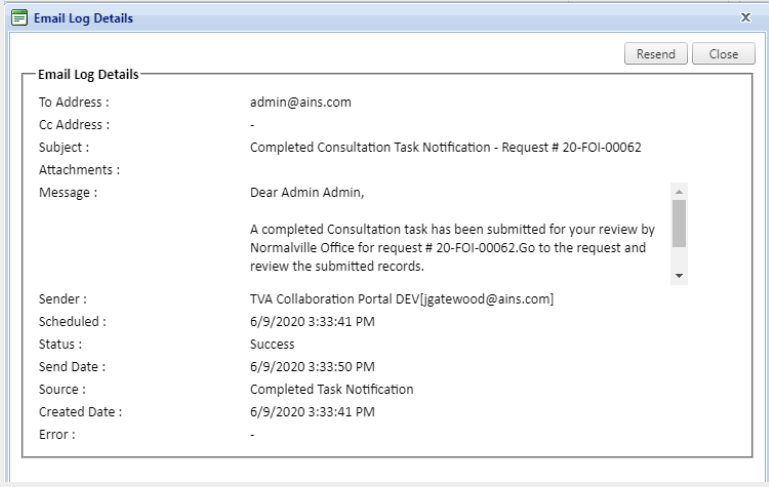
### Results

Subject	Sender	Template	Created	Scheduled	Sent	Status	Details
Completed Consultation Task N...	jgatewood@ai...	Completed Task Not...	06/09/2020	06/09/2020	06/09/2020	Success	 <b>A</b>
Completed Consultation Task N...	jgatewood@ai...	Completed Task Not...	06/09/2020	06/09/2020	06/09/2020	Success	





## Email Log (s)

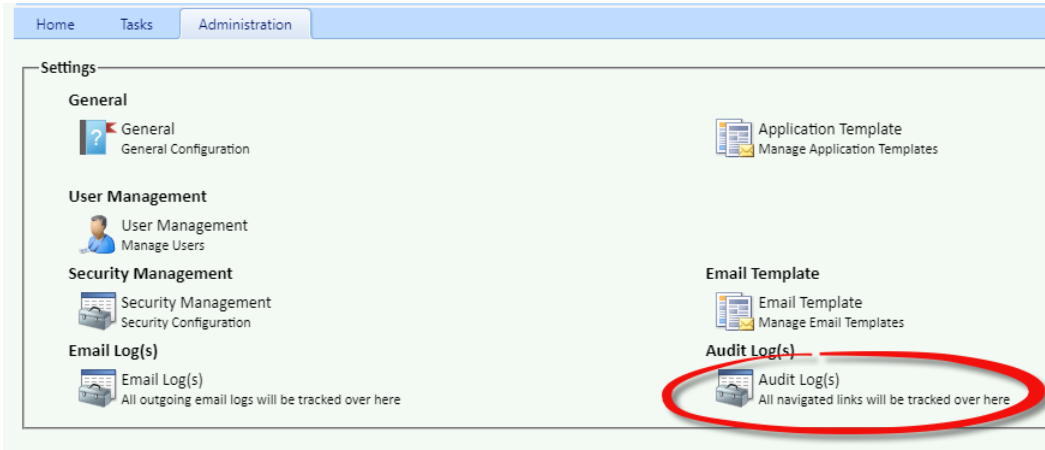
Ref	Action	Description
A	Details	<p>Click to view the message Details. There is also an option to <b>Resend</b> the message in the Details window:</p>  <p>The screenshot shows a window titled 'Email Log Details' with a 'Resend' button and a 'Close' button. The window displays the following information:</p> <ul style="list-style-type: none"> <li>To Address : admin@ains.com</li> <li>Cc Address : -</li> <li>Subject : Completed Consultation Task Notification - Request # 20-FOI-00062</li> <li>Attachments :</li> <li>Message : Dear Admin Admin,</li> </ul> <p>The message body contains the text: 'A completed Consultation task has been submitted for your review by Normalville Office for request # 20-FOI-00062. Go to the request and review the submitted records.'</p> <ul style="list-style-type: none"> <li>Sender : TVA Collaboration Portal DEV[jigatewood@ains.com]</li> <li>Scheduled : 6/9/2020 3:33:41 PM</li> <li>Status : Success</li> <li>Send Date : 6/9/2020 3:33:50 PM</li> <li>Source : Completed Task Notification</li> <li>Created Date : 6/9/2020 3:33:41 PM</li> <li>Error : -</li> </ul>
B	Export	Export the results list.
C	Clear Log	Click to clear all entries in the Emails Log.
D	Clear Filters	Click to clear any data entered in the <i>Filters</i> fields.



## 7 Audit Log(s)

The *Audit Log(s)* configuration allows you to view logs of both *Sessions* (instances when users accessed the system) as well as individual User Action Audit Logs, with a log of all user actions in the system.

To access the *Audit Log(s)*, navigate to **Administration > Audit Log(s)**:



The *Audit Log(s)* screen appears as shown below:

The screenshot shows the 'Audit Log' window. At the top, there are two radio buttons: 'Session Audit Log' (selected) and 'User Action Audit Log'. Below this is a 'Filters' section with input fields for 'First Name', 'Last Name', 'Login From', 'To', and 'User Login'. There are buttons for 'Search', 'Export', 'Clear Log', and 'Clear Filters'. Below the filters is a 'Result' section containing a table with columns: Full Name, Work Station, Login Time, Logout Time, and Login Name. The table shows three rows of data for 'Admin Admin'. At the bottom, there is a pagination bar showing 'Page: 1 of 1', 'Go', 'Page size: 3', 'Change', and 'Item 1 to 3 of 3'. Annotations A, B, and C are placed on the 'Session Audit Log' radio button, the 'Filters' section, and the 'Result' table respectively.

Ref	Element	Description
A	Log Selection	Select between <b>Session Audit Log</b> and <b>User Action Audit Log</b> .



Ref	Element	Description
B	Filters	<p>Use the <i>Filters</i> to locate a specific <i>Session</i> or <i>User Action</i>. Click <b>Search</b> to display matching results in the <i>Results</i> list.</p> <p>There are also options to <b>Export</b> the results list, <b>Clear Log</b> to clear the log contents, and <b>Clear Filters</b> to clear data entered in the search fields.</p>
C	Results	All matching audit results display in the <i>Results</i> list.

The following sections detail the *Session Audit Log* and *User Action Audit Log*.

## 7.1 Session Audit Log

The session audit log logs all user sessions, including the IP of the workstation where the portal was accessed and the access times.

To view the *Session Audit Log*, navigate to **Administration > Audit Log(s)**. The *Audit Log* screen appears with **Session Audit Log** selected by default.

**Audit Log**

☒ Session Audit Log ☐ User Action Audit Log

**Filters**

First Name :  Last Name :

Login From :   To :

User Login :

**Results**

Full Name	Work Station	Login Time ▼	Logout Time	Login Name
Admin Admin	66.16.86.162	06/15/2020:03:23:24		Admin
Admin Admin	66.16.86.162	06/15/2020:03:18:18	06/15/2020:03:23:18	Admin
Admin Admin	66.16.86.162	06/15/2020:02:43:29	06/15/2020:03:23:18	Admin

Use the *Filters* to search for users using the *First Name*, *Last Name*, *Login From* dates, or *User Login*, then click **Search** to display matching results. The *Results* list appears as shown below:

## Audit Log(s)

Results				
Full Name <b>A</b>	Work Station <b>B</b>	Login Time <b>C</b>	Logout Time <b>D</b>	Login Name <b>E</b>
Admin Admin	66.16.86.162	06/17/2020:10:48:10		Admin
Admin Admin	66.16.86.162	06/17/2020:10:44:16	06/17/2020:10:48:07	Admin
Admin Admin	66.16.86.162	06/17/2020:10:09:17:10 <b>F</b>	06/17/2020:10:48:07	Admin
<div> <div>1</div> <div>Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3</div> </div>				

Ref	Field	Description
<b>A</b>	Full Name	Full name of the user account attached to this session.
<b>B</b>	Work Station	IP of the workstation that accessed the portal.
<b>C</b>	Login Time	Time and date the session began.
<b>D</b>	Logout Time	Time and date the session was terminated.
<b>E</b>	Login Name	Login name attached to the session.
<b>F</b>	Navigation	Use the <i>Page</i> options to view additional pages or change the number of entries displayed per page.

## 7.2 User Action Audit Log

The session audit log logs all user sessions, including the IP of the workstation where the portal was accessed, and the access times.

To view the *Session Audit Log*, navigate to **Administration > Audit Log(s)**. The *Audit Log* screen appears with **User Action Audit Log** selected by default.



## Audit Log(s)

**Audit Log**

☐ Session Audit Log ☒ User Action Audit Log

**Filters**

Action Type :

First Name :

Last Name :

Action From :

To :

User Login :

**Results**

Action Performed By	Action Type	Action Performed	Time of Action	Program Office
Admin Admin	User Logged In	User Admin logged into the system	06/17/2020:10:48:10	
Admin Admin	User Logged In	User Admin logged into the system	06/17/2020:09:17:10	

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

Use the *Filters* to search for users using the *Action Type*, *First Name*, *Last Name*, *Login From* dates, or *User Login*, then click **Search** to display matching results. The *Results* list appears as shown below:

**Results**

Action Performed By	Action Type	Action Performed	Time of Action	Program Office
Admin Admin	User Logged In	User Admin logged into the system	06/17/2020:10:48:10	
Admin Admin	User Logged In	User Admin logged into the system	06/17/2020:09:17:10	

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

Ref	Field	Description
A	Action Performed By	Full name of the user account attached to this action.
B	Action Type	Type of action logged in the portal.
C	Action Performed	Description of specific user action.
D	Time of Action	Time the action was taken in the system.



Audit Log(s)

Ref	Field	Description
E	Program Office	Program office associated with the user action.
F	Navigation	Use the <i>Page</i> options to view additional pages or change the number of entries displayed per page.

