

FOIAXpress

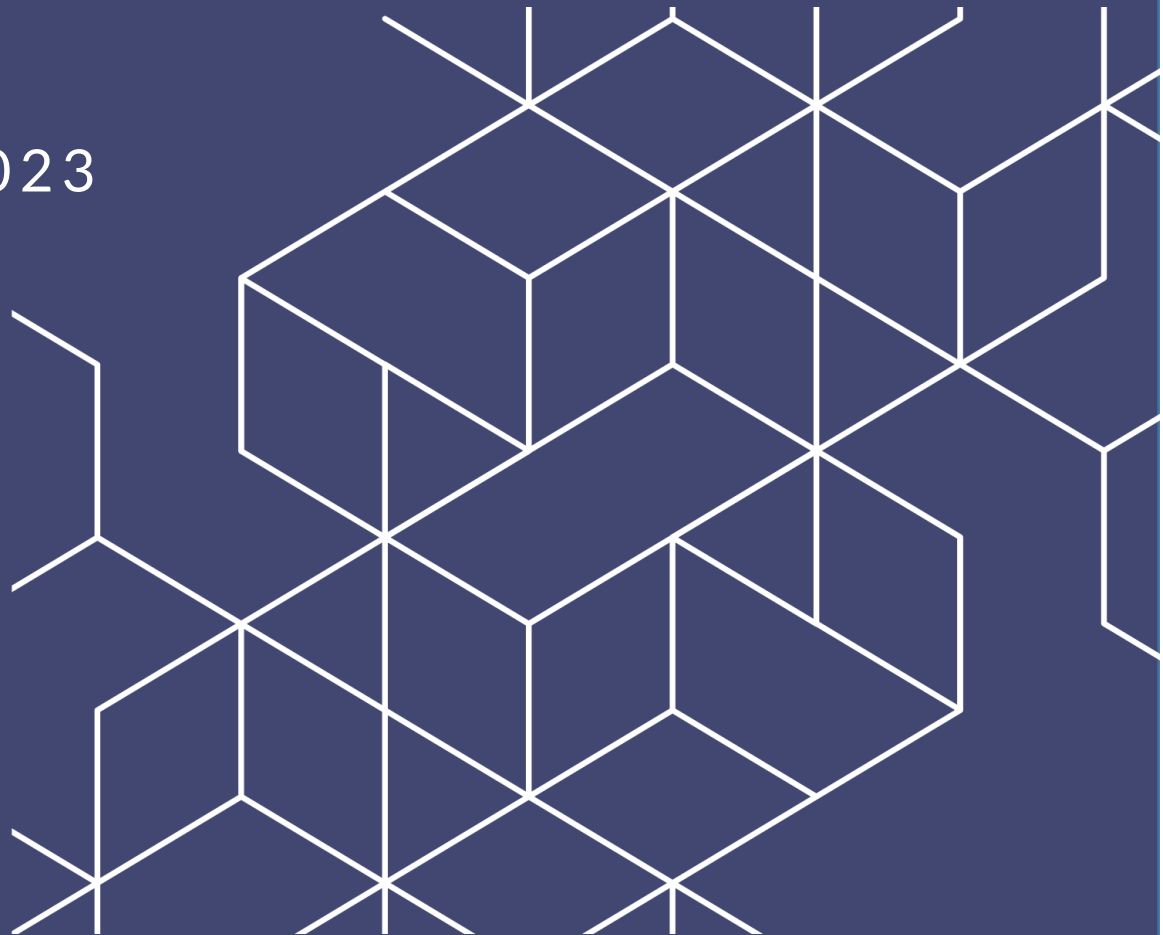


OPEXUS

Collaboration Portal User Manual

v11.1.0

March 2023



FX 11.1.0 Collaboration Portal User Manual

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1 About this Manual

1.1 Introduction

Welcome to the FOIAXpress Collaboration Portal. The FX Collaboration Portal provides a platform for FOIAXpress users to work together on requests with others outside their FOIAXpress environment, easily collaborating on requests for documents and document reviews. This document provides an introduction to the portal, the portal UI, and steps for collaborating on requests using the portal. This includes sending requests for FOIAXpress, responding via the portal (including correspondence and document submission), and collaborating on responsive materials.

1.2 How to Use this Manual

This manual is divided in two main sections. The first applies to users on the FOIAXpress side, sending Requests for Documents and Consultation Tasks to the portal for collaboration with outside offices. The *Collaboration for Portal Users* section focuses on the Portal user experience, with instructions for receiving and fulfilling tasks, and utilizing the tools at hand to make collaboration effective.

For FOIAXpress Users:

See the *Collaboration for FOIAXpress Users* section. This section covers topics for *Requests for Documents*, *Consultation Reviews*, and *Correspondence* with Portal users.

For Portal Users:

See the *Collaboration for Portal Users* section. This section covers topics for *Accessing the Collaboration Portal*, *Request for Document Tasks*, *Consultation Tasks*, and *Sending Messages Using the Portal*.

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 and this symbol (!!) are used in *Notes* to **bring attention to crucial information**.



2 Collaboration for FOIAXpress Users

This section provides instructions for FOIAXpress 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 FOIAXpress application.
- *Consultation Reviews*: How to send documents for consultation review using Collaboration.
- *Correspondence*: Sending and receiving messages from the Collaboration Portal

2.1 Requests for Documents

2.1.1 Sending a Request for Documents

One of the main uses for Collaboration is to request documents from a source who does not have access to FOIAXpress. 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 are not assigned are not eligible for submitting RFDs.
2. Select **(A) Request for Documents** from the left-hand navigation, then click **(B) New**:

The screenshot displays the FOIAXpress application interface. At the top, there is a navigation bar with links: Home, Requesters, Requests, Document Management, Administration, and Reports. Below this, a breadcrumb trail shows: Home >> Requests View [Search] >> 20-FOI-00055 - Request. The main content area is titled 'FOIA - Request: 20-FOI-00055' and shows 'Remaining Days: 18' and 'Status: Assigned'. On the left, a sidebar contains navigation links: Request Information, Assign Users, Correspondence, Request for Documents (0/0) (highlighted with a red circle 'A'), Electronic Document Review (0/0), and Add/Search/View Documents (0/0). The main content area shows a table with columns: Action ID, Location(s) Referred, Request Date, Sent Date, Due Date, Completed Date, and Status. Below the table, there are buttons: New, Take Action, View, Delete, Messages(0/0), Send Email/Reminder, Send Reminder by Print, and Action(s) Log. The 'New' button is highlighted with a red circle 'B'.

3. On the *New Request for Documents* screen, locate the *Request for Documents mode* and select **Send via Collaboration**. This option submits the request to the Collaboration Portal.



Collaboration for FOIAXpress Users

Previous

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 * : 6/8/2020

Comments :

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 * : 6/8/2020 ☐ Add Reminder

Priority :

4. In the *Send to: Program Offices* section, click **Add Program Offices**. The *Create/Search Program Office/Consultancy* screen appears as shown below:

Create/Search Program Office/Consultancy

Search Program Office/Consultancy Create New Program Office/Consultancy

Search Criteria Wild card searches (*) are supported

Basic Information

Program Office : * Action Office : HQ

Active : ☐ All ☐ No ☒ Yes Category : ☒ Program Office ☐ Consultancy Location ☐ Both

Edit Search Clear Close

	Name	Contact Name	Phone Number	Has RX	Action Office	Category	Mapped To Collaborate
<input type="checkbox"/>	Normalville Office	Gatewood, John		No	HQ	Both	Yes

Page size 100 1 items in 1 pages

Select

Note: Click on hyperlink to view/edit program office.
Use 'Select' button select program office.

5. Here you can search for and select from existing Program Offices/Consultancies, or **Create New Program Office/Consultancy**.

(!!) Note: If you create a new Program Office/Consultancy, you must select the Collaborate Access Portal checkbox to submit requests to a office/consultancy:



Collaboration for FOIAXpress Users

[Use , to separate mail addresses]

Phone Number:

Alternate Phone Number:

Fax:

State:

ZIP Code:

☐ Collaboration Access Portal

Login (Email) :

Note: The Collaboration Room allows a single email address and will automatically pick up the first email

6. When you've selected at least one office/consultancy, click **Select** to add these to the RFD, then click **Next** to move to step 2:

Previous

New Request for Documents - Step 1

Request for Documents mode:

Request for Documents Information

Request Date * :

Comments :

Due Date * : ☐ Add Reminder

Priority :

Send To : Program Offices

Action Office	Program Office	Contact Name	Phone	Contact Address	Email	Actions
HQ	Normalville Office	Gatewood, John			jgatewood@ains.com	<input type="button" value="X"/>

Note: * fields are mandatory

7. The New RFD - Step 2 screen appears as shown below. First add any (A) Attachments, such as the original request letter for context:

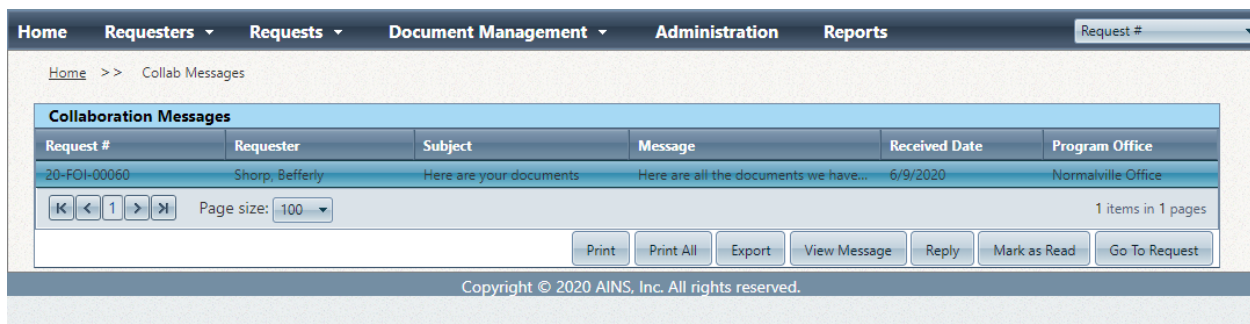


8. You can also configure the message the end user receives with the request in the collaboration portal. First add a **Subject** for the message. You can also edit the **message body** as needed.
9. When you're ready to submit the request, click **Send Message**. A pop up message appears to confirm sending the RFD. Click **OK** to continue.
10. After the job processes, click **Close Window**. The *Request for Documents* screen refreshes with the new RFD included on the list.

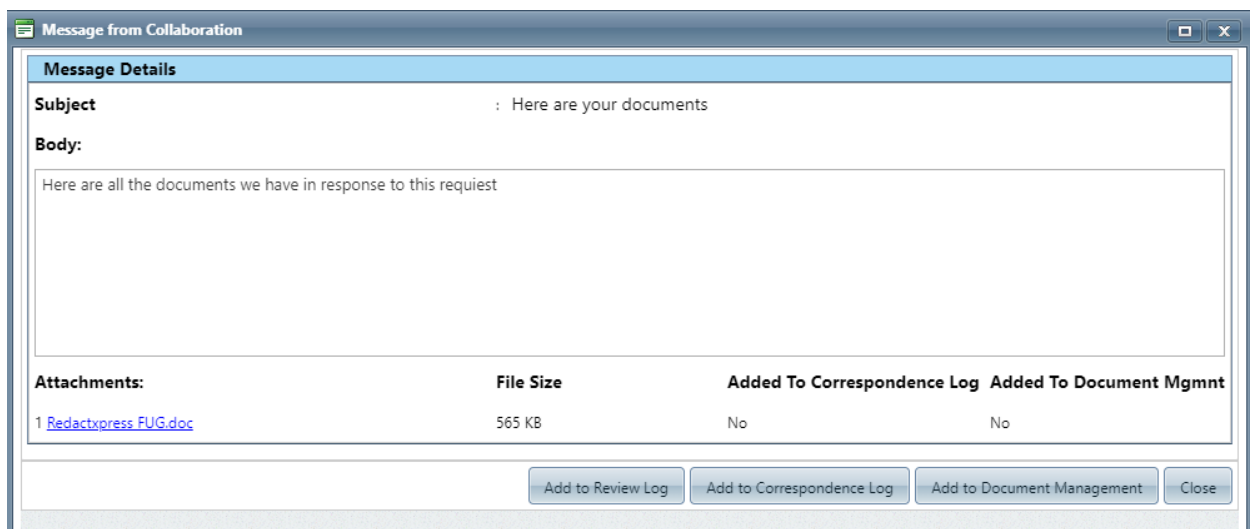
2.1.2 Receiving an RFD Response

When you receive a response to a request sent to the 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.

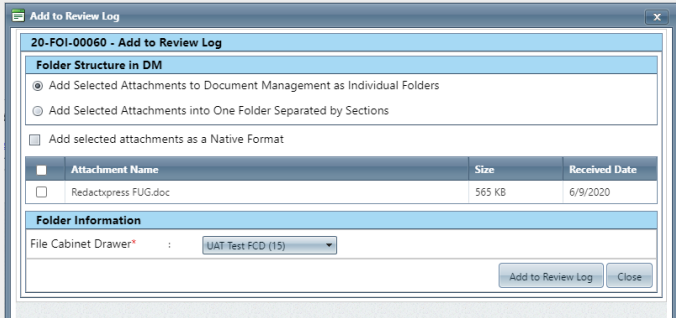
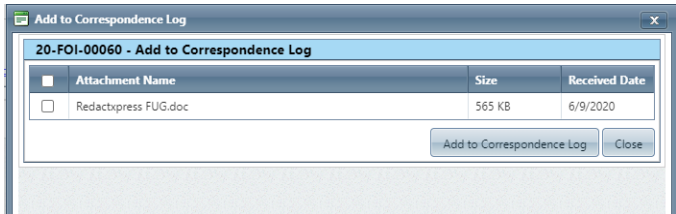
1. Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:

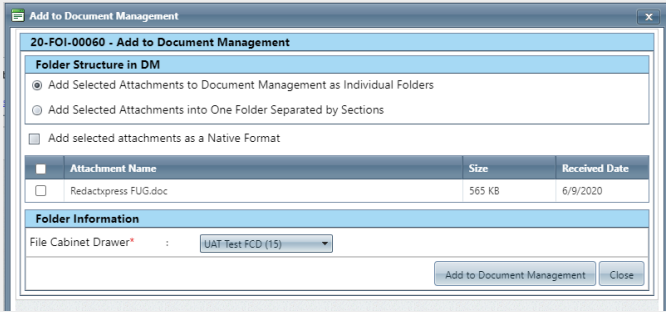


2. Select the new message and click **View Message**. The subject/body of the message should alert you that this message contains the responsive documents:

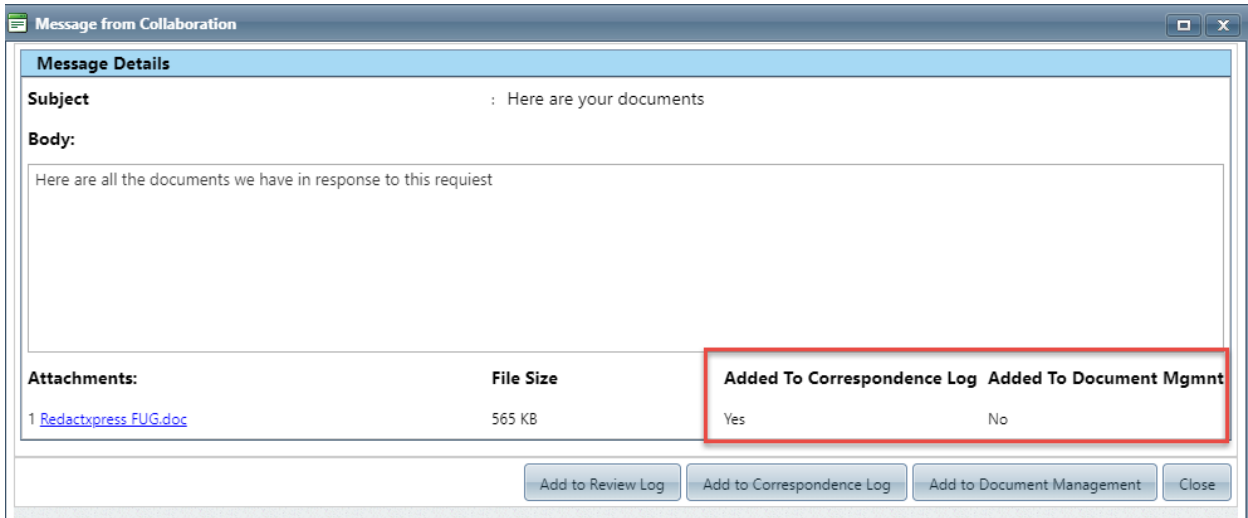


3. There are three options for moving the documents into FOIAXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

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>	
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>	

Action	Description	Image
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>	

- After adding attachments, the action is reflected on the *Message Details* screen as shown below:



Message Details

Subject : Here are your documents

Body:

Here are all the documents we have in response to this request

Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 Redactpress FUG.doc	565 KB	Yes	No

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

Collaboration for FOIAXpress Users

Home Requesters Requests Document Management Administration Reports Request #

Home >> Collab Messages

Collaboration Messages

Request #	Requester	Subject	Message	Received Date	Program Office
20-FOI-00060	Shorp, Befferly	Here are your documents	Here are all the documents we have...	6/9/2020	Normalville Office

Page size: 100 1 items in 1 pages

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

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- Click **Request for Documents** then select the request you just completed and click **Take Action**:

Request for Documents

Action ID	Location(s) Referred	Request Date	Sent Date	Due Date	Completed Date	Status
49	Normalville Office (jgatewood@ai...	06/07/2020	06/08/2020	06/07/2020		Request for Documents Sent
48	Normalville Office (jgatewood@ai...	06/08/2020	06/08/2020	06/08/2020		Request for Documents Sent

Page size: 100 2 items in 1 pages

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

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

Request For Documents Action

New Action - Request for Documents -49

Location : Normalville Office (jgatewood@ains.com)

Action Date* : 6/9/2020

Status* : Completed

Comments :

Due Date* : 6/7/2020

☒ Completed

Completed Date* : 6/9/2020

Attachment :

Drag and Drop Zone

Scan File

Attach File

Print Barcode

[Professional Referen...](#)

Save Cancel



8. Check the **Completed** checkbox and enter the **Completed Date**.
9. Click **Save** to save the action. The status updated to *Completed*, and the RFD updates on the portal side to let the portal user know the task is complete:

Request for Documents						
Action ID	Location(s) Referred	Request Date	Sent Date	Due Date	Completed Date	Status
49	Normalville Office (jgatewood@ai...	06/07/2020	06/08/2020	06/07/2020	06/09/2020	Completed
48	Normalville Office (jgatewood@ai...	06/08/2020	06/08/2020	06/08/2020		Request for Documents Sent

⏪ ⏩ 1 ⏴ ⏵ Page size: 100 2 items in 1 pages

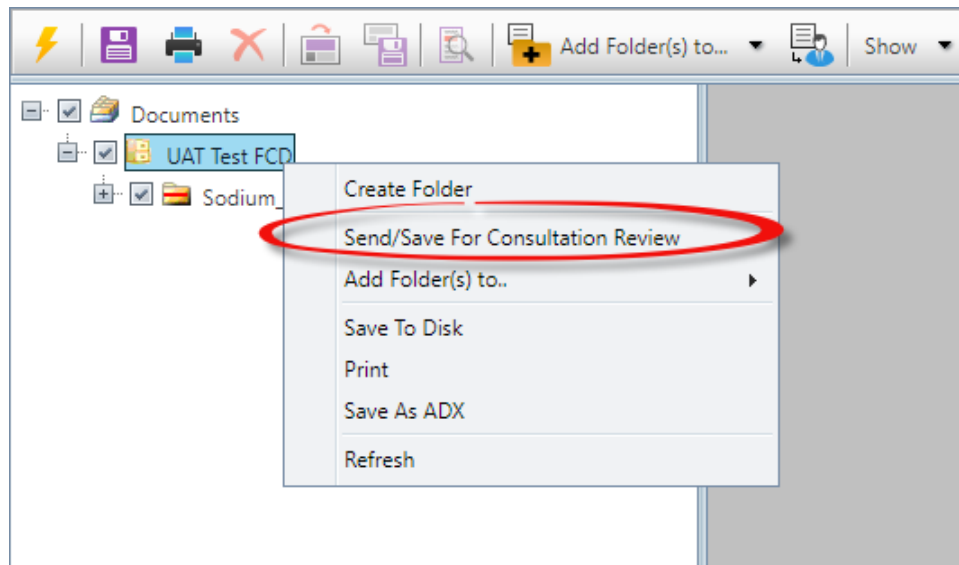
New Take Action View Delete Messages(0/0) Send Email/Reminder Send Reminder by Print Action(s) Log

2.2 Consultation Reviews

2.2.1 Send Documents for Consultation Review

The Collaboration Portal allows you to send documents directly from Document Management to the portal for review. Follow the steps below to send documents for consultation:

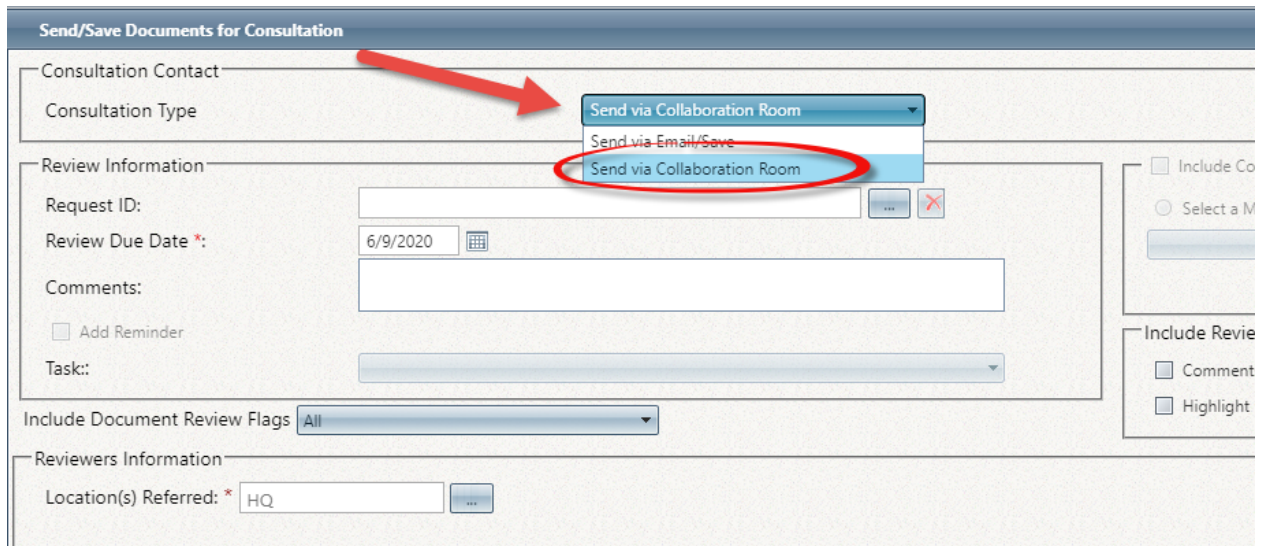
1. First, open the folder you'd like to send in Document Management. In *Document Management*, select the **Document/Folder** to send for review and load any review layer you'd like to include.
2. Right click the Document/Folder and click Send/Save for Consultation Review:



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



Collaboration for FOIAXpress Users



Send/Save Documents for Consultation

Consultation Contact
Consultation Type

Review Information
Request ID:
Review Due Date *: 6/9/2020
Comments:
☐ Add Reminder
Task:

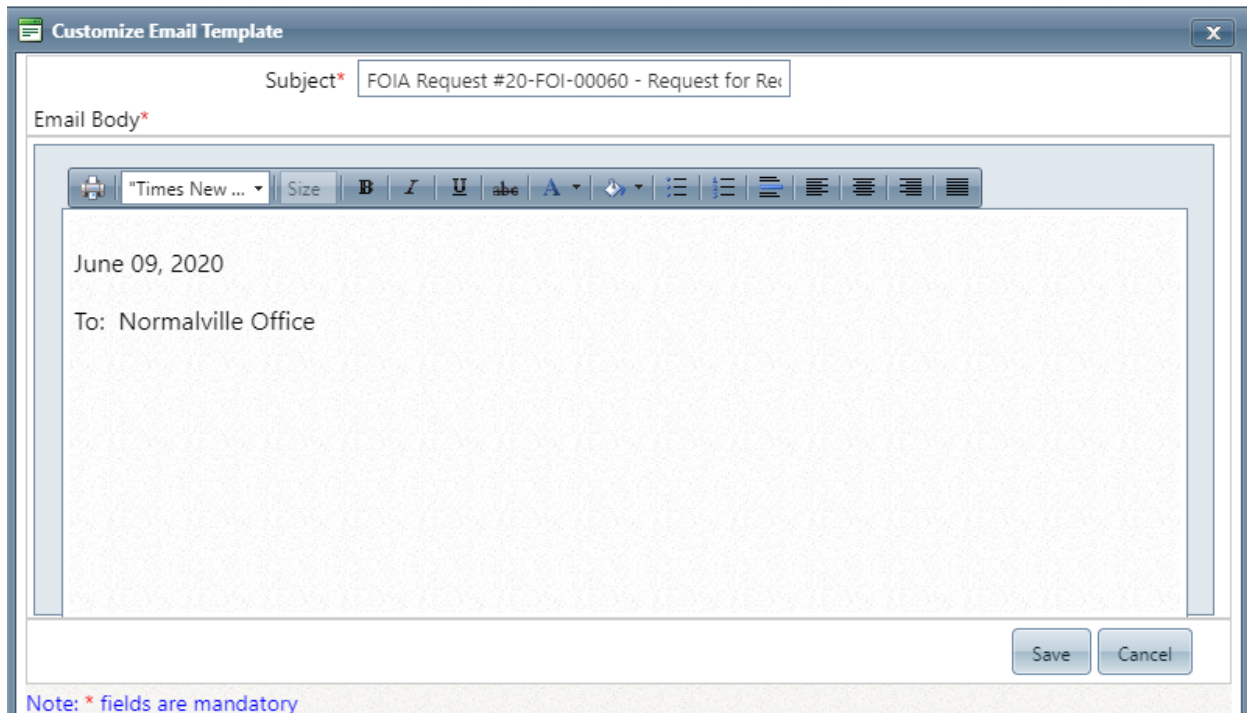
Include Document Review Flags: All

Reviewers Information
Location(s) Referred: * HQ

Send via Collaboration Room
Send via Email/Save
Send via Collaboration Room

Include Co
Select a M
Include Revie
Comment
Highlight

4. In the *Review Information* section, click the **Lookup** button to locate a request to associate with this consultation.
5. In the *Reviewers Information*, select an eligible **Consultation Location**.
6. Under *Email Template*, select a message template to send with the consultation. Click **Customize** to customize the template for this consultation:



Customize Email Template

Subject* FOIA Request #20-FOI-00060 - Request for Re

Email Body*

June 09, 2020
To: Normalville Office

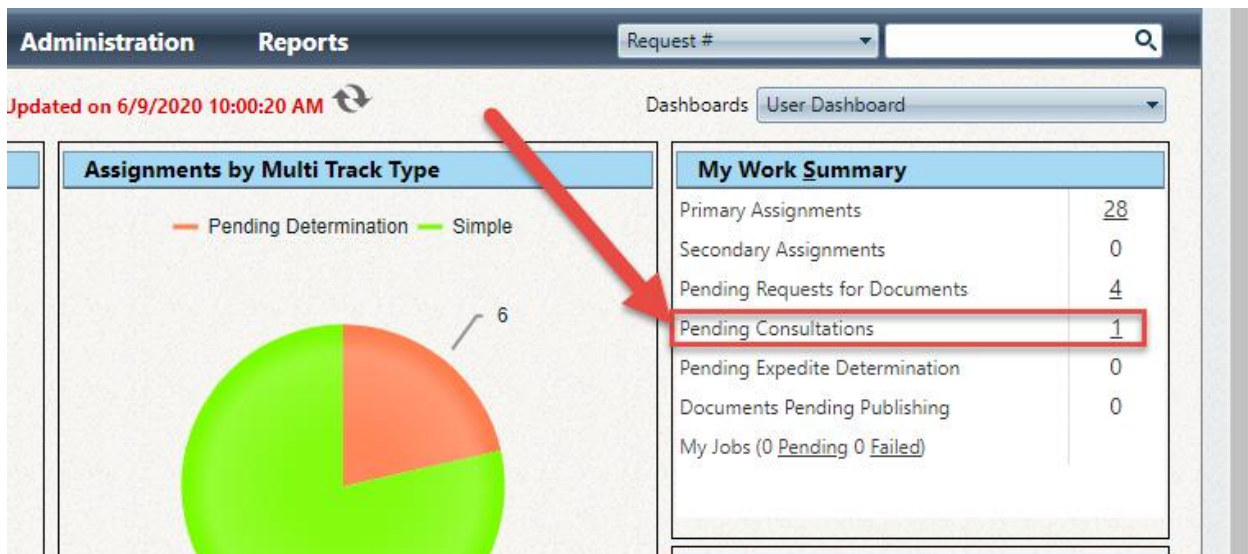
Save Cancel

Note: * fields are mandatory

7. In the *Customize Email Template* screen, edit the message however you need. When you're done, click **Save**.
8. When you've configured all the details on the *Send/Save Documents for Consultation* screen, click **OK** to continue.



- The job processes, and on completion 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**:



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

2.2.2 Receiving a Consultation Review

When you receive a response to a consultation review sent to the 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. These steps apply to both *Consultation Reviews* and *Requests for Documents*.

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

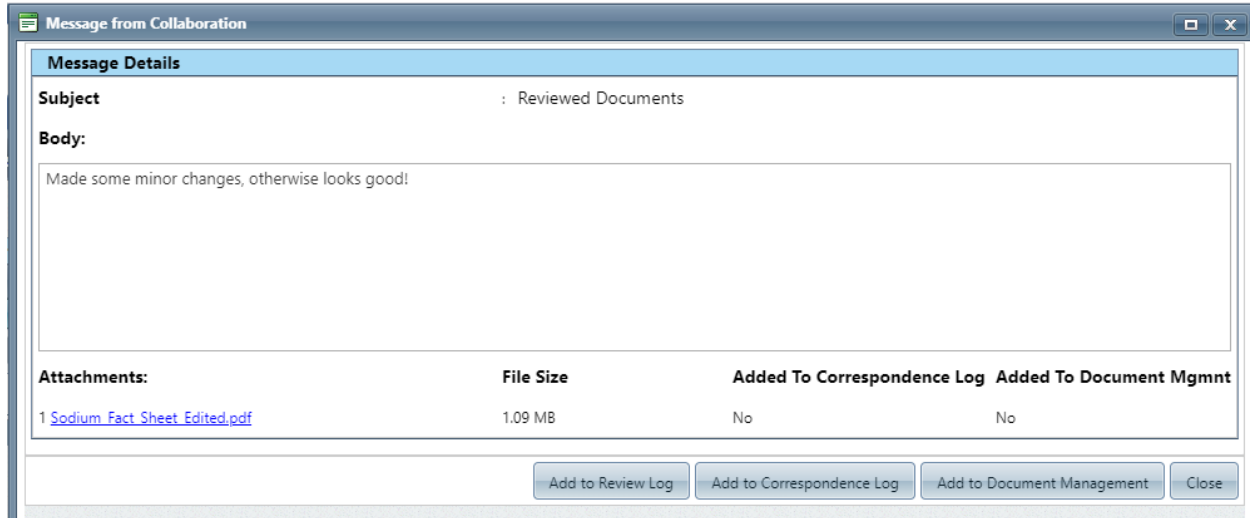
The screenshot shows the 'Collaboration Messages' screen. At the top, there are tabs for 'Home', 'Requesters', 'Requests', 'Document Management', 'Administration', and 'Reports', along with a 'Request #' search bar. Below the tabs, the breadcrumb 'Home >> Collab Messages' is visible. The main content area is titled 'Collaboration Messages' and contains a table with the following data:

Request #	Requester	Subject	Message	Received Date	Program Office
20-FOI-00062	Shorp, Befferly	Reviewed Documents	Made some minor changes, otherwise lo...	6/9/2020	Normalville Office

Below the table, there are navigation controls including 'Page size: 100' and '1 items in 1 pages'. At the bottom, there are buttons for 'Print', 'Print All', 'Export', 'View Message', 'Reply', 'Mark as Read', and 'Go To Request'.

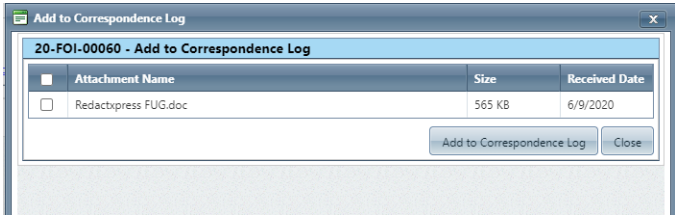
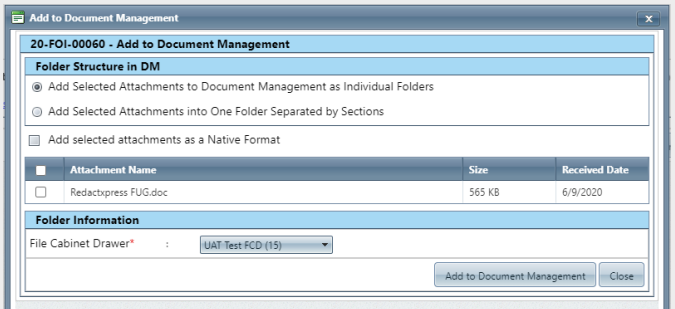
- Select the new message and click **View Message**. The subject/body of the message should alert you that this message contains the responsive documents:

Collaboration for FOIAXpress Users



3. There are three options for moving the documents into FOIAXpress: **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 screenshot shows a dialog box titled "Add to Review Log" for request "20-FOI-00060". It has two main sections: "Folder Structure in DM" with radio buttons for "Add Selected Attachments to Document Management as Individual Folders" (selected), "Add Selected Attachments into One Folder Separated by Sections", and "Add selected attachments as a Native Format"; and "Folder Information" with a table listing attachments and a dropdown for "File Cabinet Drawer" set to "UAT Test FCD (15)". Buttons at the bottom are "Add to Review Log" and "Close".</p>

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>	

- After adding attachments, the action is reflected on the *Message Details* screen as shown below:



Collaboration for FOIAXpress Users

Message from Collaboration

Message Details

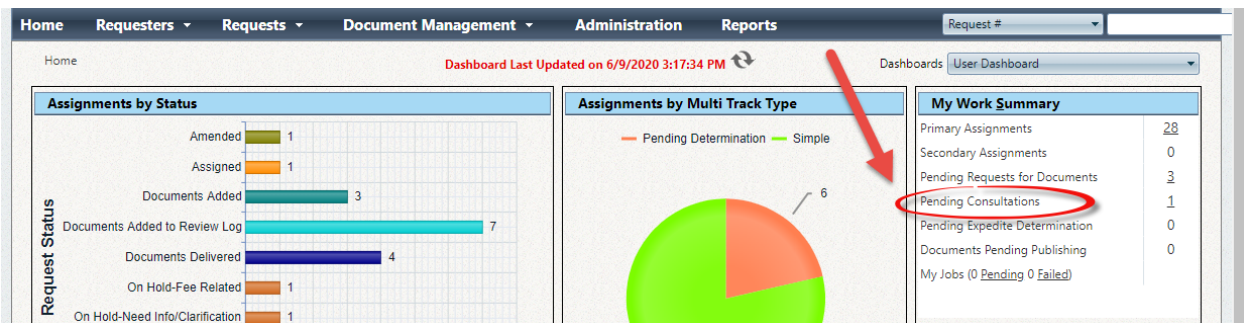
Subject: : Reviewed Documents

Body:
Made some minor changes, otherwise looks good!

Attachments:

	File Size	Added To Correspondence Log	Added To Document Mgmt
1 Sodium Fact Sheet Edited.pdf	1.09 MB	Yes	No

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



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

Request for Documents

Action ID	Location(s) Referred	Request Date	Sent Date	Due Date	Completed Date	Status
49	Normalville Office (jgatewood@ai...)	06/07/2020	06/08/2020	06/07/2020		Request for Documents Sent
48	Normalville Office (jgatewood@ai...)	06/08/2020	06/08/2020	06/08/2020		Request for Documents Sent

2 items in 1 pages

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



New Action - Consultation Review Log -1

Location : Normalville Office

Action Date* : 6/9/2020

Status* : Review Complete

Comments :

Due Date* : 6/9/2020

☒ Completed

Completed Date* : 6/9/2020

Attachment :

Drag and Drop Zone

Scan File

Attach File

Print Barcode

Save Cancel

Note: * fields are mandatory

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

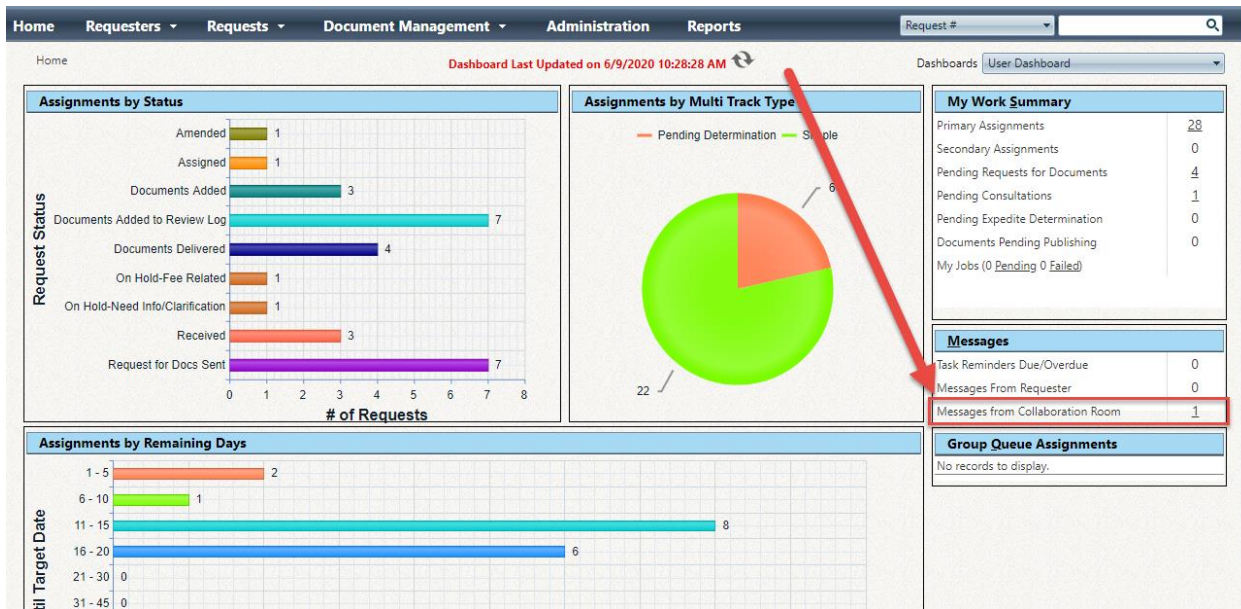
2.3 Correspondence

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.



Collaboration for FOIAXpress Users



- 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, including **View Message**, **Reply**, **Mark as Read**, and **Go To Request**, which links directly to the associated Request.

Home >> Collab Messages

Request #	Requester	Subject	Message	Received Date	Program Office
20-FOI-00060	Shorp, Befferly	Example attachment	Here's an attachment, as an example.	6/9/2020	Normalville Office
20-FOI-00060	Shorp, Befferly	Clarification on the thing	Do you mean THE thing, or THAT thing...	6/9/2020	Normalville Office

Page size: 100

2 items in 1 pages

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

- Select a message from the list and click **View Message** to view the message contents and details:



The screenshot shows a window titled "Message from Collaboration". It has a "Message Details" section with "Subject : Example attachment" and "Body: Here's an attachment, as an example." Below this is a table of attachments:

Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 10.6 Cover Page.pdf	1.04 MB	No	No

At the bottom are four buttons: "Add to Review Log" (labeled B), "Add to Correspondence Log" (labeled C), "Add to Document Management" (labeled D), and "Close". A red circle labeled A is next to the attachment name.

- The *Message Details* includes the message *Subject* and *Body*. If the message includes any (A) *Attachments*, there are options to take these attachments and (B) **Add to Review Log**, (C) **Add to Correspondence Log**, or (D) **Add to Document Management**.
- You can also click **Reply** to respond to the portal. The correspondence interface appears as shown below:
- 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:

Original Message (labeled A):

Subject : Clarification on the thing
 Body : Do you mean THE thing, or THAT thing? This is an i...

Compose Message:

Subject* : (labeled B)
 Body* : (labeled C)
 Attachment : Attach From Disk

 OR
[Attach from Request Correspondence Log](#)

At the bottom right are "Send" (labeled D) and "Back" buttons. A note at the bottom left says "Note: * fields are mandatory".

- If you click **Mark as Read** on a selected message, it is removed from this *Collaboration Messages* list.



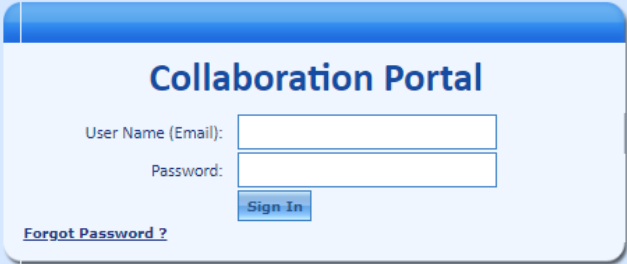
3 Collaboration for Portal Users

This section provides instructions for Collaboration Portal users to work on tasks received from FOIAXpress. The following topics are covered in this section:

- *Accessing the Collaboration Portal:* Logging in to the portal and an overview of the UI
- *Requests for Documents:* Details on receiving and fulfilling a Request for Documents.
- *Consultation Reviews:* How to complete and assigned Consultation Review using Collaboration.
- *Sending Messages Using the Portal:* Sending and receiving messages from the Portal

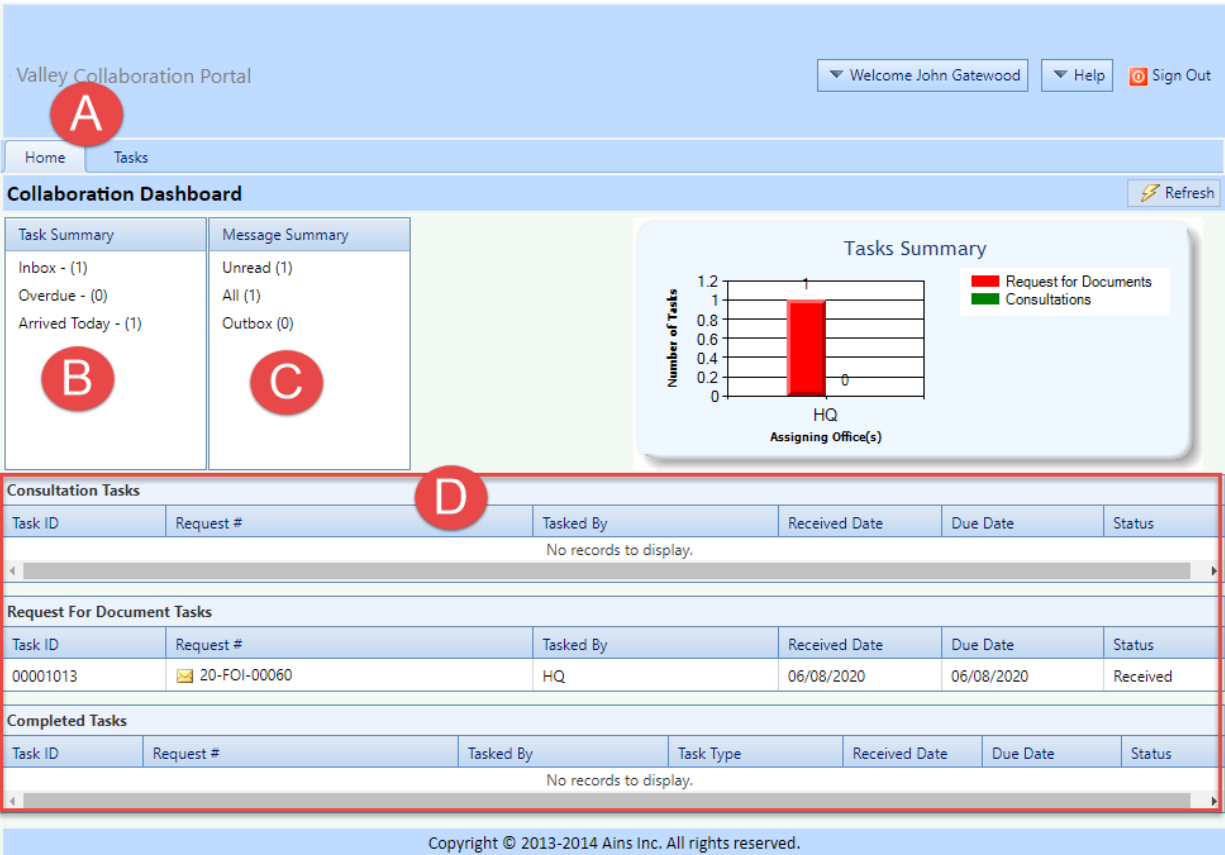
3.1 Accessing the Collaboration Portal

As a collaboration portal user, you will receive an email when your account is created, allowing you to log in to the portal. An example log in screen is shown below:

The image shows a login interface for the 'Collaboration Portal'. It features a blue header bar with the title 'Collaboration Portal' in white. Below the header, there are two input fields: 'User Name (Email):' and 'Password:'. To the right of the 'Password:' field is a blue 'Sign In' button. Below the 'User Name (Email):' field, there is a link that says 'Forgot Password?'. The entire login form is set against a light blue background.

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

Collaboration for Portal Users



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 (where you land on login), as well as the <i>Tasks</i> tab, which consolidates all of your current tasks in one location
B	Task Summary	The <i>Task Summary</i> widget provides links to your Inbox , Overdue tasks, and tasks which Arrived Today
C	Message Summary	The <i>Message Summary</i> widget provides quick links to Unread messages, All of your messages, and your Outbox



Ref	Element	Description
D	Tasks	Ongoing <i>Consultation Tasks</i> and <i>Request for Document Tasks</i> are listed here. There is also a listing of your <i>Completed</i> tasks.

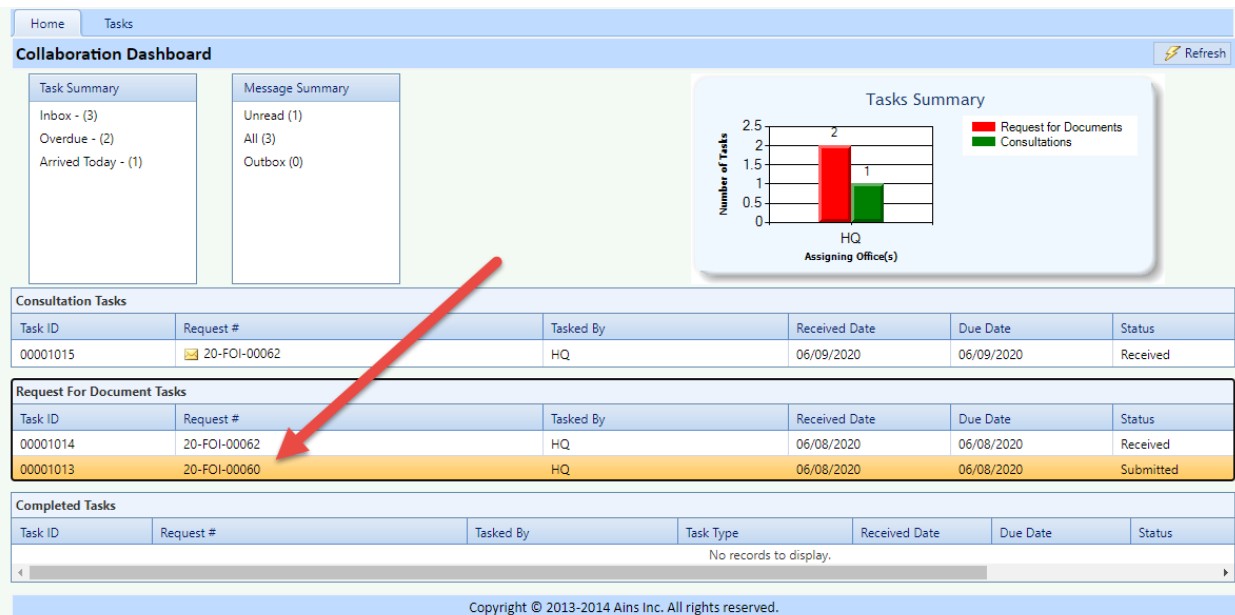
The next sections provide steps to complete *Request for Documents Tasks*, *Consultation Tasks*, and *Sending Messages Using the Portal*.

3.2 Request for Document Tasks

3.2.1 Responding to a Request for Documents Task

After you log in to the Collaboration Portal, 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.

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



2. 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 sent you the RFD:



Collaboration for Portal Users

test.efoia-host.com says

Confirmation of receipt has been sent to sender.

OK

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

HomeTasks

Task ID: 00001013

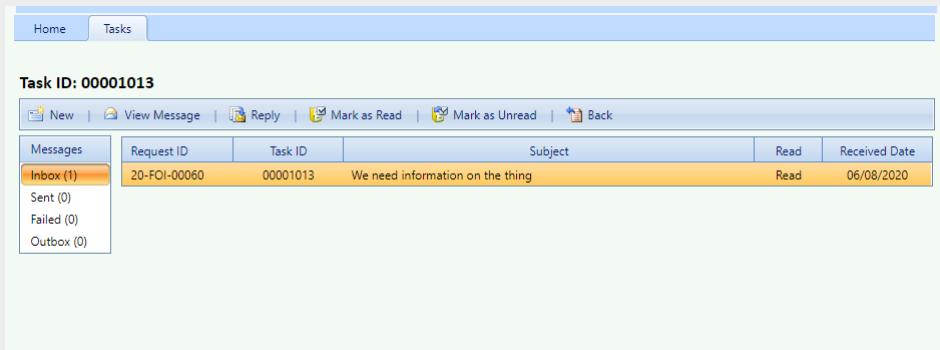
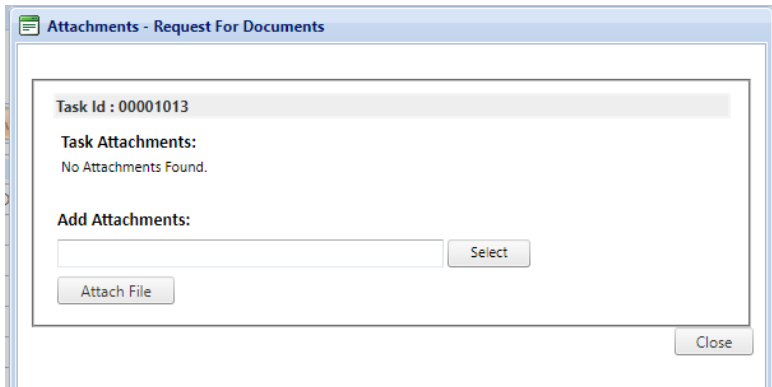
Messages 1/1View/Add Attachments (0)Notes Log (1)Change StatusSubmit Completed TaskBack

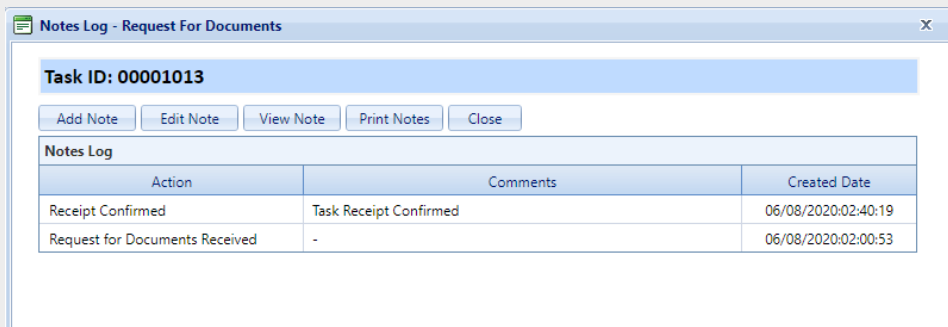
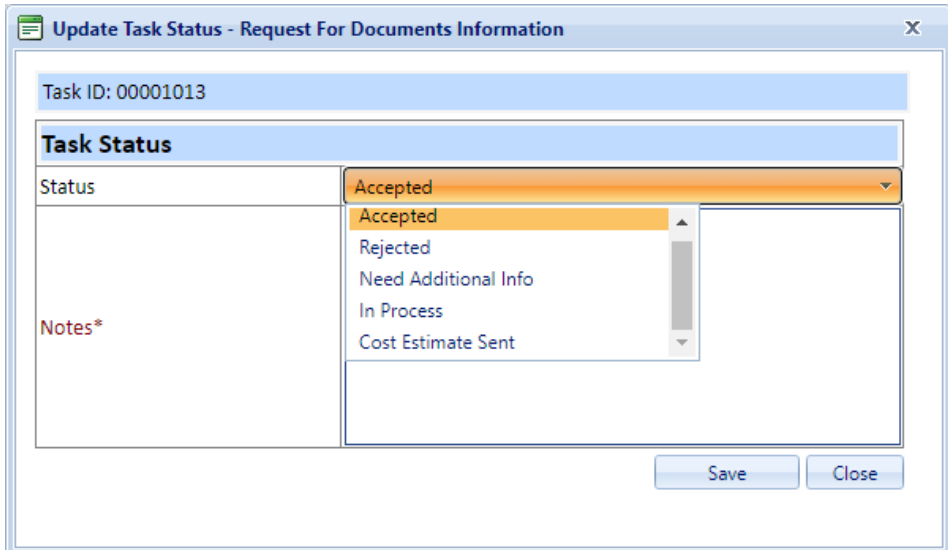
Request Information	
Request for Documents ID	48
Request #	20-FOI-00060
Status	Received
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	I want to know about that thing. You know what I mean. (Date Range for Record Search: From 1/1/2020 To 6/1/2020)

Sender Information	
First Name	Admin
Last Name	Admin
Email	admin@ains.com
Tasked By	HQ
Phone Number	-
Comments	Need all the documents you have about that thing. You know the one.

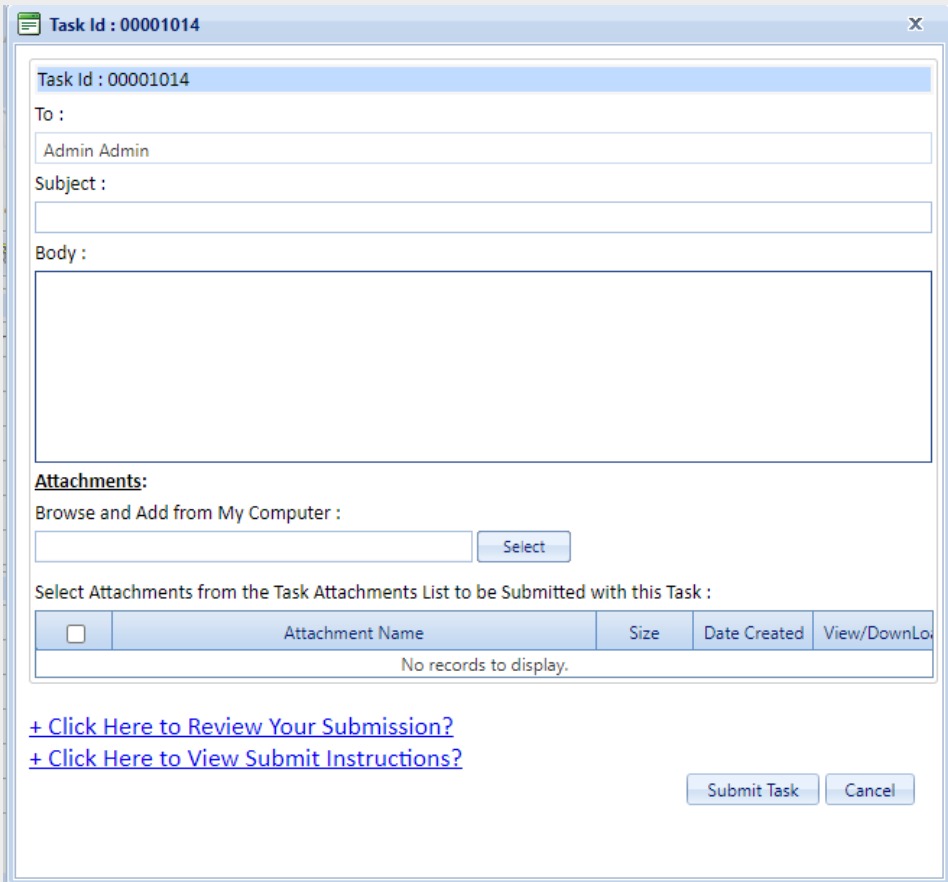
- This includes all the information provided by the user who sent the RFD. This is also the screen where you'll take action to respond to this request. These actions are described below:



Action	Interface										
<p>Click Messages to access correspondence for this task. You can send a New message to the user who sent the request, or View/Reply to messages in your inbox.</p>	 <p>The screenshot shows a web interface for a task with ID 00001013. At the top, there are tabs for 'Home' and 'Tasks'. Below the tabs, the task ID is displayed. A toolbar contains links for 'New', 'View Message', 'Reply', 'Mark as Read', 'Mark as Unread', and 'Back'. On the left, a 'Messages' sidebar shows 'Inbox (1)', 'Sent (0)', 'Failed (0)', and 'Outbox (0)'. The main area displays a table of messages:</p> <table><thead><tr><th>Request ID</th><th>Task ID</th><th>Subject</th><th>Read</th><th>Received Date</th></tr></thead><tbody><tr><td>20-FOI-00060</td><td>00001013</td><td>We need information on the thing</td><td>Read</td><td>06/08/2020</td></tr></tbody></table>	Request ID	Task ID	Subject	Read	Received Date	20-FOI-00060	00001013	We need information on the thing	Read	06/08/2020
Request ID	Task ID	Subject	Read	Received Date							
20-FOI-00060	00001013	We need information on the thing	Read	06/08/2020							
<p>Click View/Add Attachments to attach documents to this RFD for submittal back to the requester. You can also view any attachments included with this original request.</p>	 <p>The screenshot shows a dialog box titled 'Attachments - Request For Documents'. It displays the task ID '00001013'. Under 'Task Attachments:', it says 'No Attachments Found.'. Under 'Add Attachments:', there is a text input field, a 'Select' button, and an 'Attach File' button. A 'Close' button is located at the bottom right of the dialog.</p>										

Action	Interface									
<p>The Notes option 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.</p>	 <p>The screenshot shows a window titled "Notes Log - Request For Documents". At the top, it displays "Task ID: 00001013". Below this are buttons for "Add Note", "Edit Note", "View Note", "Print Notes", and "Close". A section titled "Notes Log" contains a table with the following data:</p> <table><tr><th>Action</th><th>Comments</th><th>Created Date</th></tr><tr><td>Receipt Confirmed</td><td>Task Receipt Confirmed</td><td>06/08/2020:02:40:19</td></tr><tr><td>Request for Documents Received</td><td>-</td><td>06/08/2020:02:00:53</td></tr></table>	Action	Comments	Created Date	Receipt Confirmed	Task Receipt Confirmed	06/08/2020:02:40:19	Request for Documents Received	-	06/08/2020:02:00:53
Action	Comments	Created Date								
Receipt Confirmed	Task Receipt Confirmed	06/08/2020:02:40:19								
Request for Documents Received	-	06/08/2020:02:00:53								
<p>Use the Update Task Status feature to track progress on this task. This status is internal to the Collaboration Portal and is not reported back to the requester. The selectable statuses are shown in the example screen.</p>	 <p>The screenshot shows a window titled "Update Task Status - Request For Documents Information". It displays "Task ID: 00001013". Below this is a section titled "Task Status" with a "Status" label and a dropdown menu. The dropdown menu is open, showing the following options: "Accepted", "Rejected", "Need Additional Info", "In Process", and "Cost Estimate Sent". The "Accepted" option is currently selected. At the bottom right of the window are "Save" and "Close" buttons.</p>									



Action	Interface
<p>Click Submit Completed Task to submit responsive materials to the requester.</p> <p>Here you can include a message, as well as select from existing attachments to include with the response package. There is also the option to add attachments by clicking <i>Select</i> from the <i>Browse and Add from My Computer</i> field.</p> <p>See the <i>Complete a Request for Documents</i> section for more.</p>	 <p>The screenshot shows a web interface for a task with ID 00001014. It includes a 'To' field with 'Admin Admin', a 'Subject' field, and a large 'Body' text area. Under the 'Attachments' section, there is a 'Browse and Add from My Computer' button with a 'Select' button next to it. Below this is a table for selecting attachments from a task list, which currently shows 'No records to display.' At the bottom, there are two links: '+ Click Here to Review Your Submission?' and '+ Click Here to View Submit Instructions?'. The interface concludes with 'Submit Task' and 'Cancel' buttons.</p>

5. You can now opt to *Accept* or *Reject* this request. Click **Change Status** to mark this request as **Accepted** or **Rejected**:



Update Task Status - Consultation Review Information

Task ID: 00001015

Task Status

Status: Accepted

Notes*

Accepted
Rejected
Need Additional Info
In Process
Cost Estimate Sent

Save Close

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

6. 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**. In this example we will accept the request.
7. Use the tools available to collaborate and fulfill this request. This includes *Sending Messages Using the Portal*

3.2.2 Completing a Request for Documents Task

When you've gathered all responsive documents to fulfill a 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 the Collaboration Portal, open the *Request For Document Task* that you are ready to complete.
2. On the *Tasks* tab, click **Submit Completed Task**:

Collaboration for Portal Users

Home Tasks

Task ID: 00001013

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

Request Information	
Request for Documents ID	48
Request #	20-FOI-00060
Status	Received
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	I want to know about that thing. You know what I mean. (Date Range for Record Search: From 1/1/2020 To 6/1/2020)

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

Task Id : 00001013

Task Id : 00001013

To :
Admin Admin

Subject :

Body :

Attachments:
Browse and Add from My Computer :

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

<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

[+ Click Here to Review Your Submission?](#)
[+ Click Here to View Submit Instructions?](#)

4. On this screen, provide the *Subject* and *Body* for the message that accompanies the completed Request.



5. In the *Attachments* field, use the **Select** button to upload documents to include with the completed request, or you can select attachments from this task to include in the response package.
6. There are also options to [Click Here to Review Your Submission?](#) And [Click Here to View Submit Instructions.](#)
7. When you're ready to submit click **Submit Task**. A pop up message appears as shown below:

efoia-host.com says

Job ID '1032' has been submitted. The status of this job can be viewed from the 'My Jobs' link in your welcome dropdown on the Home Screen. An email notification will be sent when the process is complete.

OK

8. Click **OK** to dismiss the message. The *Tasks* tab refreshes, with the *Status* updated to *Submitted*. Additionally, the options to **Change Status** and **Submit Completed Task** are no longer available.

3.3 Consultation Tasks

3.3.1 Responding to a Consultation Task

Consultation Tasks arrive in the *Consultation Tasks* list on your Collaboration Portal *Home* tab.

1. When you receive a new Consultation Task, it appears in the list as shown below. Double click the new **Consultation Task** to open it.

Collaboration Dashboard

Home Tasks

Refresh

Task Summary

- Inbox - (3)
- Overdue - (2)
- Arrived Today - (1)

Message Summary

- Unread (1)
- All (3)
- Outbox (0)

Tasks Summary

Number of Tasks

Assigning Office(s)

HQ

Request for Documents (2)

Consultations (1)

Consultation Tasks

Task ID	Request #	Tasked By	Received Date	Due Date	Status
00001015	20-FOI-00062	HQ	06/09/2020	06/09/2020	Received

Request For Document Tasks

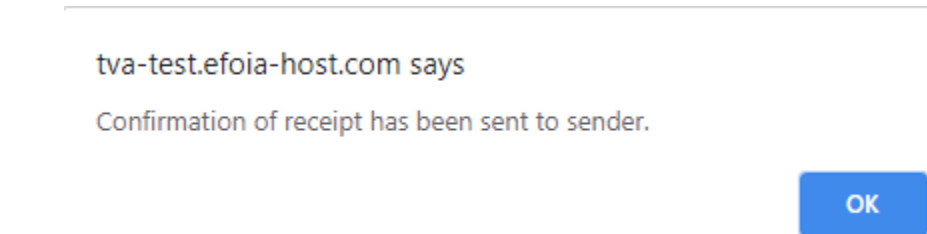
Task ID	Request #	Tasked By	Received Date	Due Date	Status
00001014	20-FOI-00062	HQ	06/08/2020	06/08/2020	Received
00001013	20-FOI-00060	HQ	06/08/2020	06/08/2020	Submitted

Completed Tasks

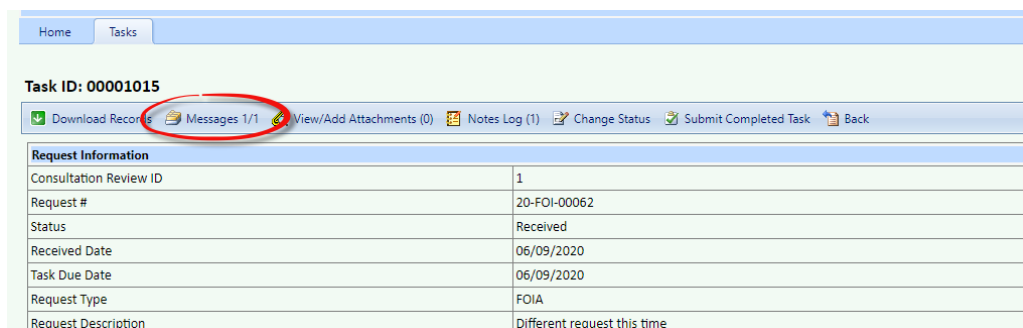
Task ID	Request #	Tasked By	Task Type	Received Date	Due Date	Status
No records to display.						



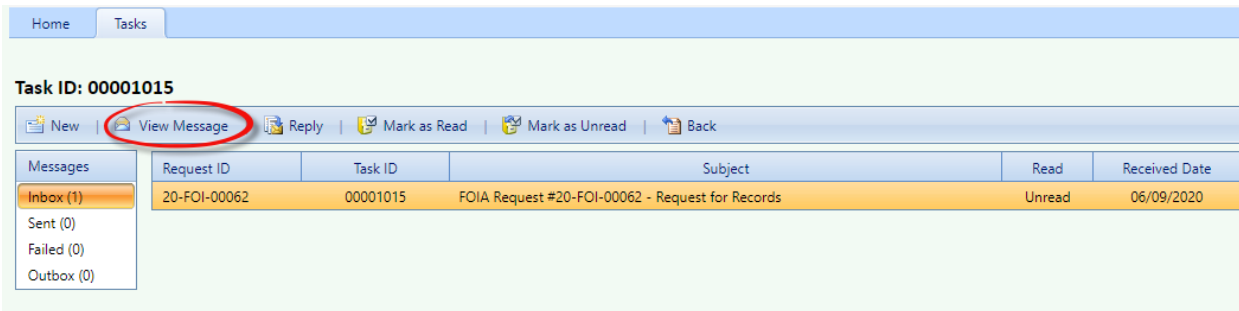
2. A pop up appears informing that the sender has been notified that you opened the task. Click **OK** to dismiss this message.



3. The *Tasks* tab appears with the new task details. First, click **Messages** to view the message sent with this consultation:

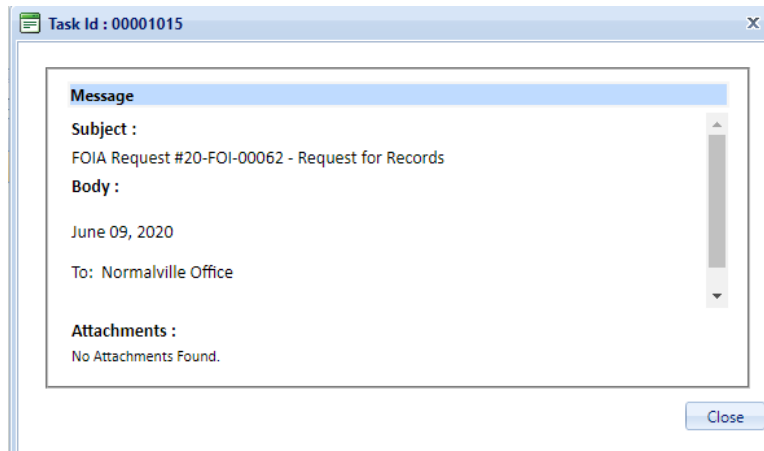


4. Click **View Message** to view the message details:

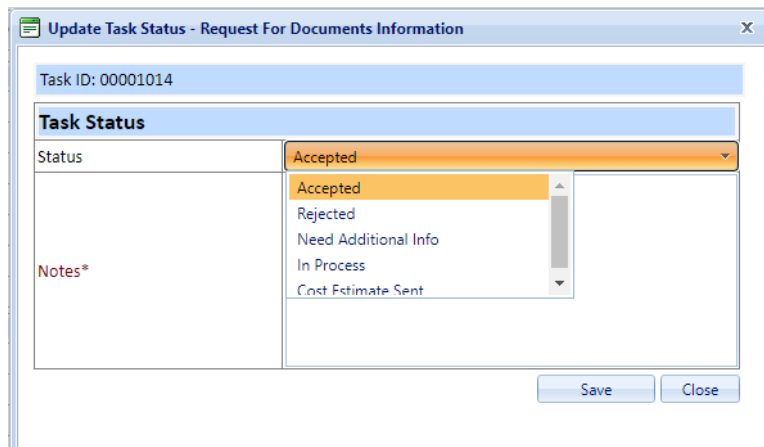


5. Review the details of the consultation request, then click **Close**.



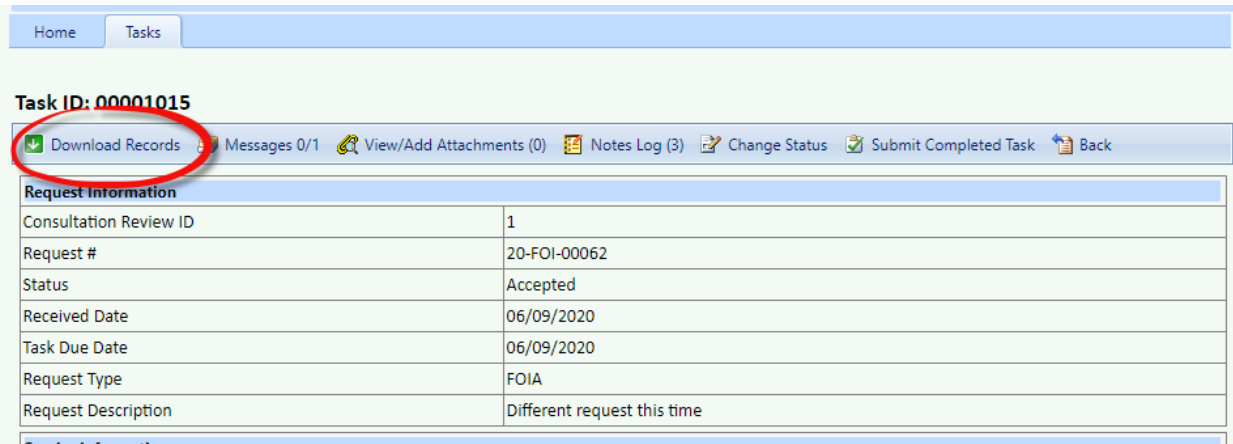


6. The *Status* of the message updates to *Read*. Click **Back** to return to the *Task Details*.
7. You can now opt to *Accept* or *Reject* this request. Click **Change Status** to mark this request as **Accepted** or **Rejected**:










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

8. 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**. In this example we will accept the request.
9. The status updates to *Accepted*. Next, click **Download Records**. This allows you to access the materials provided for your review.



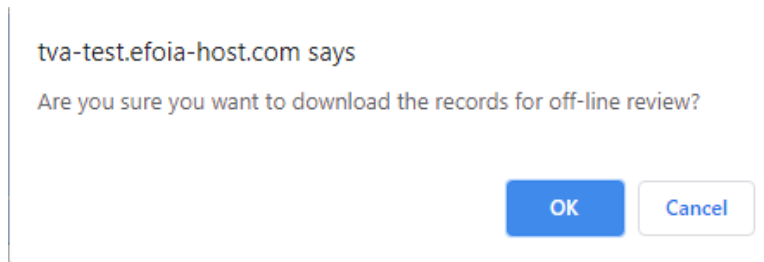
Home Tasks

Task ID: 00001015

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

Request Information	
Consultation Review ID	1
Request #	20-FOI-00062
Status	Accepted
Received Date	06/09/2020
Task Due Date	06/09/2020
Request Type	FOIA
Request Description	Different request this time

10. A pop up appears confirming that you'd like to download the records for review. Click **OK** to continue:



tva-test.efoia-host.com says

Are you sure you want to download the records for off-line review?

OK Cancel

11. The download automatically begins. You can now conduct offline review of the materials. Once your review is complete, follow the steps in the *Completing a Consultation Task* section to complete the task.

3.3.2 Completing a Consultation Task

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

1. In the Collaboration Portal, open the *Collaboration Task* that you are ready to complete.
2. On the *Task* tab, click **Submit Completed Task**:

Collaboration for Portal Users

Home Tasks

Task ID: 00001015

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

Request Information	
Consultation Review ID	1
Request #	20-FOI-00062
Status	Accepted
Received Date	06/09/2020
Task Due Date	06/09/2020
Request Type	FOIA
Request Description	Different request this time

Sender Information	
First Name	Admin
Last Name	Admin

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

Task Id : 00001013

Task Id : 00001013

To :
Admin Admin

Subject :

Body :

Attachments:
Browse and Add from My Computer :

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

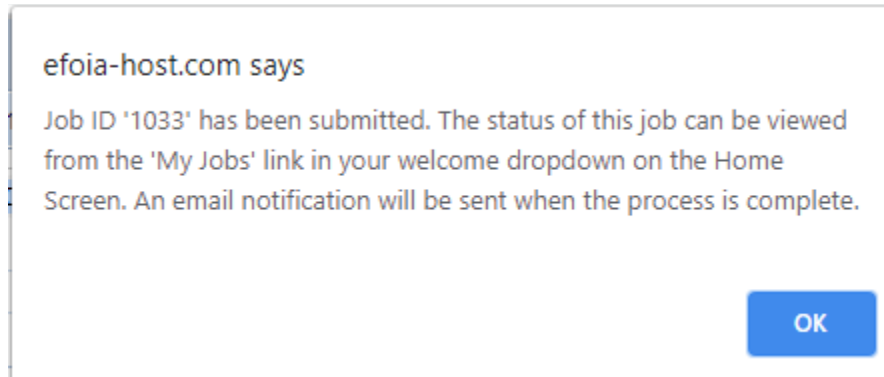
<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

[+ Click Here to Review Your Submission?](#)
[+ Click Here to View Submit Instructions?](#)

4. On this screen, provide the *Subject* and *Body* for the message that accompanies the completed Consultation Task.
5. In the *Attachments* field, use the **Select** button to upload the reviewed documents to be included with the completed request.



- There are also options to [Click Here to Review Your Submission?](#) and [Click Here to View Submit Instructions](#).
- When you're ready to submit click **Submit Task**. A pop up message appears as shown below:



- Click **OK** to dismiss the message. The *Tasks* tab refreshes, with the *Status* updated to *Submitted*. Additionally, the options to **Change Status** and **Submit Completed Task** are no longer available.

3.4 Sending Messages Using the Portal

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

- Open a Task, either an RFD or a Consultation. The process is the same for both. From the *Tasks* tab, click **Messages**:

Task ID: 00001013

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

Request Information	
Request for Documents ID	48
Request #	20-FOI-00060
Status	Received
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	I want to know about that thing. You know what I mean. (Date Range for Record Search: From 1/1/2020 To 6/1/2020)

Sender Information	
First Name	Admin
Last Name	Admin
Email	admin@ains.com
Tasked By	HQ
Phone Number	-
Comments	Need all the documents you have about that thing. You know the one.

- The *Messages* screen includes a (A) list of all messages received for this task (click **Outbox** to see any sent messages), as well as (B) *Actions* you can take:

Task ID: 00001013

Home Tasks

New View Message Reply Mark as Read Mark as Unread Back

Messages

	Request ID	Task ID	Subject	Read	Received Date
Inbox (1)	20-FOI-00060	00001013	We need information on the thing	Read	06/08/2020
Sent (0)					
Failed (0)					
Outbox (0)					

- You can select a message from the list and click to **View Message**, 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**.
- You can also send a message to the requester. Click **New** to send a new message. The *New Message* screen appears as shown below:

Task Id : 00001013

Task Id : 00001013

To :
Admin Admin

Subject : A

Body : B

Attachments:

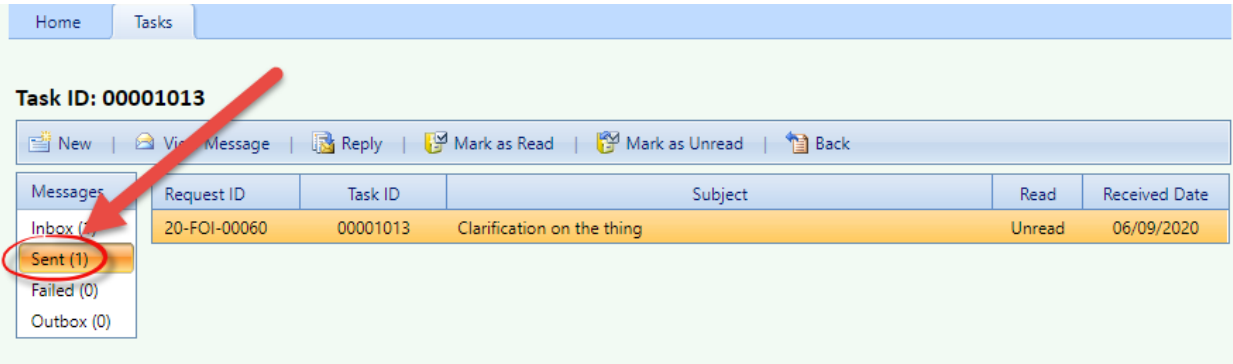
Browse and Add from My Computer : C Select

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

<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

D Send Message Cancel

5. First enter a (A) *Subject*, fill in the message (B) *Body*, and add any (C) *Attachments* if needed. While you can attach documents, you should provide all responsive documents as part of the request completion process. See the *Complete a Request Details* section for steps to provide responsive documents.
6. When you're ready, click (D) **Send Message** to send the message to the requester in FX. The message appears in the *Outbox*, and after processing, is viewable by clicking your **Sent** messages:

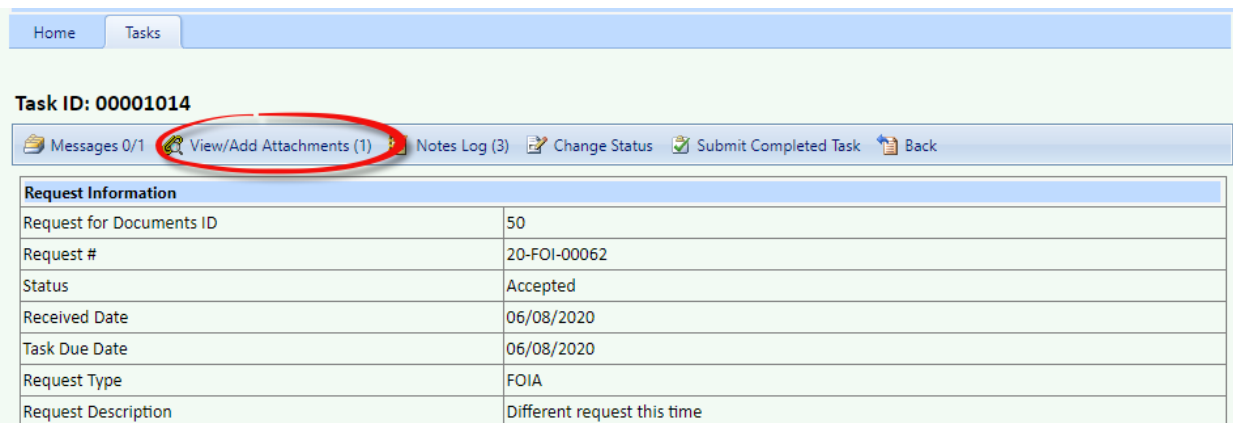


(!!) **Note:** If an error occurs when sending a message, it appears under the *Failed* messages.

3.5 Using Attachments in Tasks

Completing tasks assigned to you will require adding attachments to messages and task submissions. Regardless of how you access the *Attachments* function, the steps are the same. Follow the example below to use *Attachments*.

1. Open any *Task*. On the *Tasks* tab, click **View/Add Attachments**:



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

Task Id : 00001014

Task Attachments:

No.	Attachment	Size	Received Date	Sent Date
1.	Copy of e.Complaints Test Scripts.pdf	171.64 KB	6/8/2020	-

Add Attachments:

Select Attach File

Close

3. To add an attachment to the Task, first click **Select**. This opens an explorer window to locate the attachment you'd like to add. Locate the record(s) and click **Open**.
4. In the *Attachments* window, the selected files are listed under the *Add Attachments* field. When all attachments are listed, click **Attach File**.

Task Id : 00001014

Task Attachments:

No.	Attachment	Size	Received Date	Sent Date
1.	Copy of e.Complaints Test Scripts.pdf	171.64 KB	6/8/2020	-

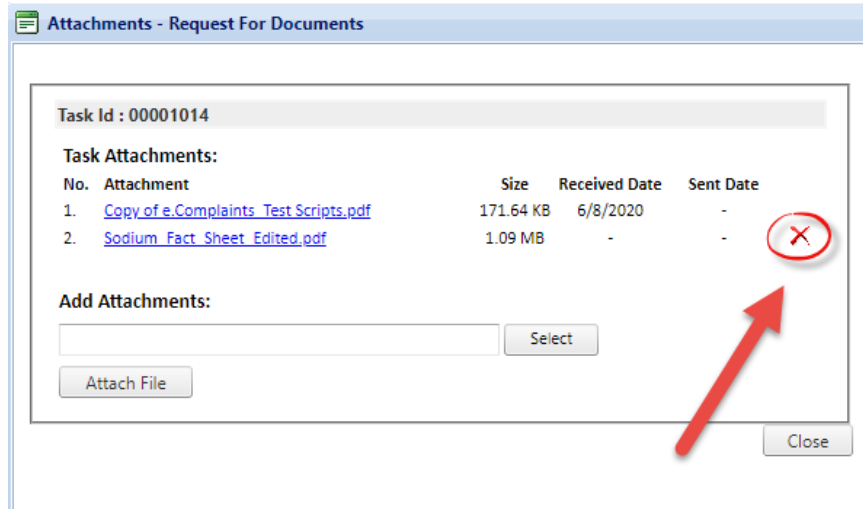
Add Attachments:

Select

Sodium_Fact_Sheet_Edited.pdf Remove

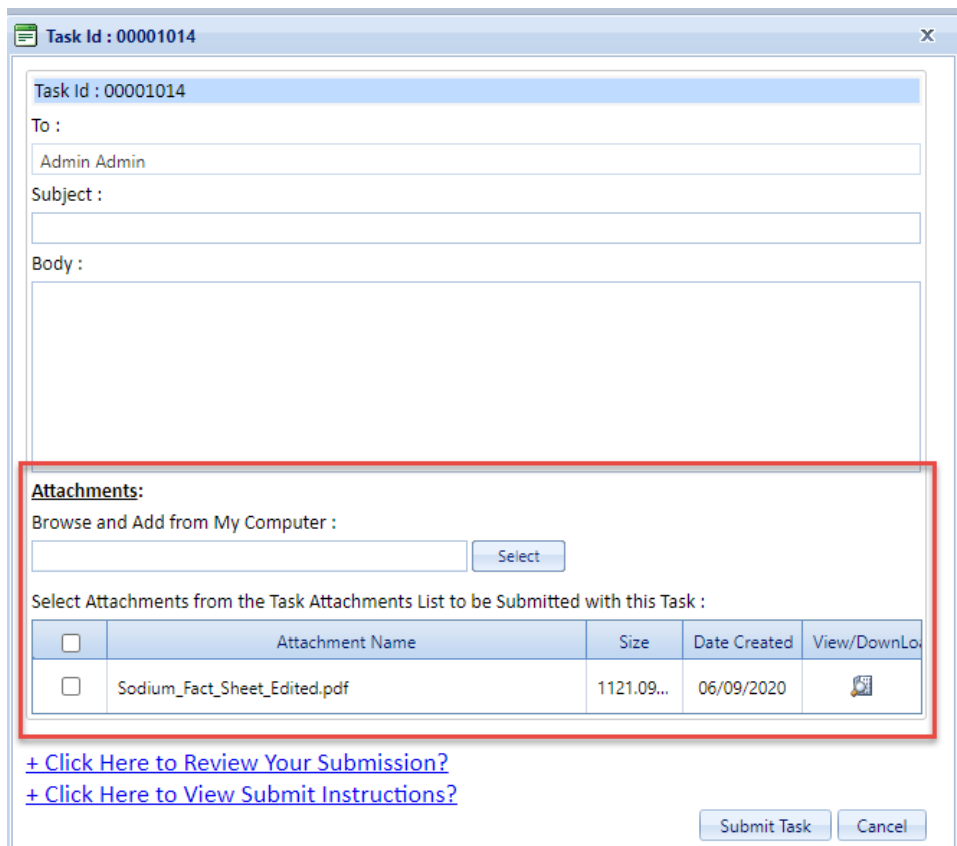
Attach File Close

5. The selected file is added to the *Task Attachments* list. You can also click the **X** next to any attachment to remove it from the Task:



(!!) Note: You can only delete records you've attached to this task.

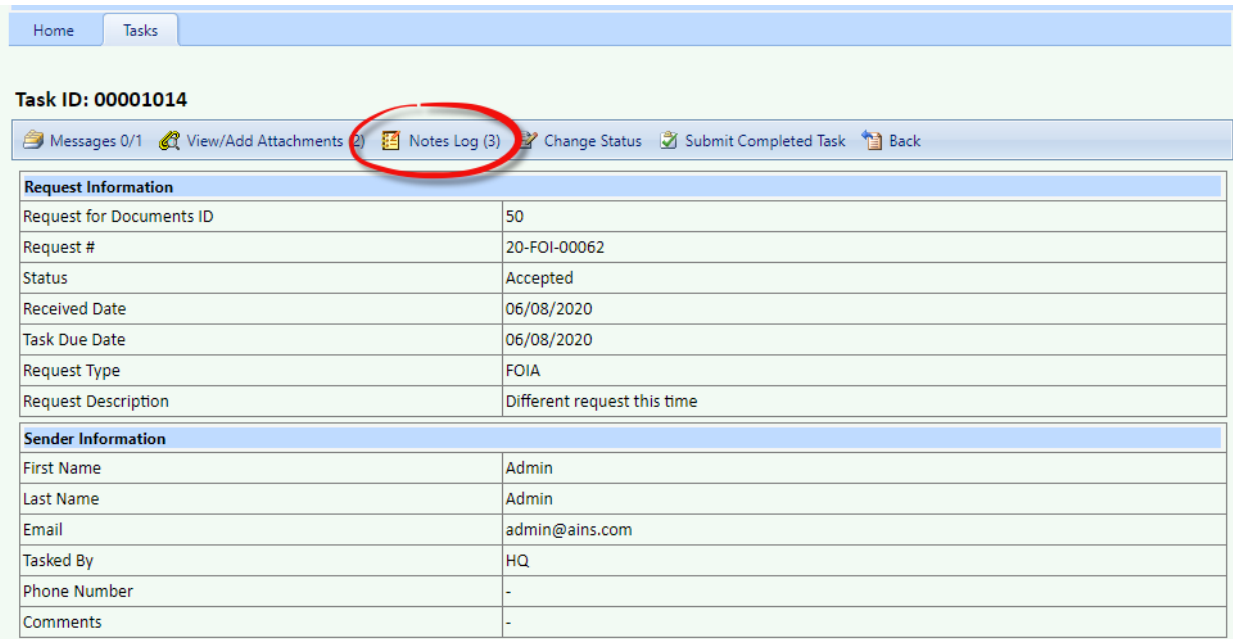
6. A similar *Attachments* interface also appears when using the **Submit Completed Task** function:



7. Here you can click **Select** to add new attachments to the submission, or select existing attachments added through the **View/Add Attachments** interface.

3.6 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:



Home Tasks

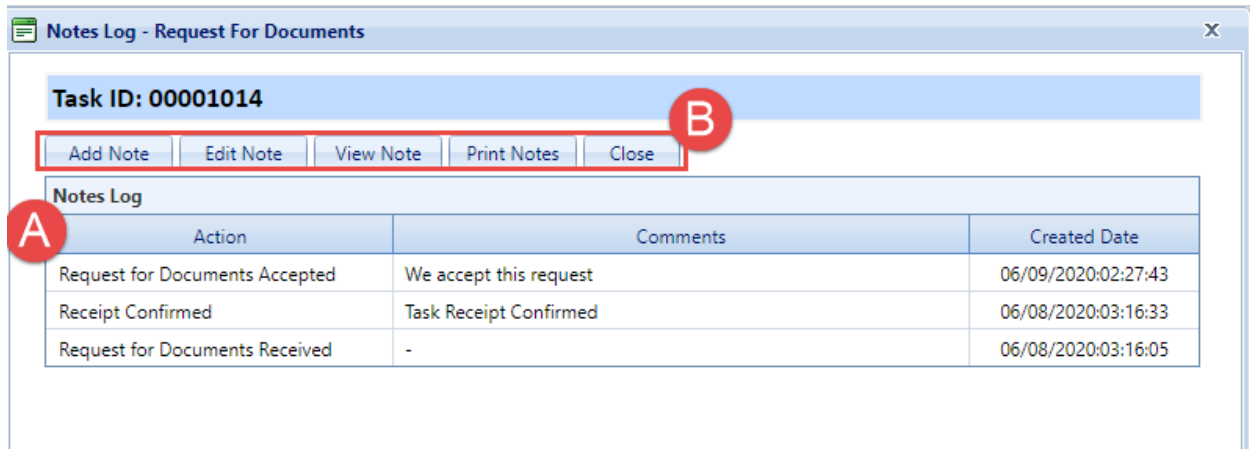
Task ID: 00001014

Messages 0/1 View/Add Attachments (2) **Notes Log (3)** Change Status Submit Completed Task Back

Request Information	
Request for Documents ID	50
Request #	20-FOI-00062
Status	Accepted
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	Different request this time

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

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.



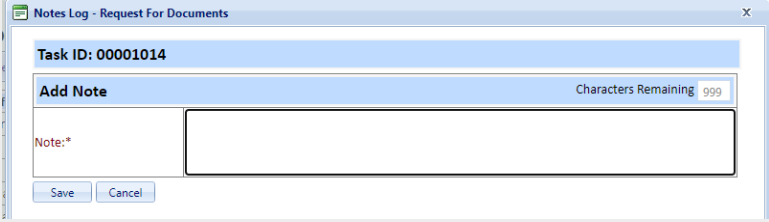
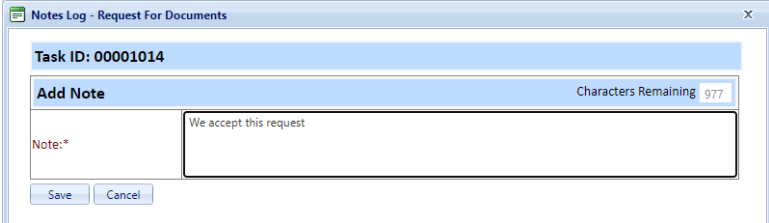
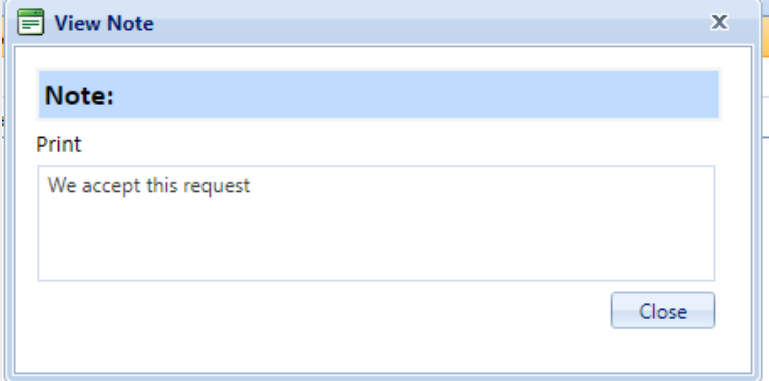
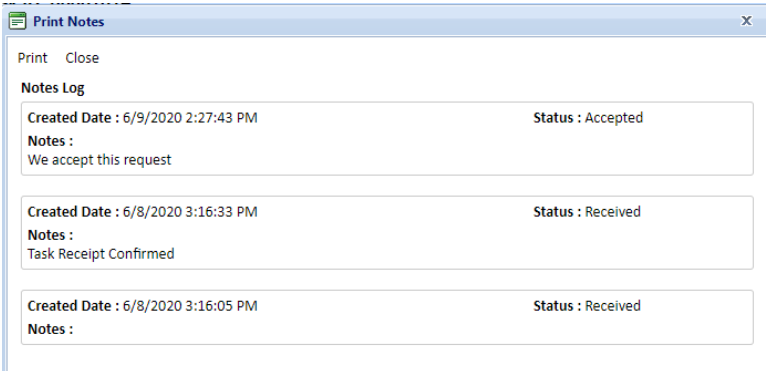
Notes Log - Request For Documents

Task ID: 00001014

Add Note Edit Note View Note Print Notes Close

Notes Log		
Action	Comments	Created Date
Request for Documents Accepted	We accept this request	06/09/2020:02:27:43
Receipt Confirmed	Task Receipt Confirmed	06/08/2020:03:16:33
Request for Documents Received	-	06/08/2020:03:16:05

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

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.	



Action	Description	Image
Close	Click Close to close the <i>Notes Log</i> .	

