FOIAXpress

Collaboration User Manual

v11.11.0

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OPEXUSTECH.COM

FOIAXpress 11.11.0 Collaboration User Manual

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Contents

1 Introduction

1.1 About FOIAXpress Collaboration

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

1.2 How to Use this Manual

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

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

1.3 Typography

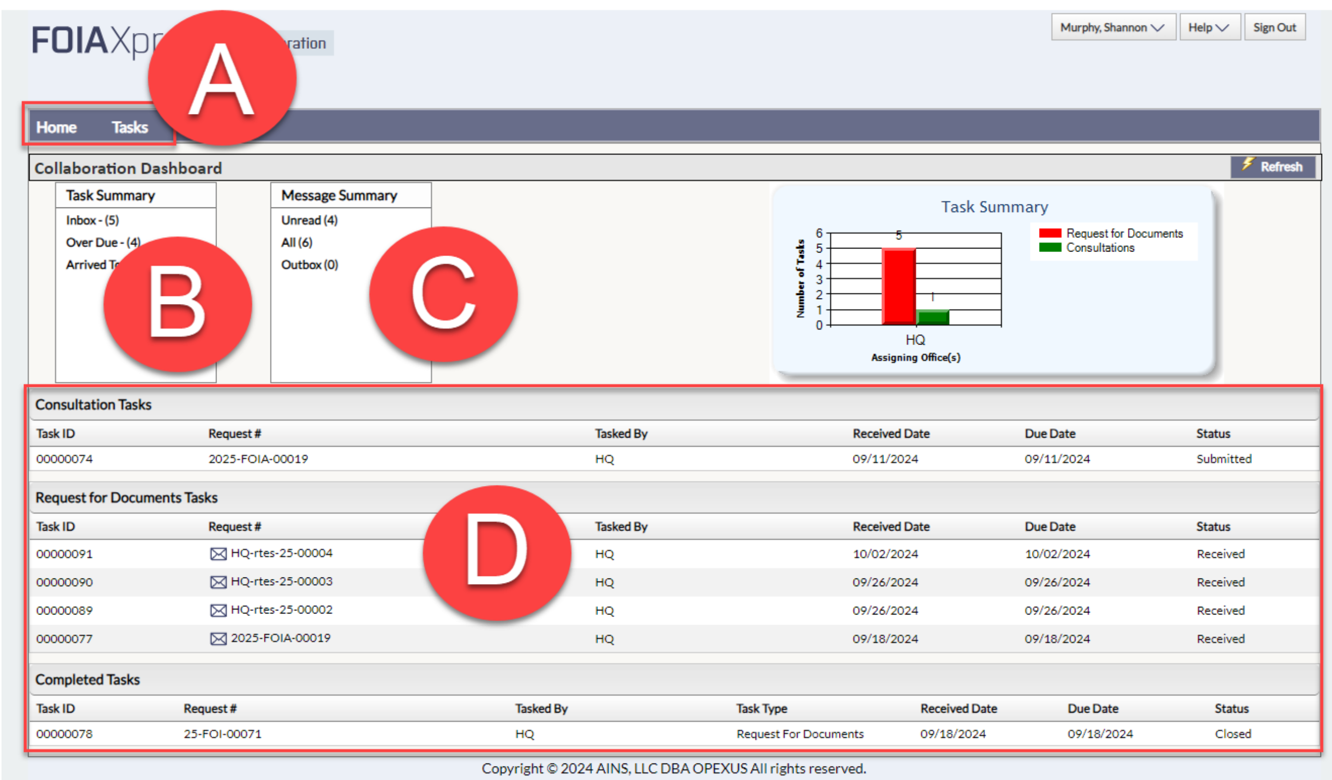
The following formatting conventions are used in this manual to highlight important information:

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

2 Accessing FOIAXpress Collaboration

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

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:



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

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

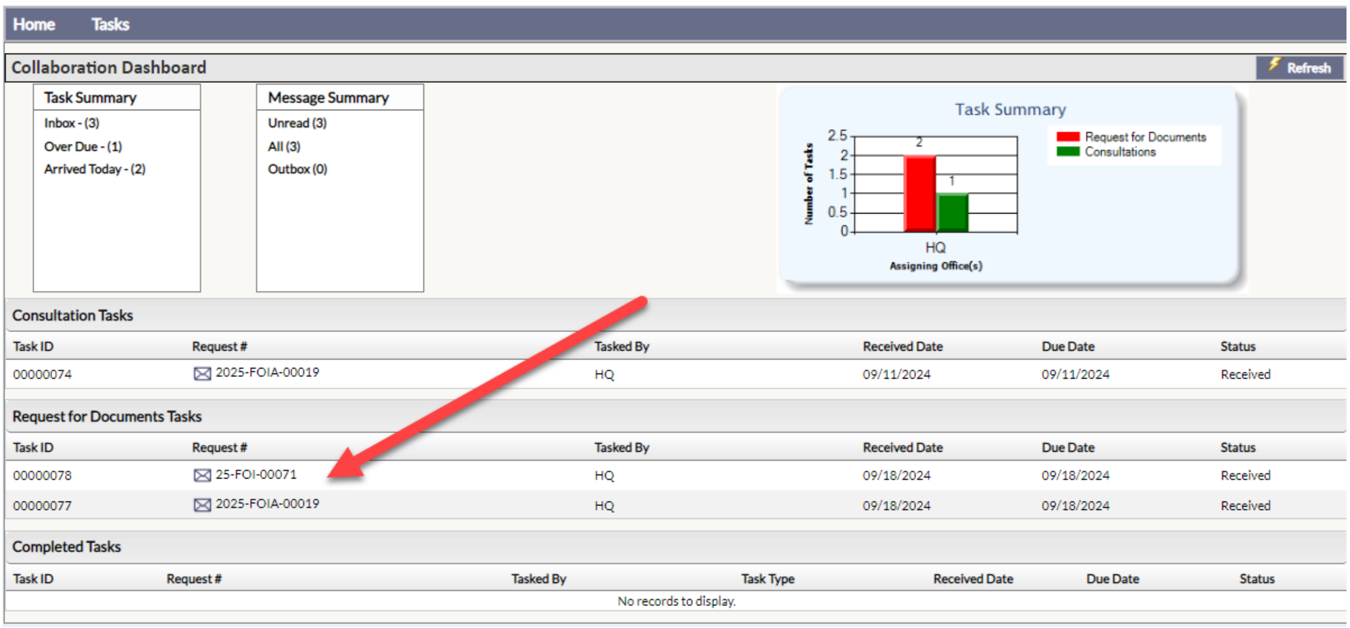
The next sections provide steps to complete Request for Documents Tasks and Consultation Tasks.

3 Request for Documents Tasks

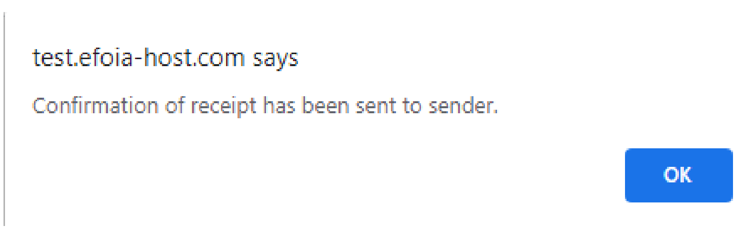
3.1 Accessing a Request for Documents Task

After you log in to 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.

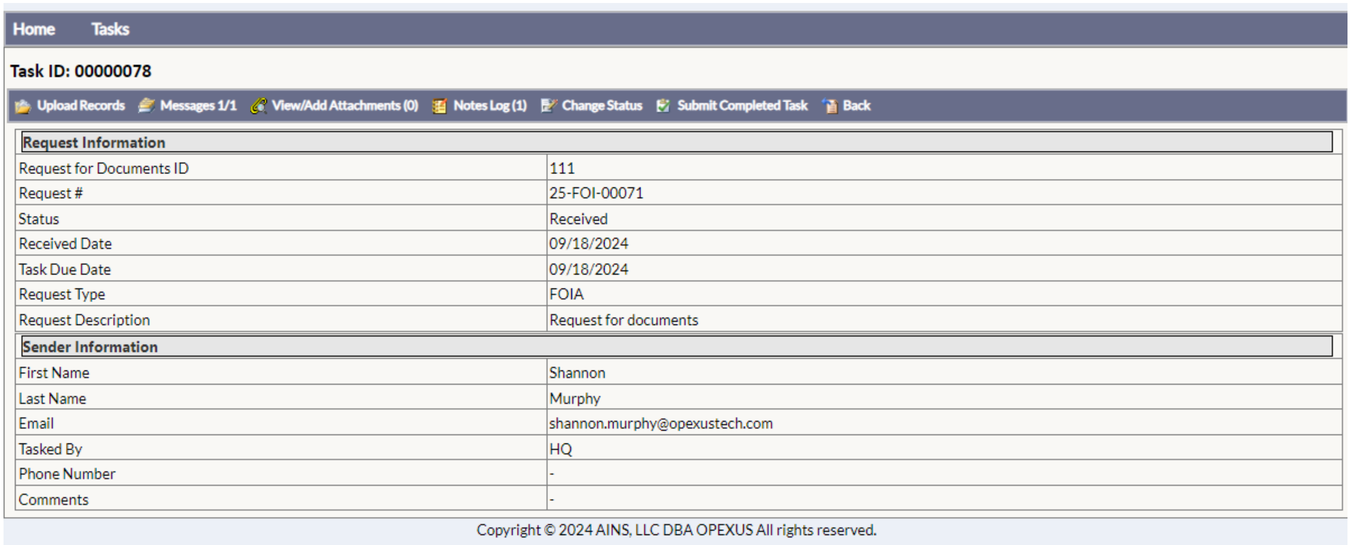
In this example, we'll double click the request listed in the *Request for Documents Tasks* list.



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



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



Home Tasks

Task ID: 00000078

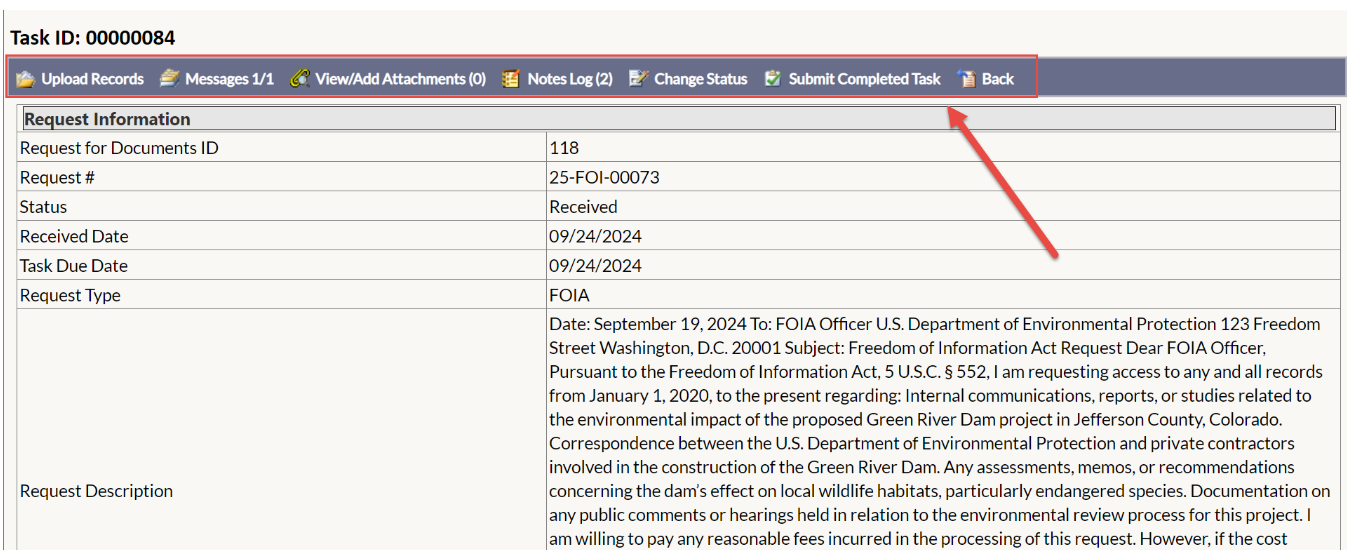
Upload Records | Messages 1/1 | View/Add Attachments (0) | Notes Log (1) | Change Status | Submit Completed Task | Back

Request Information	
Request for Documents ID	111
Request #	25-FOI-00071
Status	Received
Received Date	09/18/2024
Task Due Date	09/18/2024
Request Type	FOIA
Request Description	Request for documents
Sender Information	
First Name	Shannon
Last Name	Murphy
Email	shannon.murphy@opexustech.com
Tasked By	HQ
Phone Number	-
Comments	-

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

3.2 Request for Documents Task Dashboard

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



Task ID: 00000084

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

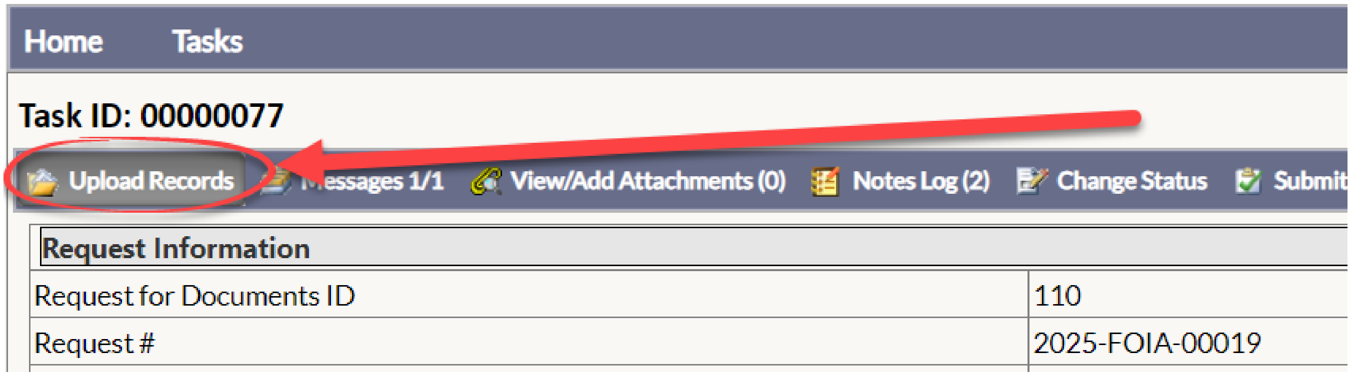
Request Information	
Request for Documents ID	118
Request #	25-FOI-00073
Status	Received
Received Date	09/24/2024
Task Due Date	09/24/2024
Request Type	FOIA
Request Description	Date: September 19, 2024 To: FOIA Officer U.S. Department of Environmental Protection 123 Freedom Street Washington, D.C. 20001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

3.2.1 Upload Records

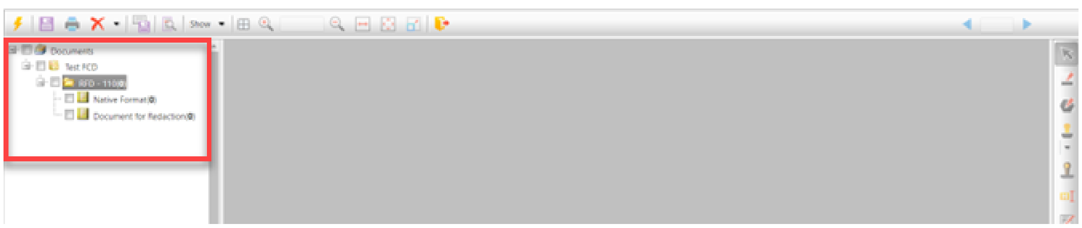
You can upload documents, add redactions, and more, directly from the Collaboration Portal when processing a Request for Documents.

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

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

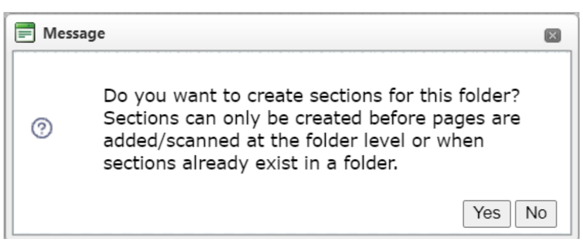


2. The Document Management interface opens in a new tab, as shown below. The document tree on the left side panel is used to navigate between folders, sections, and pages.

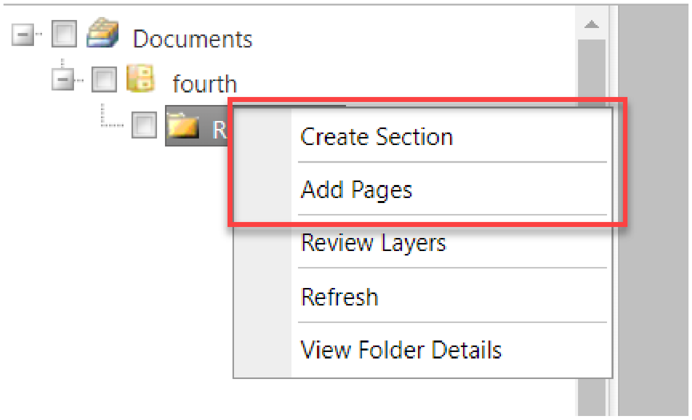


3. Determine whether you'd like to create **Sections** to organize the pages within the folder. Sections allow you to segment the documents within a folder.

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



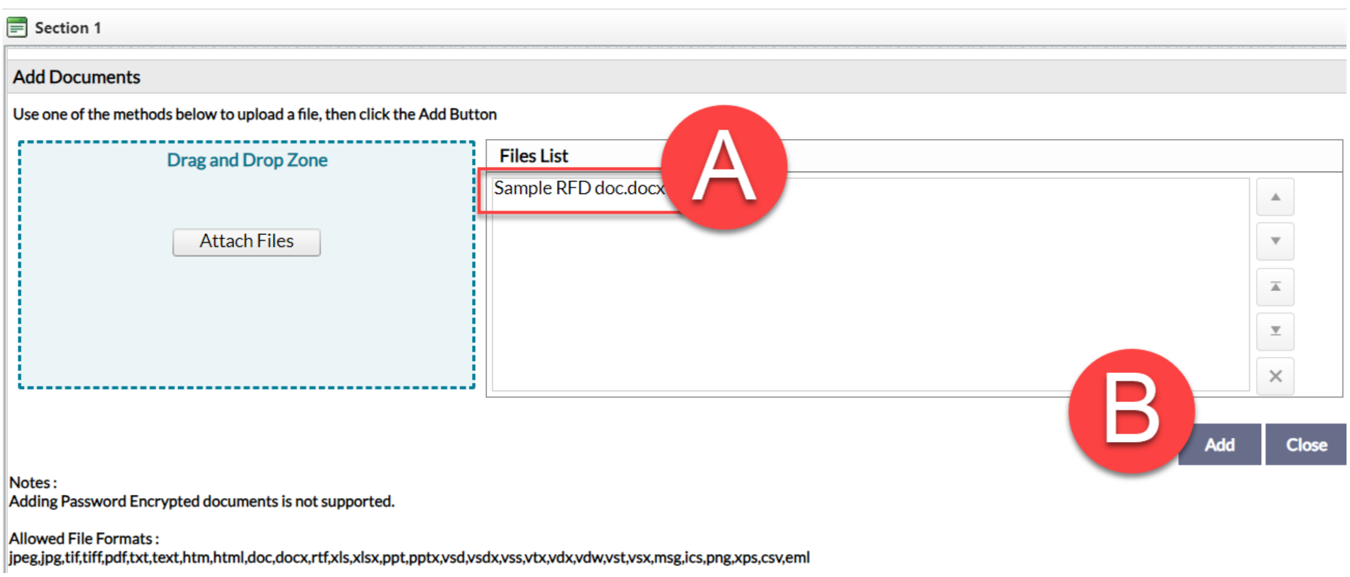
   a. To add a new section, right click on a folder and click **Create Section.** Then, right click on the new section and click **Add Pages.**



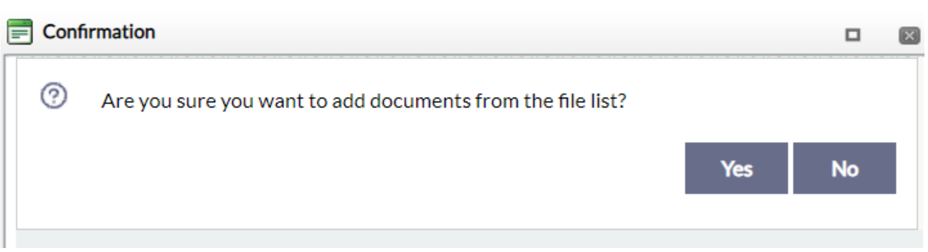
b. If you do not want to create sections in the folder, you can add pages directly to a folder by right clicking on the folder and clicking **Add Pages.**

4. After clicking Add Pages, the *Add Documents* screen appears, prompting you to upload the requested documents. You can pull files from your desktop into the *Drag and Drop Zone* or click **Attach Files** to browser your computer's files. As you add files, they will display in the **(A)** *Files List*. When you've uploaded all the requested files, click **(B) Add.**

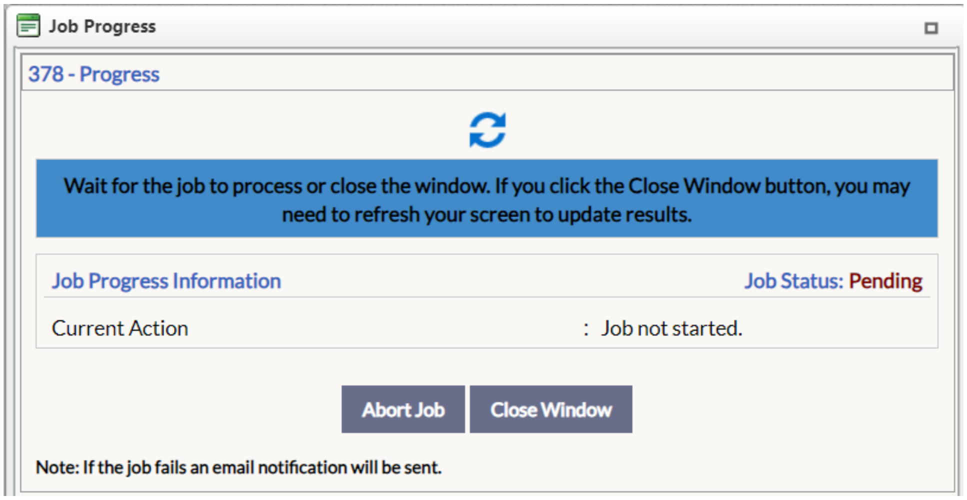
Note: You must add all files for the RFD at this point. You cannot go back and add more files later.



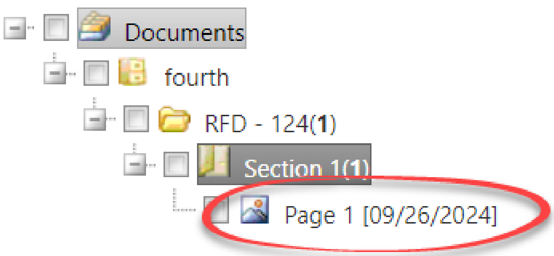
5. Click **Yes** on the confirmation box.



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



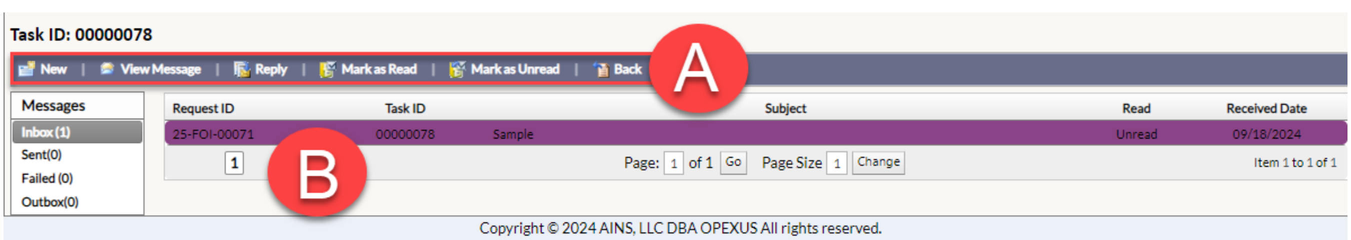
7. Once the job completes, the pages appear in the document tree:



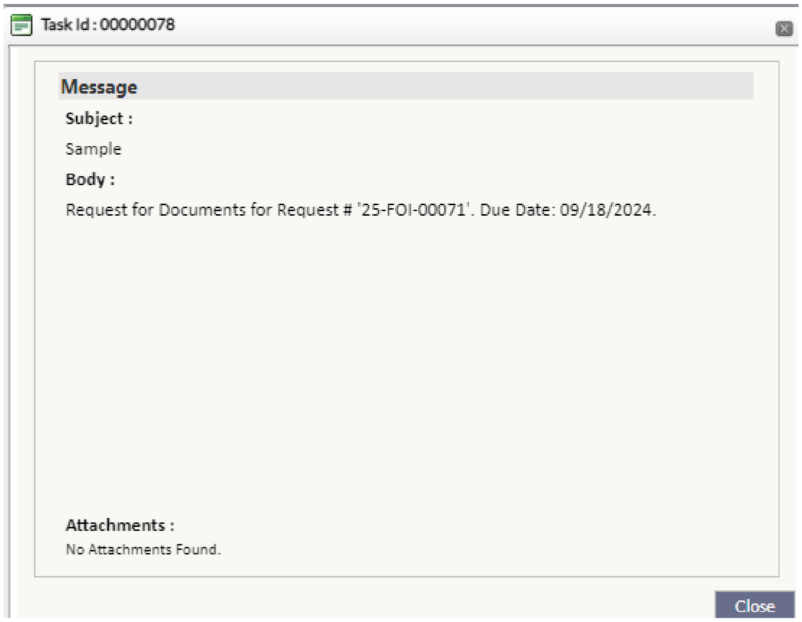
8. There are additional options to review and redact these records before completing this RFD. See the *Document Management* section for more details.

3.2.2 View & Send Messages

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



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



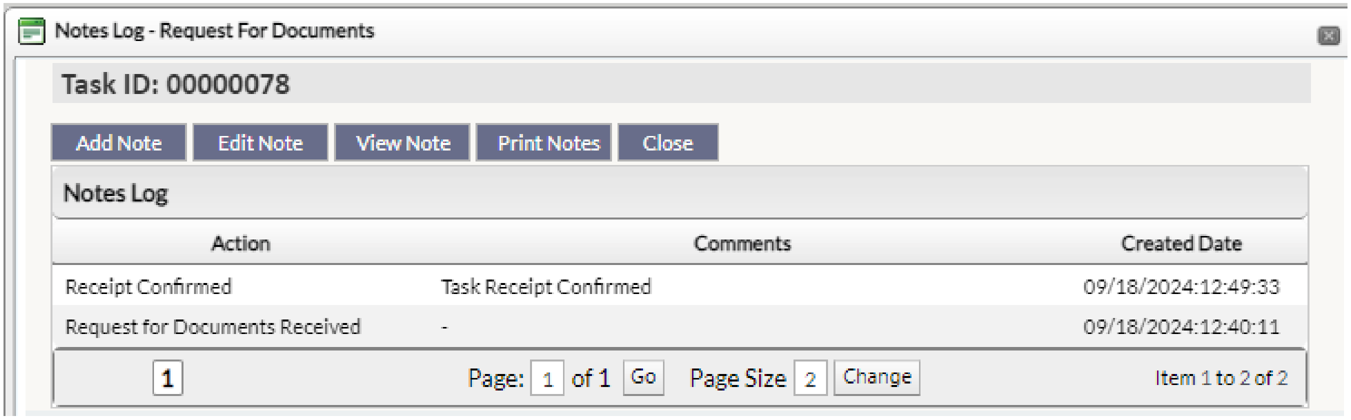
For detailed instructions on sending messages in Collaboration Portal, visit section 5: *Sending Messages Using the Portal.*

3.2.3 View/Add Attachments

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

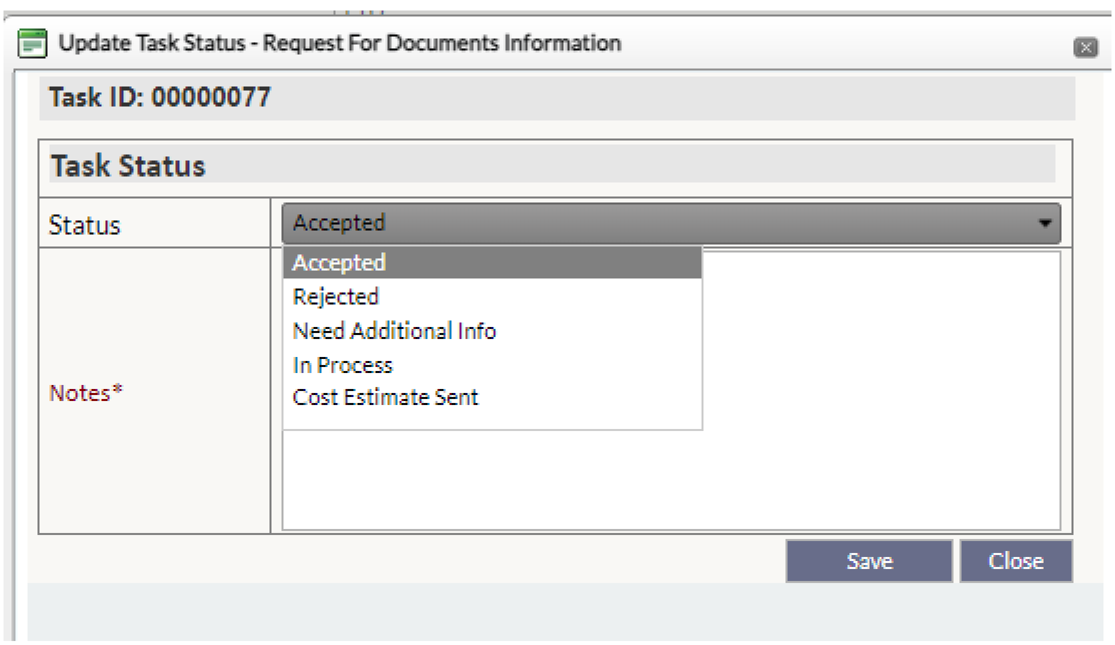
3.2.4 RFD Notes Log

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



3.2.5 Change Status

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

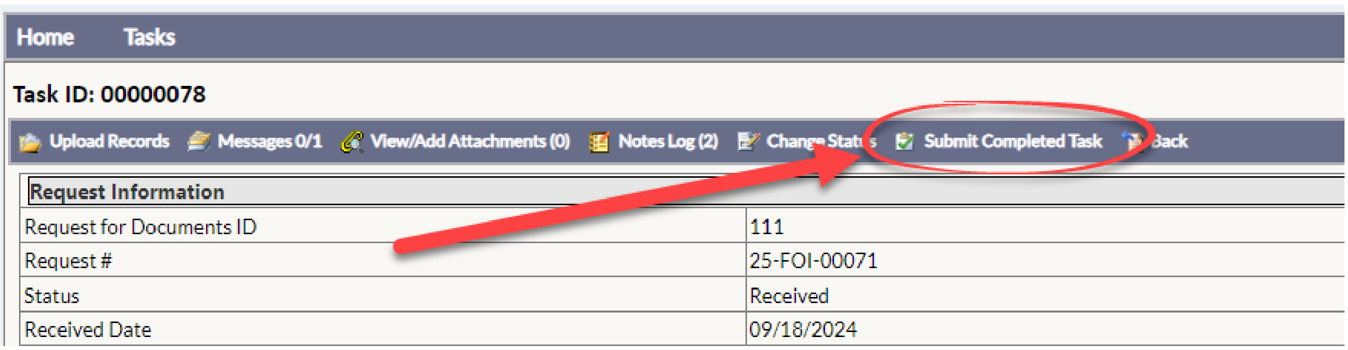


If for whatever reason you cannot fulfill the request, select **Rejected**, otherwise select **Accepted**. Provide **Notes** (required regardless of the status you select), then click **Save.**

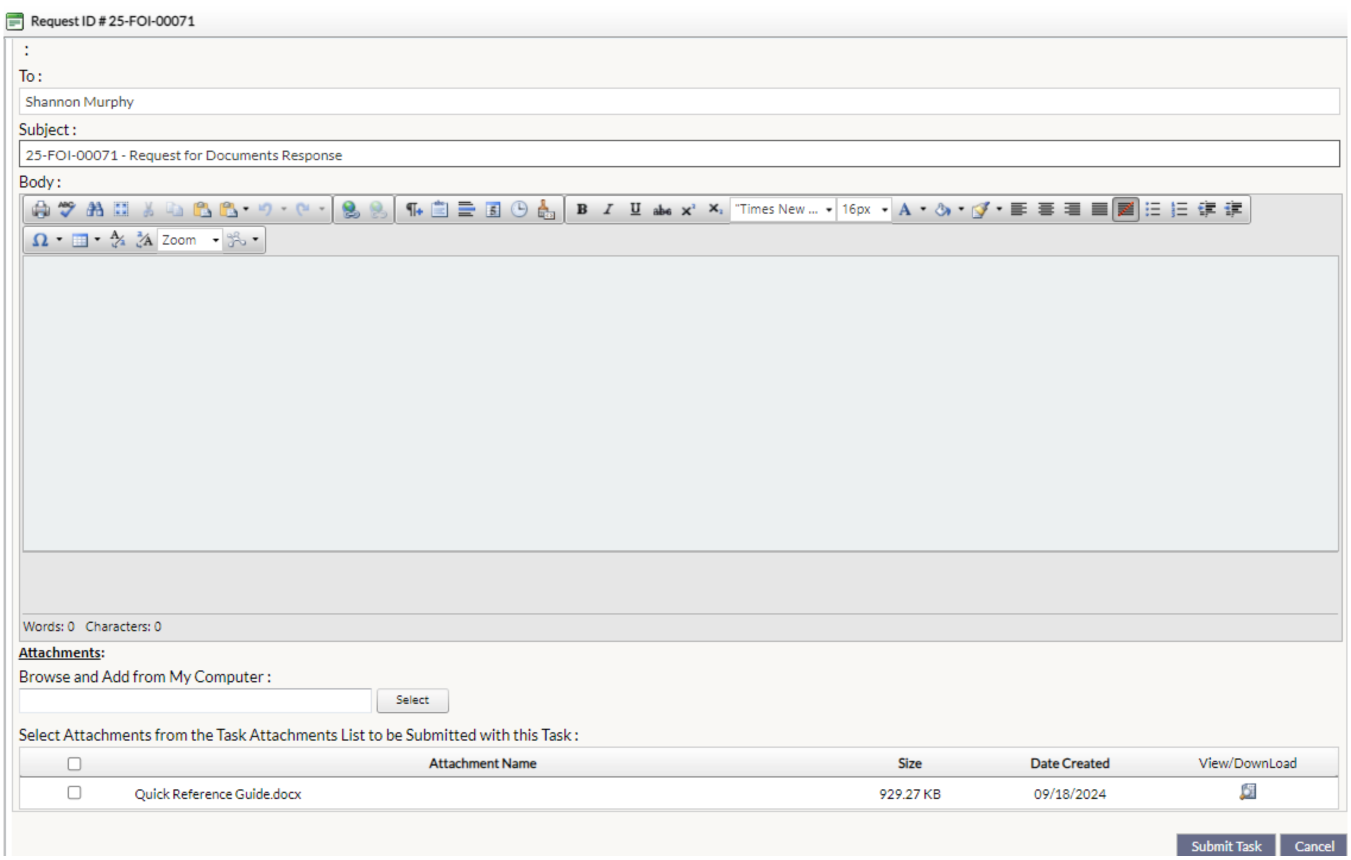
3.3 Completing a Request for Documents Task

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

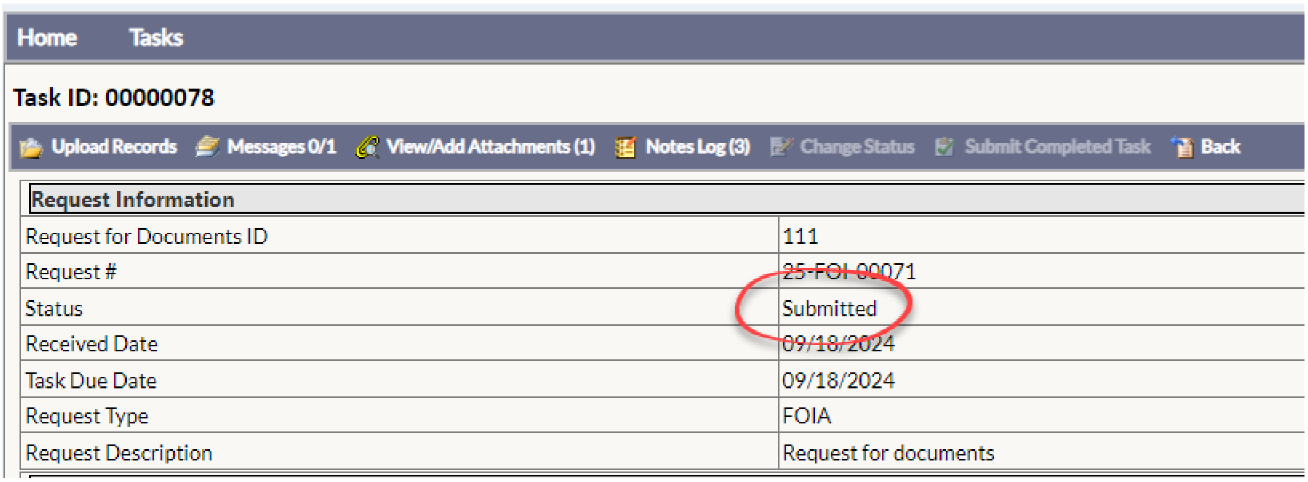
1. In the Collaboration Portal, open the *Request For Document Task* that you are ready to complete.
2. On the *Tasks* tab toolbar, click **Submit Completed Task**:



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



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 already added to the task to include in the response package.
6. When you're ready to submit the task back to the requester, click **Submit Task**.
7. A pop up message appears. Click **OK** to dismiss the message.
8. The *Tasks* tab refreshes, with the *Status* updated to *Submitted*.

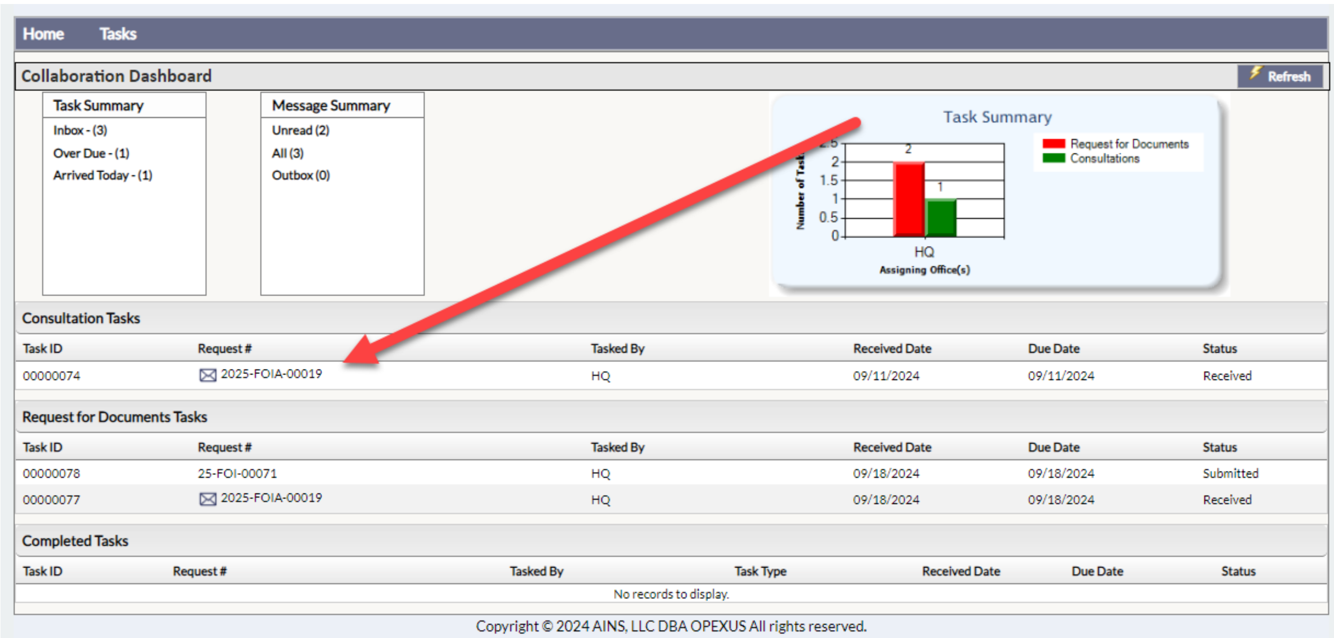


4 Consultation Tasks

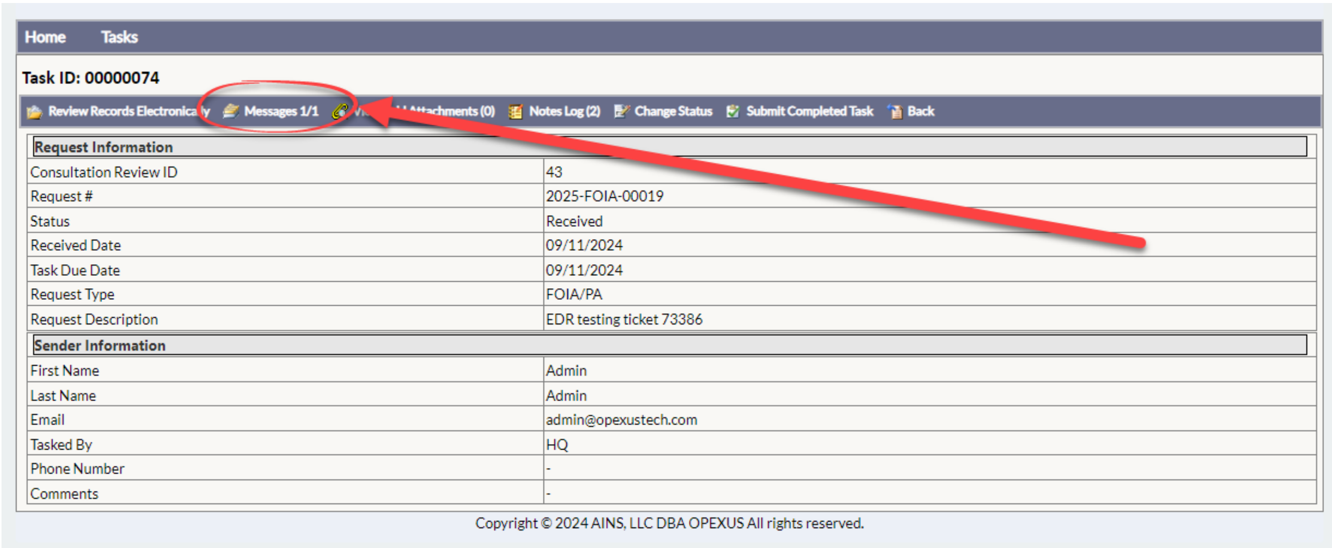
4.1 Responding to a Consultation Task

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

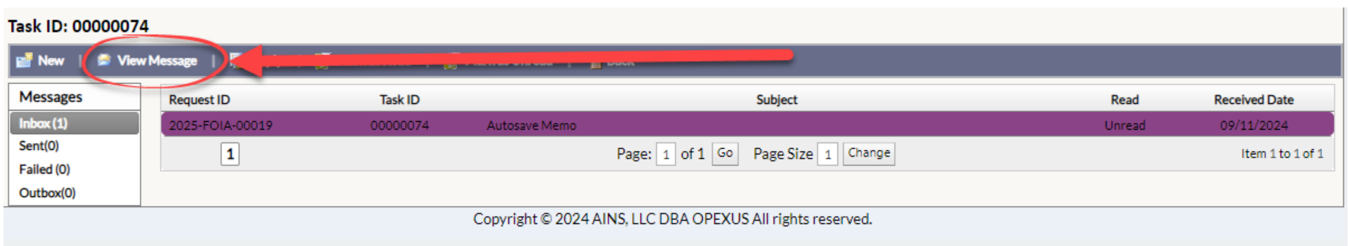
1. Locate the new **Consultation Task** in the list and double click it.



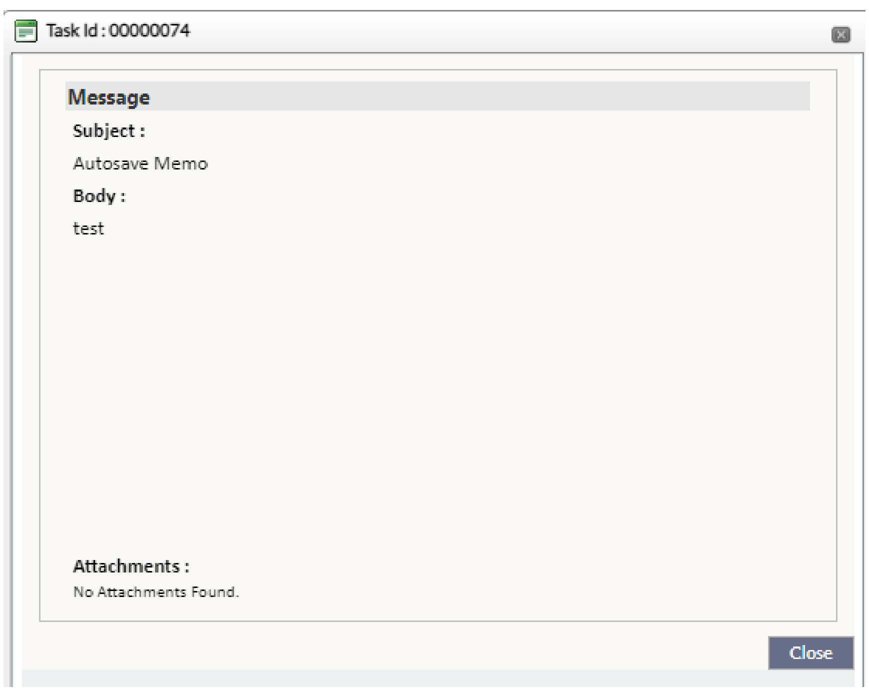
2. A pop-up appears informing that the sender has been notified that you opened the task. Click **OK** to dismiss this message.
3. The *Tasks* tab appears as shown below. First, you'll want to read the requester's message. Click **Messages** from the task toolbar.



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

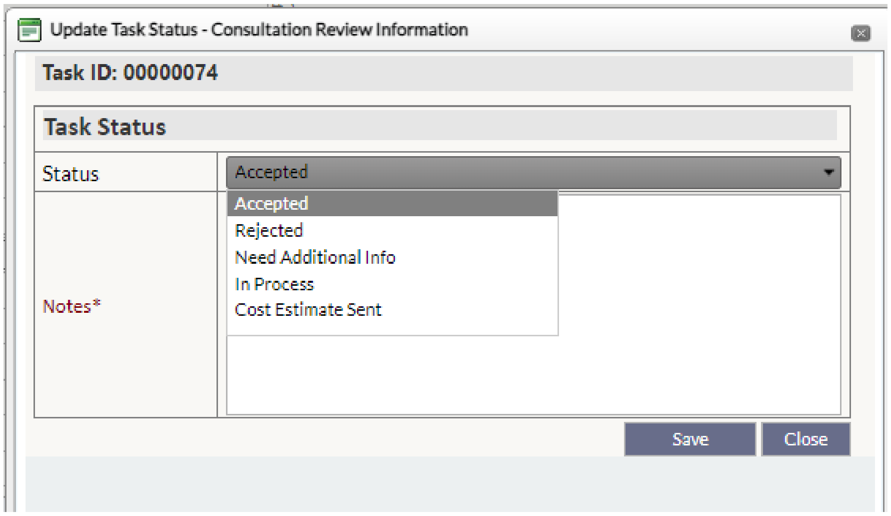


5. Review the details of the consultation request, then click **Close.**



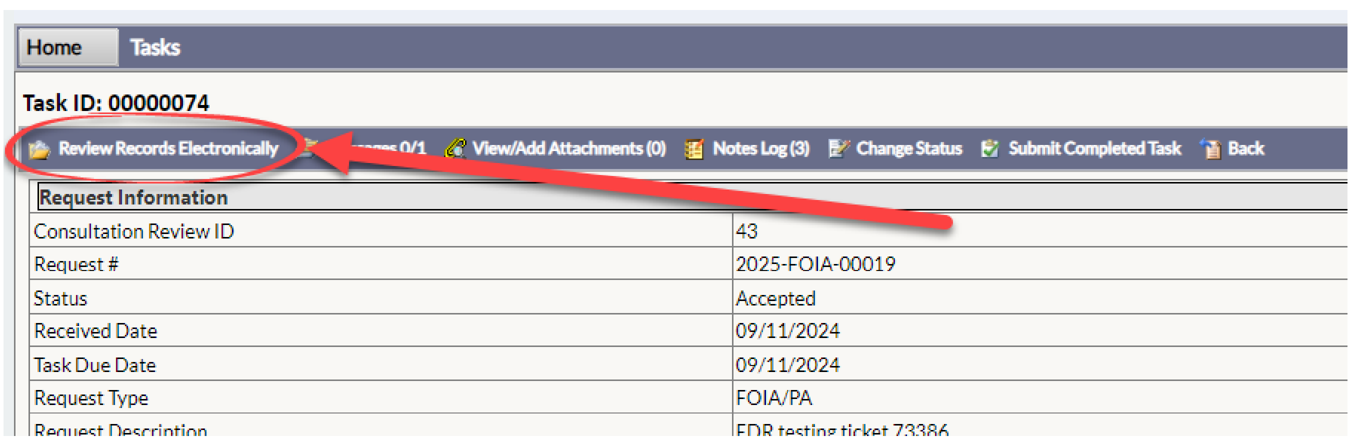
6. The *Status* of the message updates to *Read*. Click **Back** in the task toolbar to return to the *Task Details* page.

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

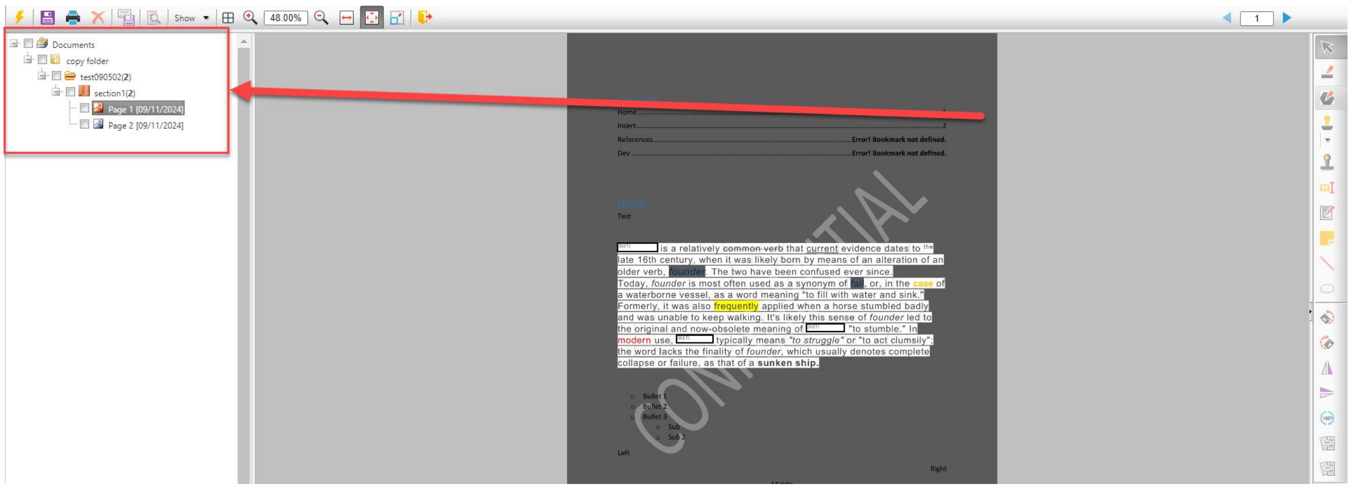


Note: There are also options to select *Need Additional Info*, *In Process*, and *Cost Estimate Sent*.

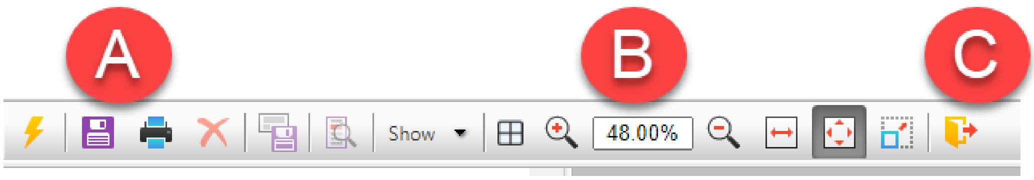
8. If for whatever reason you cannot fulfill the request, select **Rejected**, otherwise select **Accepted**. Provide **Notes** (which are required regardless of the status you select), then click **Save**. In this example, we will accept the request.
9. The status updates to *Accepted.* Next, click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



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



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



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

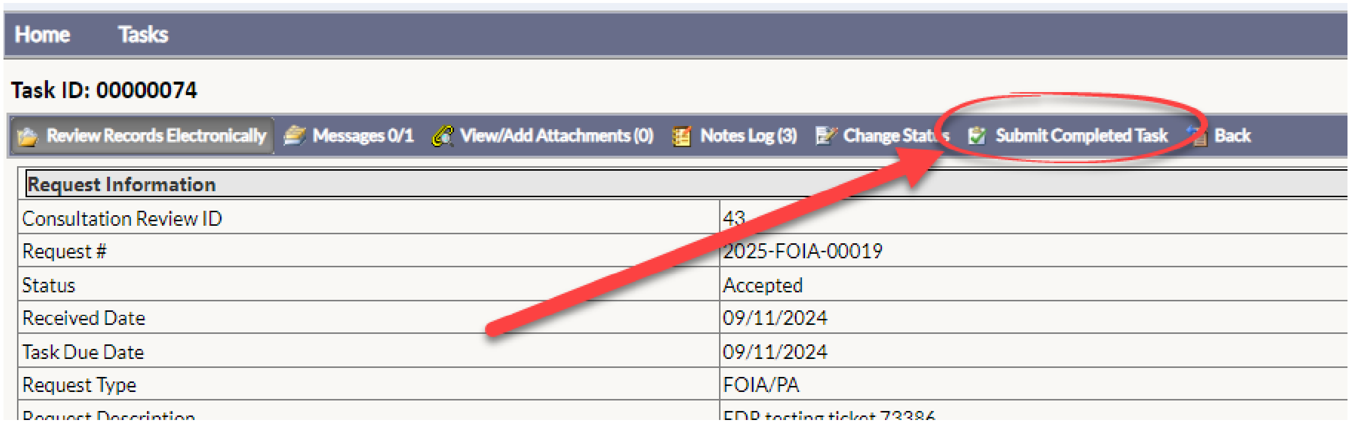
Note: You can also hover over each toolbar icon to view a Tooltip with more information.

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

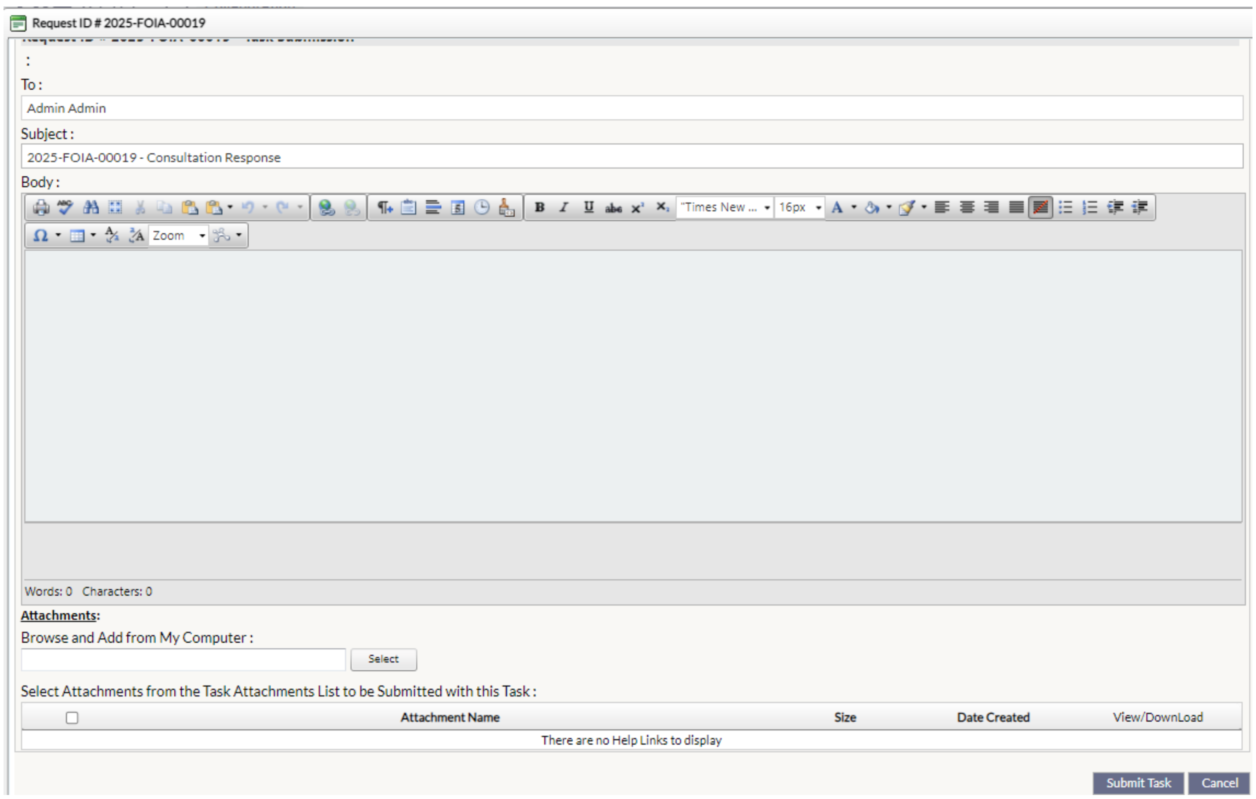
4.2 Completing a Consultation Task

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

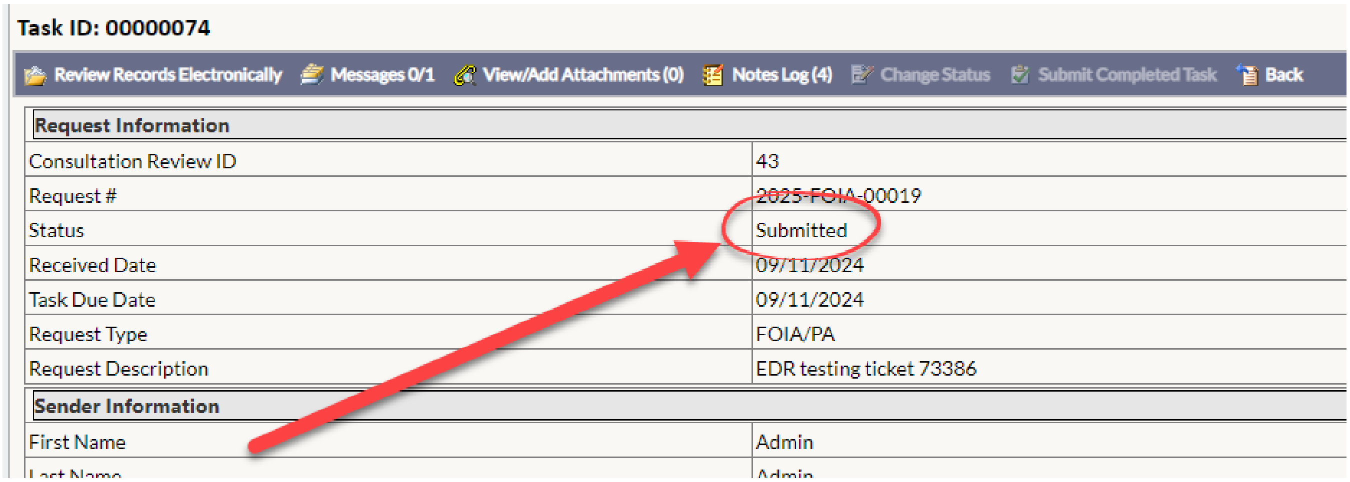
1. In the Collaboration Portal, open the *Collaboration Task* that you are ready to complete.
2. From the task toolbar, click **Submit Completed Task**:



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



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



Task ID: 00000074

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

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

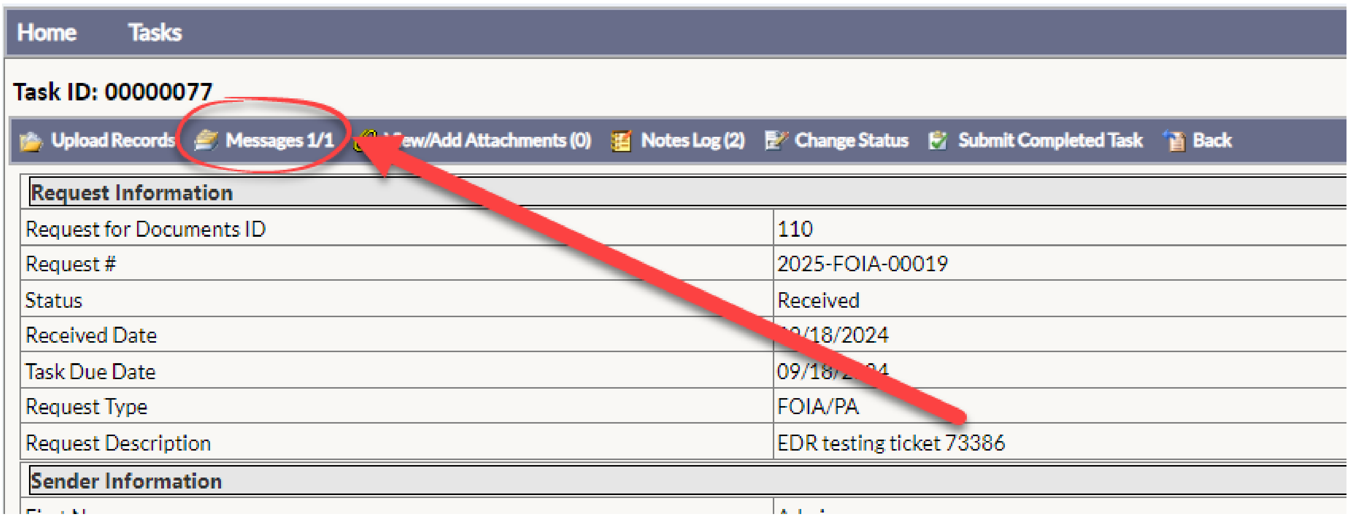
Sender Information	
First Name	Admin

5 Messages

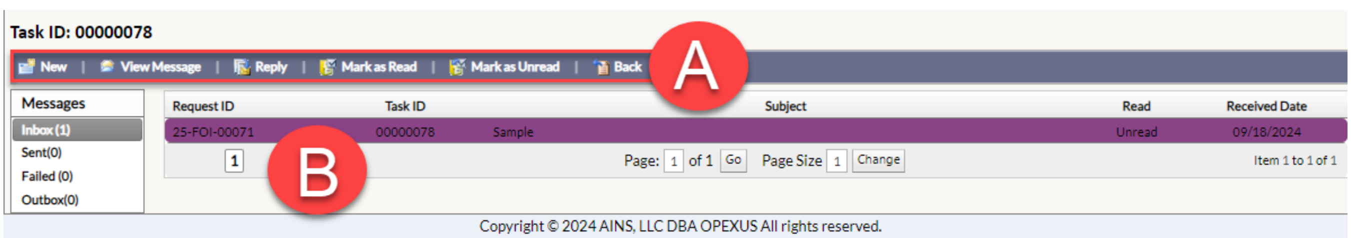
You can use the Collaboration Portal to communicate with the requester, share attachments, and update the status of the request. Follow the steps below to use the *Messages* feature:

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

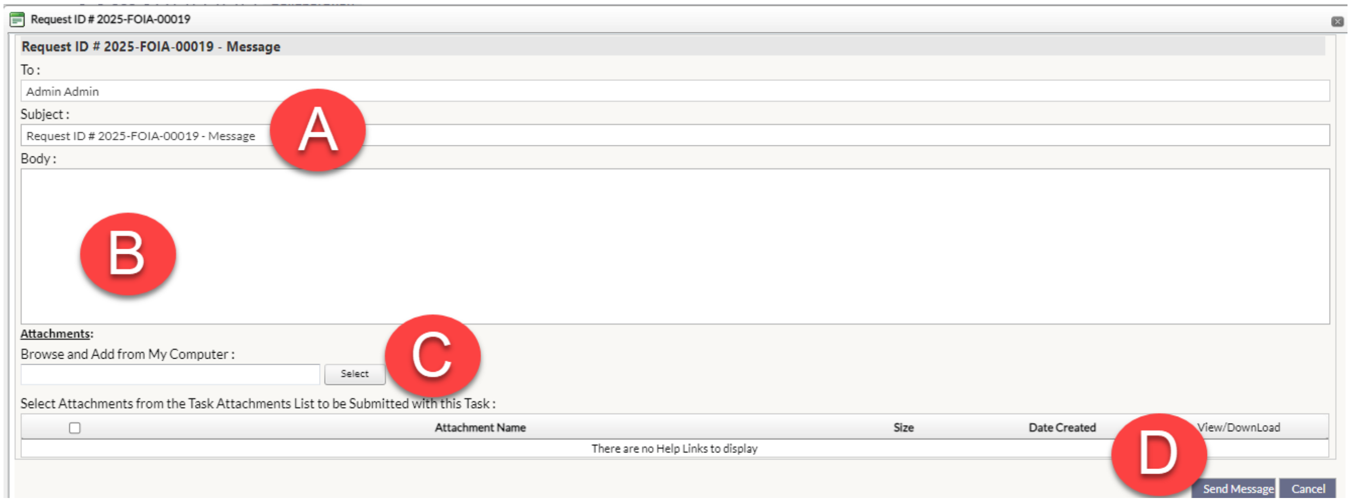
1. Open the task whose requester you'd like to contact. Click **Messages**:



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



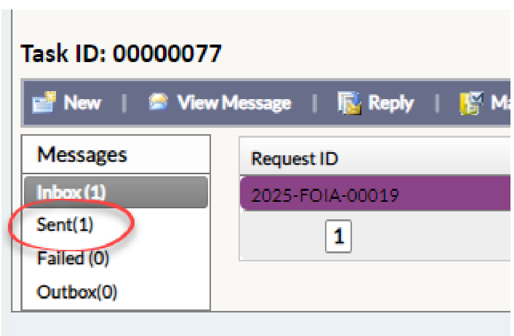
3. You can select a message from the list and click to **View Message** to open it, click **Reply** to reply to the selected message, or toggle the *Read* status for the selected message by clicking **Mark as Read** or **Mark as Unread**.
4. From this page, you can also start a new message thread with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



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

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

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



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

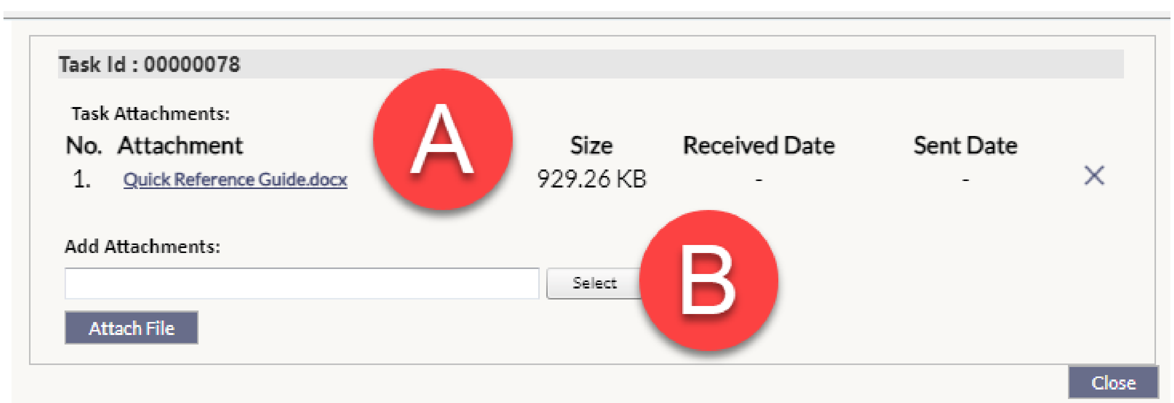
6 Attachments

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

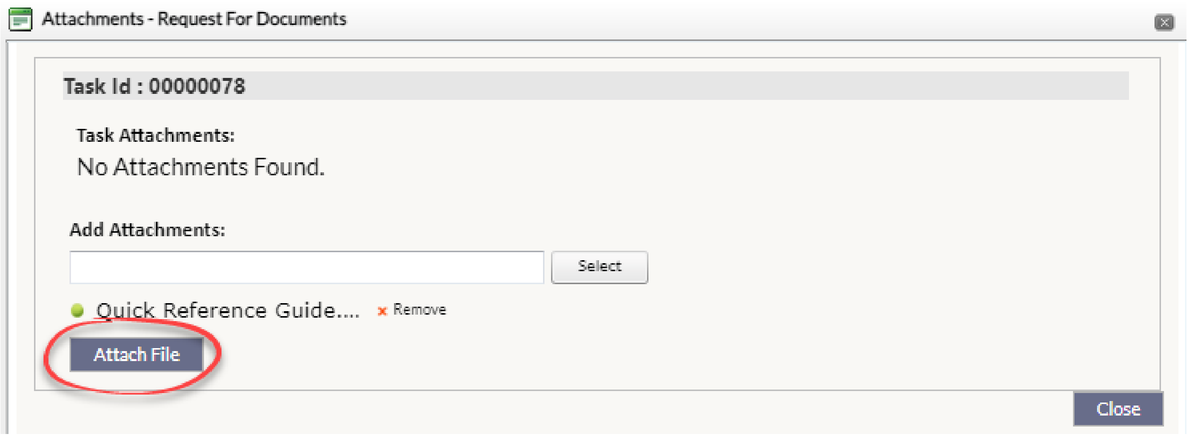
Note: The process is the same for both Requests for Documents and Consultation Tasks.

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

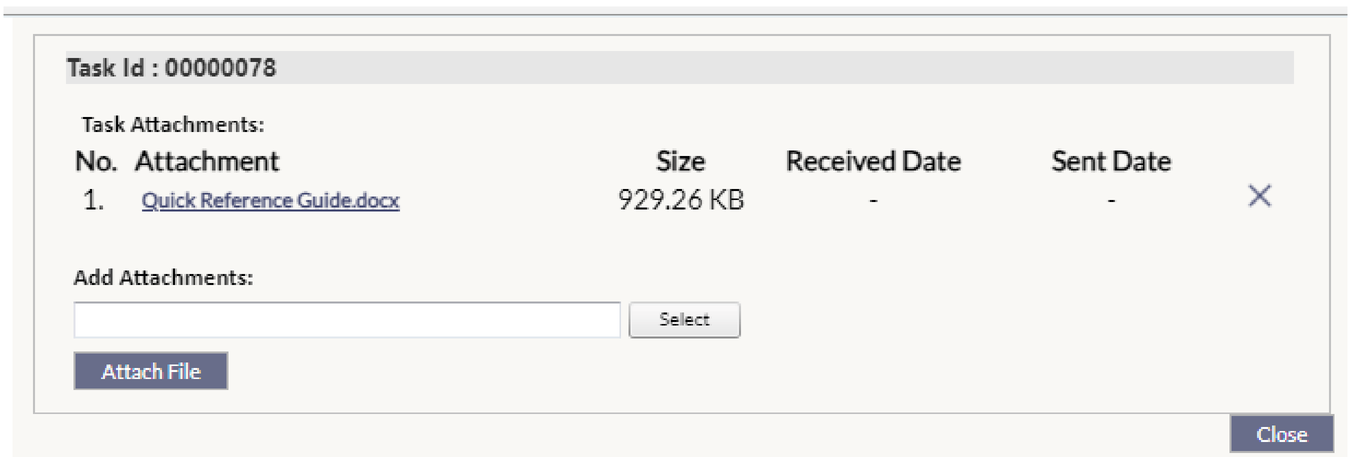
2. The *Attachments* screen appears. Included here are a **(A)** *Task Attachments* list with all current attachments (if any), and the option to **(B)** *Add Attachments*:



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



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

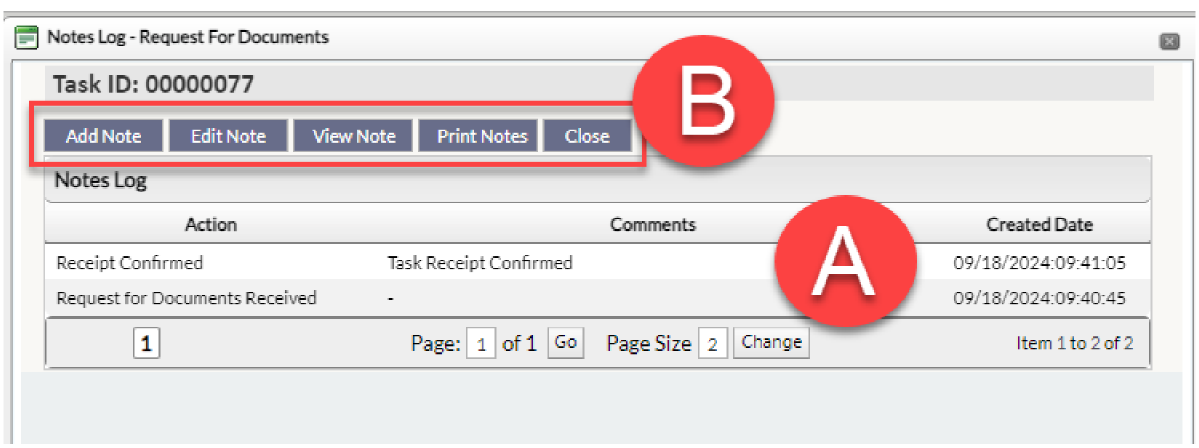


5. Repeat this process until you've uploaded all the files you'd like to attach to the task. You can also click the **X** next to any attachment to remove it from the Task.
6. When you're finished, click **Close** to return to the *Task Details* page.

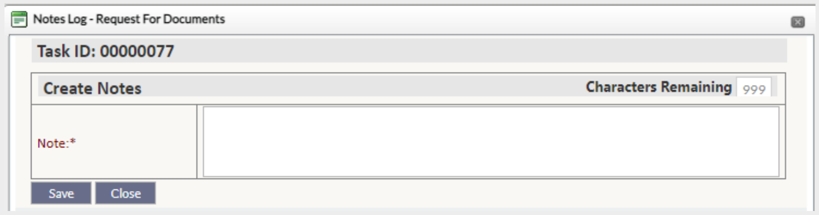
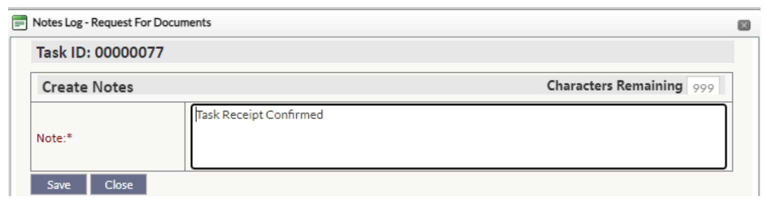
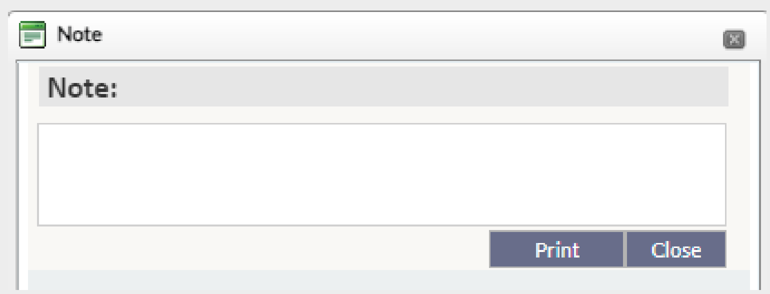
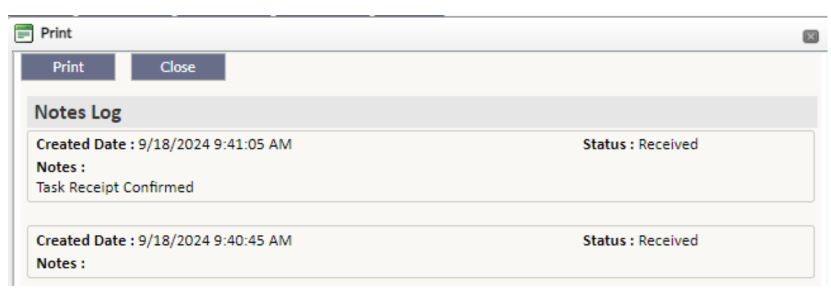
7 Notes Log

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

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.



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

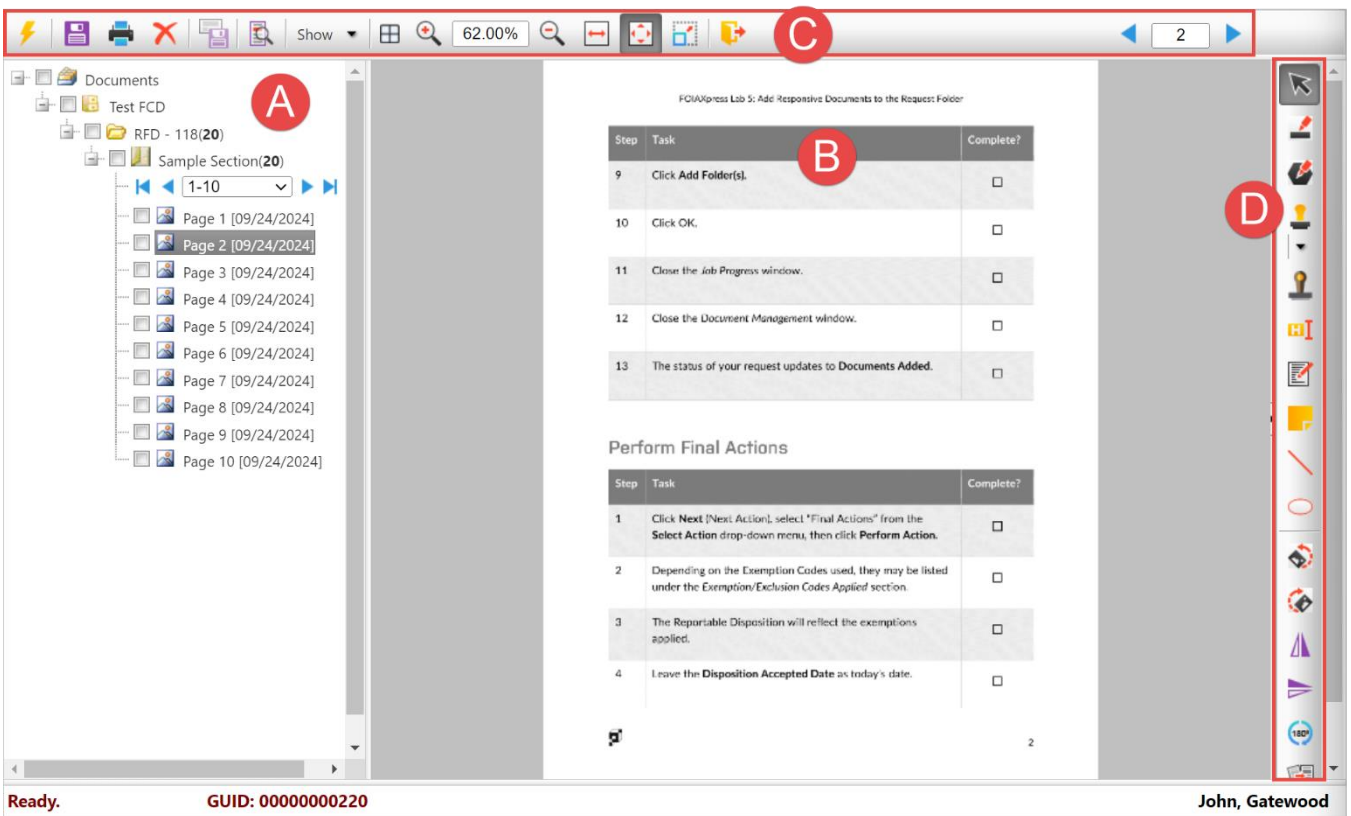
Action	Description	Image
Add Note	Click **Add Note** to manually add a note to the log. Add comments in the *Note* field, then click **Save** to save the note in the log	
Edit Note	Select a note from the list and click **Edit Note** to edit the content. Click **Save** to save any changes you make.	
View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

8 Document Management

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

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

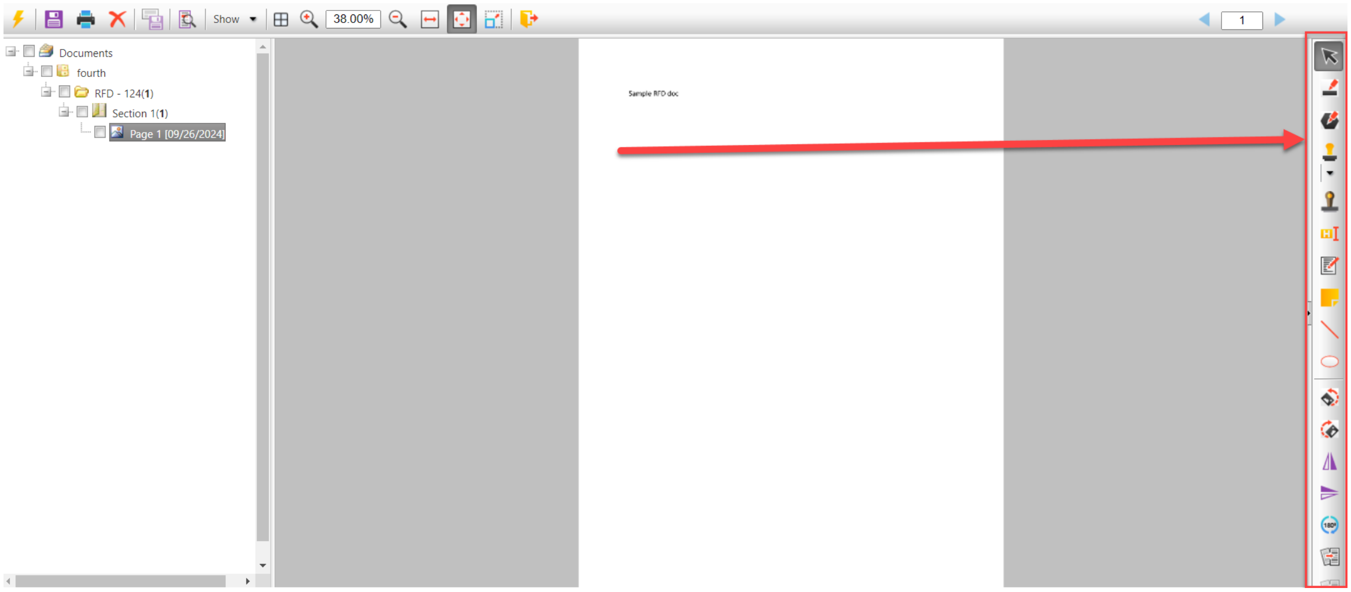
8.1 Document Management Interface



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

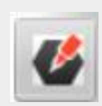
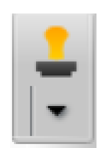
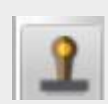
8.2 Review Objects

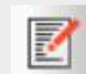
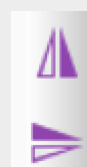
In Document Management, you can use one of many available **Review Objects** available on the right-hand side of the window.



The following table outlines each toolbar item:

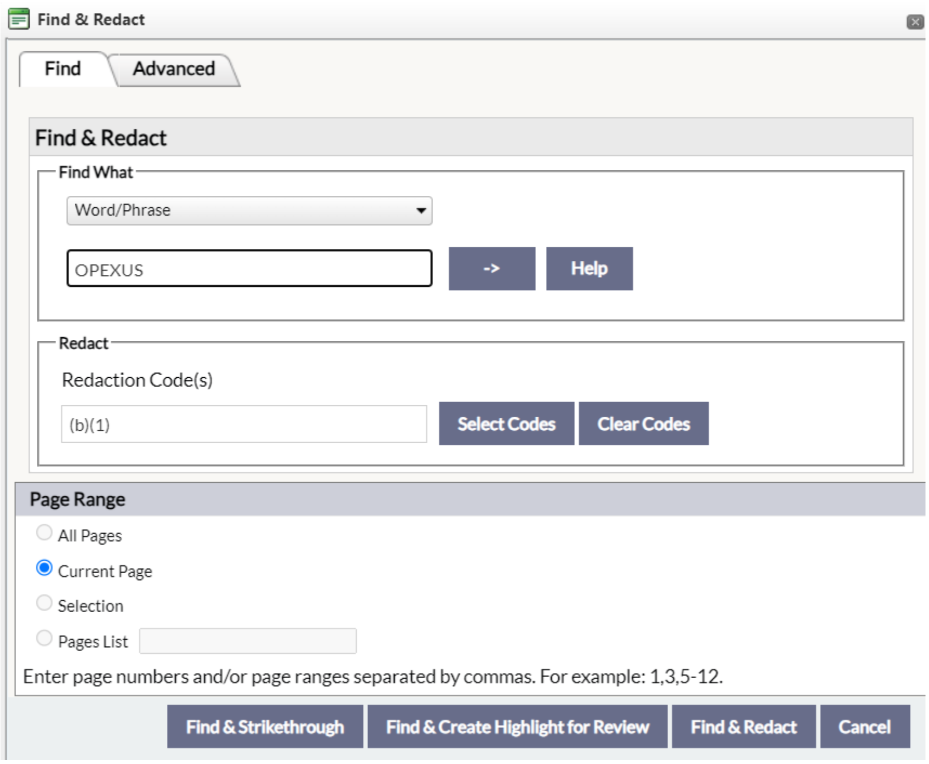
Note: You can also hover over each toolbar icon to view a Tooltip with more information.

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

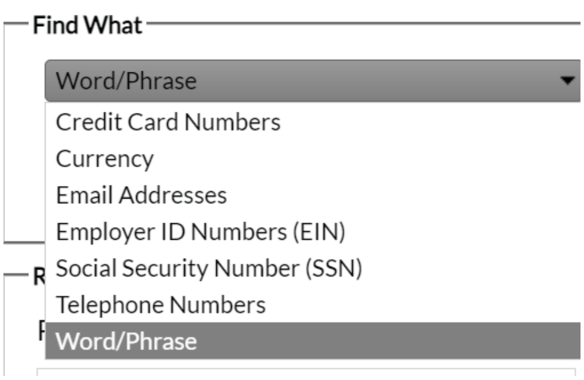
Task	Description	Toolbar Icon
Highlight	Identify specific text by highlighting it in yellow.	
Comments	Type comments on the document.	
Sticky notes	Add sticky notes to the document.	
Shape tools	Add lines, circles, or ellipses to the document.	
Rotate tools	Rotate the page left or left.	
Flip tools	Flip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

8.3 Find and Redact

Use the **Find and Redact** feature to locate and redact specific content and automatically apply redactions to any matching text. You can use find at redact at the folder, section, or individual page level. To use find and redact, select the area in the document tree you want to search, then right click and select **Find and Redact**:



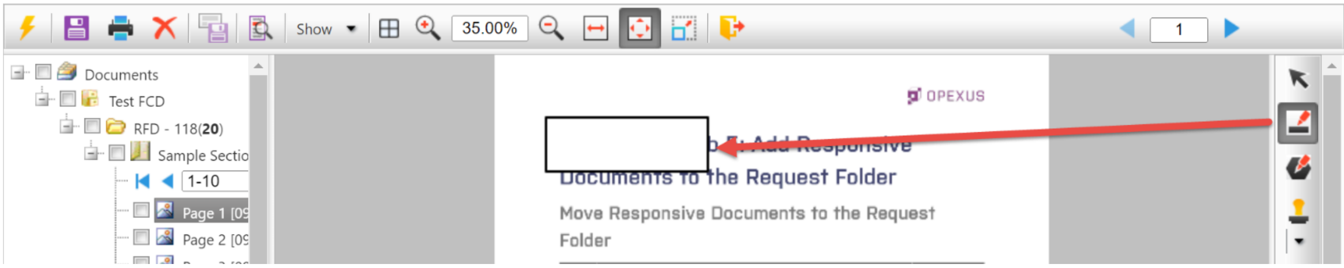
You can use the *Find What* dropdown menu to search for specific content or PII, as shown below:



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

8.4 Apply Redactions

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



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