FOIAXpress

Sending Requests to Collaboration

v11.11.0

February 2025

OPEXUSTECH.COM

FOIAXpress v11.11.0 Sending Requests to Collaboration

Contents

1 Introduction

1.1 About Collaboration

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 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.

1.2 Typography

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

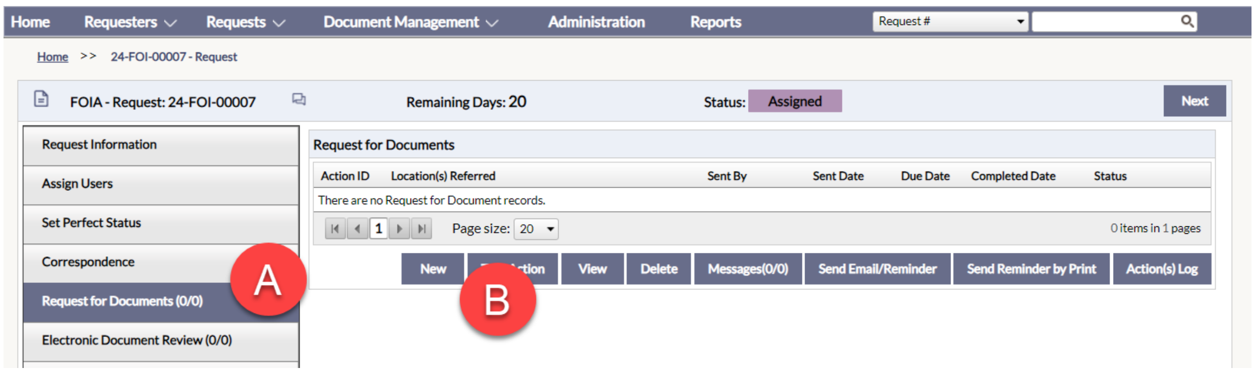
- *Italicized* text indicates a location, for example a particular *Folder*, *Tab*, or *Window*.
- **Bold** text indicates a specific user action, such as clicking a **button**.
- **Red** text is used in *Notes* to bring attention to **crucial information**.

2 Requests for Documents

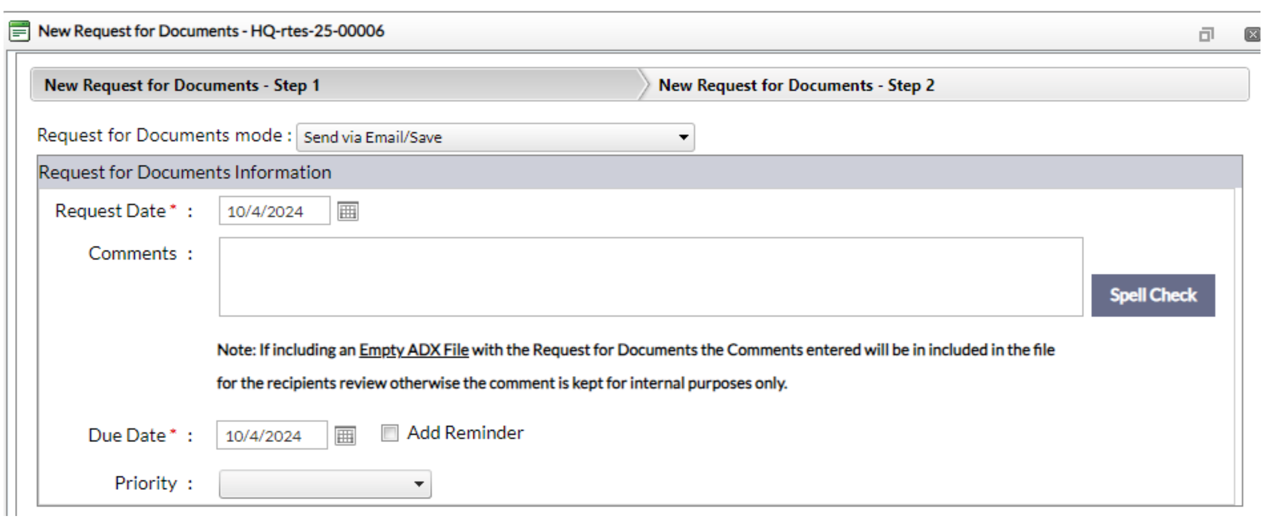
2.1 Sending a Request for Documents

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

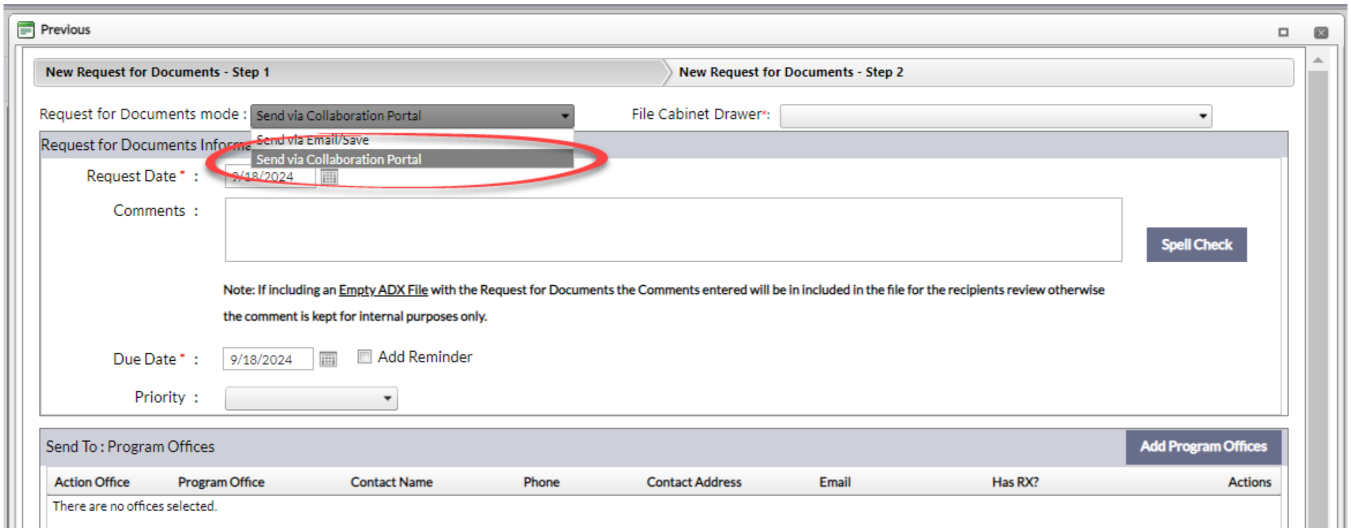


The *New Request for Documents* screen, as shown below, opens. In the following sections, we'll cover how to fill out each section.

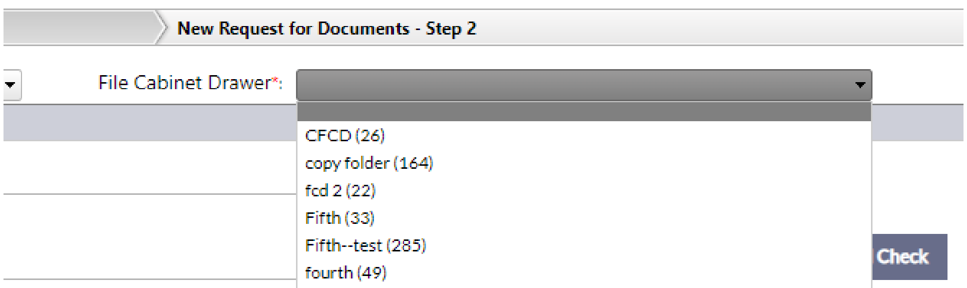


2.1.1 Request for Documents Mode/Information

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



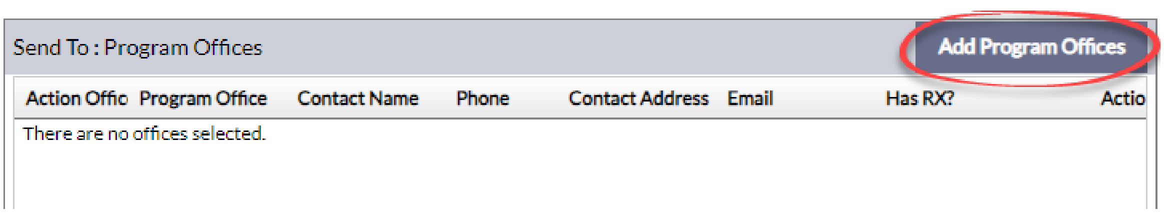
Next, use the *File Cabinet Drawer* field to select the folder in FOIAXpress where you'd like the documents to be delivered.



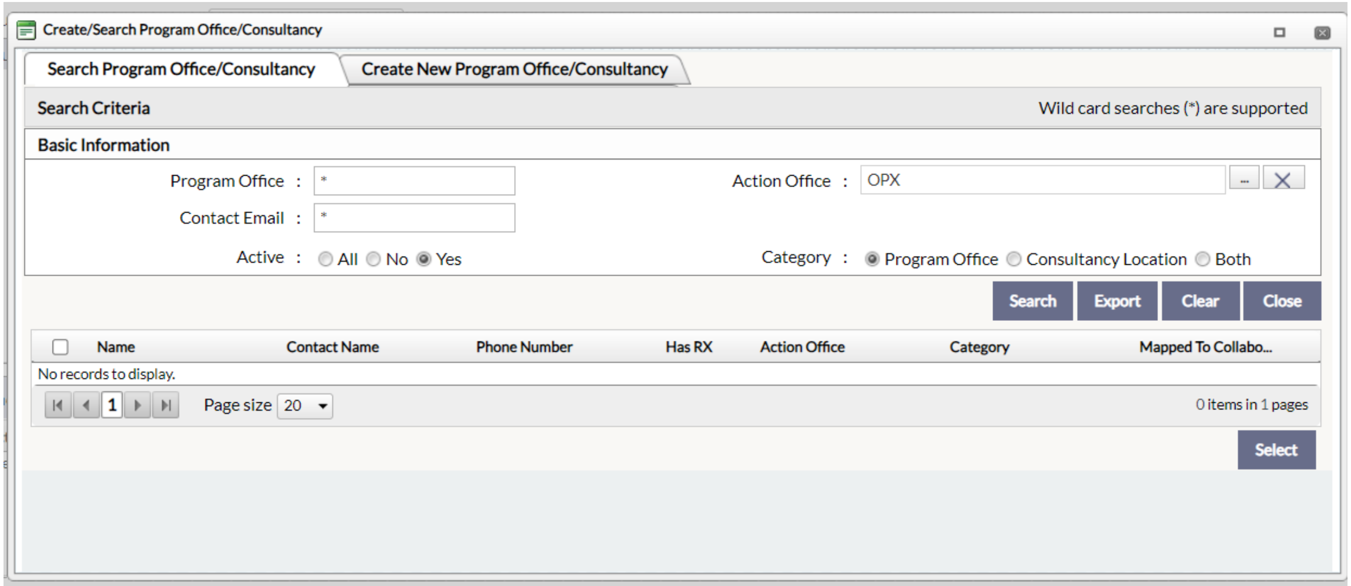
You can also include *Comments*, update the *Request Date* and *Due Date*, and set a *Priority* level in this section.

2.1.2 Select a Program Office/Consultancy

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



The *Create/Search Program Office/Consultancy* screen appears as shown below:

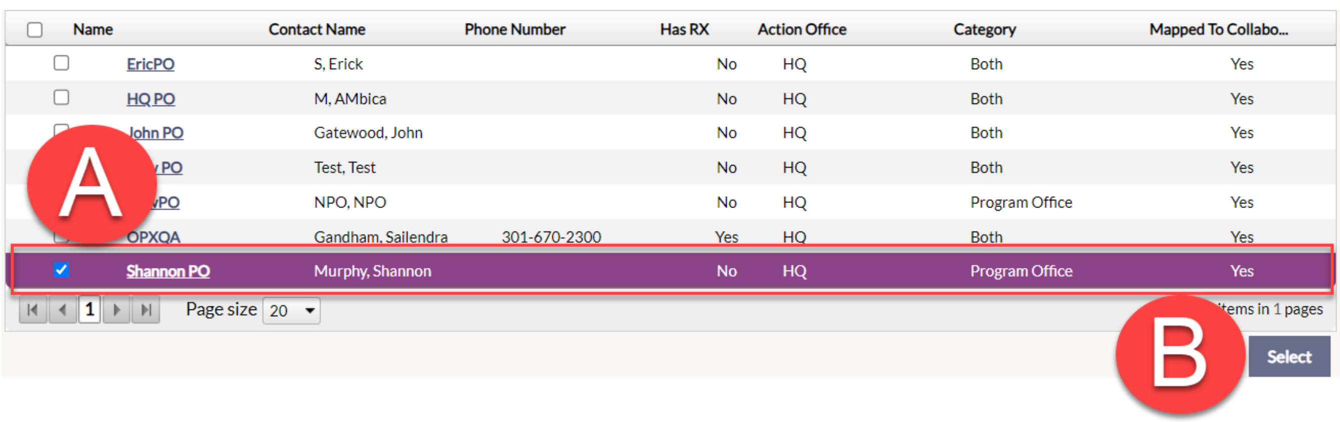


Here, you can search for and select from existing Program Offices/Consultancies, or create a new Program Office/Consultancy.

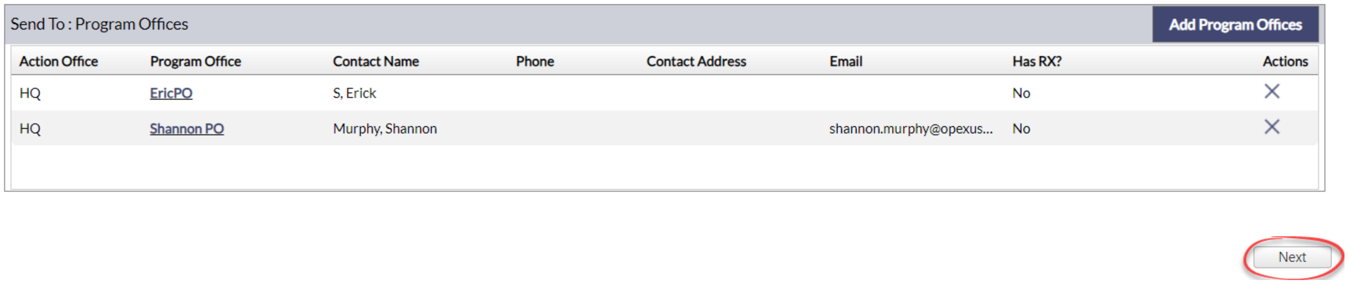
Note: You can add multiple Program Offices/Consultancies if needed.

2.1.2.1 Select an Existing Program Office/Consultancy

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

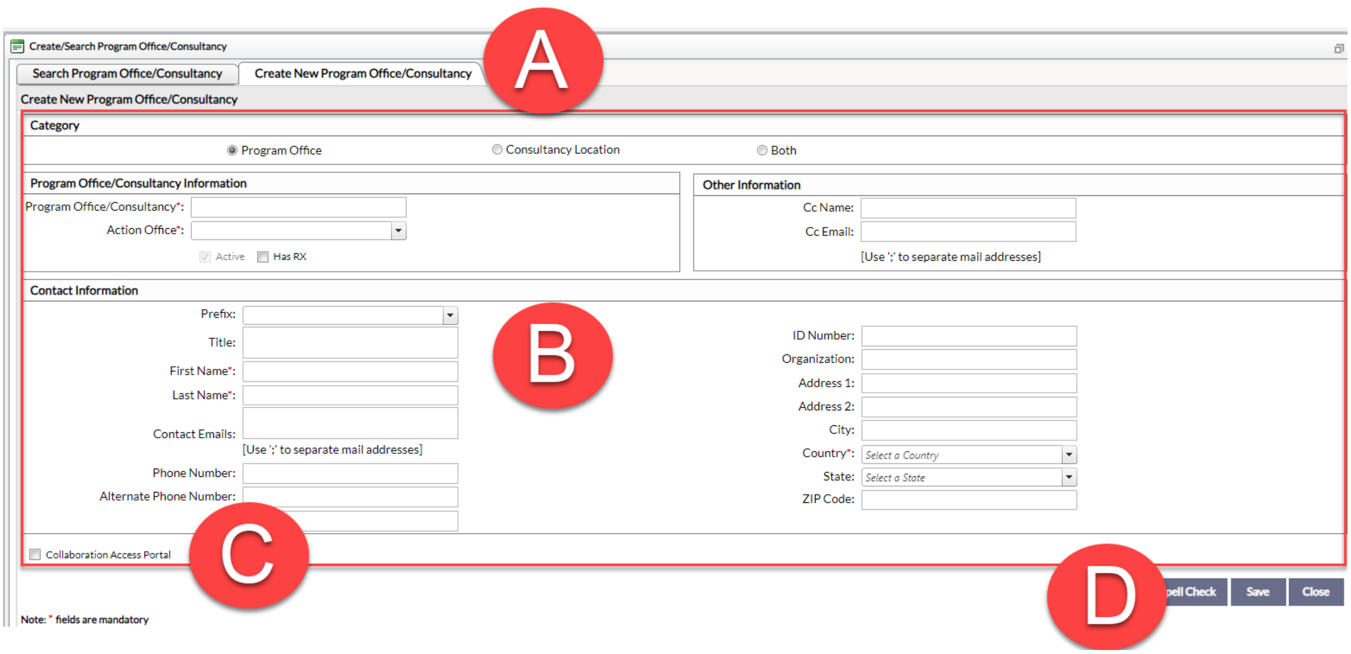


The *Program Offices* list will refresh with your selection(s). When you're finished adding Program Offices/Consultancies, click **Next** to move on:



2.1.2.2 Create a New Program Office/Consultancy

To create a new PO/Consultancy, click the **(A) Create New Program Office/Consultancy** tab.

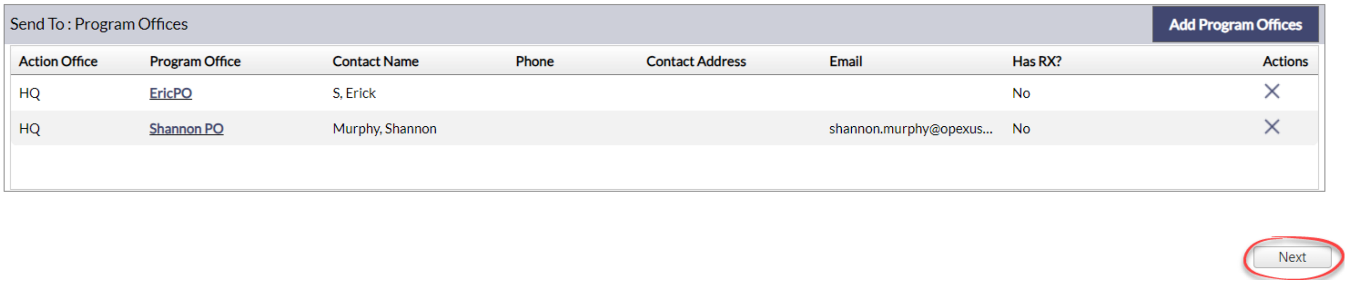


In the *Category* section, indicate whether it is a Program Office, Consultancy, or Both. Then, fill out the applicable fields in the *Program Office/Consultancy Information* section, including the PO/Consultancy title and Action Office. You should also include some *Contact Information*, including the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

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

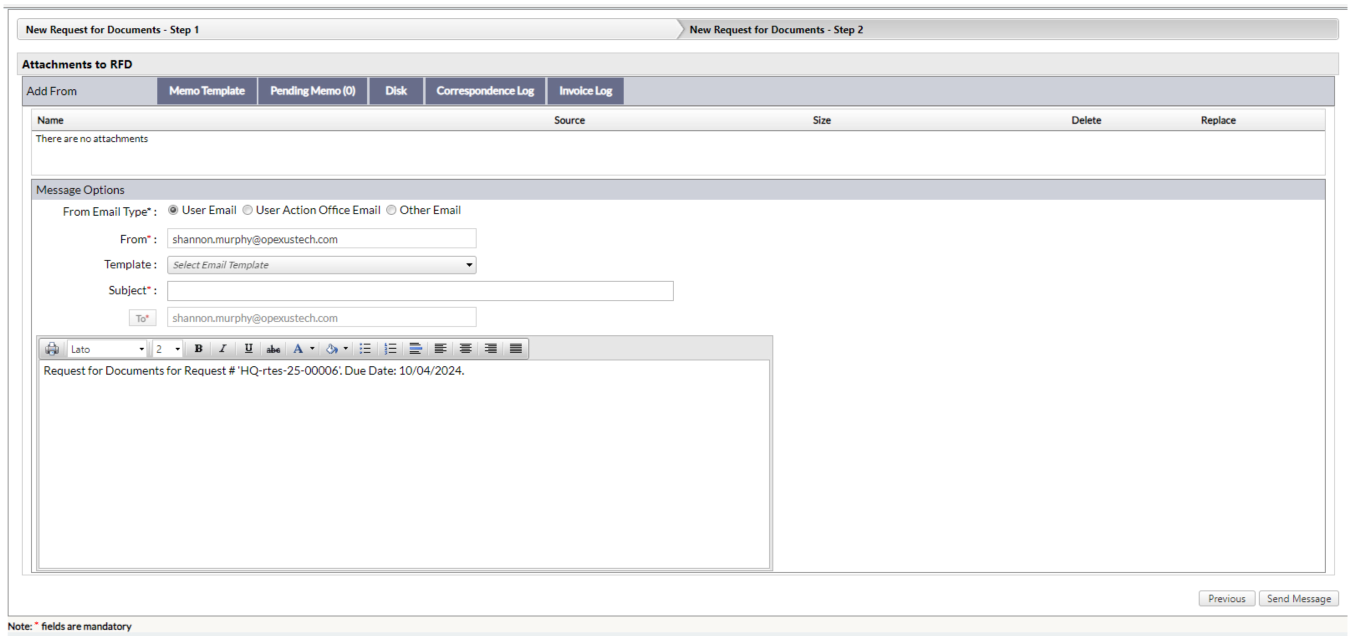
When you're finished, click **(D) Save.**

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

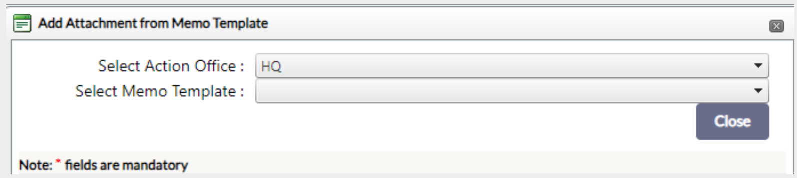
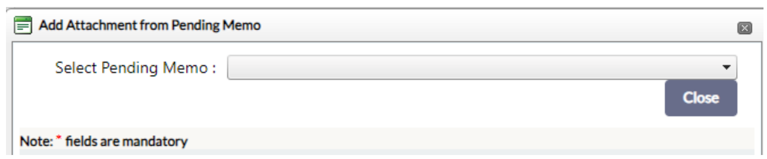
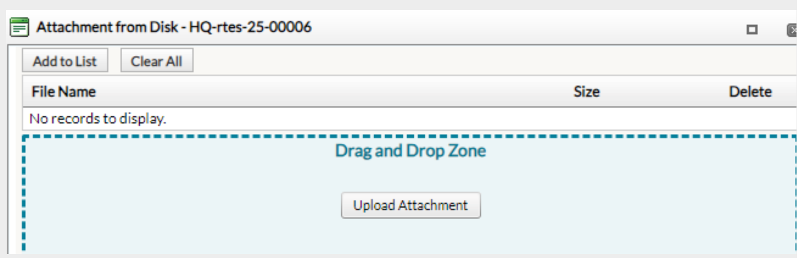


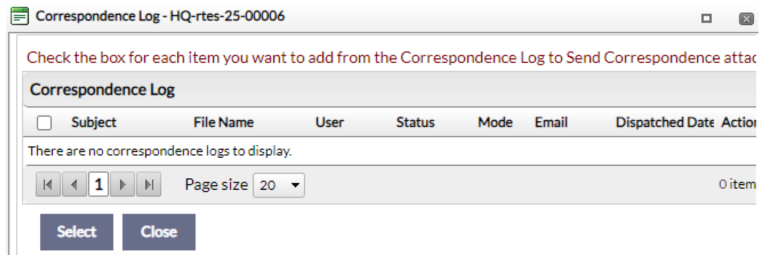
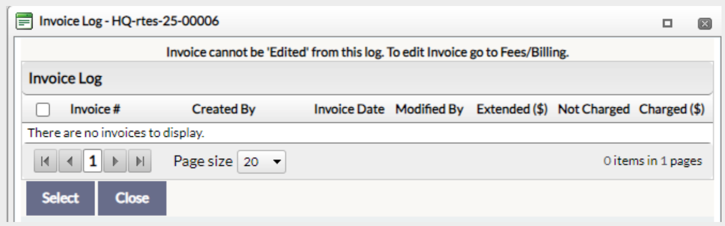
2.1.3 Configure and Send the Message

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

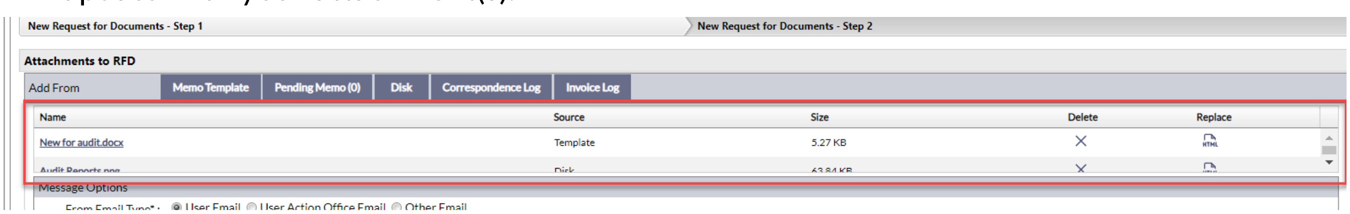


1. First, you can use the **Attachments** menu to share any relevant documents with the RFD recipient, such as the original request letter for context.

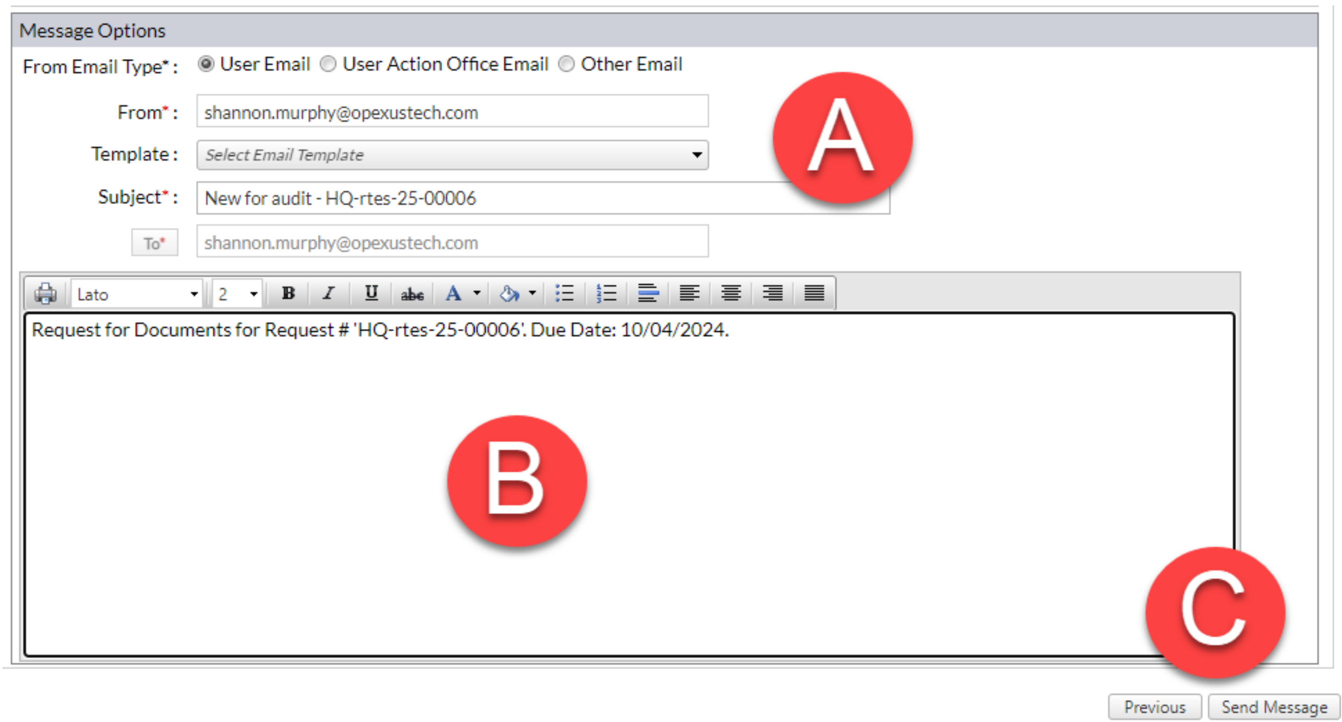
Action	Description	Image
Memo Template	Select an Action Office and a Memo Template. You'll have the option to customize the template if needed.	
Pending Memo	If a pending memo is available, you can select it from the drop-down list and customize it.	
Disk	Use the *Drag and Drop* zone or click **Upload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

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

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

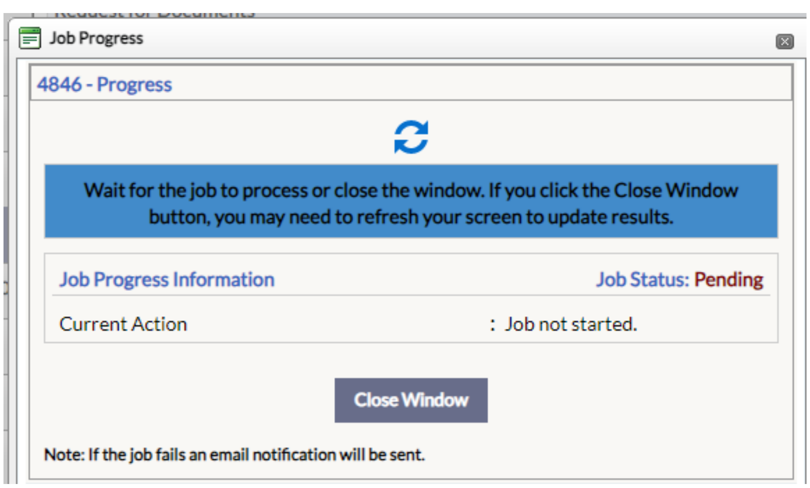


3. Next, configure the message the RFD recipient will receive with the request in the Collaboration Portal. First add a **Subject** for the message. You can also edit the **(B) message body** as needed.

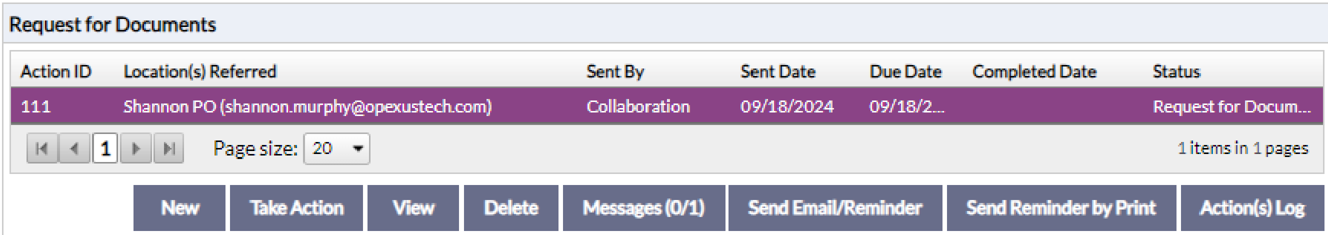


4. When you're ready to submit the request, click **(C) Send Message**. A pop up message appears to confirm sending the RFD. Click **OK** to continue.
5. The *Job Progress* window will appear. You can wait on this screen until the job is complete, or you can click **Close Window**.

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



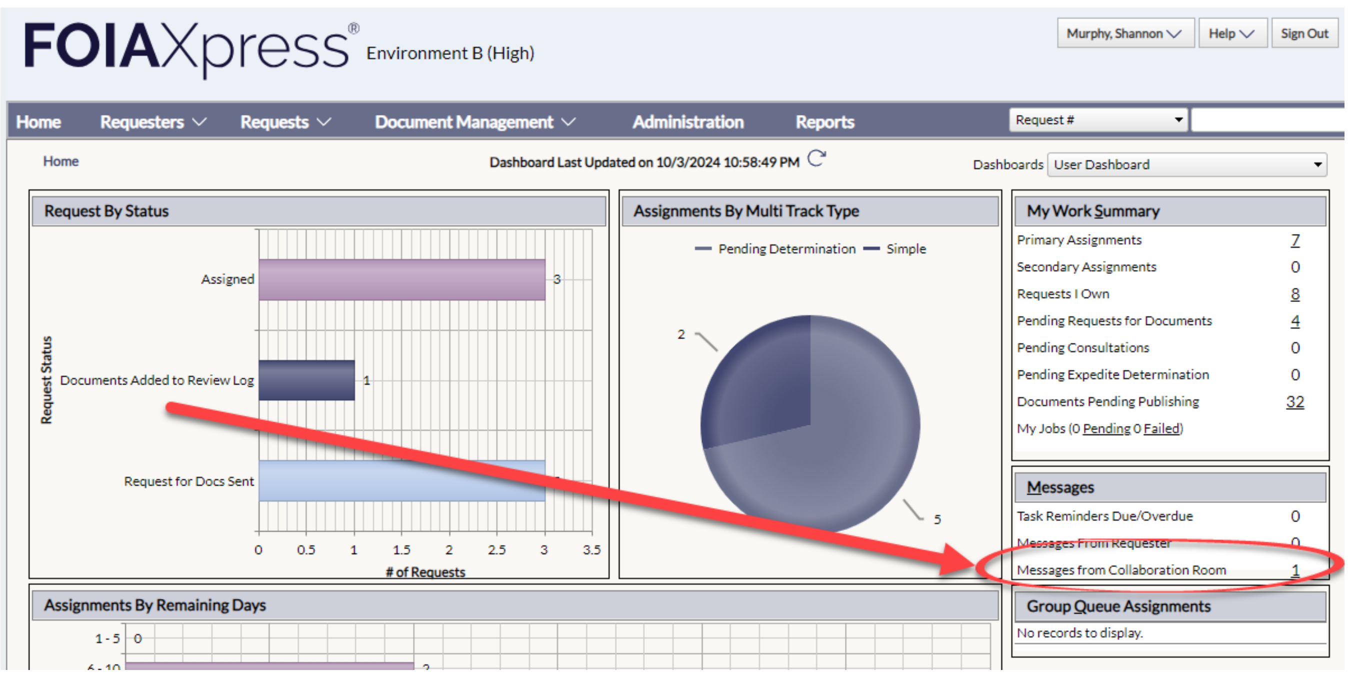
6. The *Request for Documents* screen refreshes with the new RFD included on the list.



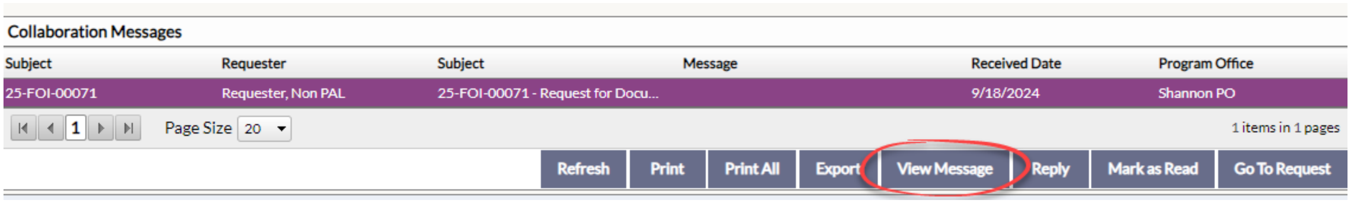
2.2 Receiving Responses from Collaboration

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

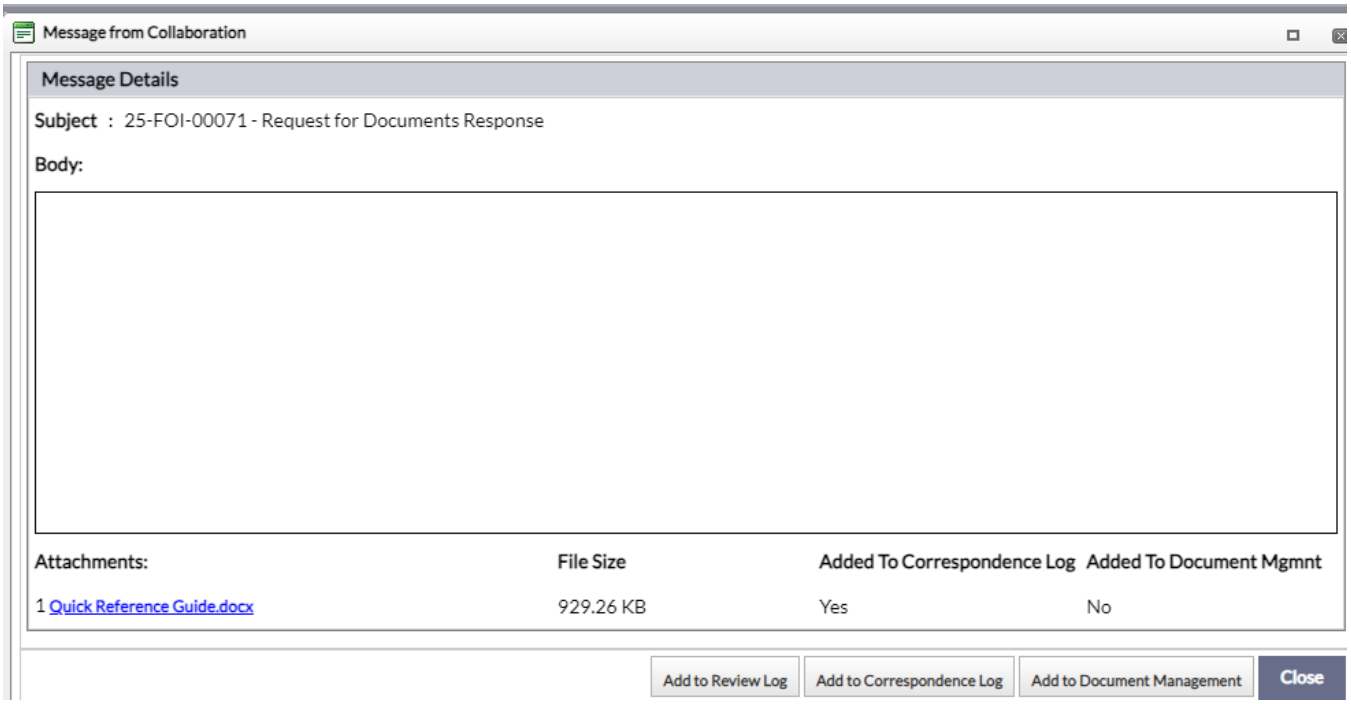
1. Click **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages.



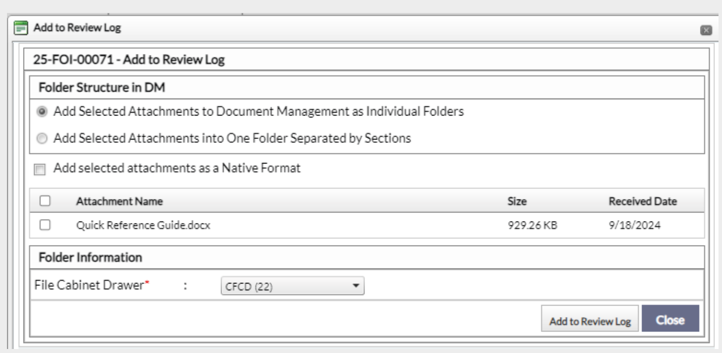
2. The *Collaboration Messages* screen appears as shown below. Click the message you'd like to open, then click **View Message.**

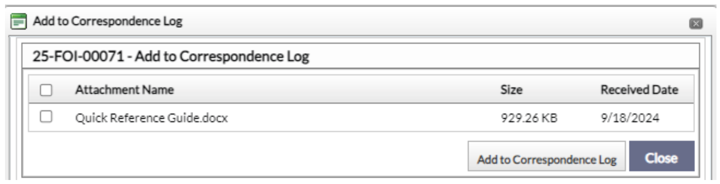
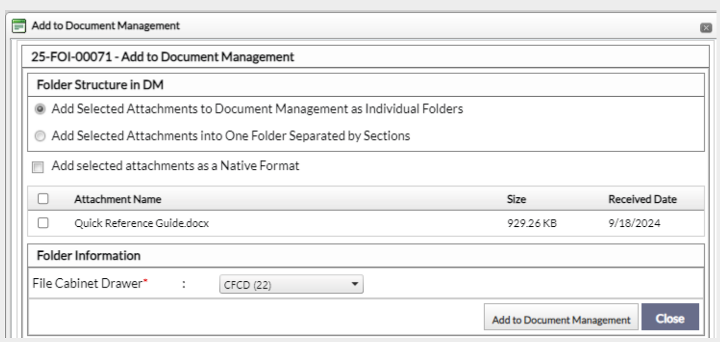


3. The *Message from Collaboration* screen displays the message contents. You'll see the message subject, body text, and, most importantly, the RFD documents in the *Attachments* list.

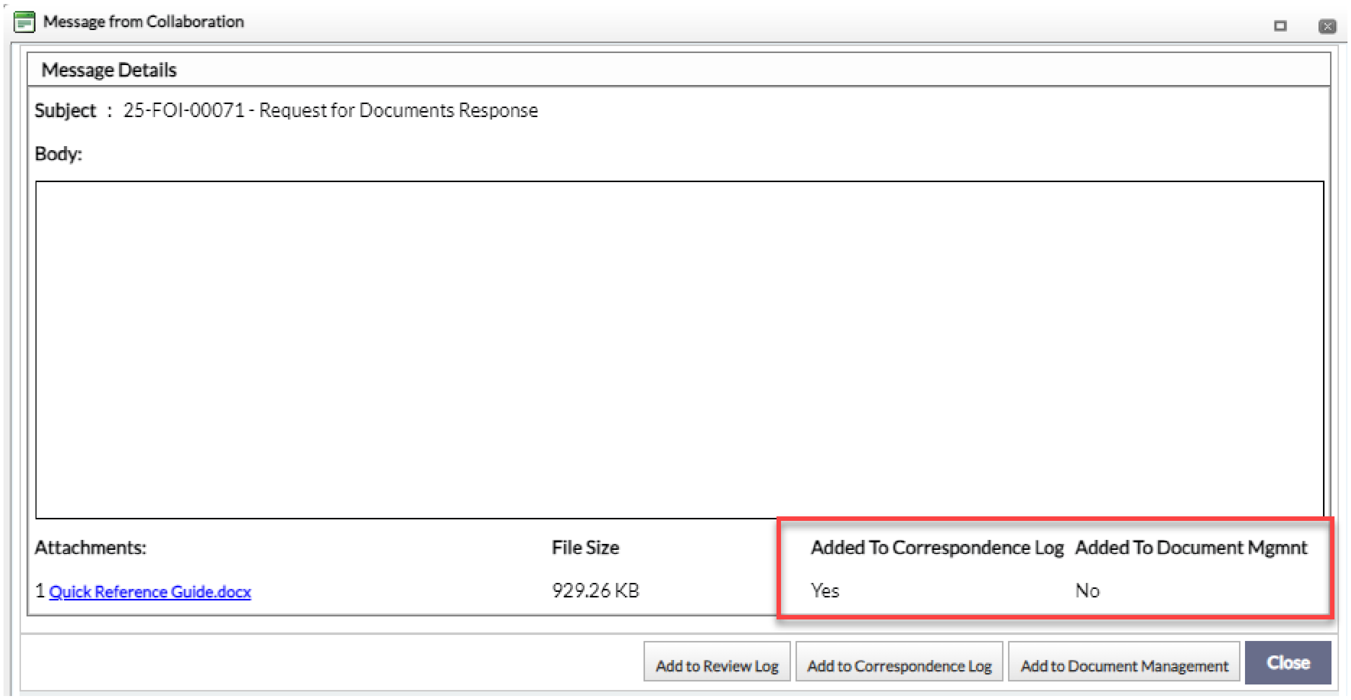


4. There are three options for moving the attachments into FOIAXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

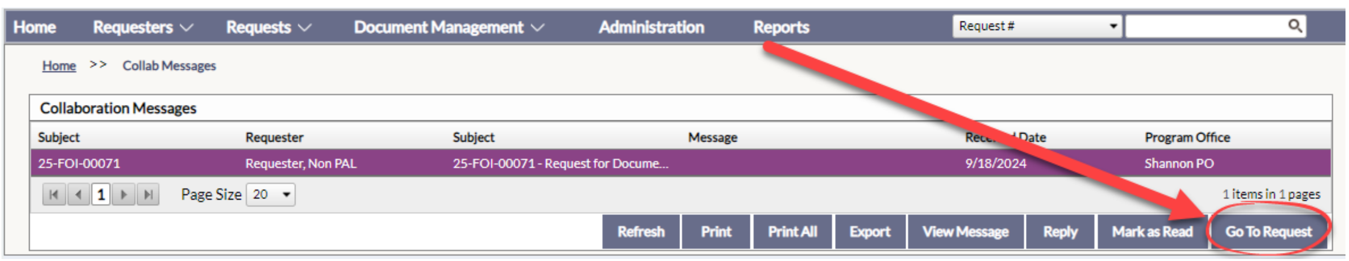
Action	Description	Image
Add to Review Log	Add the attachments to the Review Log of the request for further processing. Select the *Attachments* to include, the *Folder Information* and the *Folder Structure.*	

Action	Description	Image
Add to Correspondence Log	Add the attachments to the Correspondence Log of the request. Select *Attachments* to include and click **Add to Correspondence Log**.	
Add to Document Management	Add the attachments to Document Management. Select the *Attachments* to include, the *Folder Information* and the *Folder Structure*.	

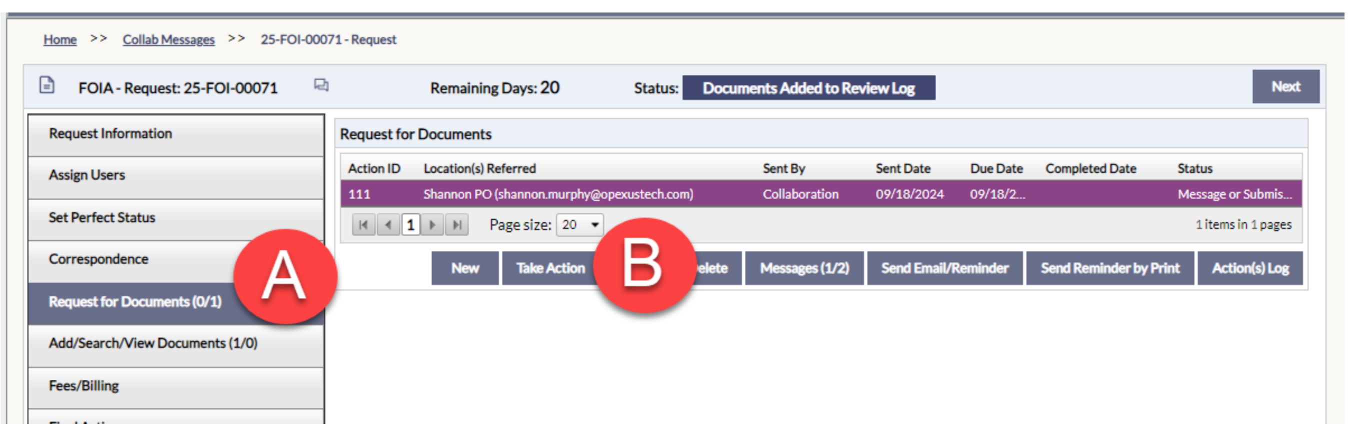
5. Once you've moved the attachments, the action is reflected on the *Message Details* screen as shown below:



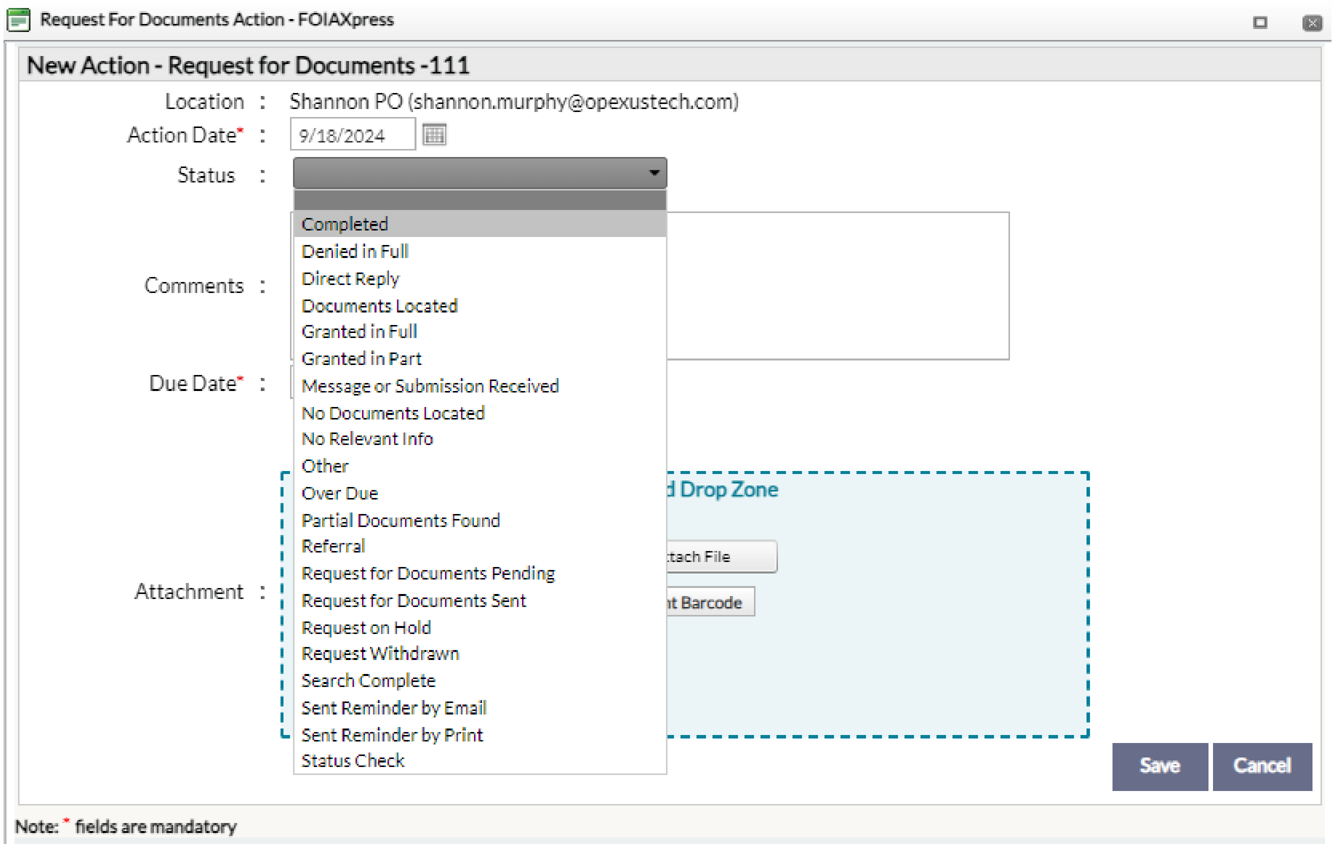
6. Click **Close**, then click **Go To Request** from the *Collaboration Messages* screen:



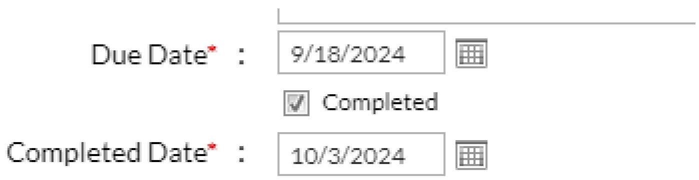
7. Click **(A) Request for Documents**, then select the request you just completed and click **(B) Take Action**:



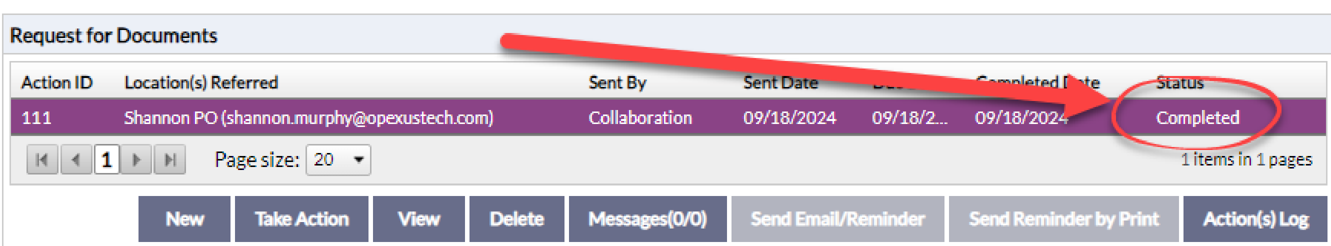
8. On the *Request for Documents Action* screen, under *Status* select **Completed.**



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



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

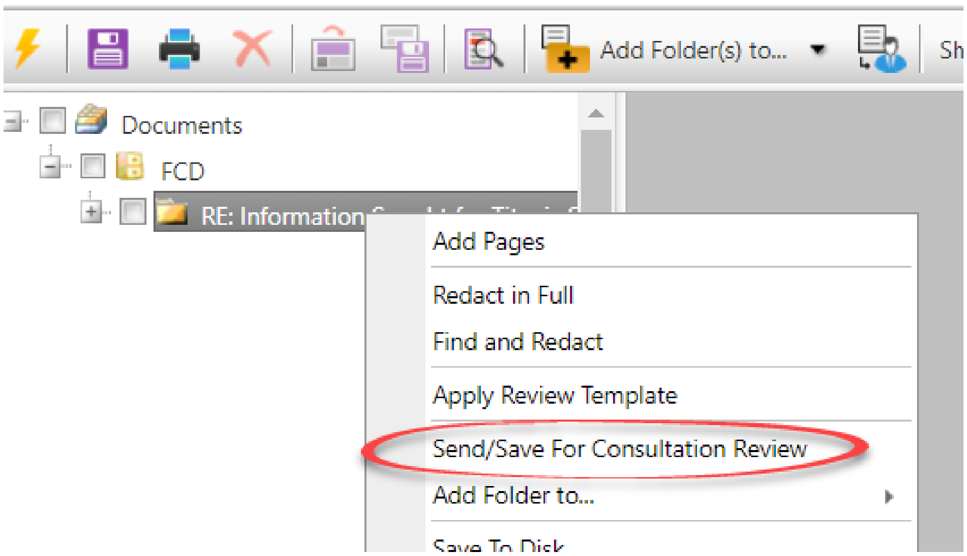


3 Consultation Reviews

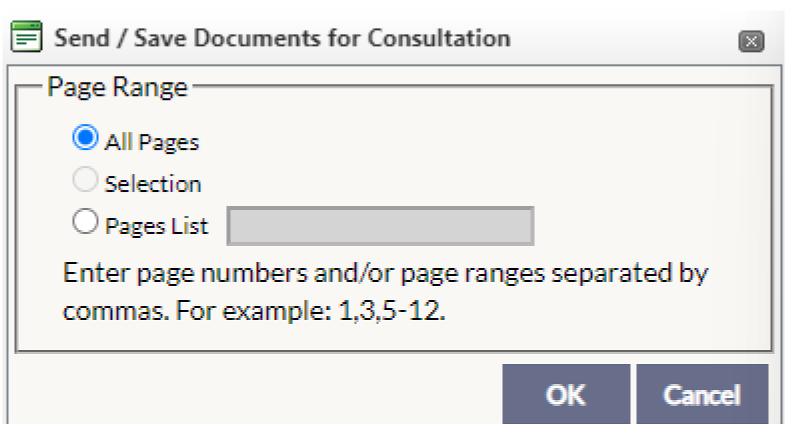
3.1 Send Documents for Consultation Review

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

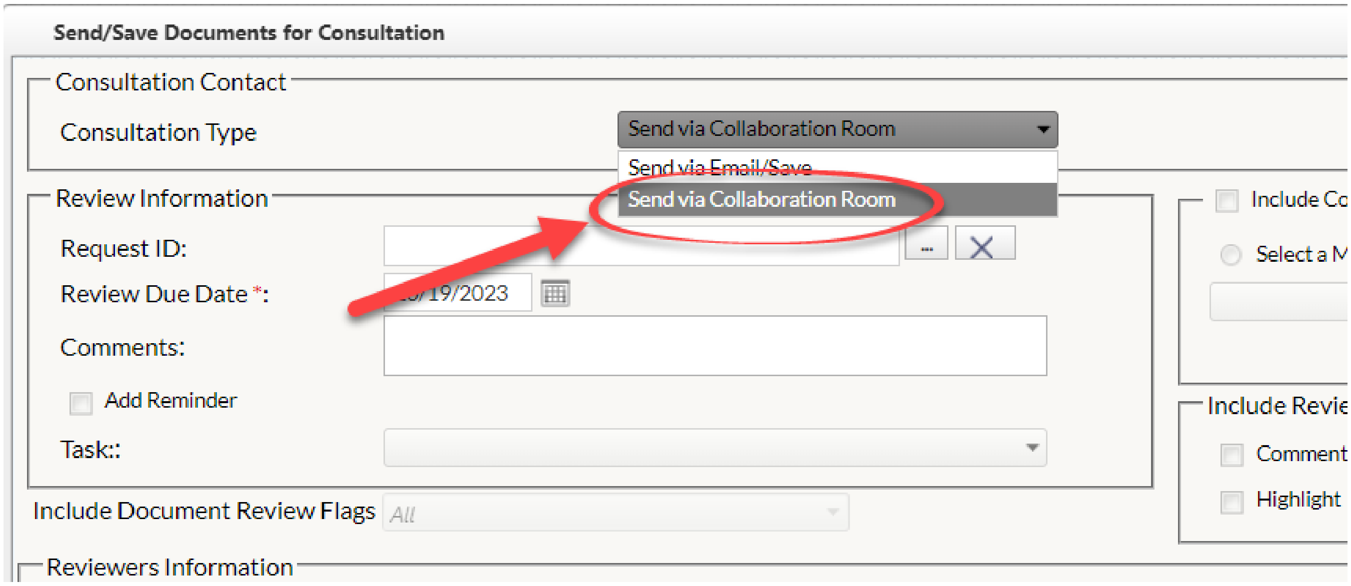
1. First, navigate to the folder with the document(s) you'd like to send and open it in Document Management. Once you're in Document Management, locate the document/folder in the document tree and load any review layer you'd like to include.
2. Right click the document/folder and click **Send/Save for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



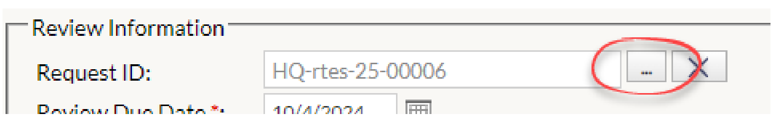
3. Next, select the page range you'd like to include. You can select **All Pages**, or include a **Pages List.** Then, click **OK.**



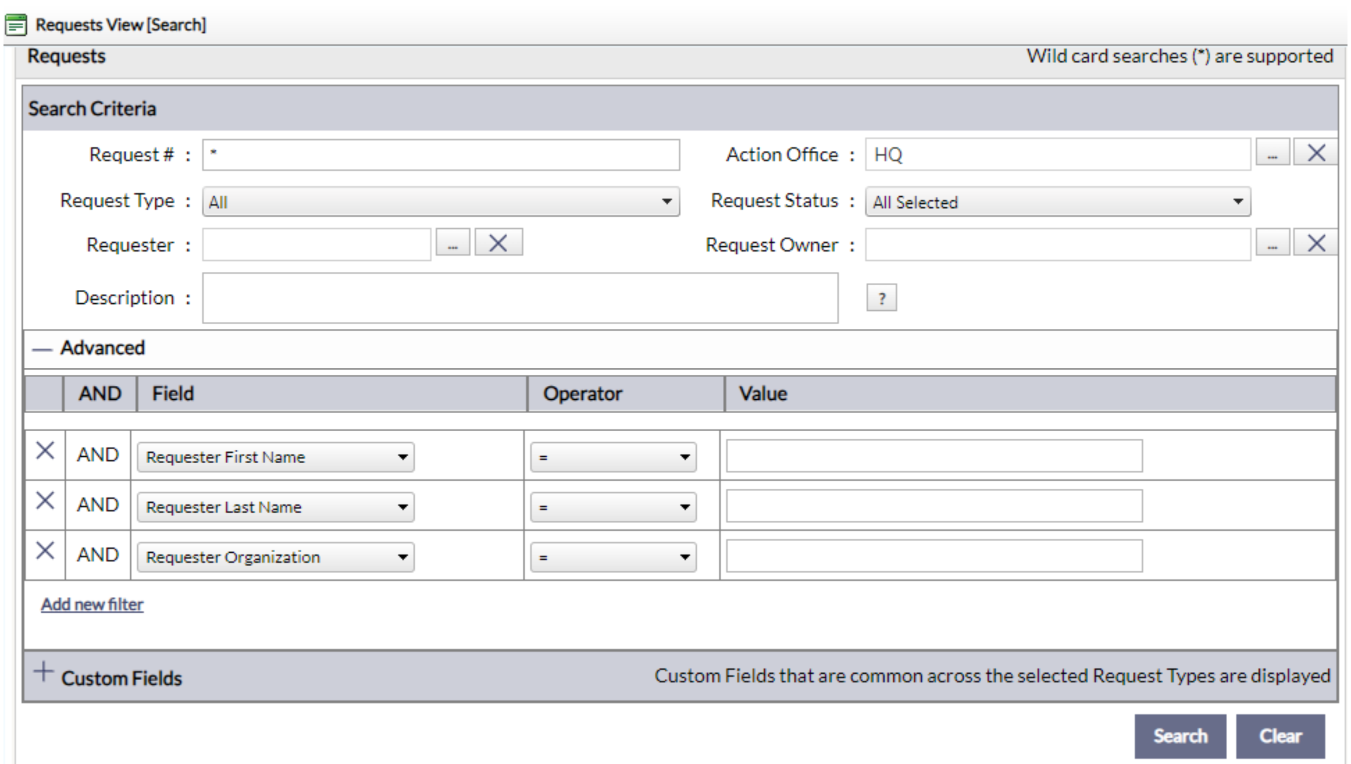
4. The *Send/Save Documents for Consultation* screen opens. First, under *Consultation Type*, you must select **Send via Collaboration Room.** This ensures the request is sent to the portal for consultation review:



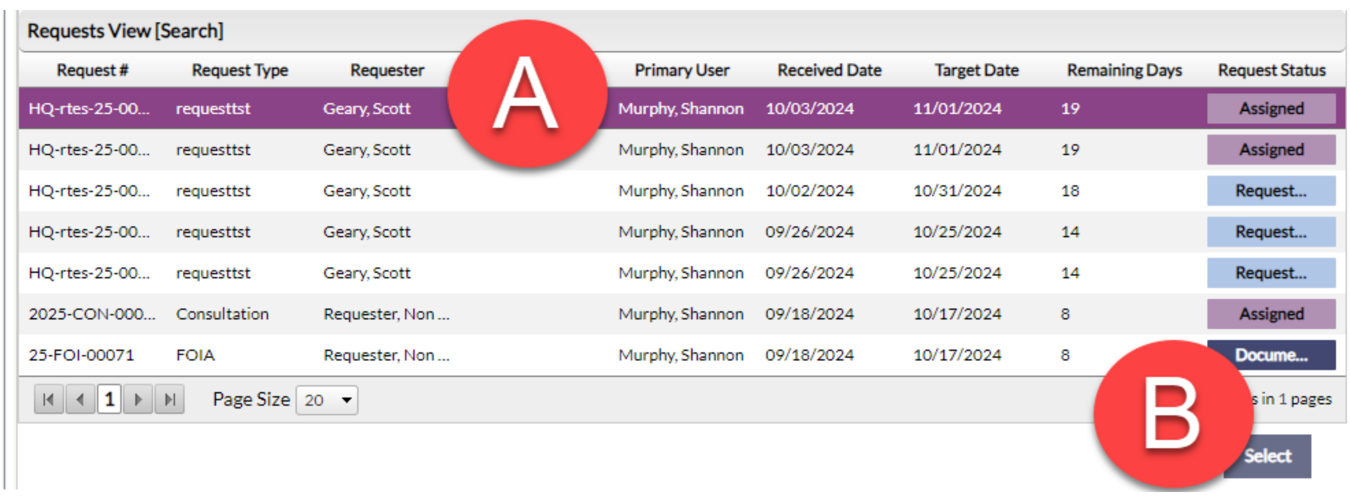
5. To associate this consultation with a Request, click the **lookup** button.



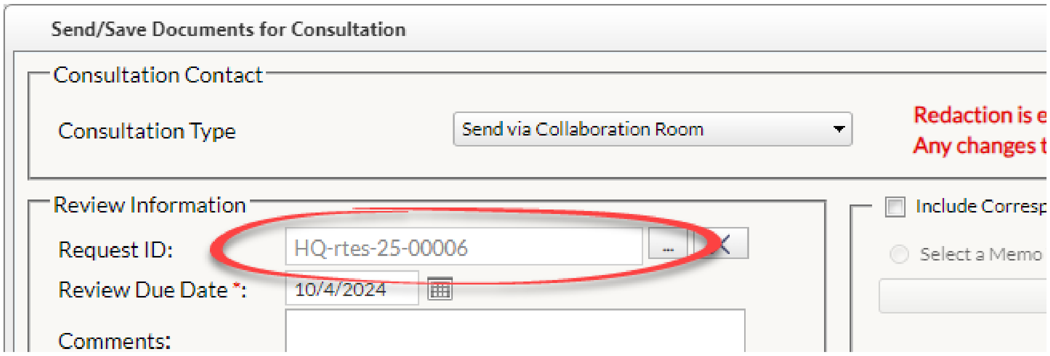
   a. To locate a specific request, fill out the **Search Criteria**, then click **Search.** To view a list of all requests, click **Search** without filling out the criteria fields.



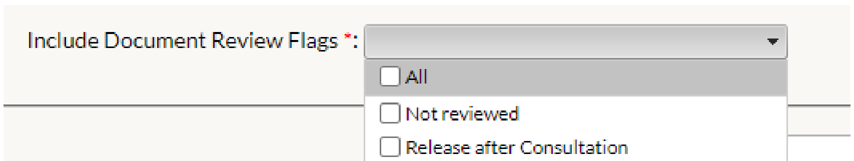
b. Scroll down to view the *Requests* list. Select the **(A)** request you want to associate with the consultation, then click **(B) Select.**



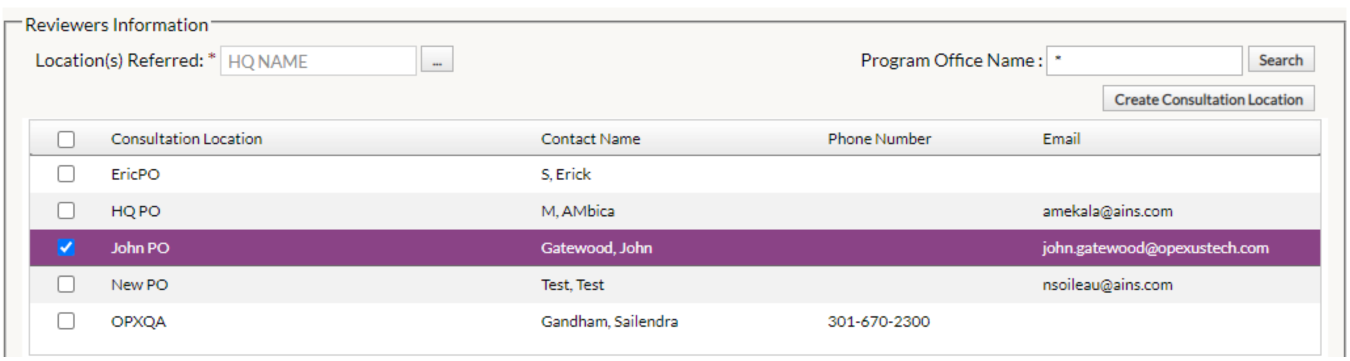
6. The page will refresh to the *Send/Save Documents for Consultation* page, with the **Request ID** populated.



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

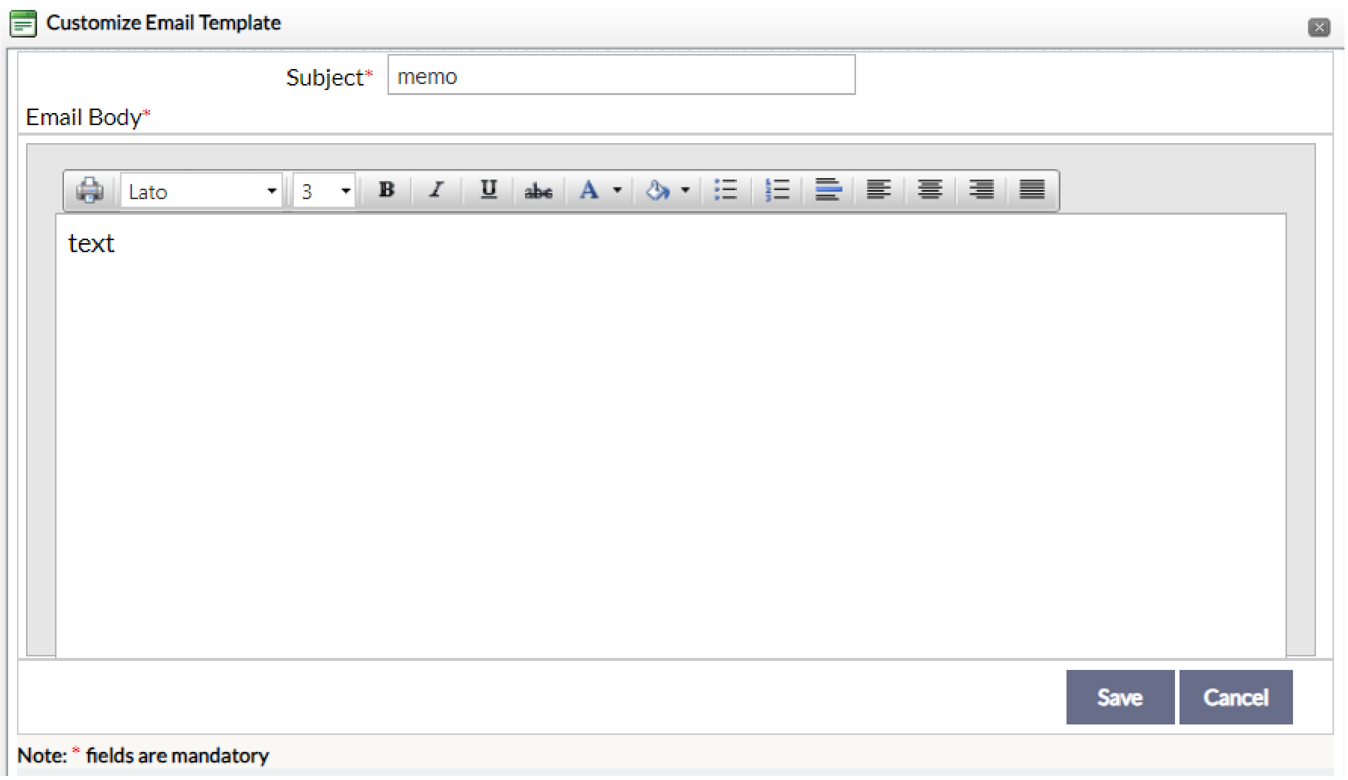


8. In the *Reviewers Information* section, select an eligible **Consultation Location**.



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

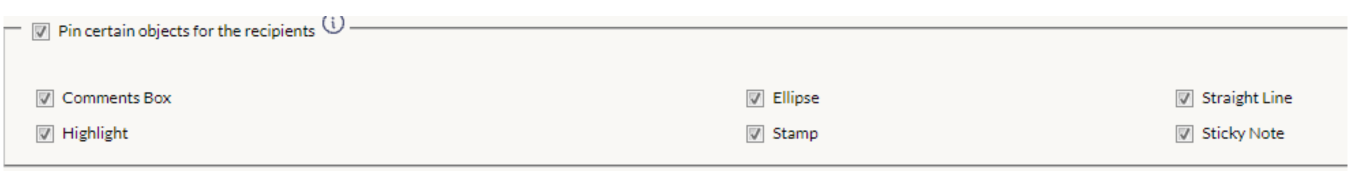
   a. If you'd like to make edits to the template, click **Customize.** You'll be able to customize the email *Subject* and *Body* on the *Customize Email Template* page.



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

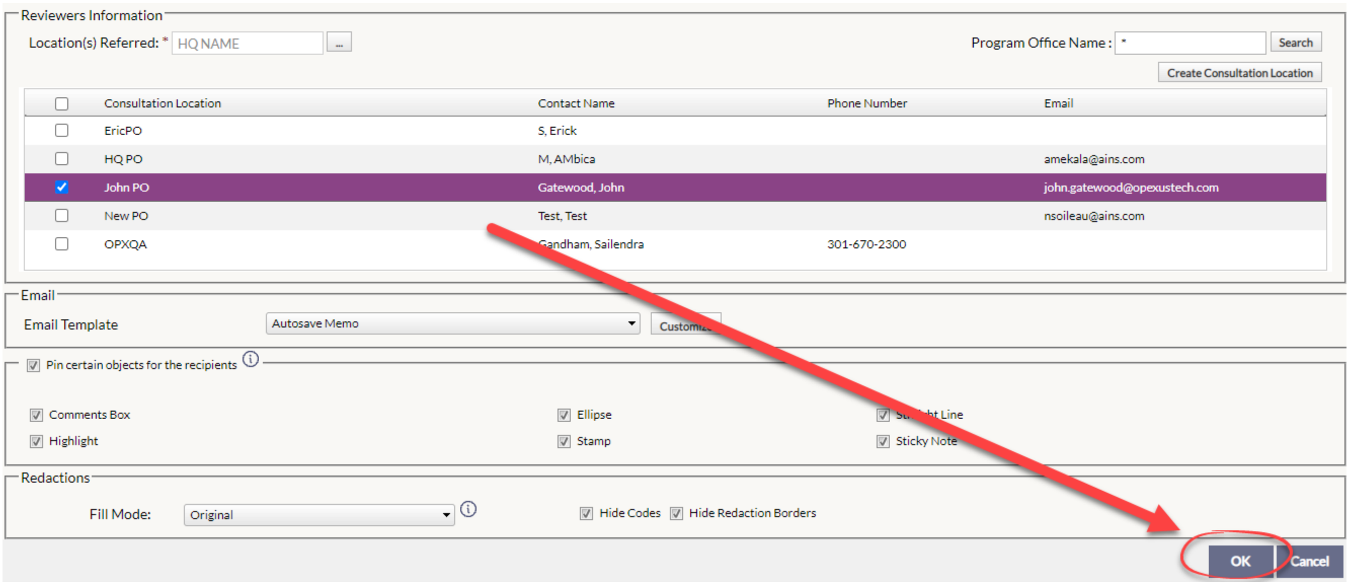
10. If the documents you're sending contain redactions, you can pin review objects to hide sensitive information from collaborators. Use the *Pin certain objects for the recipients* section to select which type(s) of review objects you'd like to lock.

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



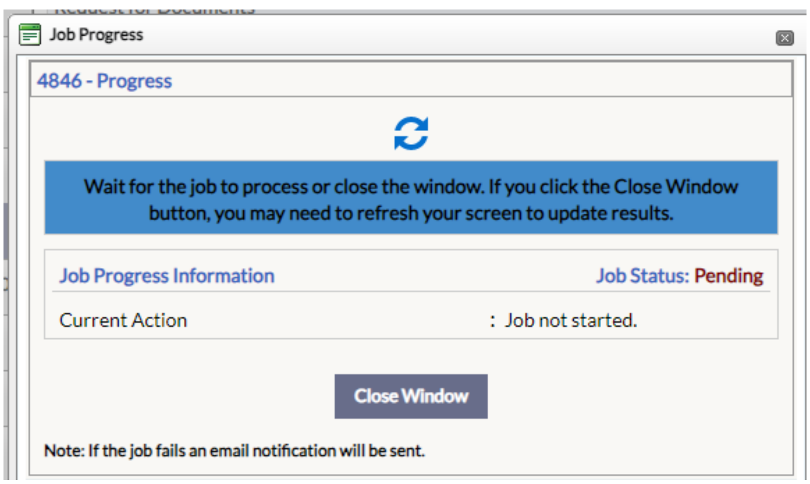
11. Next, you can configure the *Redactions Fill Mode*. Use the drop-down menu to select how the redactions are displayed in Collaboration Portal, including opaque, translucent, or transparent. You can also use the checkboxes to hide codes and/or redaction borders.

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

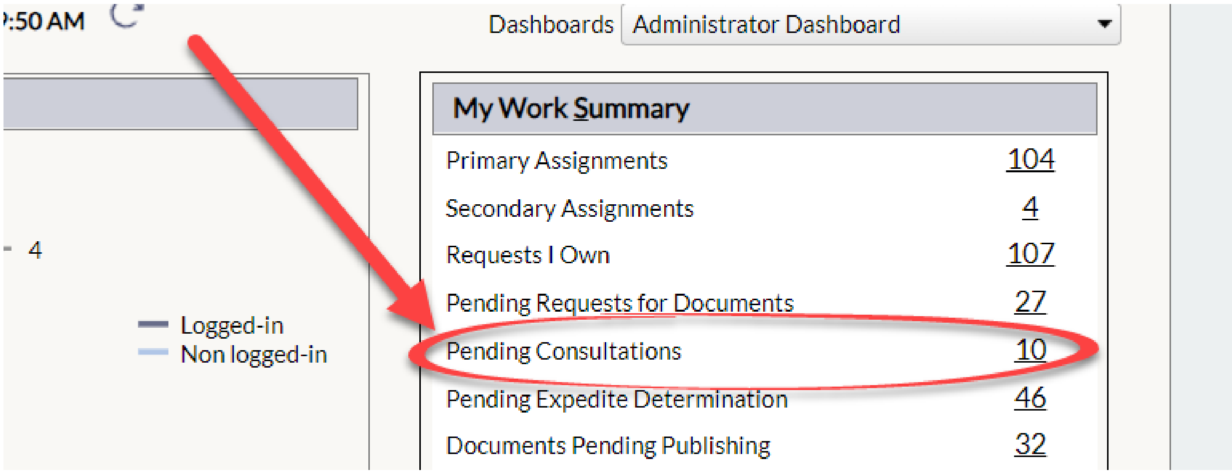


13. The *Job Progress* window will appear. You can wait on this screen until the job is complete, or you can click **Close Window**.

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



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

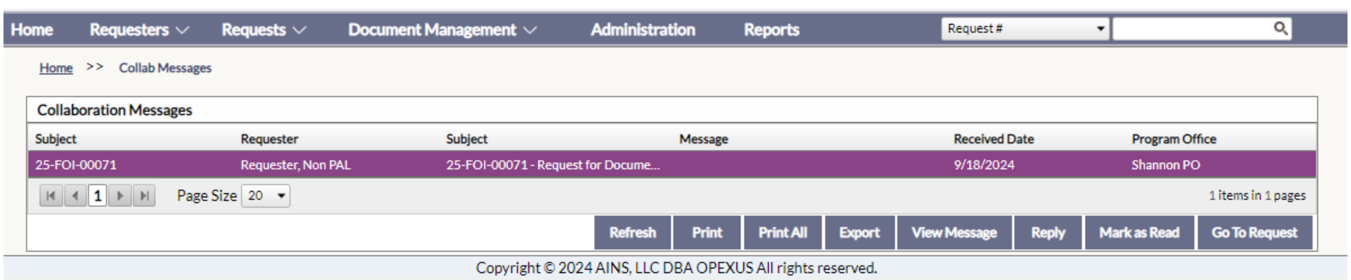


15. Follow the steps in the *Receiving a Consultation Review* section for details on receiving a Consultation Review from the portal.

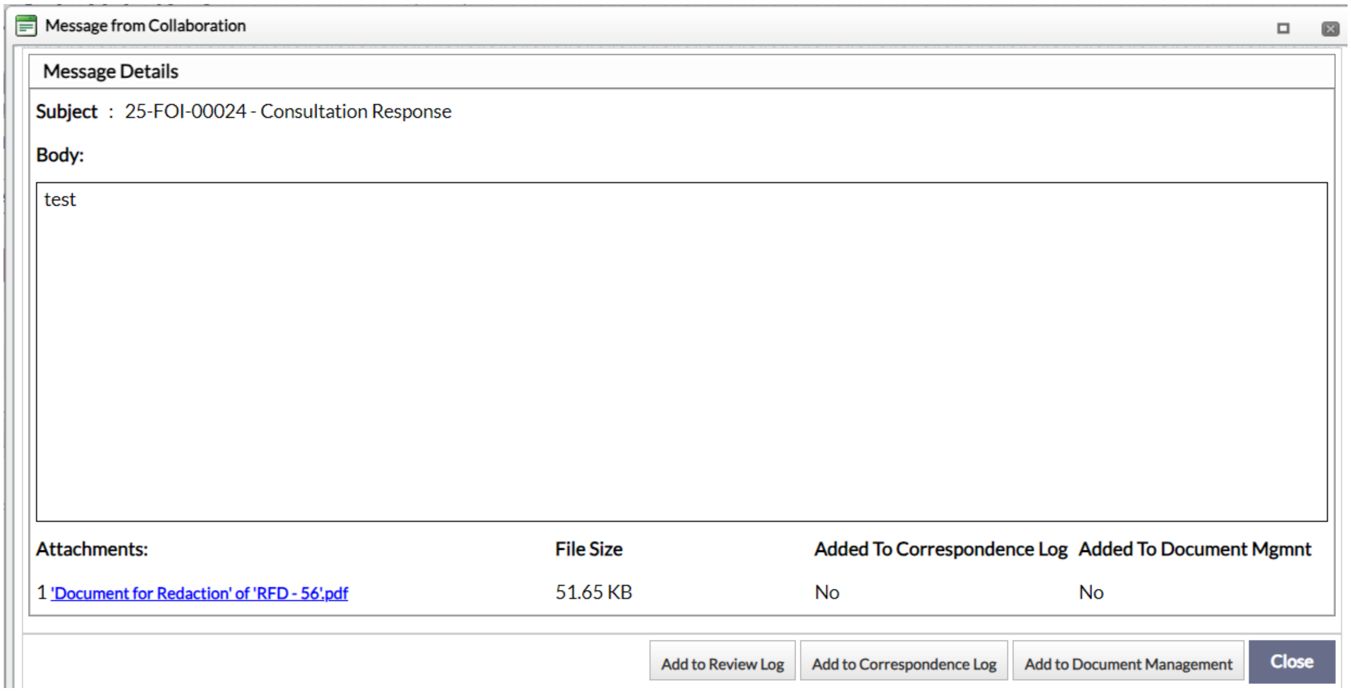
3.2 Receiving a Consultation Review

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

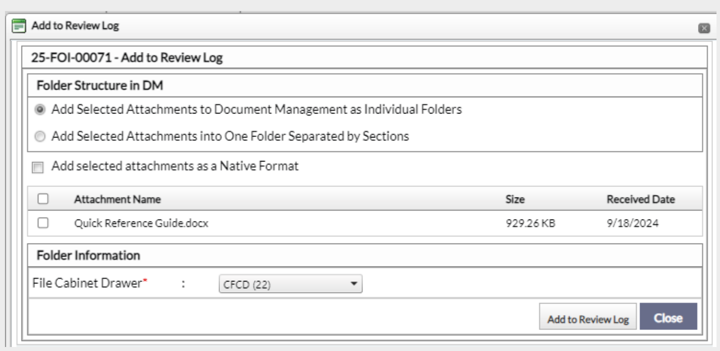
1. Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:

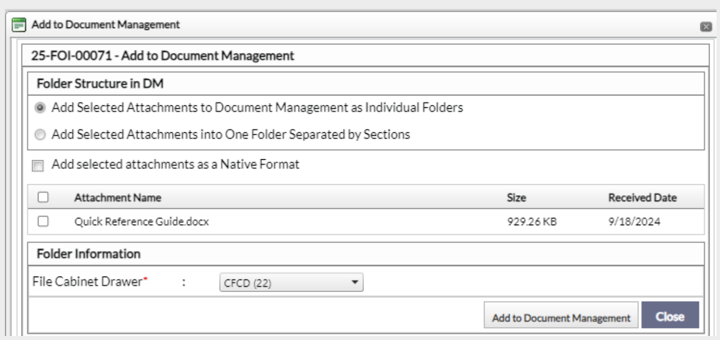


2. Select the new message and click **View Message**:

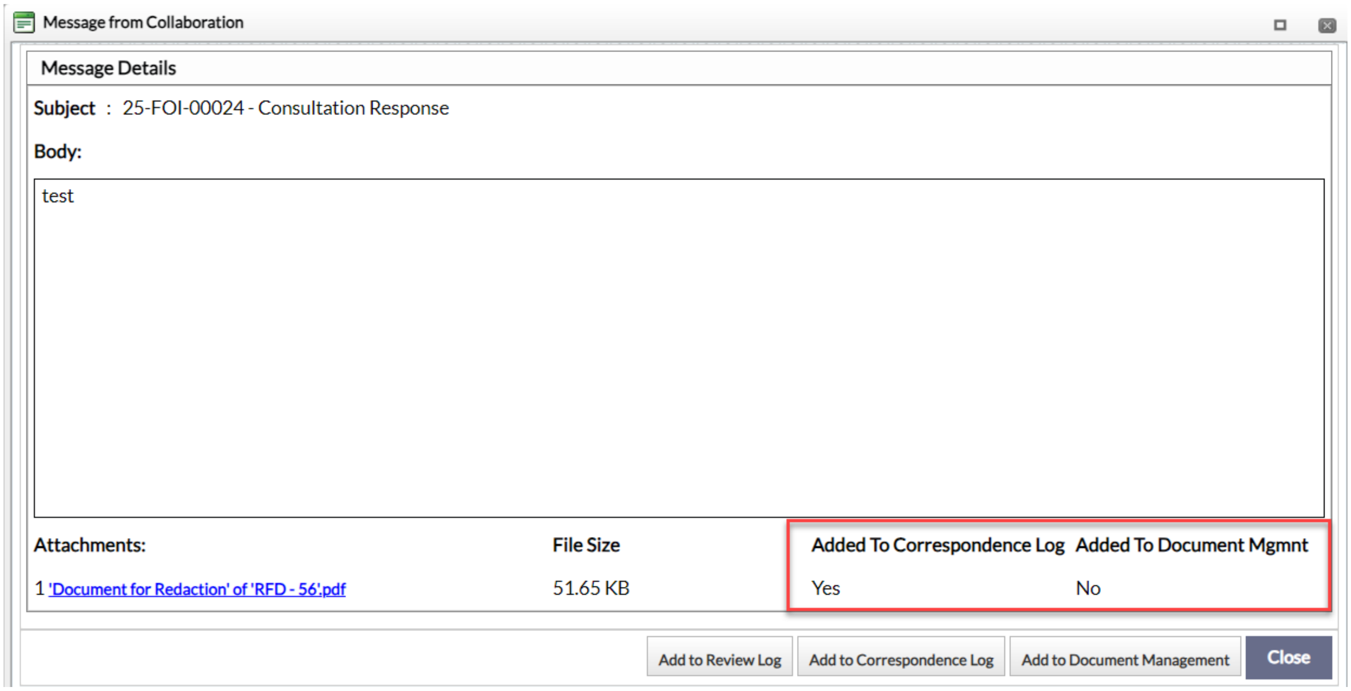


3. There are three options for moving the attachments into FOIAXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

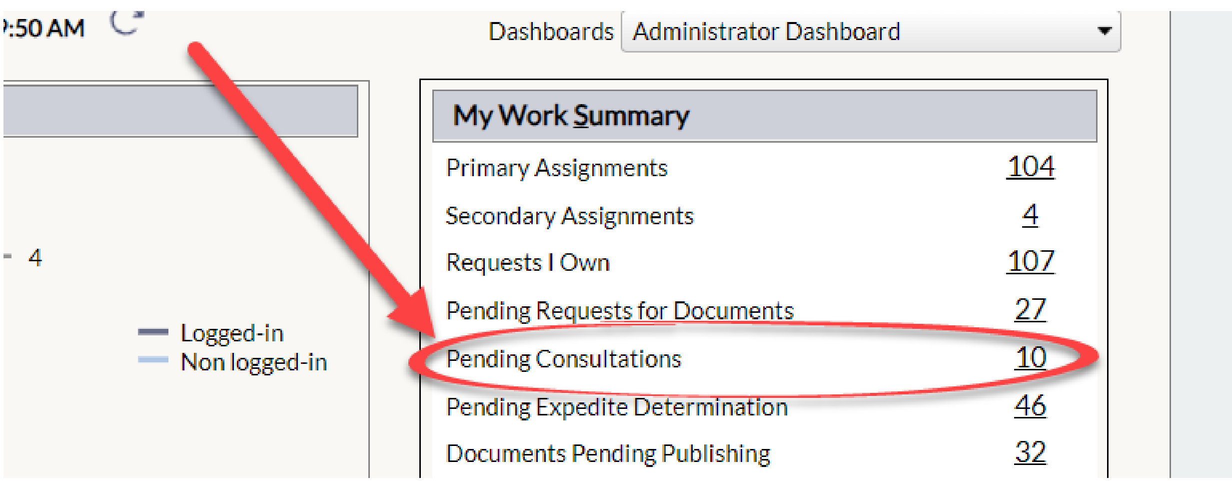
Action	Description	Image
Add to Review Log	Add the attachments to the Review Log of the request for further processing. Select the *Attachments* to include, the *Folder Information* and the *Folder Structure.*	

Action	Description	Image
Add to Correspondence Log	Add the attachments to the Correspondence Log of the request. Select *Attachments* to include and click **Add to Correspondence Log**.	
Add to Document Management	Add the attachments to Document Management. Select the *Attachments* to include, the *Folder Information* and the *Folder Structure*.	

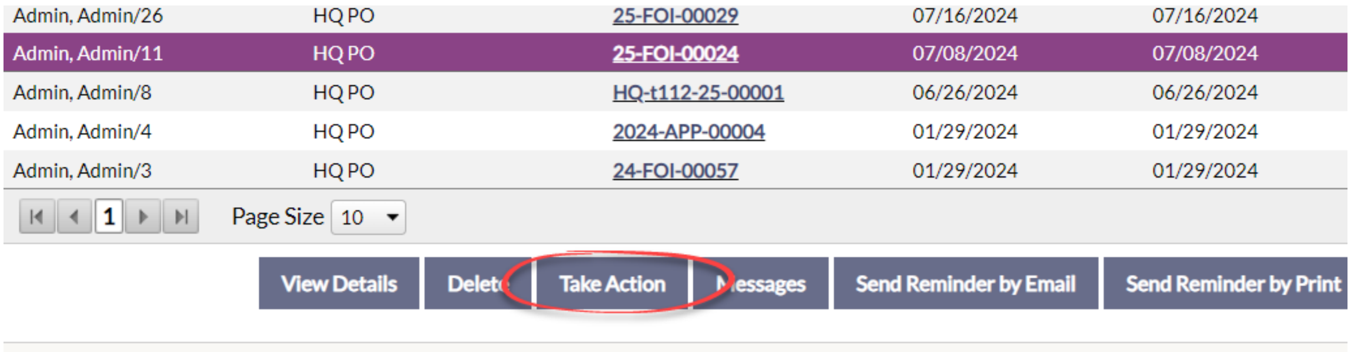
4. Once you've moved the attachments, the action is reflected on the *Message Details* screen as shown below:



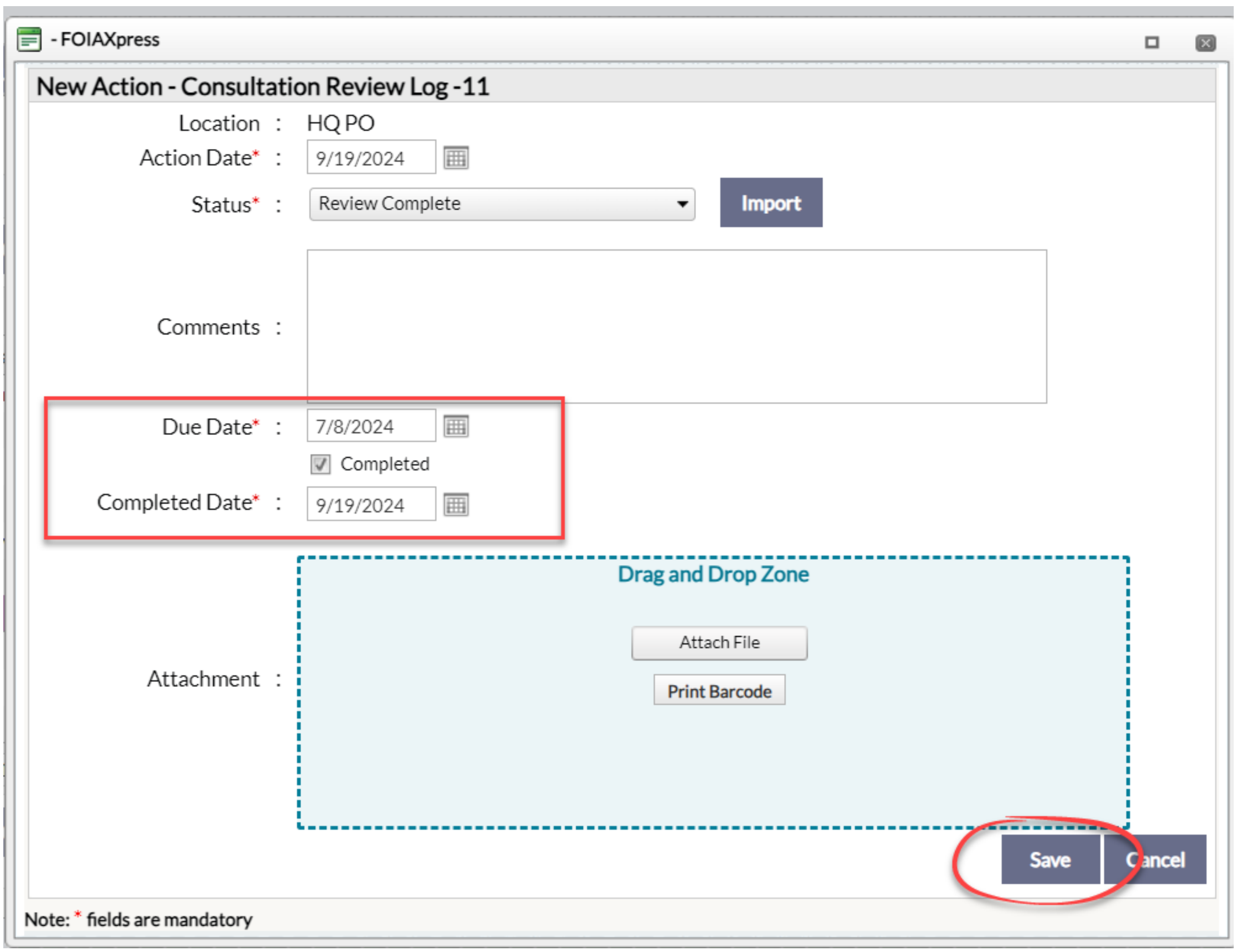
5. Click **Close**, then click **Home** to access the home screen. Under *My Work Summary*, select **Pending Consultations**:



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



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

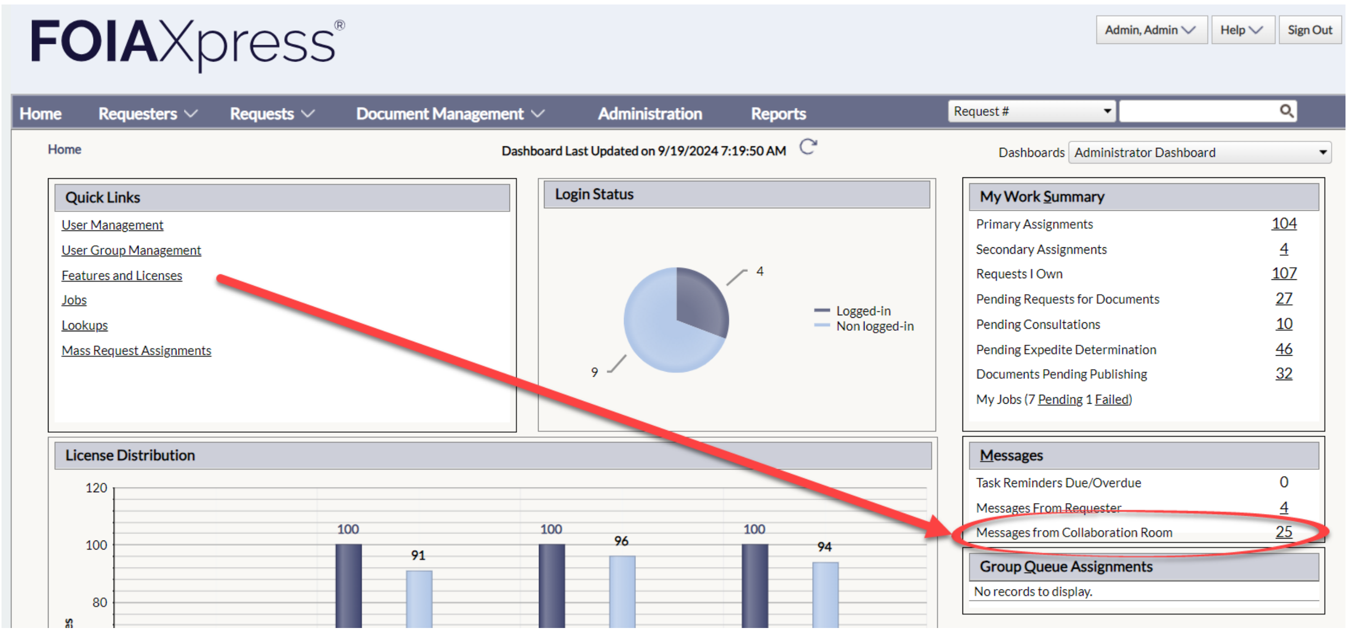


9. Click **Save** to save the action.

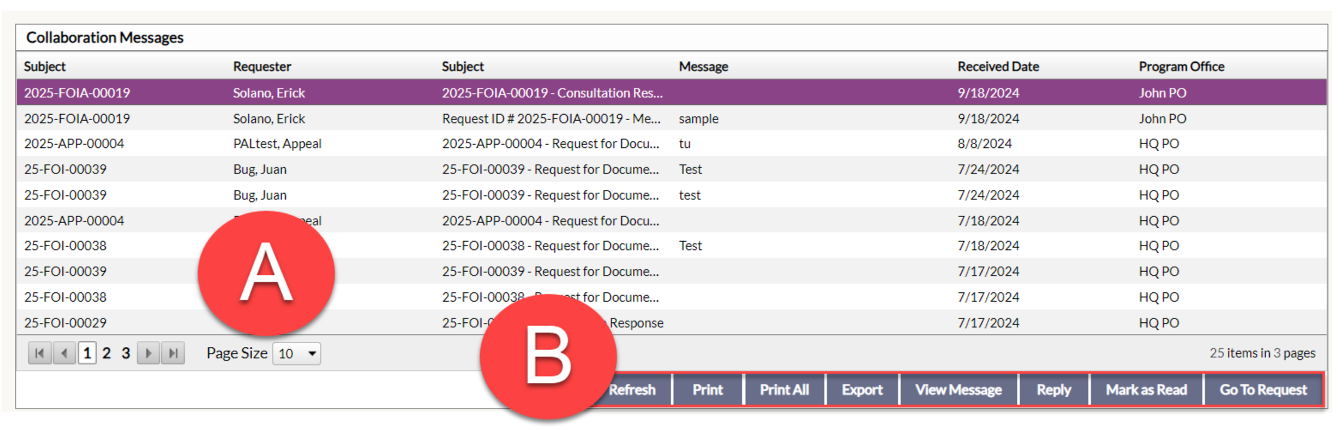
4 Correspondence

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

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

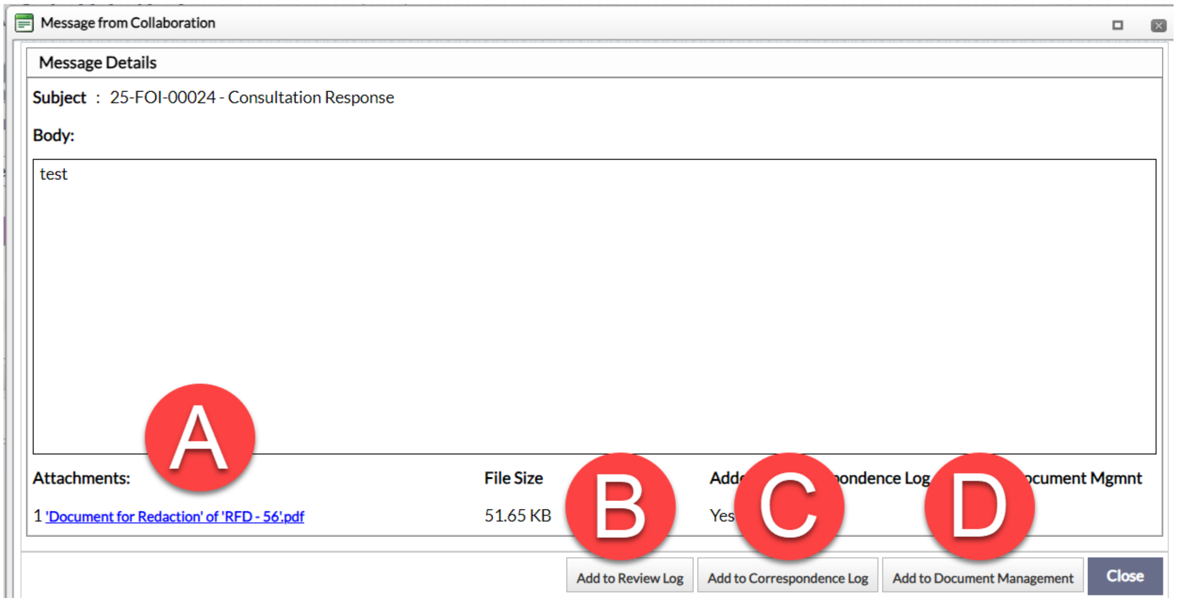


2. The *Collaboration Messages* screen appears as shown below. The screen includes a **(A)** list of messages received from the Collaboration Portal, as well as **(B)** Actions you can take on the messages.



4.1 View Message Details

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



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

4.2 Reply to a Message

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

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