# FOIAXpress

OPEXUS

# Collaboration Portal User Manual

v11.4.0

October 2023

# FX 11.4.0 Collaboration Portal User Manual

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# Contents

# 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:

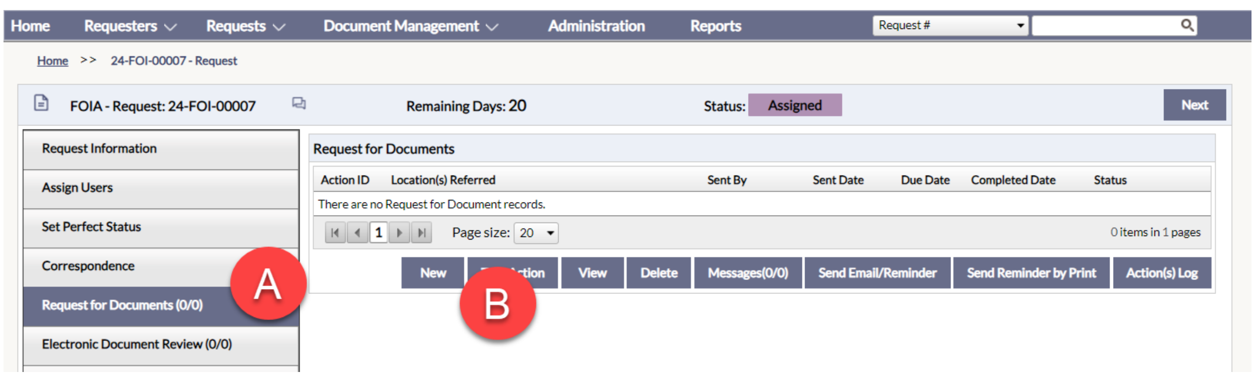
- *Requests for Documents*: Details on sending and completing a Request for Documents in the FOIAXpress application.
- *Consultation Reviews*: How to send documents for consultation review using Collaboration.
- *Correspondence*: Sending and receiving messages from the Collaboration Portal

## 2.1 Requests for Documents

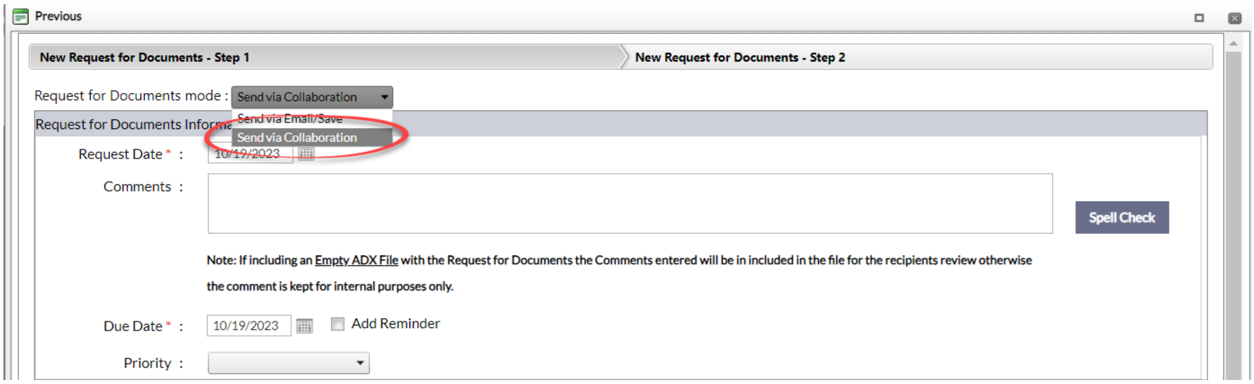
### 2.1.1 Sending a Request for Documents

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.

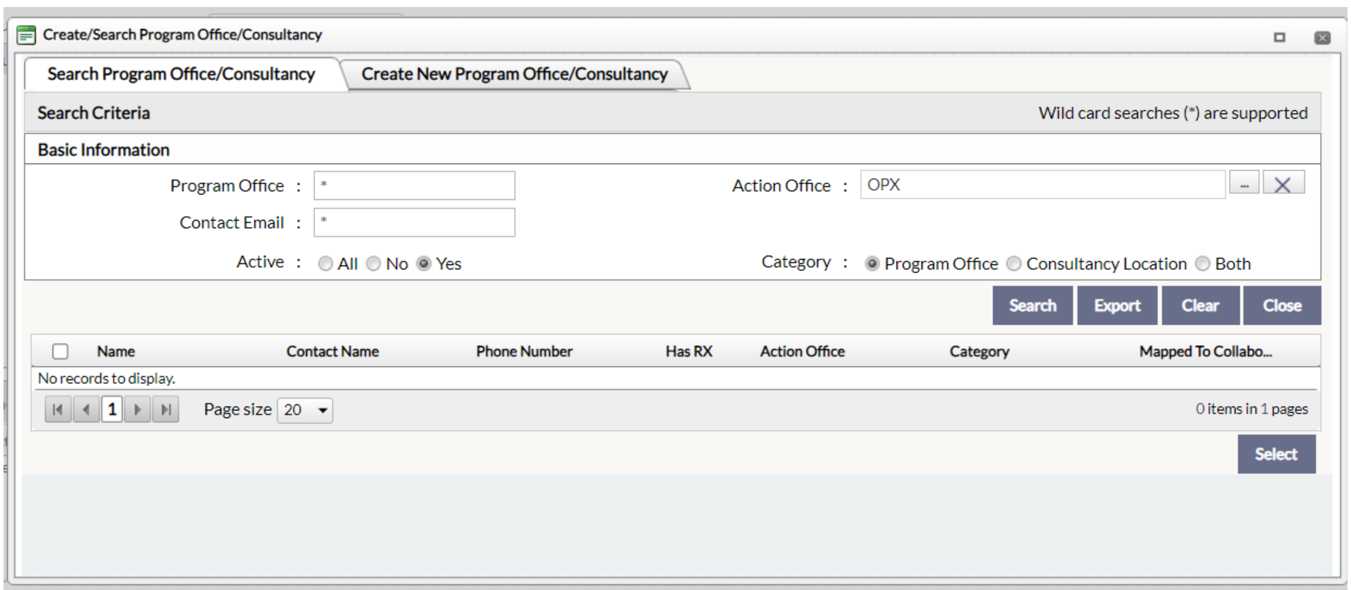
1. Open a request that has been assigned. Requests that are not assigned are not eligible for submitting RFDs.
2. Select (**A**) **Request for Documents** from the left-hand navigation, then click (**B**) **New**:




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.

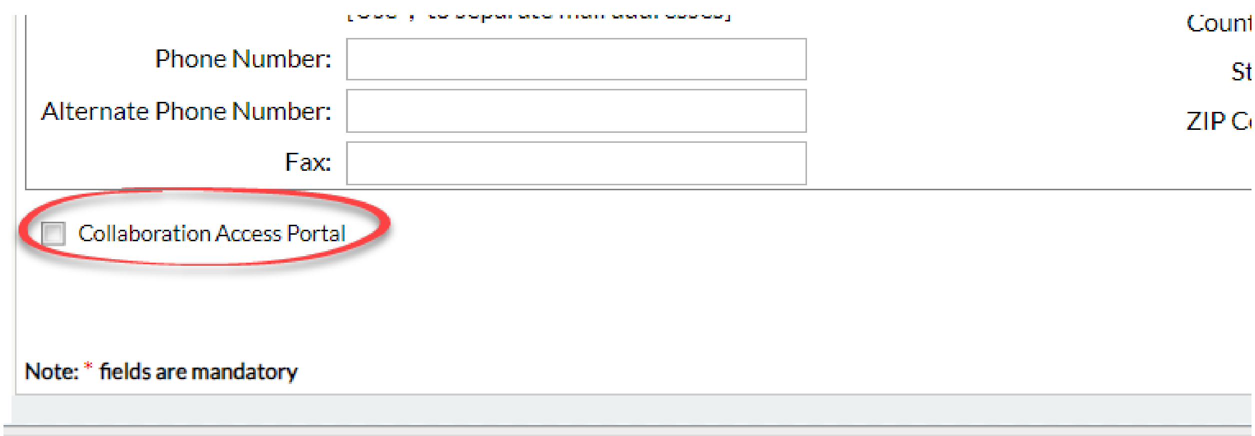



4. In the *Send to: Program Offices* section, click **Add Program Offices**. The *Create/Search Program Office/Consultancy* screen appears as shown below:

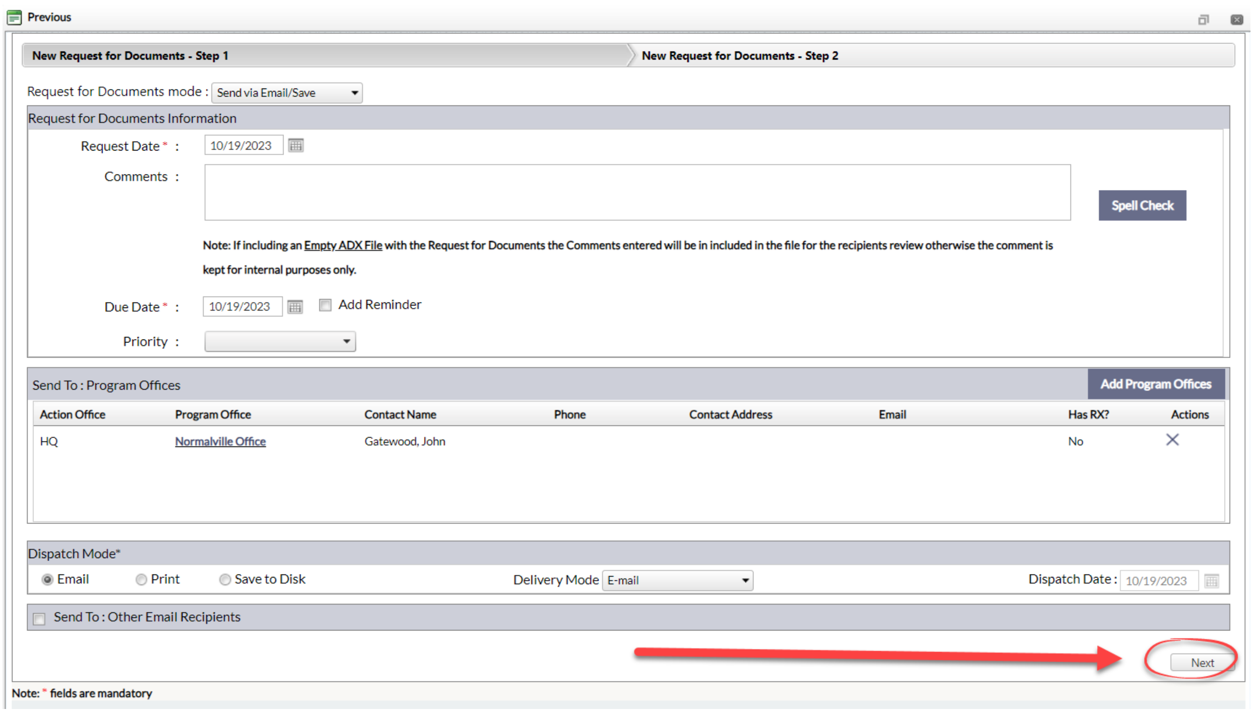



5. Here you can search for and select from existing Program Offices/Consultancies, or **Create New Program Office/Consultancy**.

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




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:

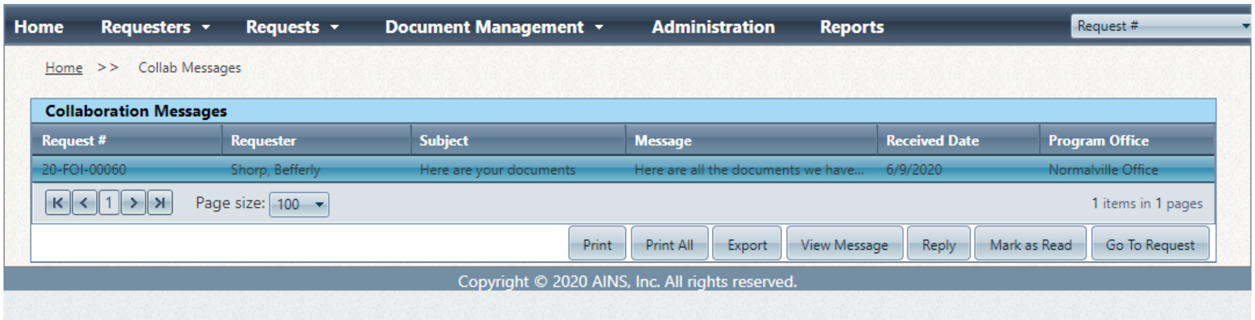



7. The *New RFD – Step 2* screen appears as shown below. First add any (A) Attachments, such as the original request letter for context:
8. You can also configure the message the end user receives with the request in the collaboration portal. First add a **Subject** for the message. You can also edit 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.

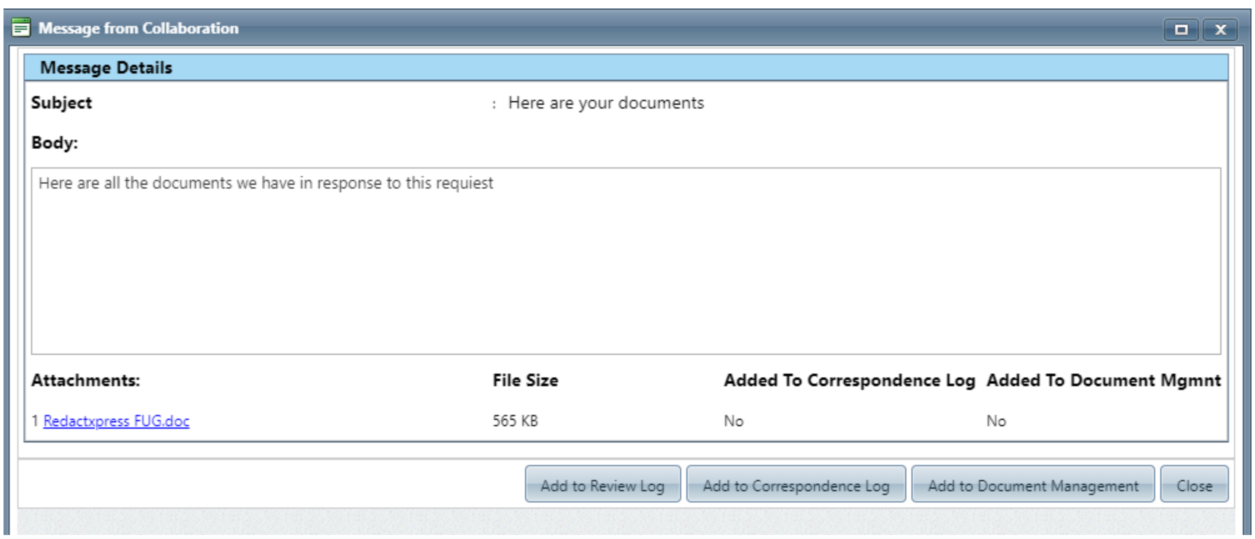
## 2.1.2 Receiving an RFD Response

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.

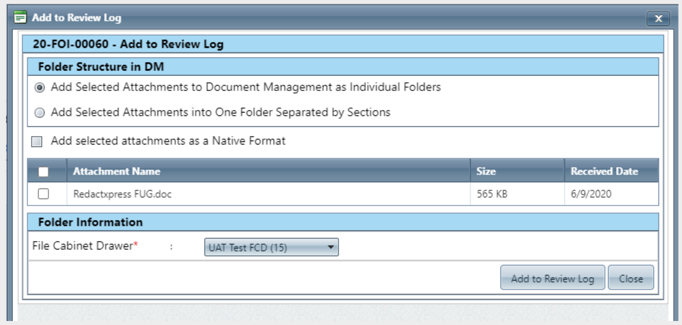
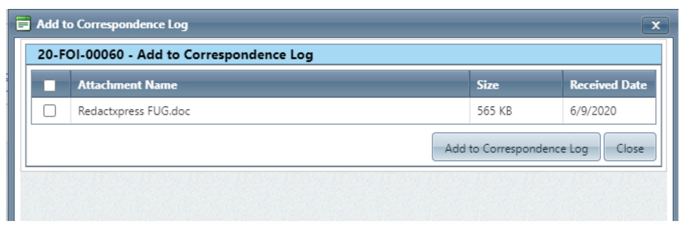
1. Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:

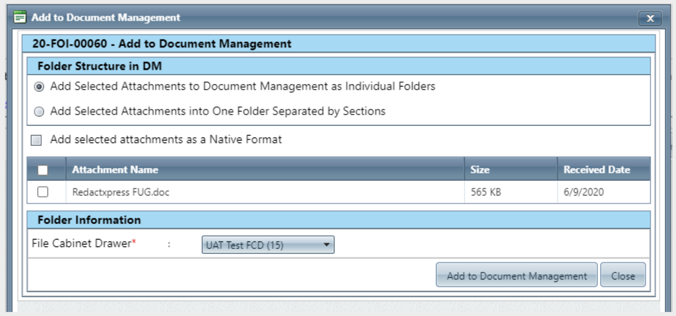



2. Select the new message and click **View Message**. The subject/body of the message should alert you that this message contains the responsive documents:

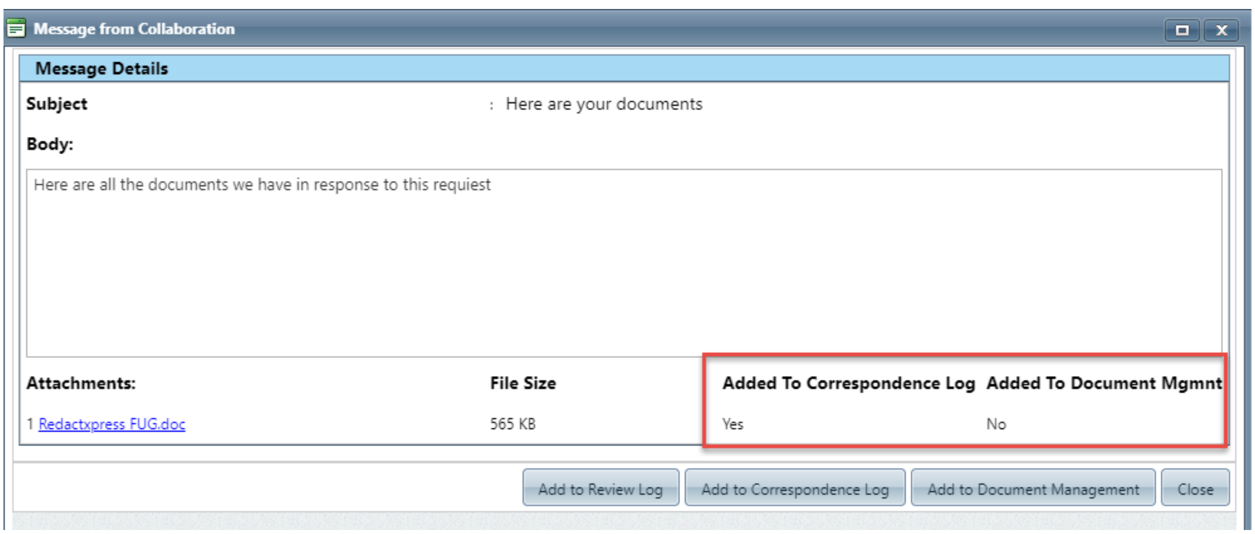



3. There are three options for moving the documents into FOIAXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

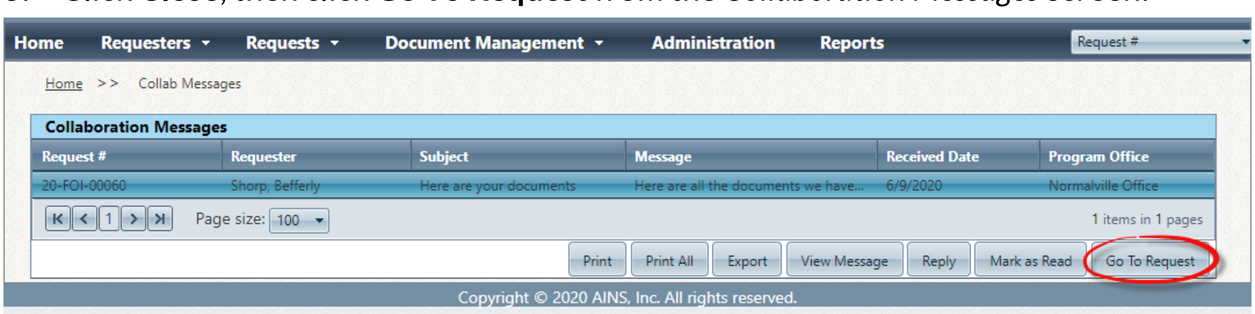
| Action | Description | Image |
|---|---|---|
| **Add to Review Log** | Add the attachments to the Review Log of the request for further processing.<br><br>Select the *Attachments* to include, the *Folder Information* and the *Folder Structure.* |  |
| **Add to Correspondence Log** | Add the attachments to the Correspondence Log of the request.<br><br>Select *Attachments* to include and click **Add to Correspondence Log**. |  |

| Action | Description | Image |
|---|---|---|
| **Add to Document Management** | Add the attachments to Document Management.<br><br>Select the *Attachments* to include, the *Folder Information* and the *Folder Structure.* |  |

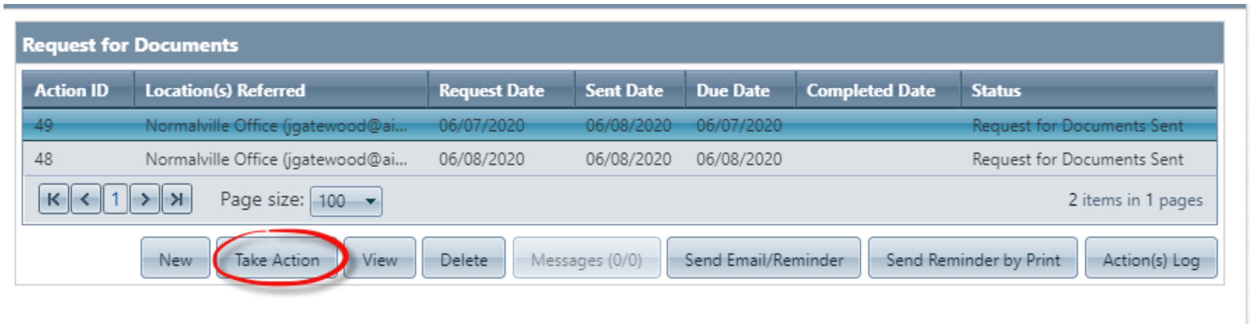
4. After adding attachments, the action is reflected on the *Message Details* screen as shown below:



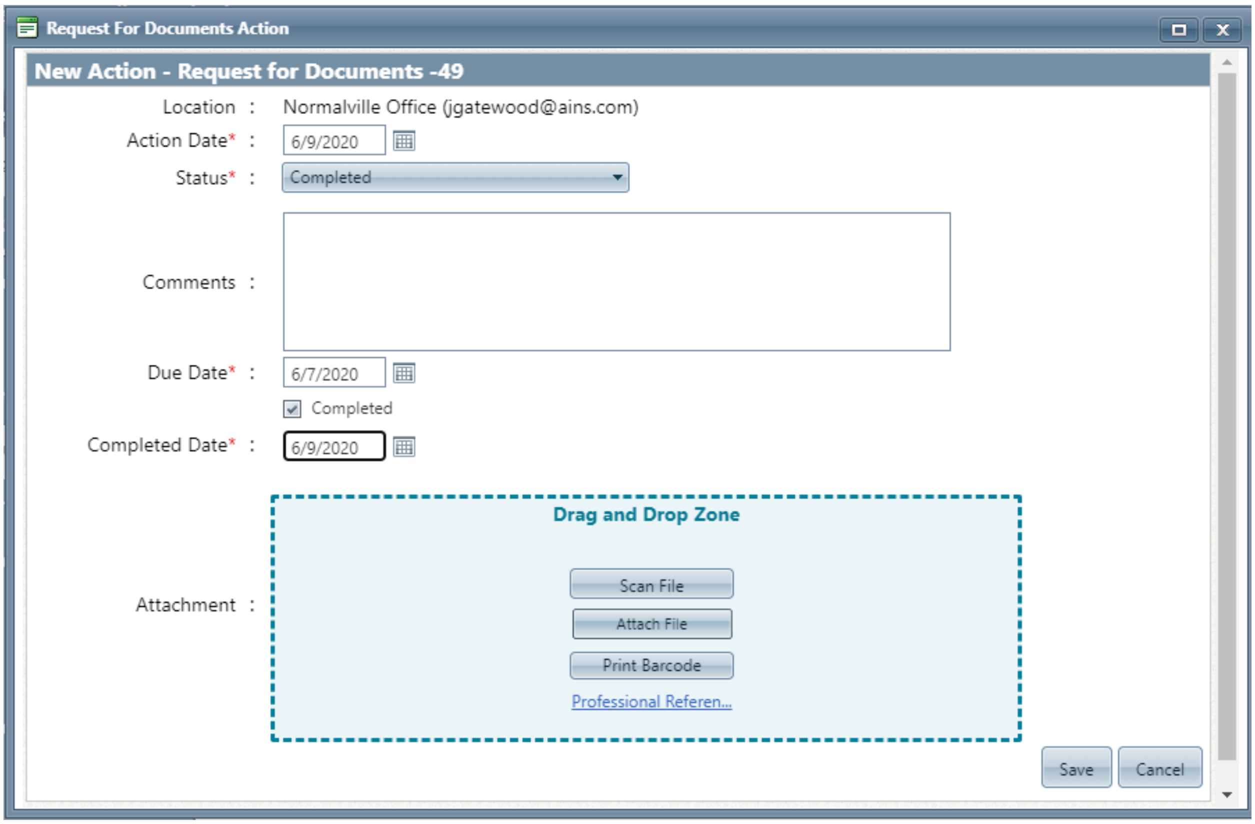

5. Click **Close**, then click **Go To Request** from the *Collaboration Messages* screen:



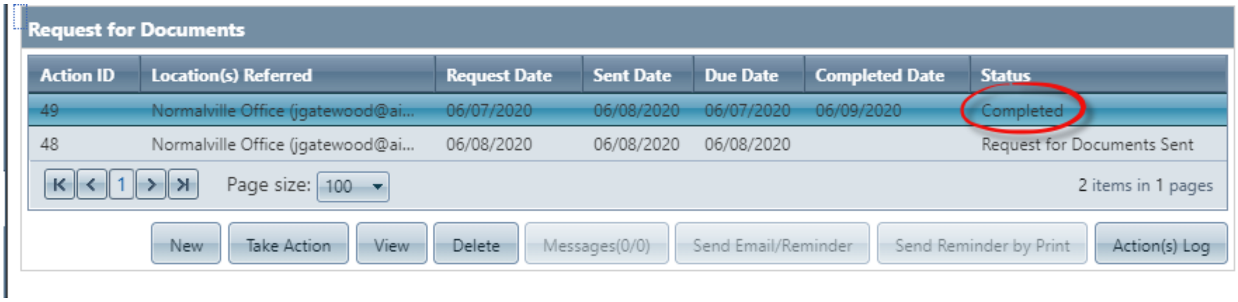
6. Click **Request for Documents** then select the request you just completed and click **Take Action**:




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




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:

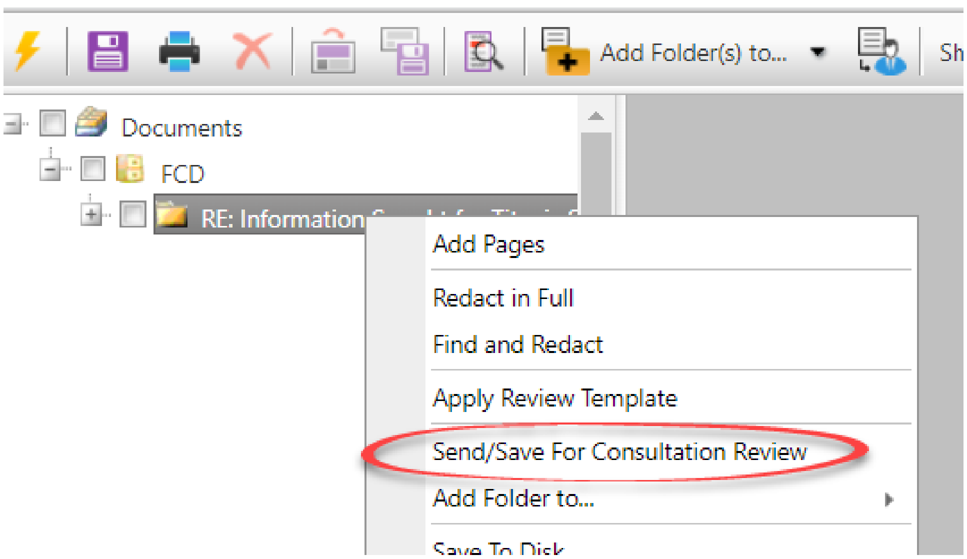



# 2.2 Consultation Reviews

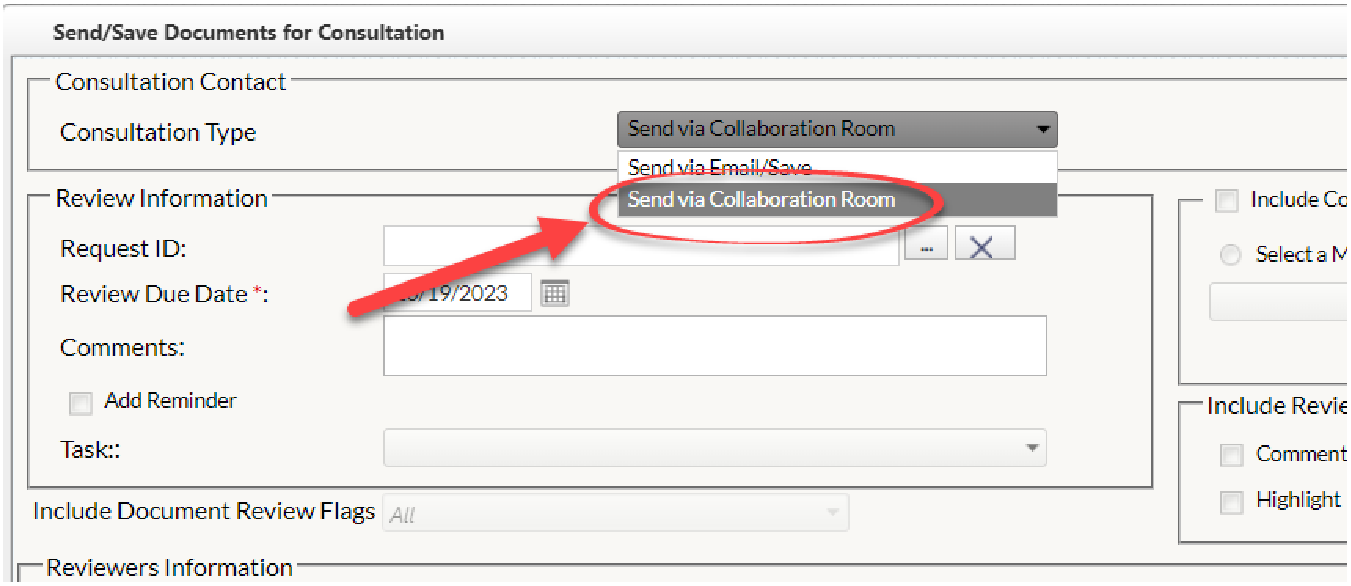
## 2.2.1 Send Documents for Consultation Review

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:

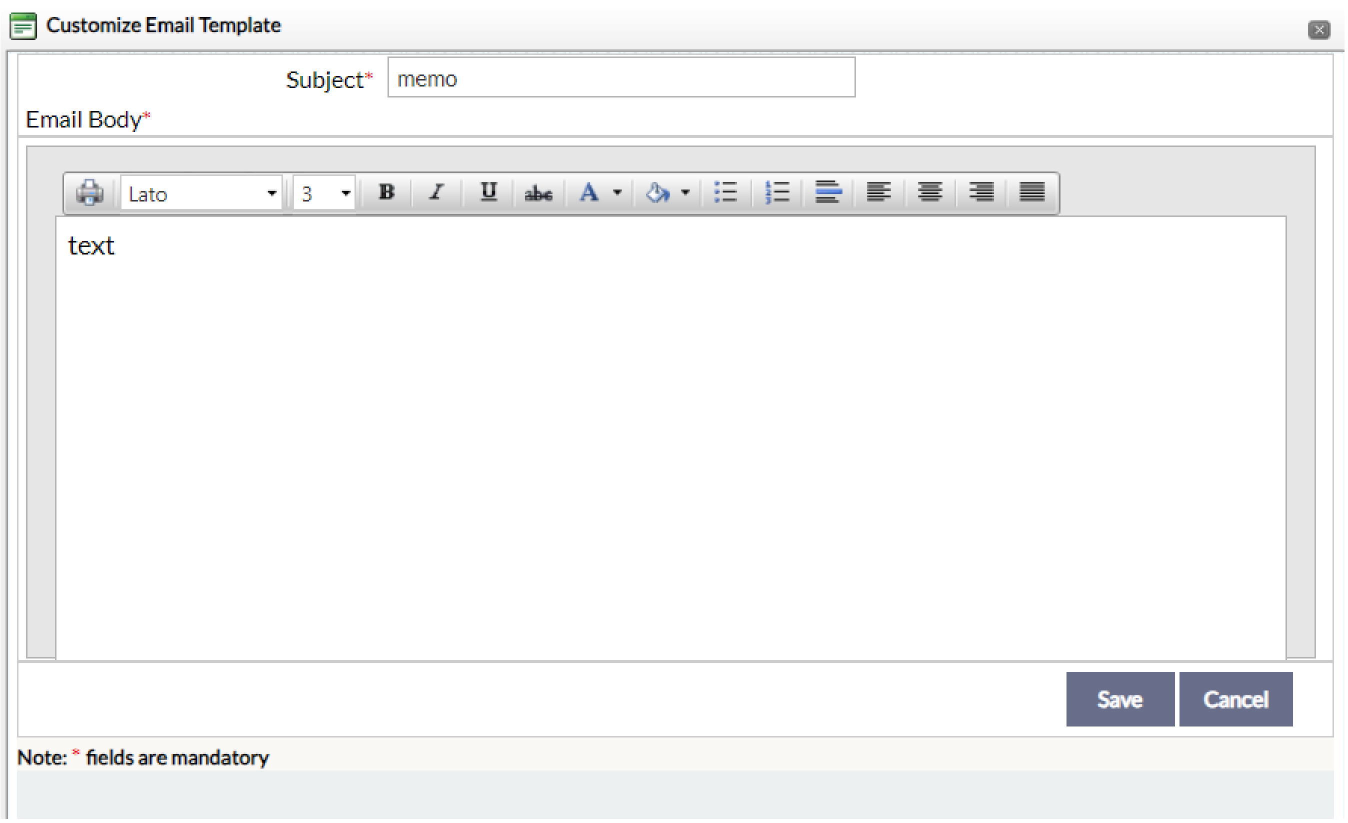
1. First, open the folder you'd like to send in Document Management. In *Document Management*, select the **Document/Folder** to send for review and load any review layer you'd like to include.
2. Right click the Document/Folder and click **Send/Save for Consultation Review**:



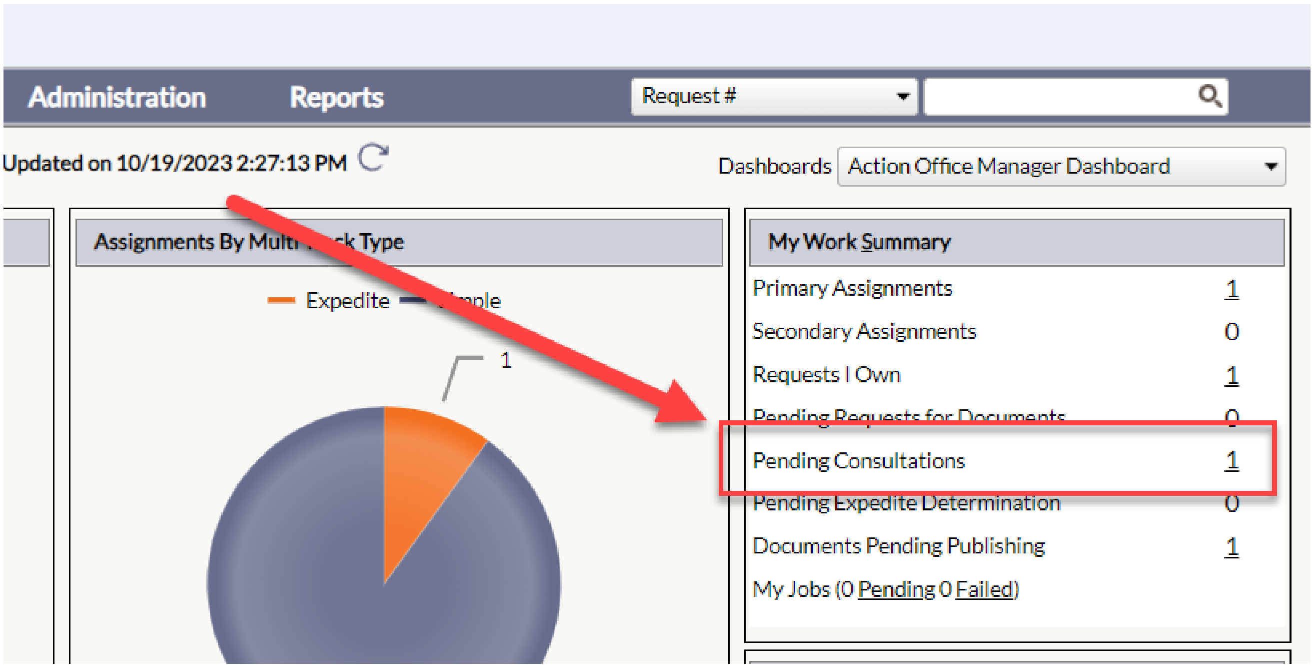

3. The *Send/Save Documents for Consultation* screen appears as shown below. First, under *Consultation Type*, you must select **Send via Collaboration Room.** This ensures the request is sent to the portal for consultation review:




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:



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.
9. 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**:

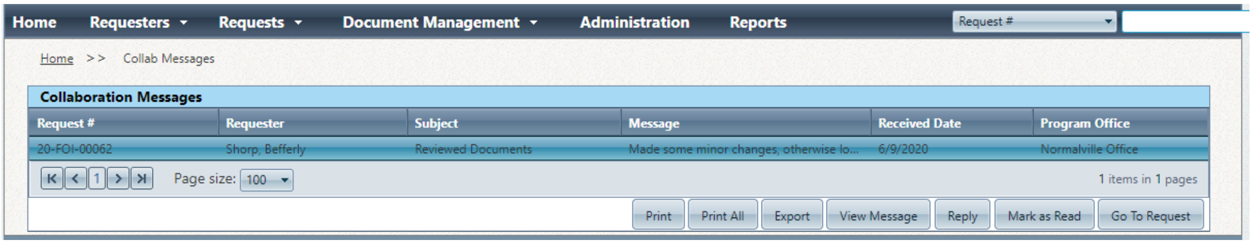



10. Follow the steps in the *Receiving Responsive Documents* section for details on receiving a Consultation Review from the portal.

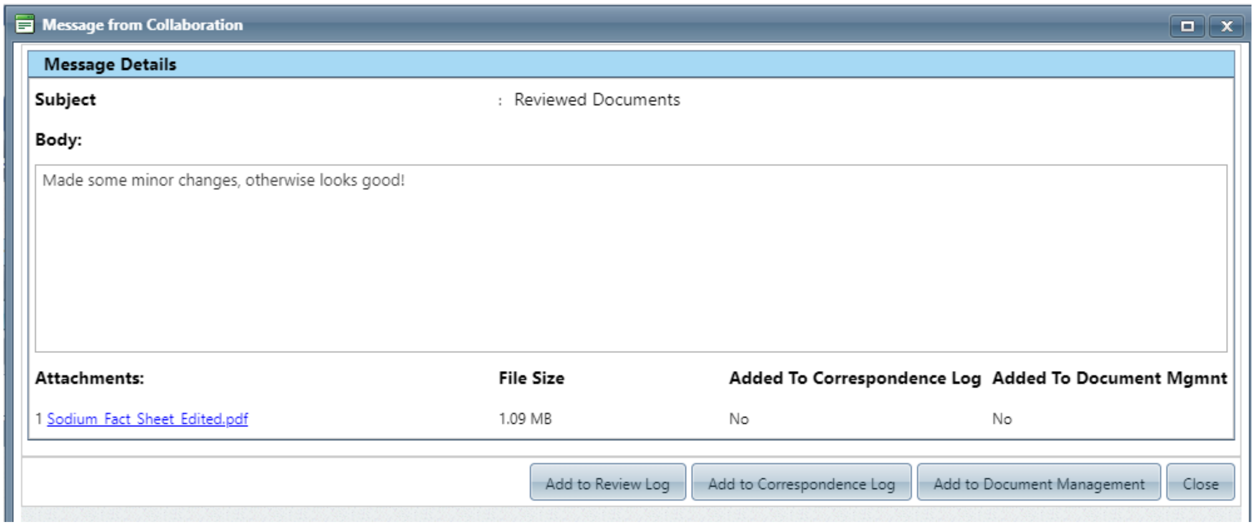
## 2.2.2 Receiving a Consultation Review

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*.

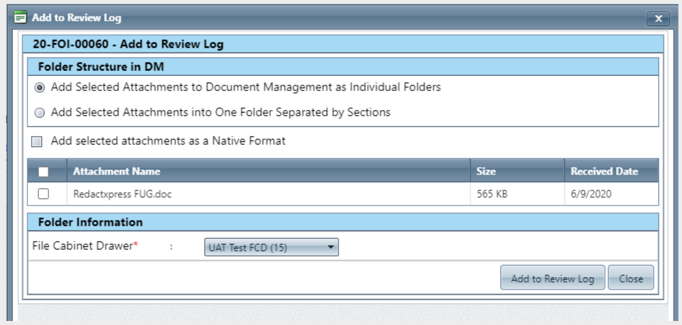
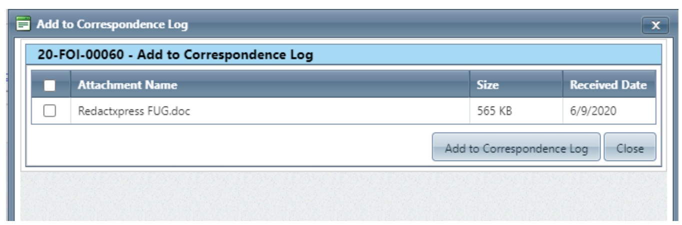
1. Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:

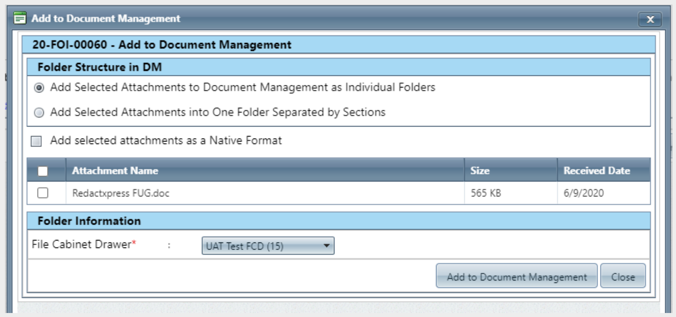



2. Select the new message and click **View Message**. The subject/body of the message should alert you that this message contains the responsive documents:



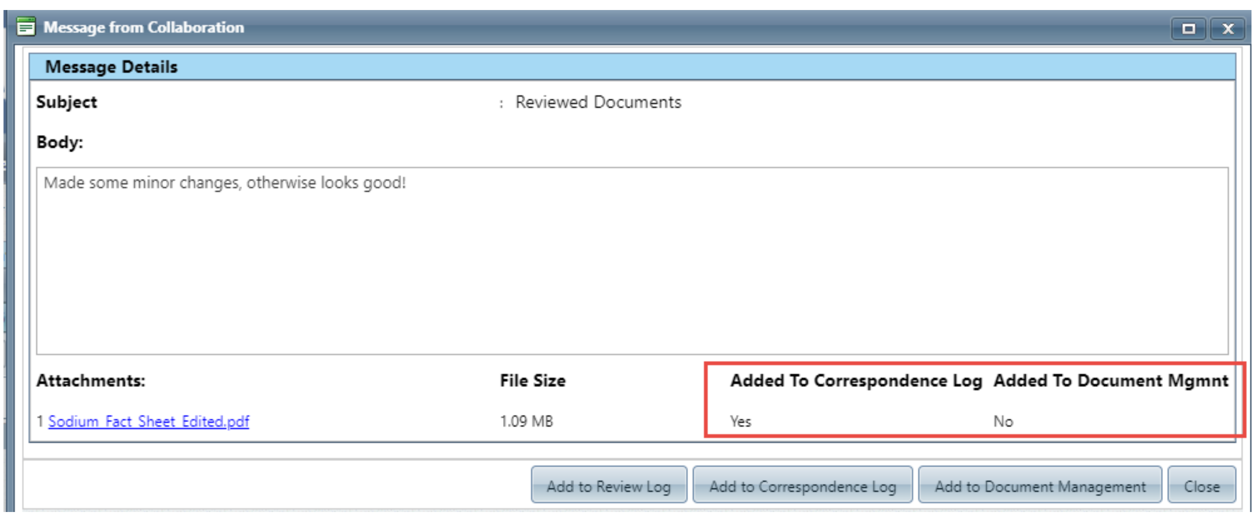

3. There are three options for moving the documents into FOIAXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

<table>
<tr><th>Action</th><th>Description</th><th>Image</th></tr>
<tr><td>Add to Review Log</td><td>Add the attachments to the Review Log of the request for further processing.<br><br>Select the Attachments to include, the Folder Information and the Folder Structure.</td><td>
</td></tr>
<tr><td>Add to Correspondence Log</td><td>Add the attachments to the Correspondence Log of the request.<br><br>Select Attachments to include and click Add to Correspondence Log.</td><td>
</td></tr>
</table>

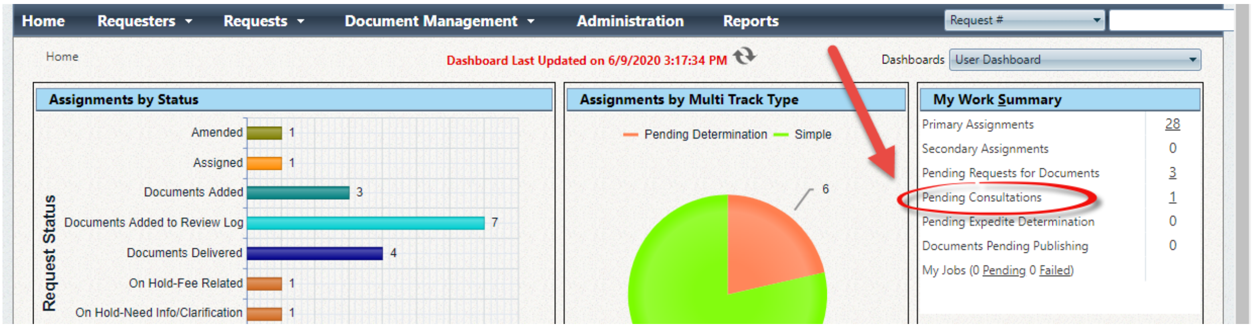
| Action | Description | Image |
|---|---|---|
| **Add to Document Management** | Add the attachments to Document Management.<br><br>Select the *Attachments* to include, the *Folder Information* and the *Folder Structure.* |  |



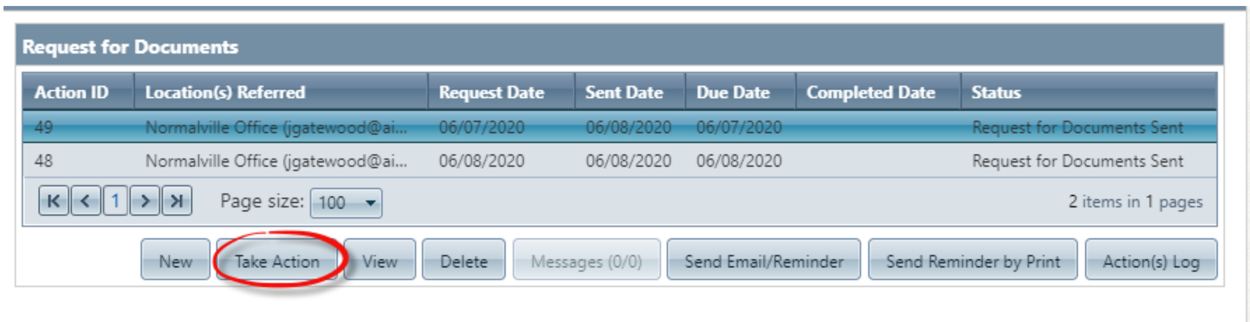
4. After adding attachments, the action is reflected on the *Message Details* screen as shown below:



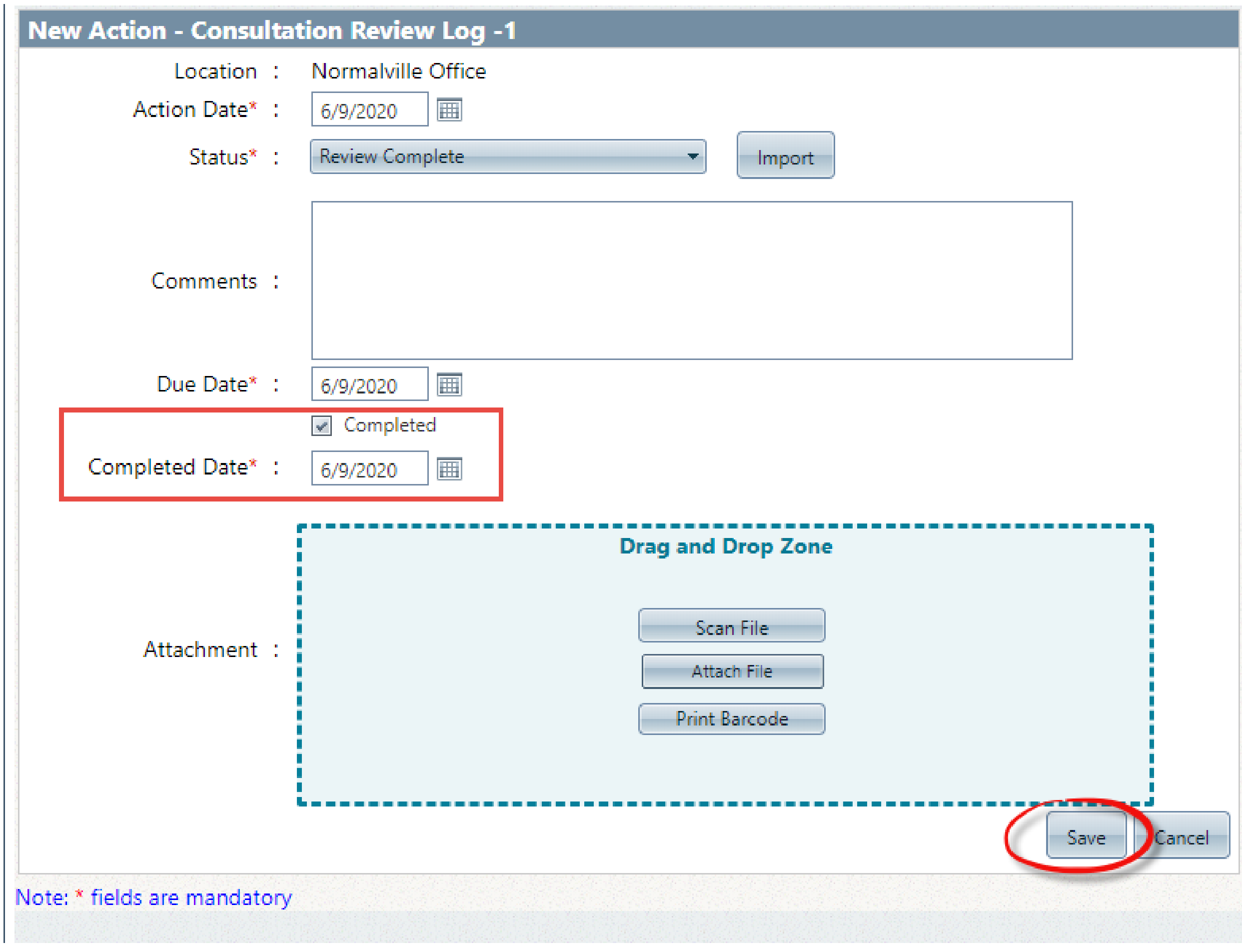

5. Click **Close**, then click **Home** to access the home screen. Under *My Work Summary*, select **Pending Consultations**:




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**.

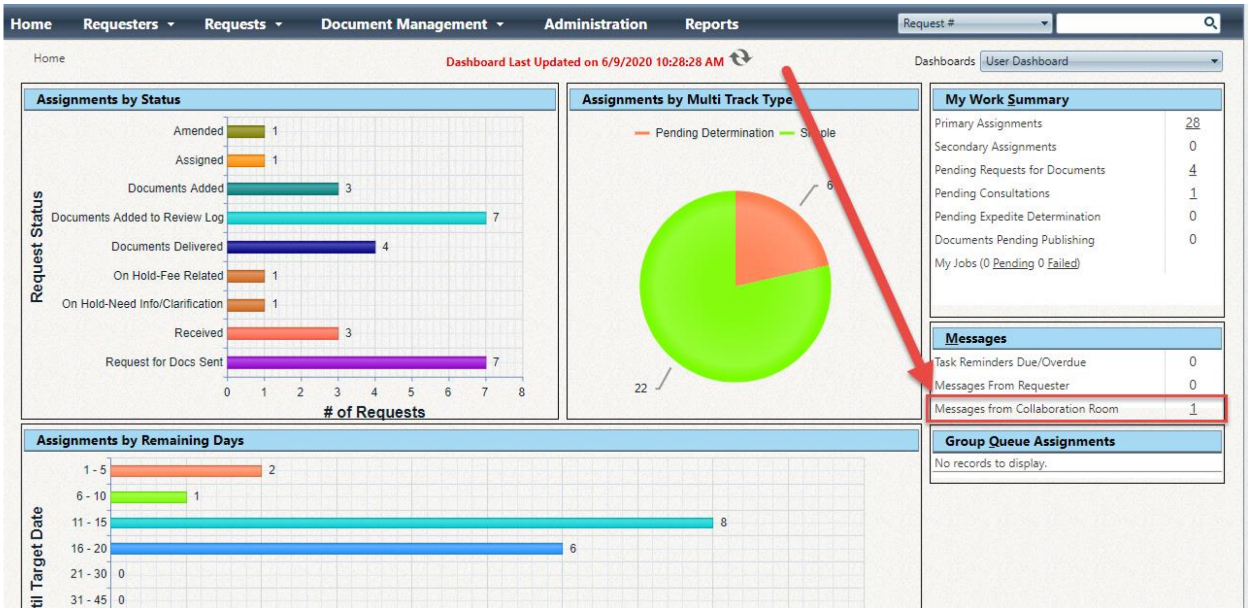



9. Click **Save** to save the action.

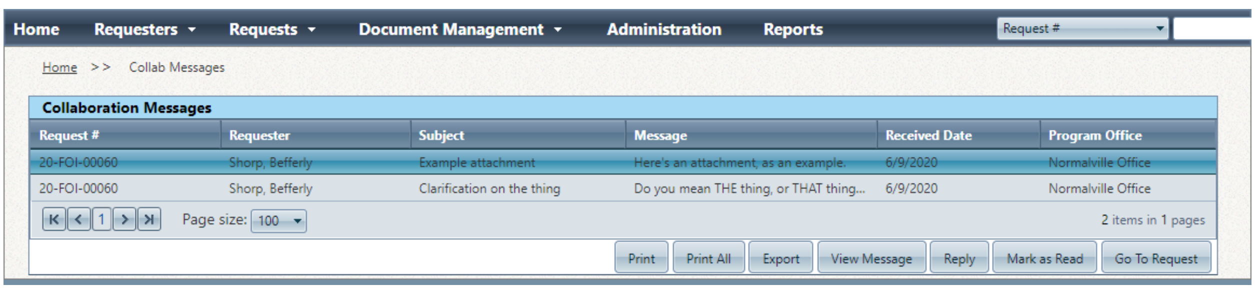
## 2.3 Correspondence

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**.

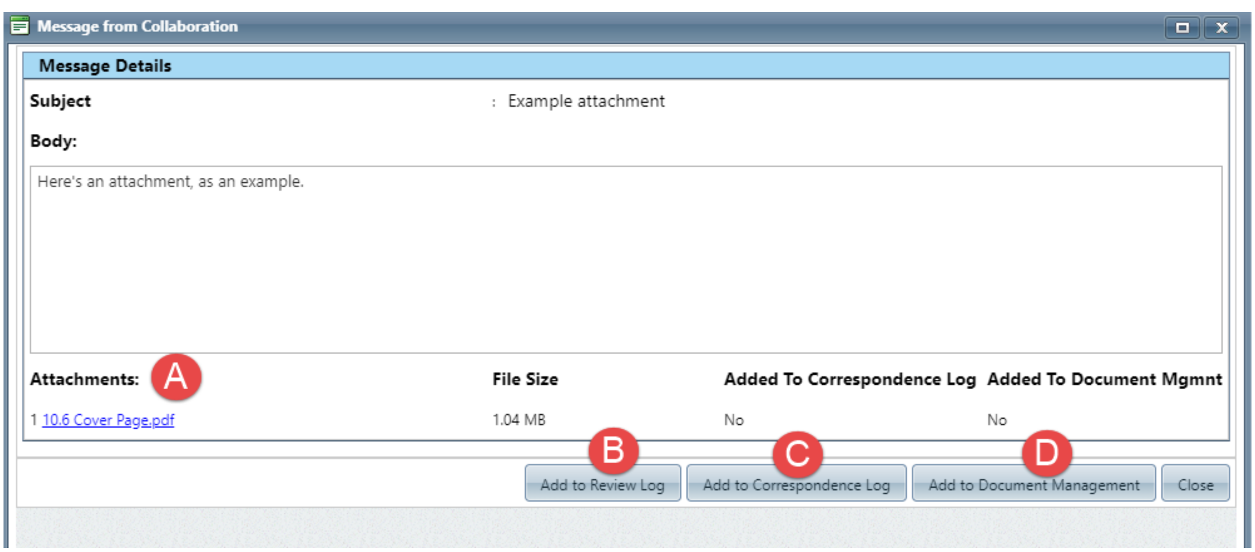
1. From the Home Page, click the **Messages from Collaboration Room** link to view messages received from the Collaboration Room.



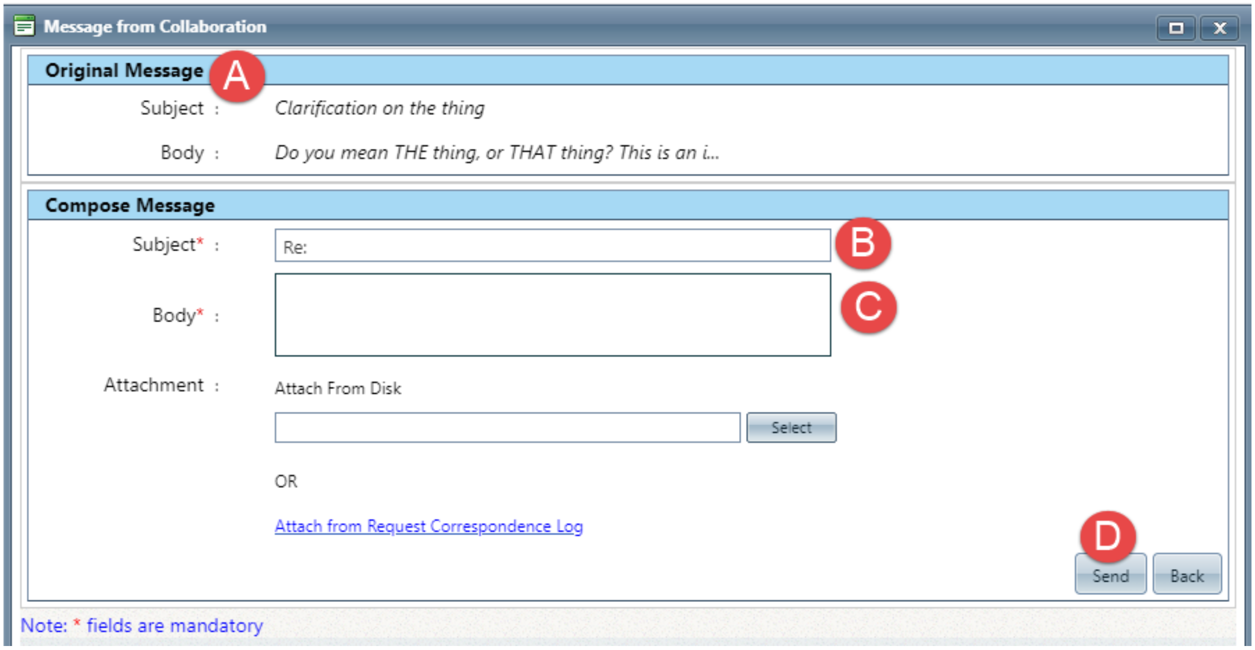

2. The *Collaboration Messages* screen appears as shown below. The screen includes a (**A**) list of messages received from the Collaboration Portal, as well as (**B**) Actions you can take on the messages, including **View Message**, **Reply, Mark as Read**, and **Go To Request**, which links directly to the associated Request.




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



4. 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**.
5. You can also click **Reply** to respond to the portal. The correspondence interface appears as shown below:
6. 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:**




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

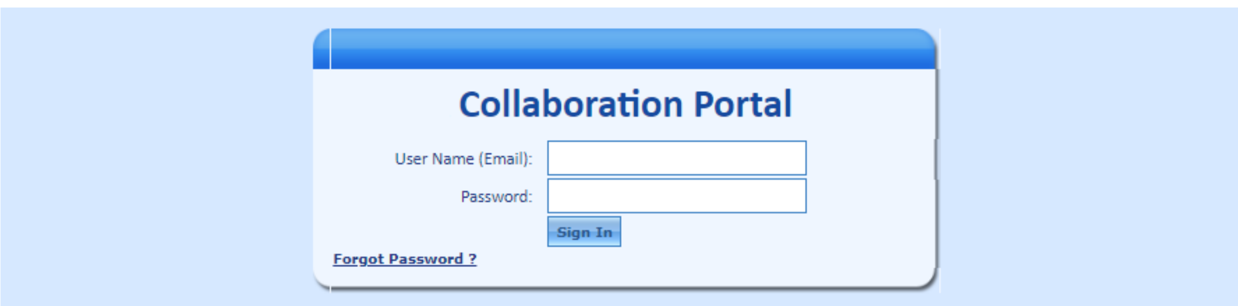
# 3 Collaboration for Portal Users

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:




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:


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

| Ref | Element | Description |
|---|---|---|
| D | Tasks | Ongoing *Consultation Tasks* and *Request for Document Tasks* are listed here. There is also a listing of your *Completed* tasks. |

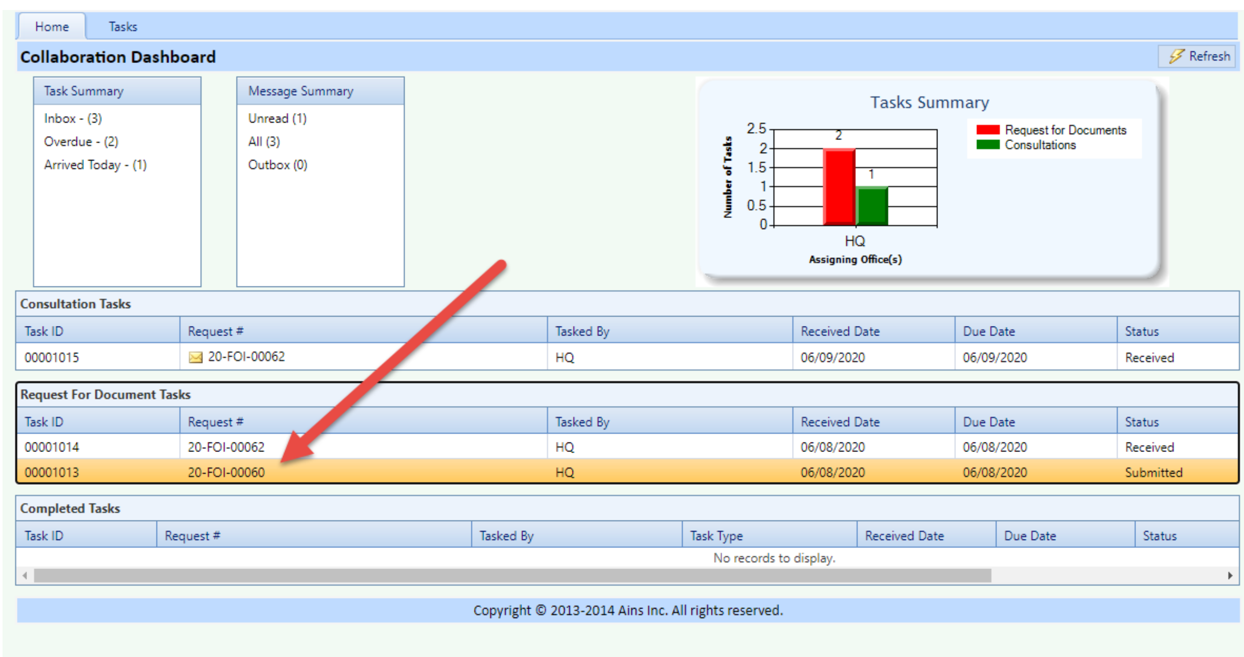
The next sections provide steps to complete *Request for Documents Tasks*, *Consultation Tasks*, and *Sending Messages Using the Portal*.

# 3.2 Request for Document Tasks

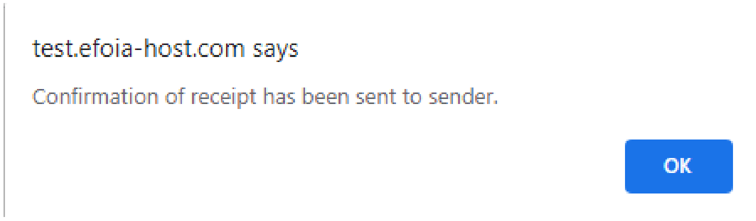
## 3.2.1 Responding to a Request for Documents Task

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.

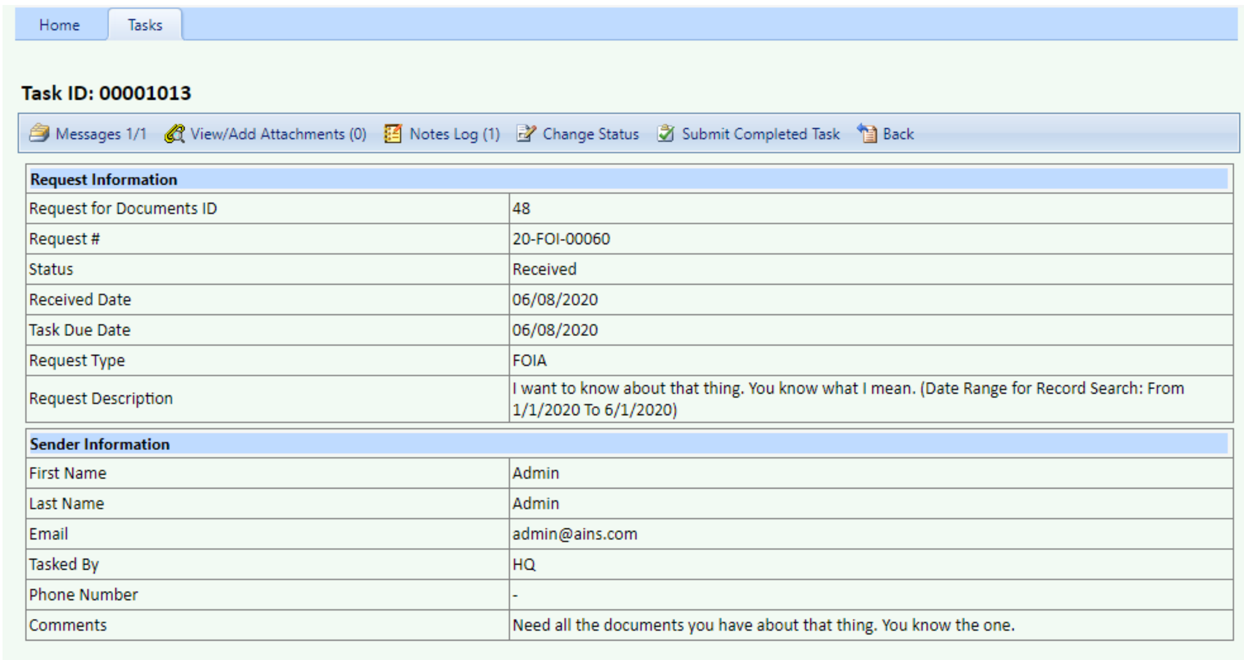
1. In this example, we'll double click the request listed in the *Request for Documents Task* list.




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:

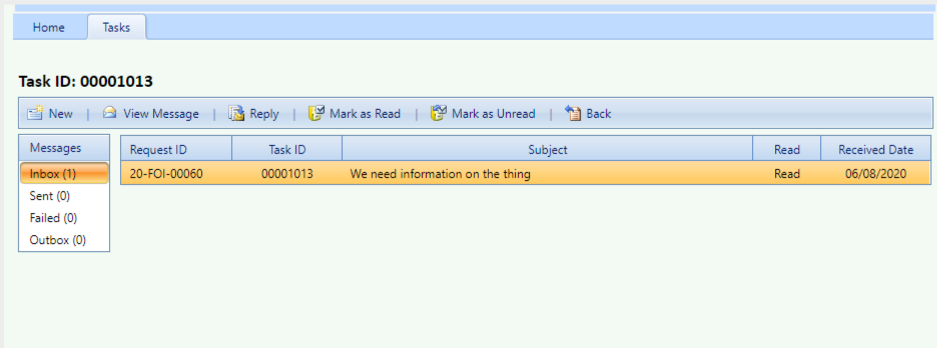
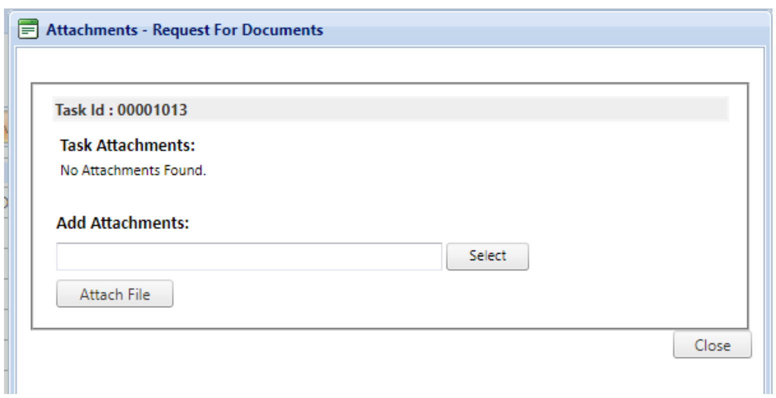


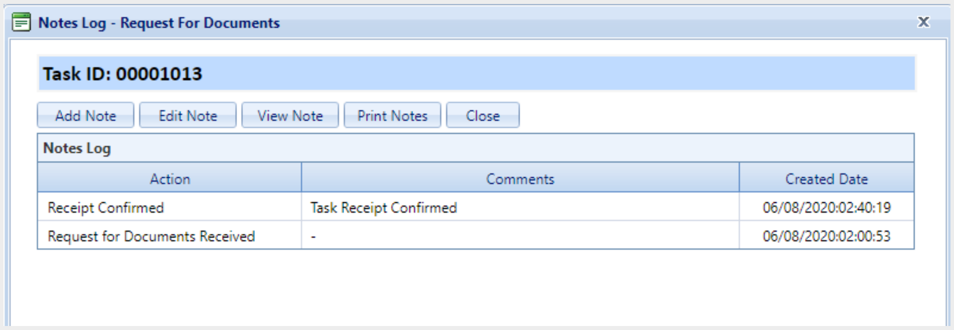
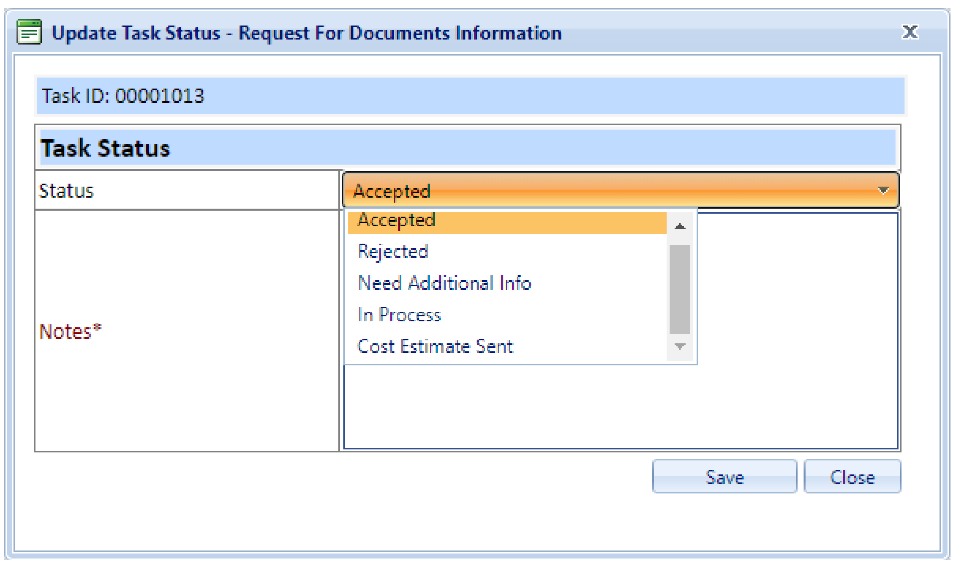

3. Click **OK** to dismiss the message and view the task. The *Tasks* tab appears as shown below:




| | |
|---|---|
| **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. |

4. 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:

<table>
<tr><th>Action</th><th>Interface</th></tr>
<tr><td>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.</td><td>
</td></tr>
<tr><td>Click View/Add Attachments to attach documents to this RFD for submittal back to the requester.<br><br>You can also view any attachments included with this original request.</td><td>
</td></tr>
</table>

<table>
<tr><th>Action</th><th>Interface</th></tr>
<tr><td>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.</td><td>
</td></tr>
<tr><td>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.</td><td>
</td></tr>
</table>

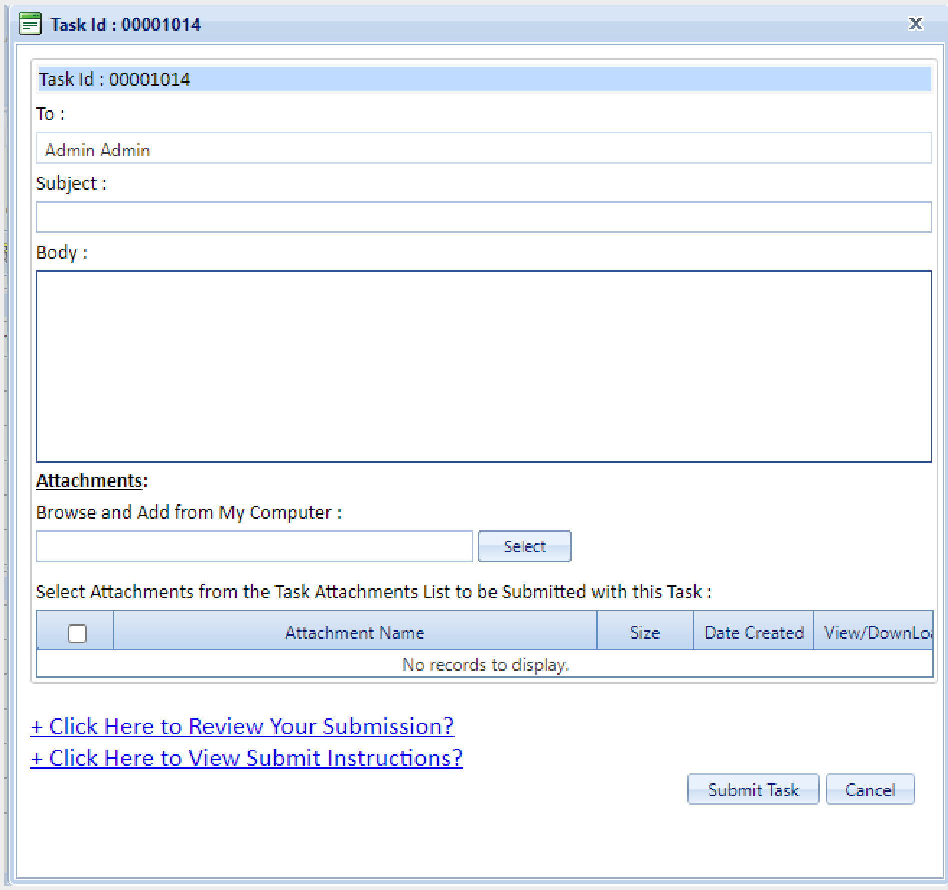
<table>
<tr><th>Action</th><th>Interface</th></tr>
<tr><td>

**Click Submit Completed Task to submit responsive materials to the requester.**

**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 Select from the *Browse and Add from My Computer* field.**

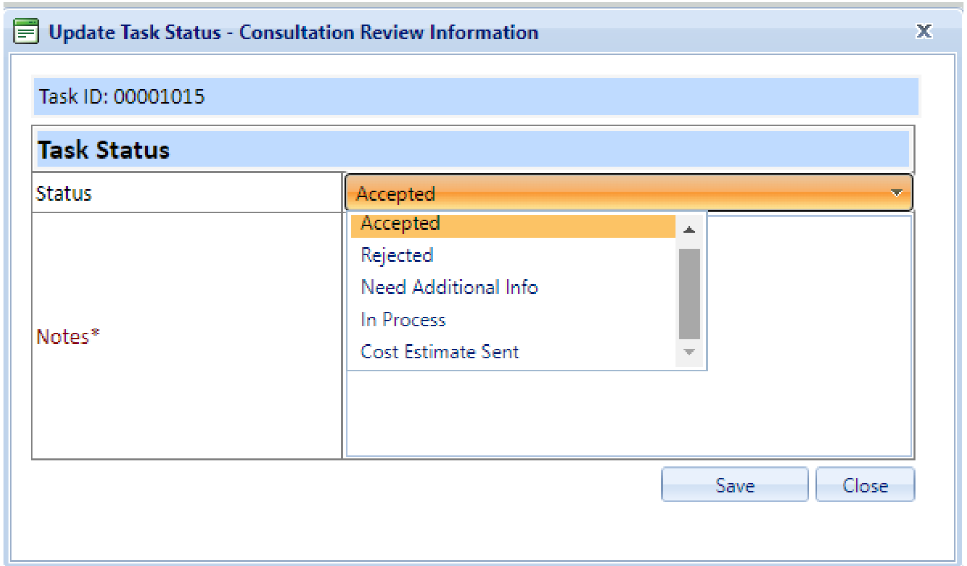
**See the *Complete a Request for Documents* section for more.**

</td><td>




</td></tr>
</table>

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



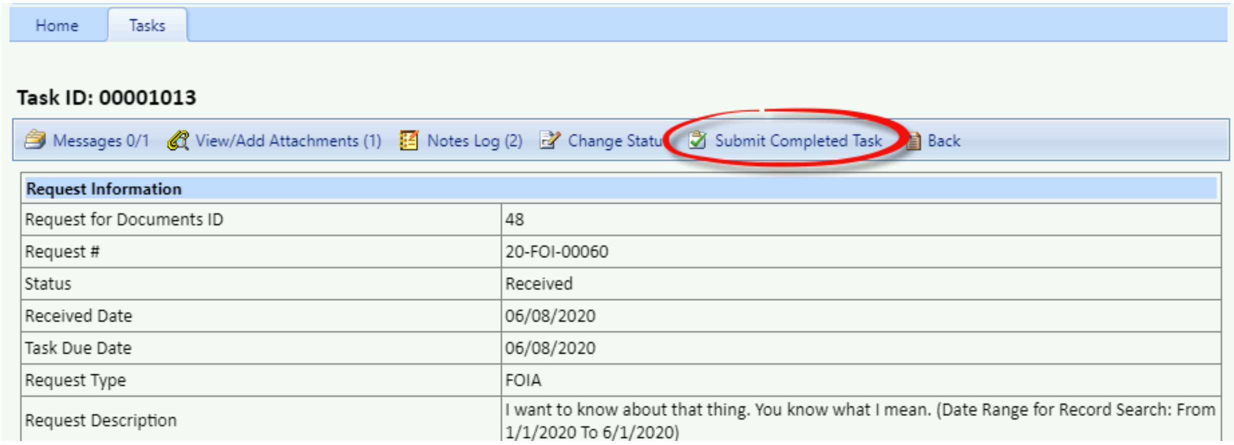

**(!!) Note: There are also options to select Need Additional Info, In Process, and Cost Estimate Sent.**

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.*

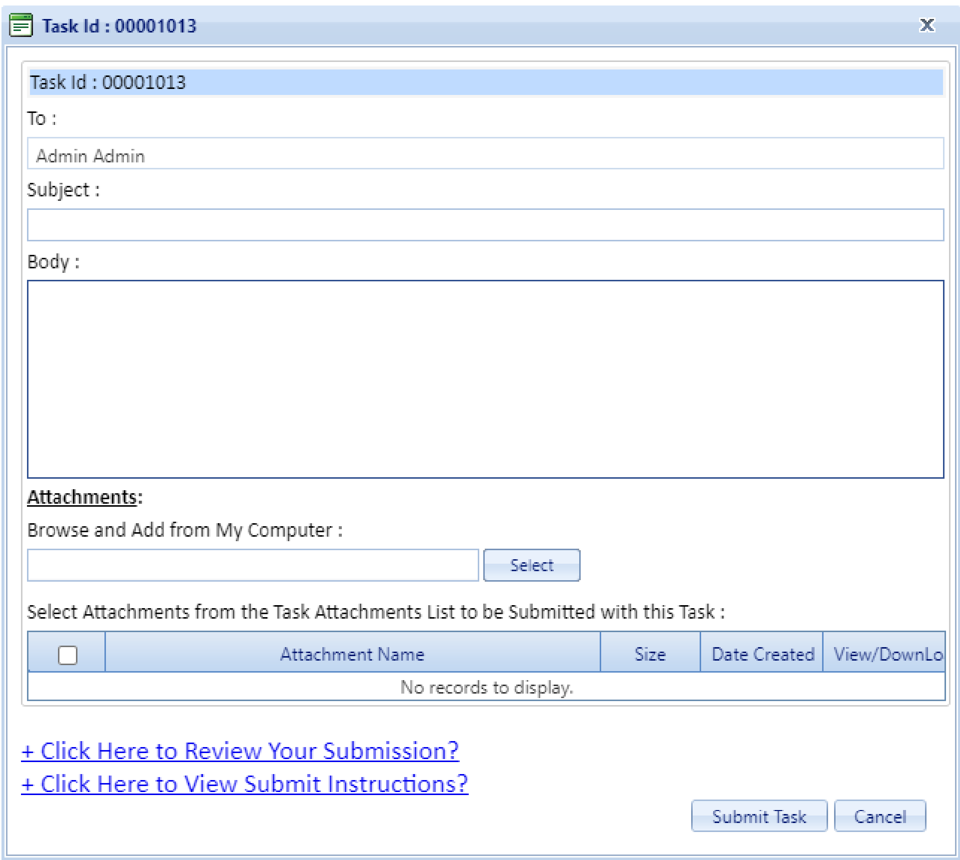
### 3.2.2 Completing a Request for Documents Task

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**:

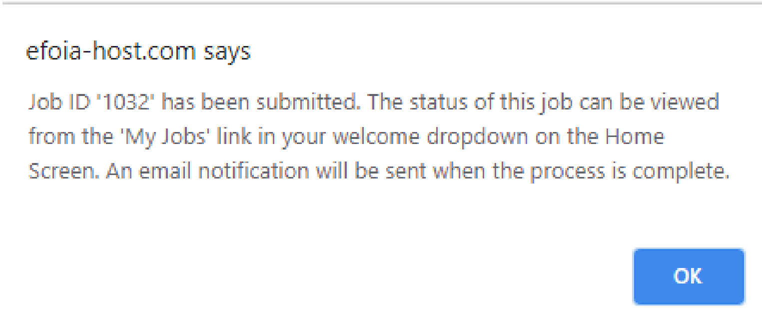



3. After clicking **Submit Completed** Task, the *Task Id* screen appears as shown below.




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 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:



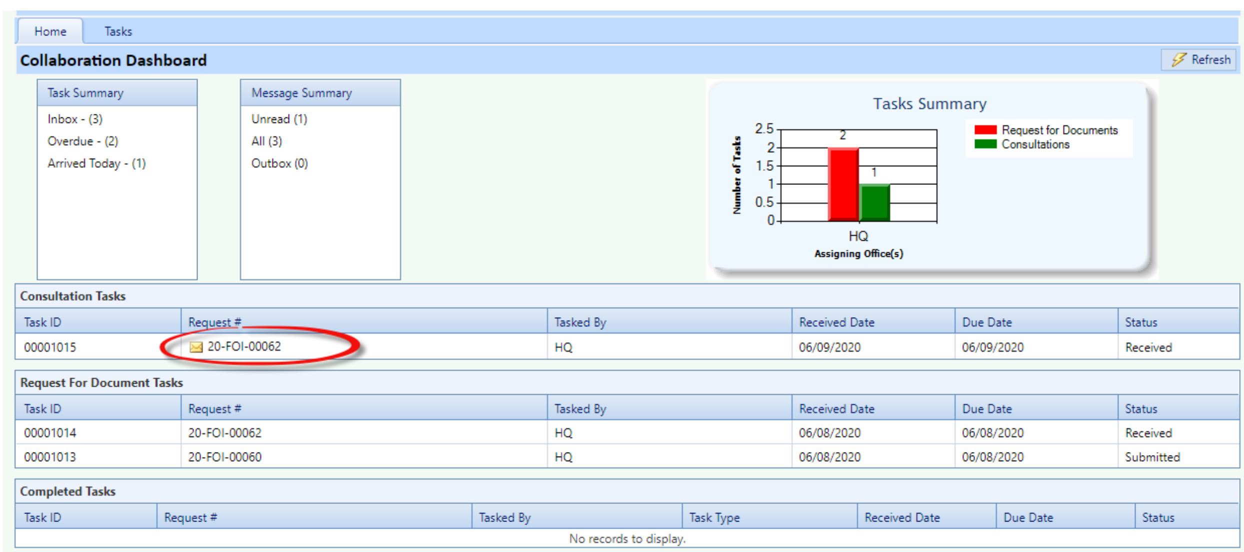

8. Click **OK** to dismiss the message. The *Tasks* tab refreshes, with the *Status* updated to *Submitted*. Additionally, the options to **Change Status** and **Submit Completed Task** are no longer available.

# 3.3 Consultation Tasks

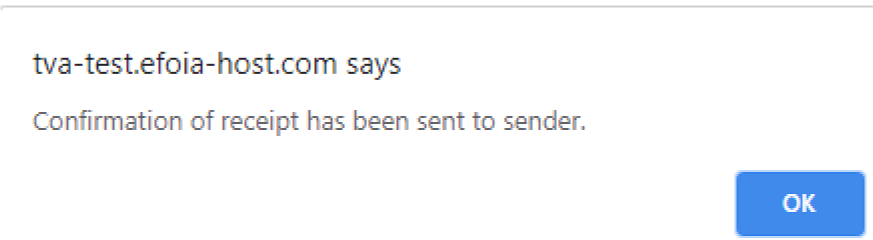
## 3.3.1 Responding to a Consultation Task

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

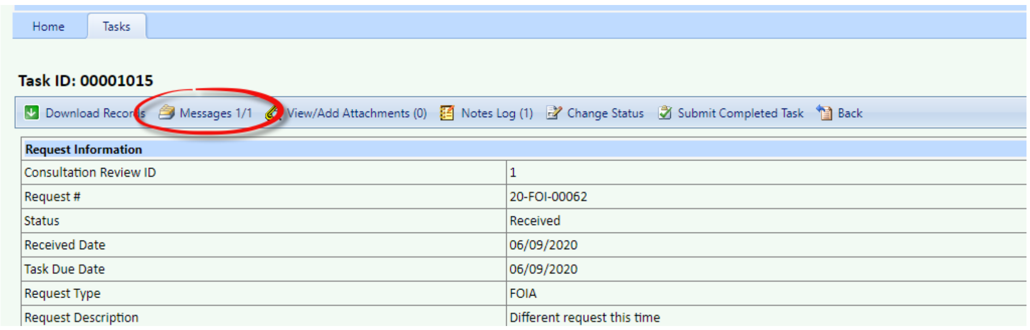
1. When you receive a new Consultation Task, it appears in the list as shown below. Double click the new **Consultation Task** to open it.



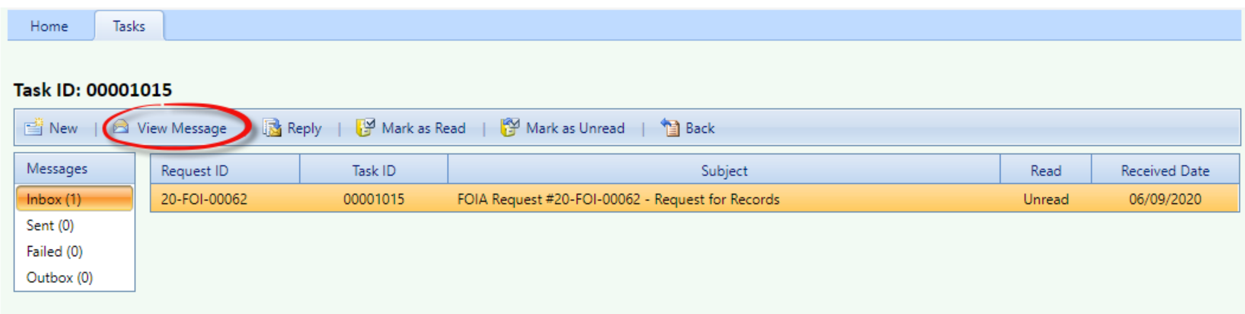

2. A pop-up appears informing that the sender has been notified that you opened the task. Click **OK** to dismiss this message.




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



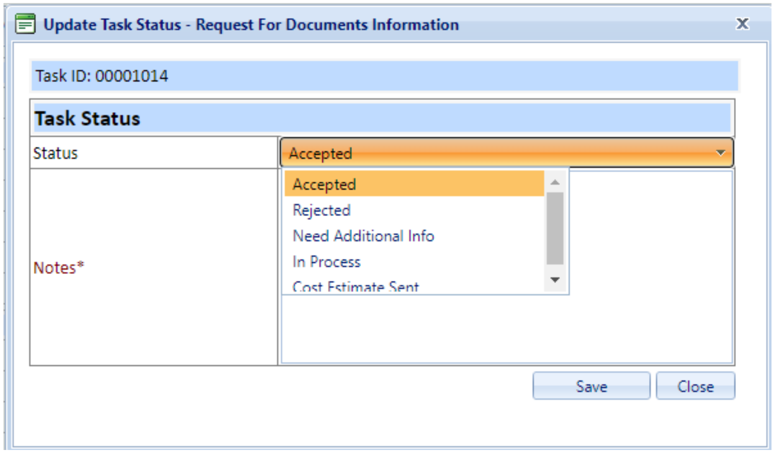

4. Click **View Message** to view the message details:




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

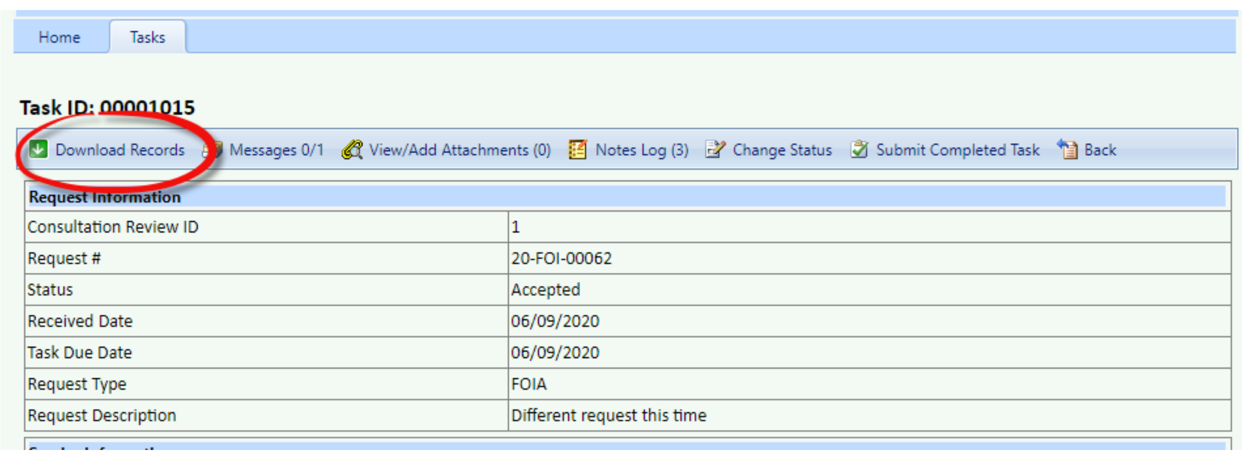

6. The *Status* of the message updates to *Read*. Click **Back** to return to the *Task Details*.

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

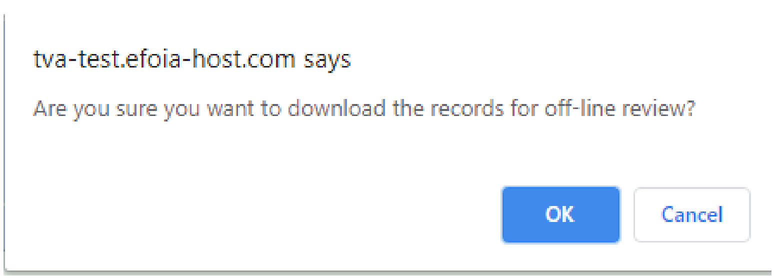



**(!!) Note: There are also options to select *Need Additional Info*, *In Process*, and *Cost Estimate Sent*.**

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.




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

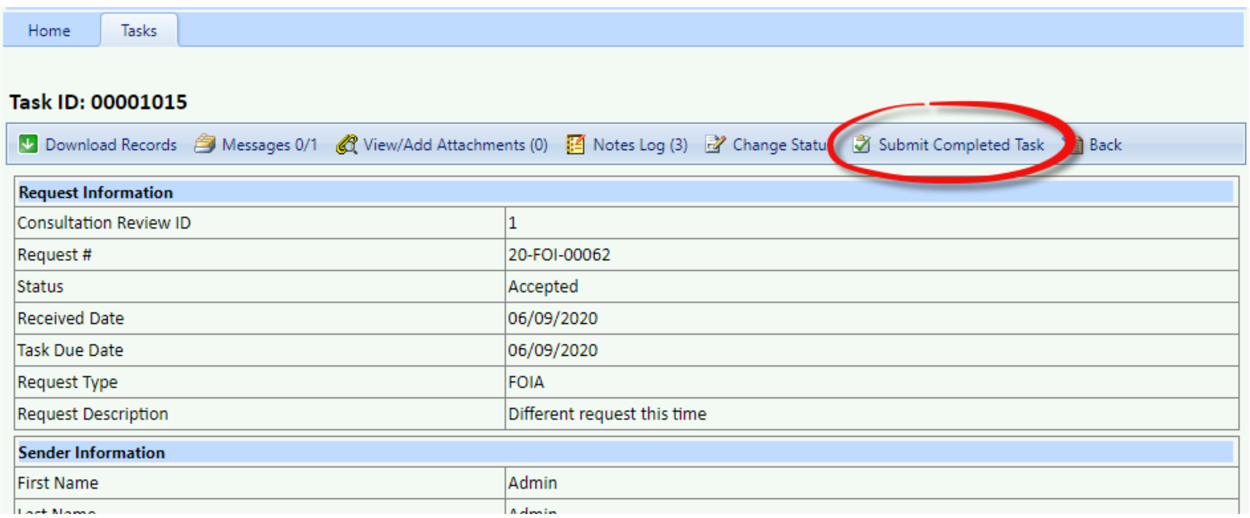


11. The download automatically begins. You can now conduct offline review of the materials. Once your review is complete, follow the steps in the *Completing a Consultation Task* section to complete the task.

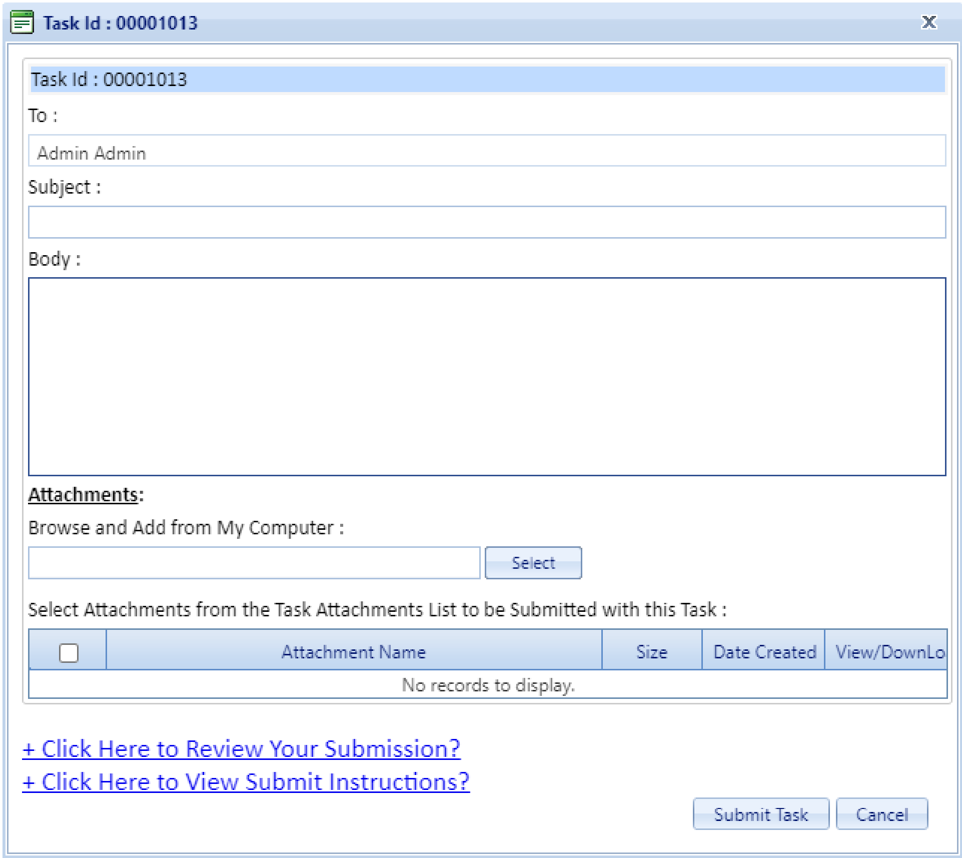
### 3.3.2 Completing a Consultation Task

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

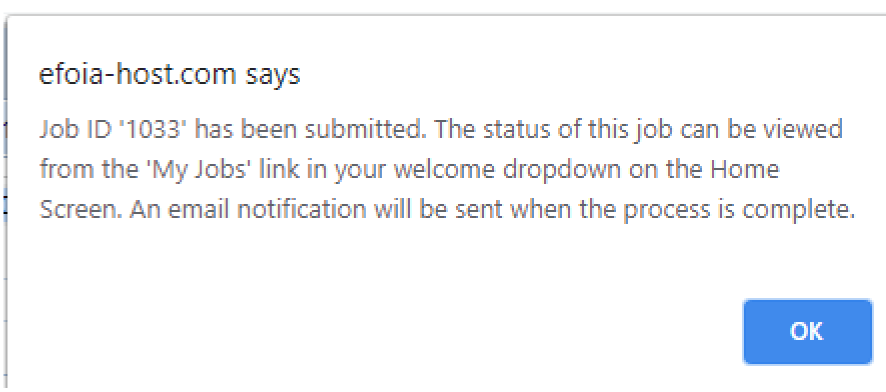
1. In the Collaboration Portal, open the *Collaboration Task* that you are ready to complete.
2. On the *Task* tab, click **Submit Completed Task**:




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




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.
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:

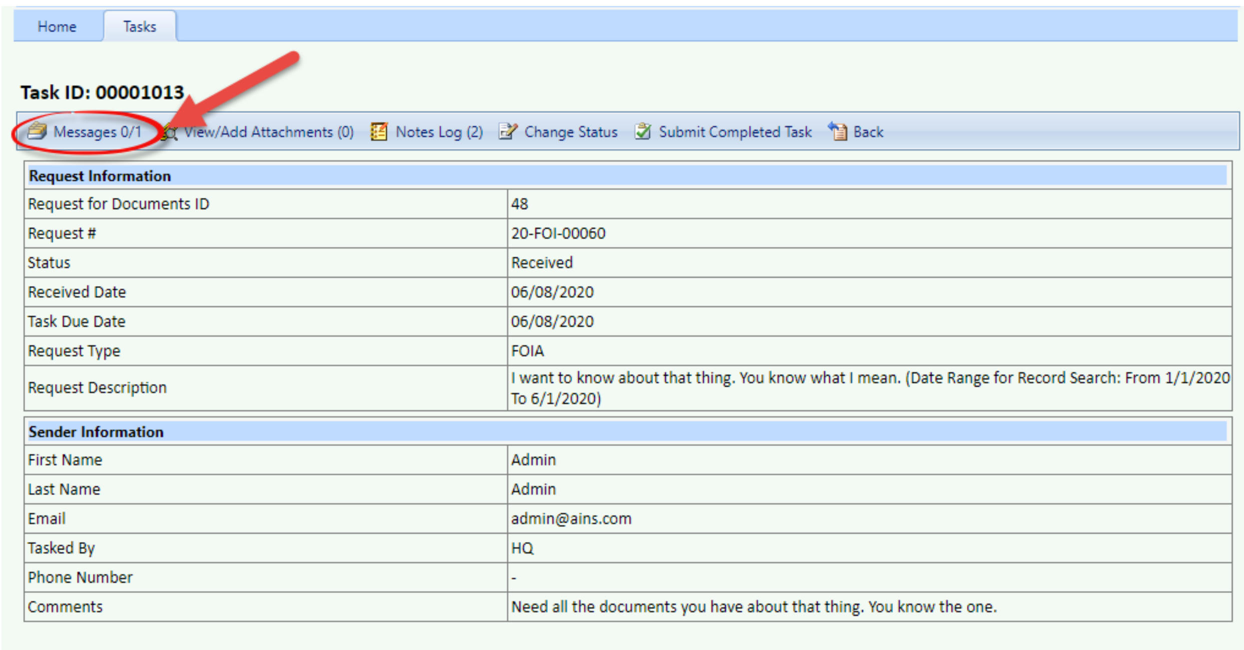


8. Click **OK** to dismiss the message. The *Tasks* tab refreshes, with the *Status* updated to *Submitted*. Additionally, the options to **Change Status** and **Submit Completed Task** are no longer available.

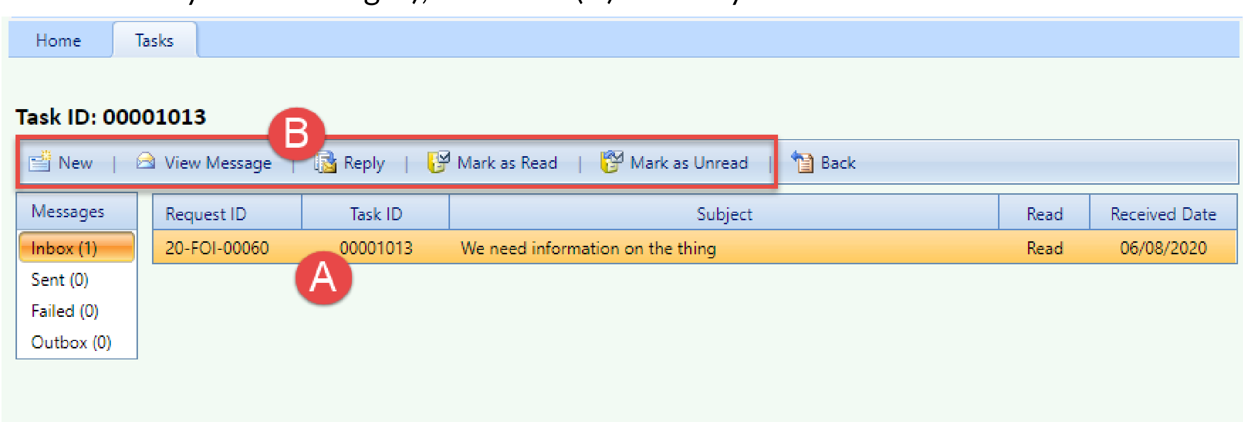
## 3.4 Sending Messages Using the Portal

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:

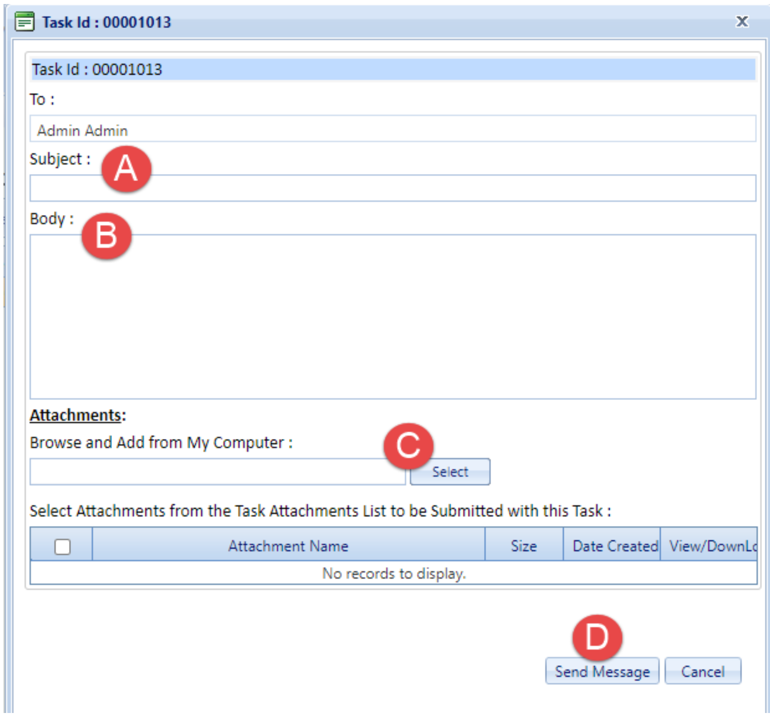
1. Open a Task, either an RFD or a Consultation. The process is the same for both. From the *Tasks* tab, click **Messages**:



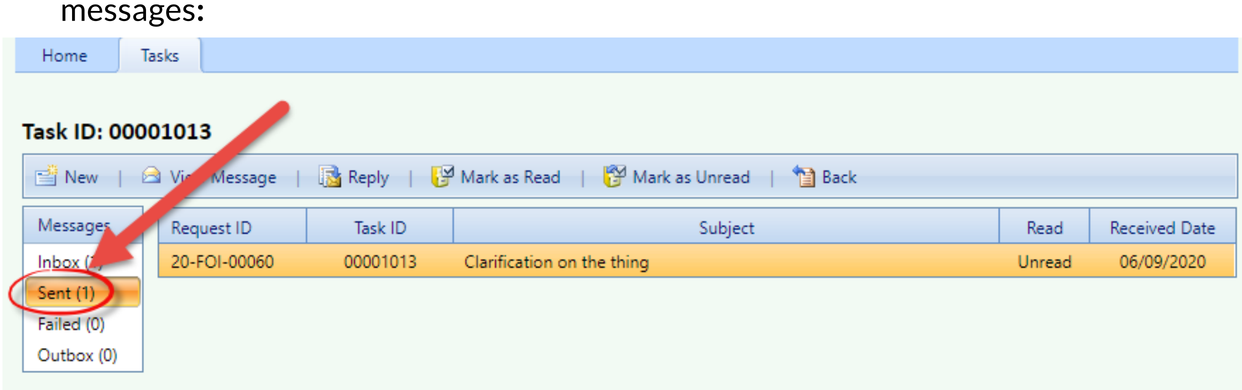

2. The *Messages* screen includes a (**A**) list of all messages received for this task (click **Outbox** to see any sent messages), as well as (**B**) *Actions* you can take:



3. 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**.
4. You can also send a message to the requester. Click **New** to send a new message. 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. 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:

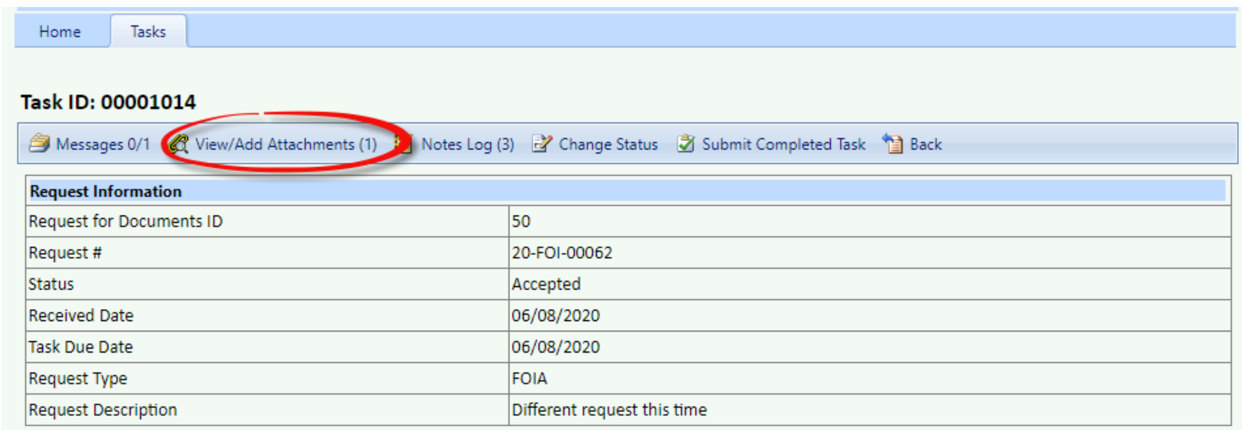


**(!!) Note: If an error occurs when sending a message, it appears under the *Failed* messages.**

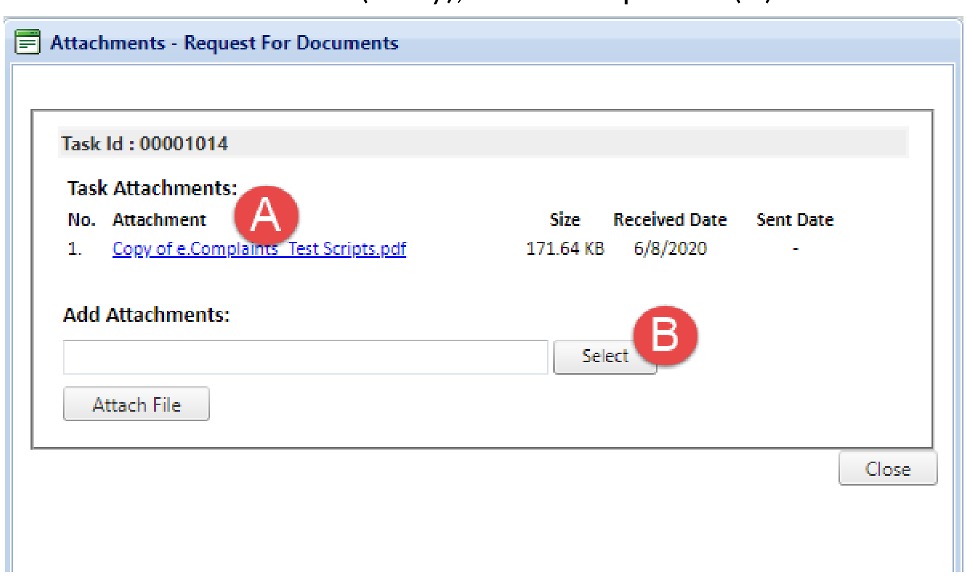
## 3.5 Using Attachments in Tasks

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*.

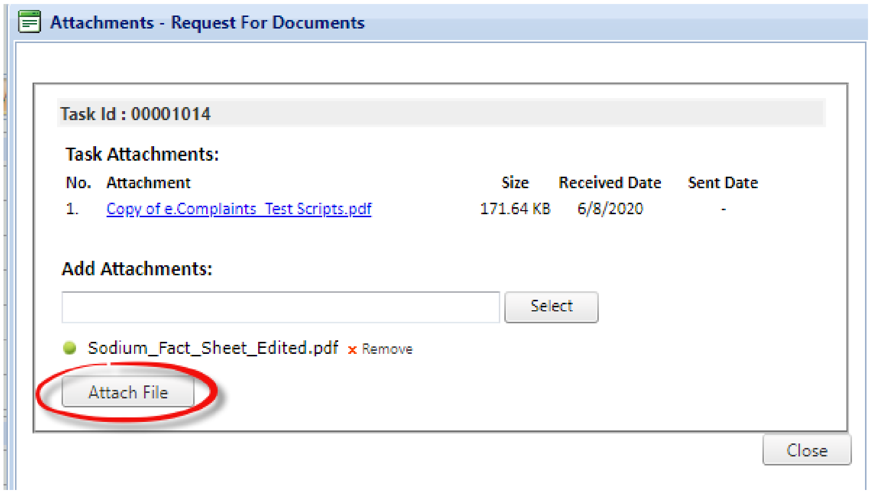
1. Open any *Task*. On the *Tasks* tab, click **View/Add Attachments**:



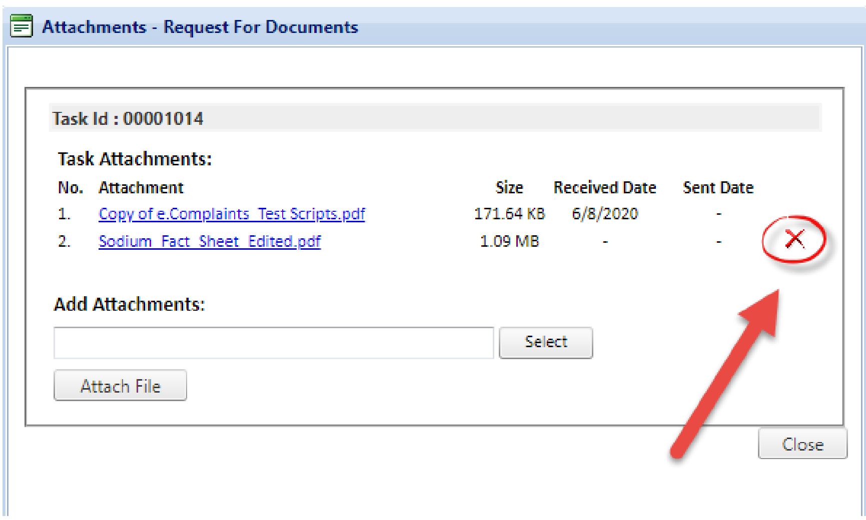

2. The *Attachments* screen appears. Included here are a (**A**) *Task Attachments* list with all current attachments (if any), as well as space to (**B**) *Add Attachments*:




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**.

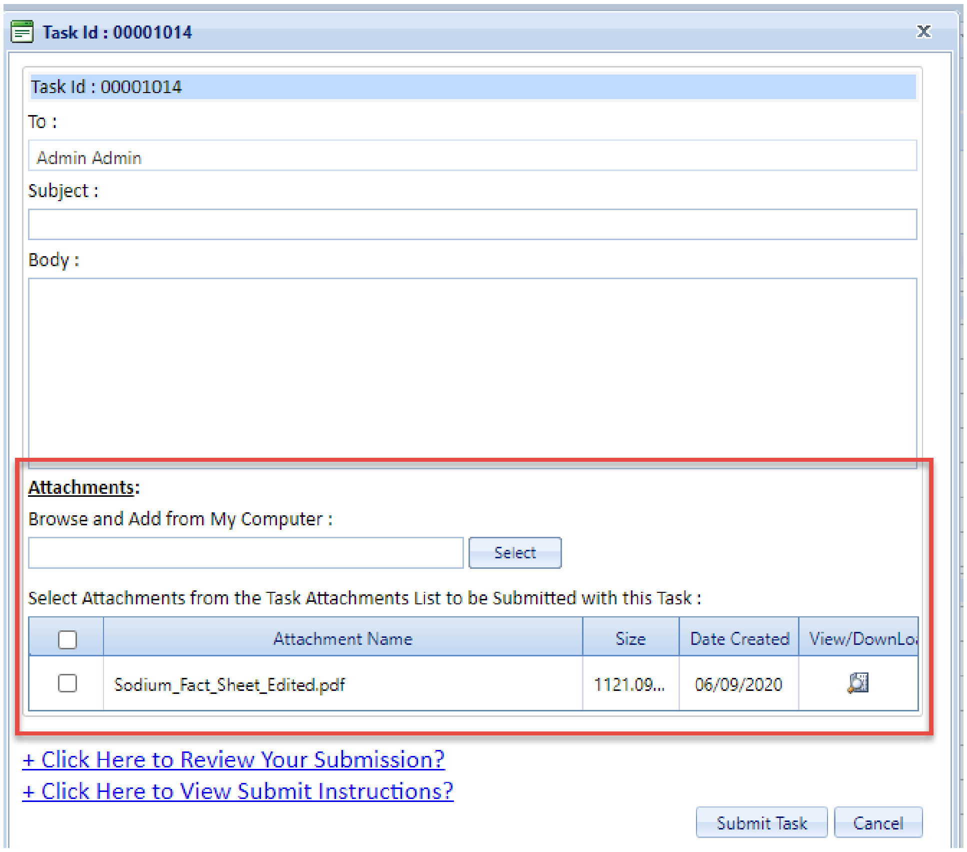



5. The selected file is added to the *Task Attachments* list. You can also click the **X** next to any attachment to remove it from the Task:




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

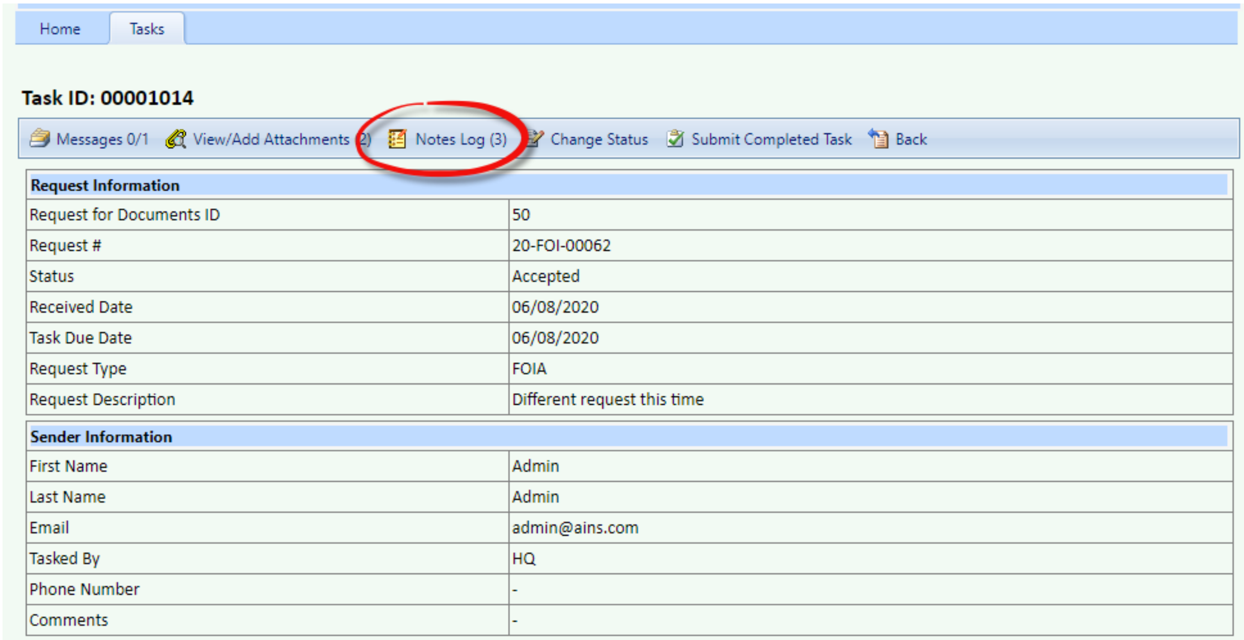
6. A similar *Attachments* interface also appears when using the **Submit Completed Task** function:



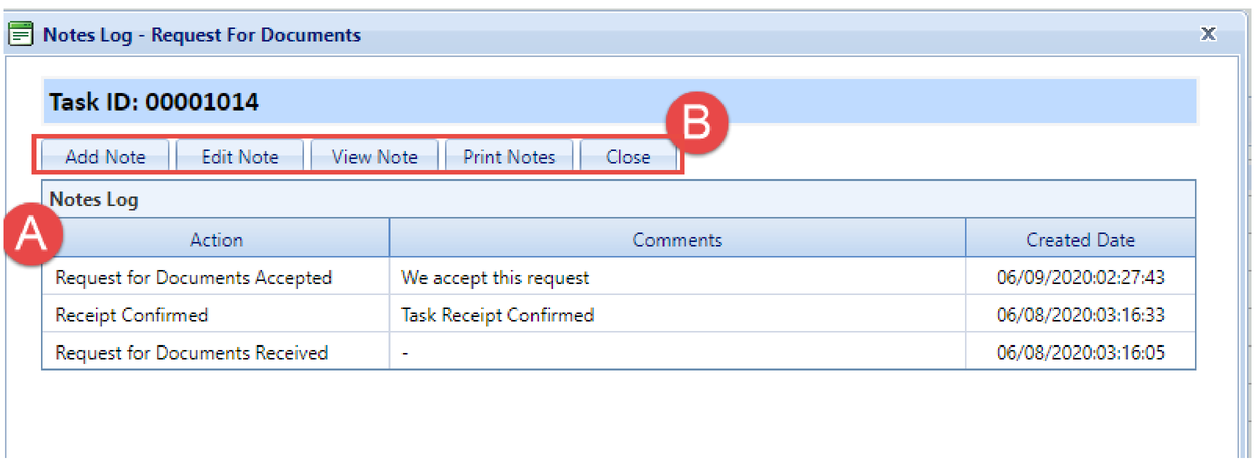

7. Here you can click **Select** to add new attachments to the submission, or select existing attachments added through the **View/Add Attachments** interface.

## 3.6 Notes Log

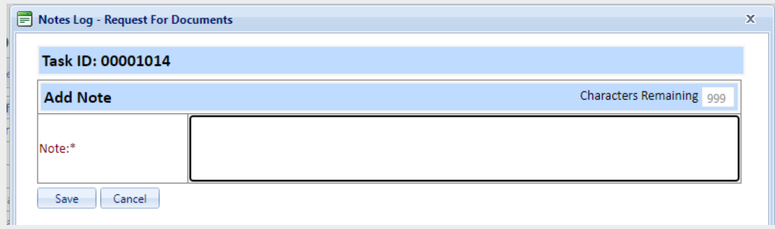
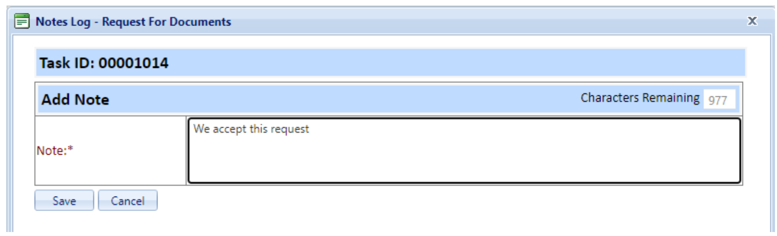
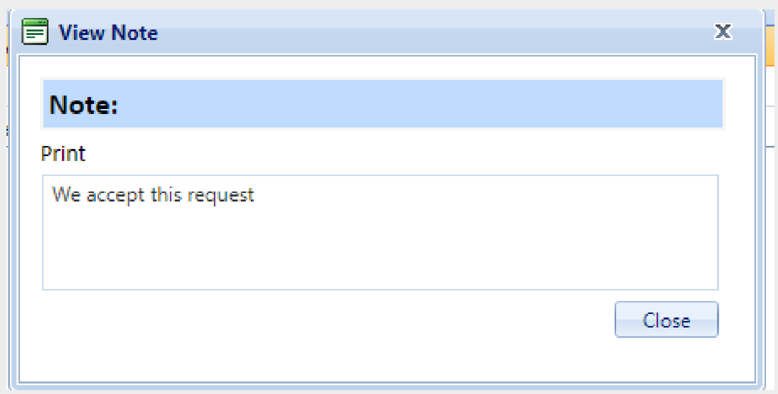
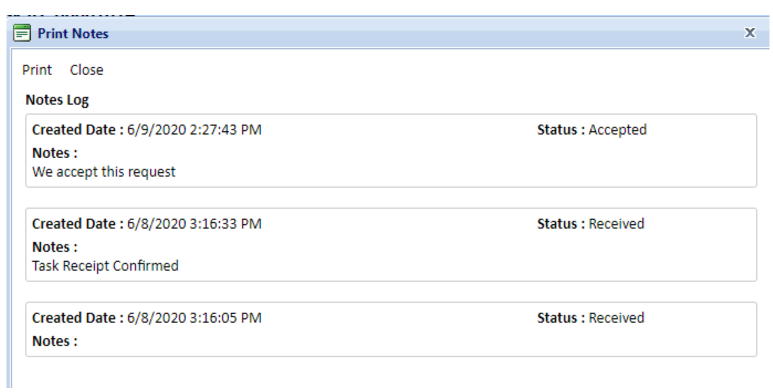
Both Requests for Documents and Consultation Tasks include a *Notes Log* to document actions taken on these tasks. You can access the *Notes Log* from within a *Task* by click the **Notes Log** as shown in the following example:




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. |  |

| Action | Description | Image |
|---|---|---|
| **Close** | Click **Close** to close the *Notes Log*. | N/A |