

FOIAXpress

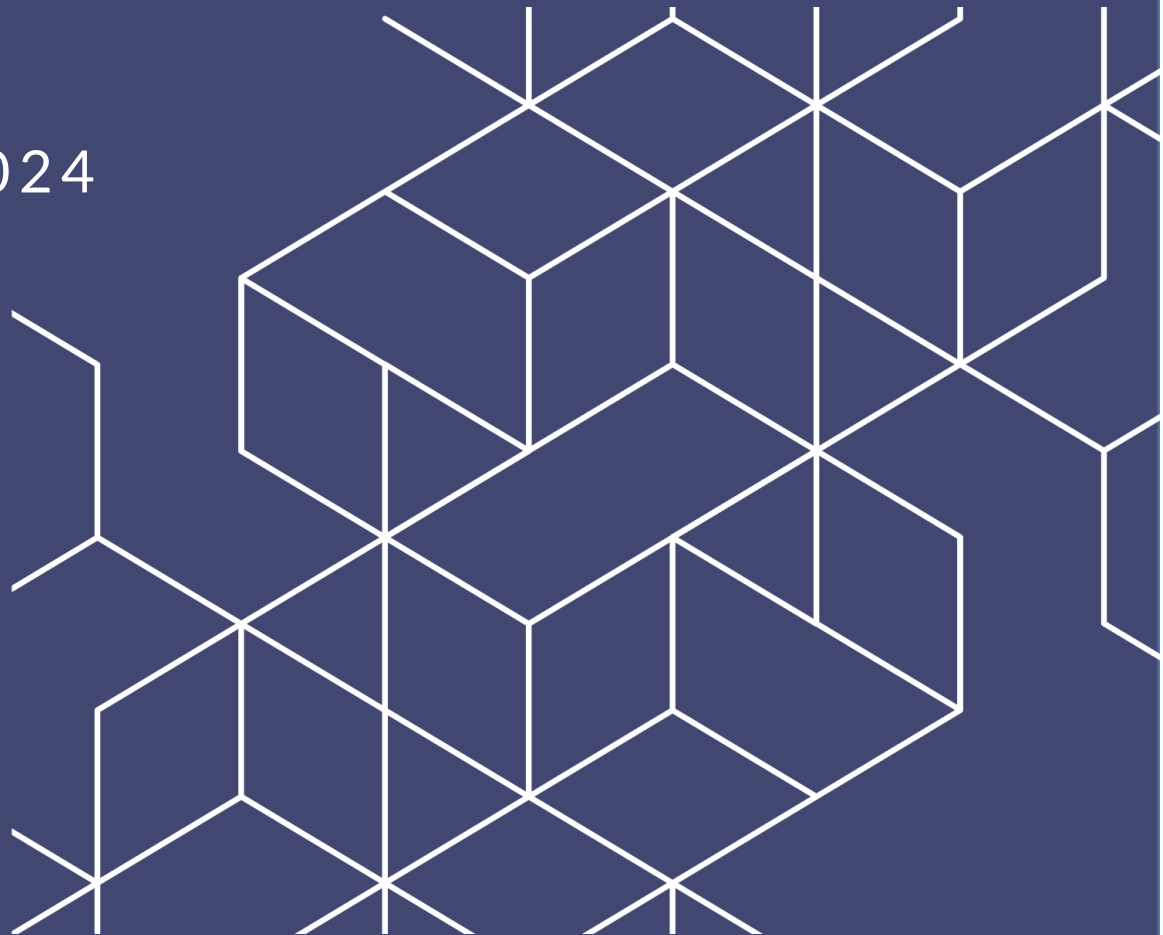


OPEXUS

Collaboration Portal User Manual

v11.5.0

March 2024



FX 11.5.0 Collaboration Portal User Manual

Notice of Rights

Copyright © 2024, AINS, LLC d/b/a OPEXUS. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission of the publisher: AINS, LLC. For information on obtaining permission for reprints and excerpts, contact info@opexustech.com.

Additionally, all copyrights, confidential information, patents, design rights and all other intellectual property rights of whatsoever nature contained herein are, and shall remain, the sole and exclusive property of the publisher.

Notice of Liability

The information in this publication is believed to be accurate and reliable. However, the information is distributed by the publisher (AINS, LLC.) on an “As Is” basis without warranty for its use, or for any infringements of patents or other rights of third parties resulting from its use.

While every precaution has been taken in the preparation of this publication, neither the author (or authors) nor the publisher will have any liability to any person or entity with respect to any loss or damage caused or alleged to be caused, directly or indirectly, by the information contained in this publication or by the computer software and hardware products described in it.

Notice of Trademarks

The publisher’s company name, company logo, company patents, and company proprietary products are trademarks or registered trademarks of the publisher: AINS, LLC. All other trademarks or registered trademarks are the property of their respective owners.

Non-Disclosure Statement

This document’s contents are confidential and proprietary to AINS, LLC. This document cannot be released publicly or outside the purchasing agency without prior written permission from AINS, LLC.

Images in this manual are used as examples and may contain data and versioning that may not be consistent with your version of the application or information in your environment.

Additional Notice

Information in this documentation is subject to change without notice and does not represent a commitment on the part of AINS, LLC.

Notwithstanding any of the foregoing, if this document was produced as a Deliverable or other work for hire under a contract on behalf of a U.S. Government end user, the terms and conditions of that contract shall apply in the event of a conflict.



Contents

- 1 About this Manual..... 4
 - 1.1 Introduction..... 4
 - 1.2 How to Use this Manual 4
 - 1.3 Typography 4
- 2 Accessing the Collaboration Portal 5
- 3 Request for Document Tasks..... 7
 - 3.1 Responding to a Request for Documents Task 7
 - 3.2 Completing a Request for Documents Task 12
- 4 Consultation Tasks 15
 - 4.1 Responding to a Consultation Task..... 15
 - 4.2 Completing a Consultation Task 17
- 5 Sending Messages Using the Portal 20
- 6 Using Attachments in Tasks 22
- 7 Notes Log 25



1 About this Manual

1.1 Introduction

Welcome to the Collaboration Portal User Manual. The 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 portal users, including the portal UI and steps for collaborating on requests.

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 Tasks
- Consultation Tasks
- Sending Messages Using the Portal
- Using Attachments in Tasks
- Notes Log

1.3 Typography

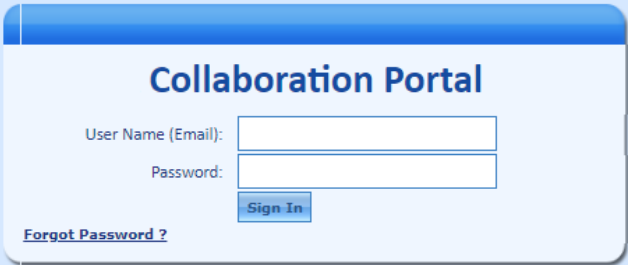
The following formatting conventions are used in this manual to highlight important information:

- *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**.



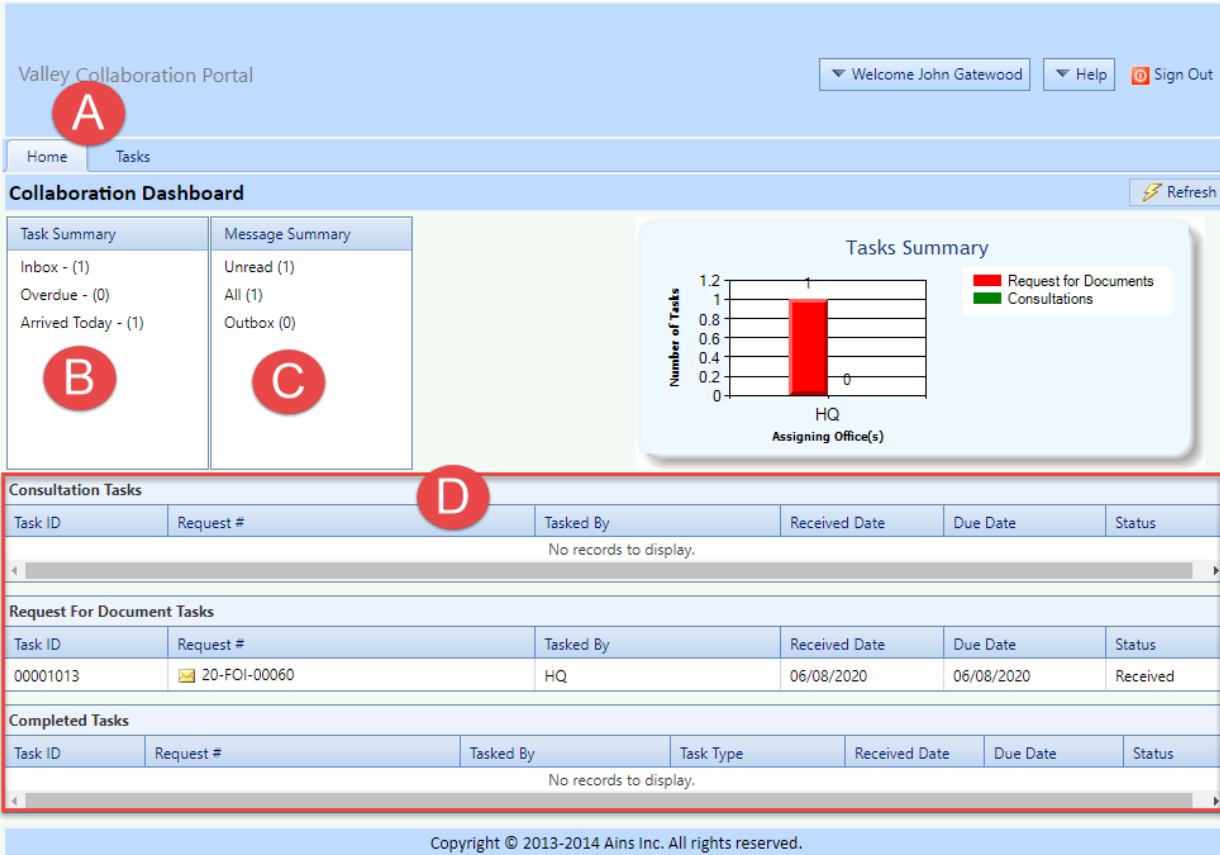
2 Accessing the Collaboration Portal

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



The login screen is titled "Collaboration Portal". It features a "User Name (Email):" field, a "Password:" field, and a "Sign In" button. Below the password field is a link for "Forgot Password?".

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 dashboard is titled "Valley Collaboration Portal" and includes a navigation bar with "Home" and "Tasks" tabs. A "Collaboration Dashboard" section contains a "Task Summary" table, a "Message Summary" table, and a "Tasks Summary" bar chart. Below these are three task lists: "Consultation Tasks", "Request For Document Tasks", and "Completed Tasks".

Task Summary

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

Message Summary

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

Tasks Summary

Number of Tasks

Assigning Office(s)

Legend: Request for Documents (Red), Consultations (Green)

Consultation Tasks

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

Request For Document Tasks

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

Completed Tasks

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

Copyright © 2013-2014 Ains Inc. All rights reserved.

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



Ref	Element	Description
A	Tabs	The dashboard contains two tabs: the main <i>Home</i> tab (where you land on login), as well as the <i>Tasks</i> tab, which consolidates all your current tasks in one location
B	Task Summary	The <i>Task Summary</i> widget provides links to your Inbox , Overdue tasks, and tasks which Arrived Today .
C	Message Summary	The <i>Message Summary</i> widget provides quick links to Unread messages, All your messages, and your Outbox .
D	Tasks	Ongoing <i>Consultation Tasks</i> and <i>Request for Document Tasks</i> are listed here. There is also a listing of your <i>Completed</i> tasks.

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



3 Request for Document Tasks

3.1 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.

The screenshot shows the Collaboration Dashboard with a 'Tasks' tab selected. It includes a 'Task Summary' sidebar, a 'Message Summary' sidebar, and a 'Tasks Summary' bar chart. The main area displays three tables: 'Consultation Tasks', 'Request For Document Tasks', and 'Completed Tasks'. A red arrow points to the task with ID 00001013 and Request # 20-FOI-00060 in the 'Request For Document Tasks' table.

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

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

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

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:

The screenshot shows a confirmation pop-up message with the text: 'test.foia-host.com says Confirmation of receipt has been sent to sender.' and an 'OK' button.

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



Collaboration for Portal Users

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

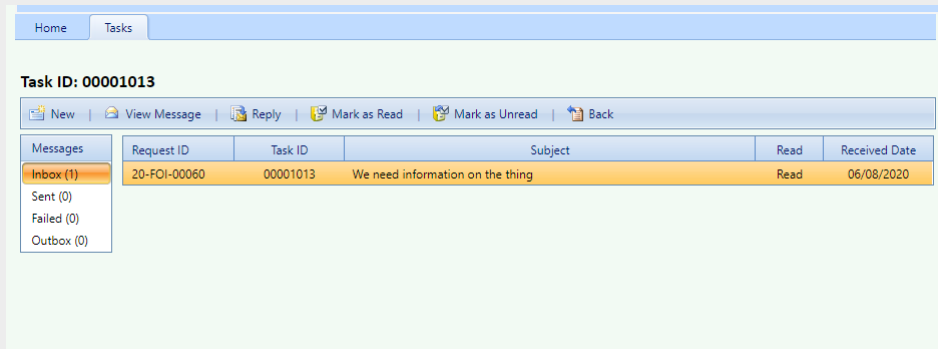
Task ID: 00001013

[Messages 1/1](#)
[View/Add Attachments \(0\)](#)
[Notes Log \(1\)](#)
[Change Status](#)
[Submit Completed Task](#)
[Back](#)

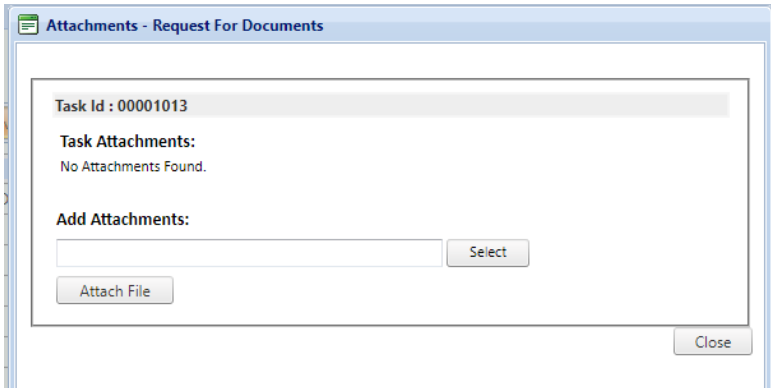
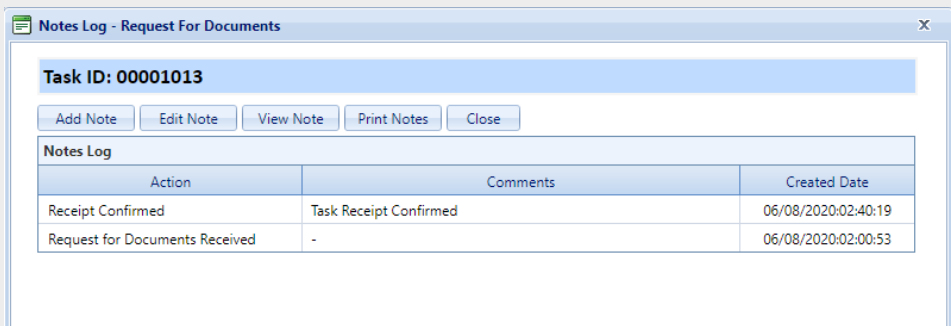
Request Information	
Request for Documents ID	48
Request #	20-FOI-00060
Status	Received
Received Date	06/08/2020
Task Due Date	06/08/2020
Request Type	FOIA
Request Description	I want to know about that thing. You know what I mean. (Date Range for Record Search: From 1/1/2020 To 6/1/2020)

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

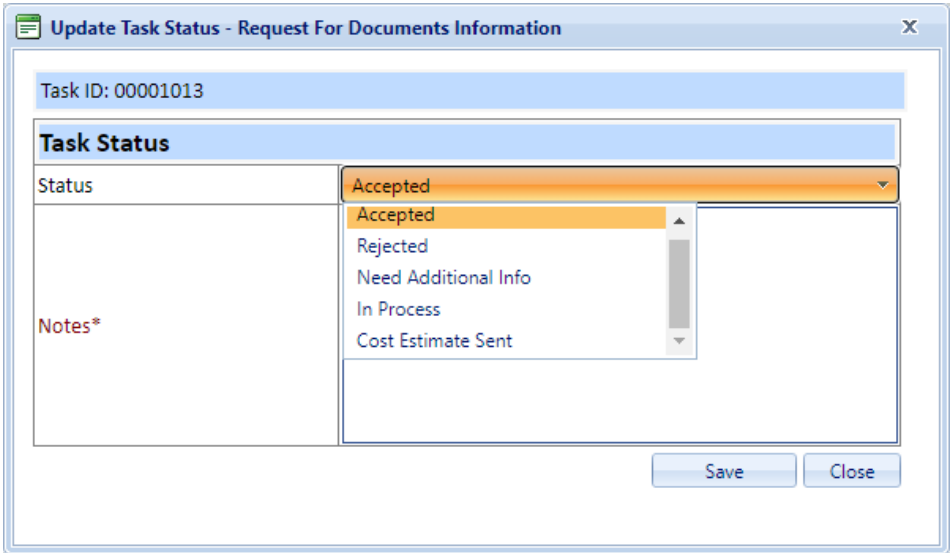
4. This includes all the information provided by the user who sent the RFD. This is also the screen where you'll take action to respond to this request. These actions are described below:

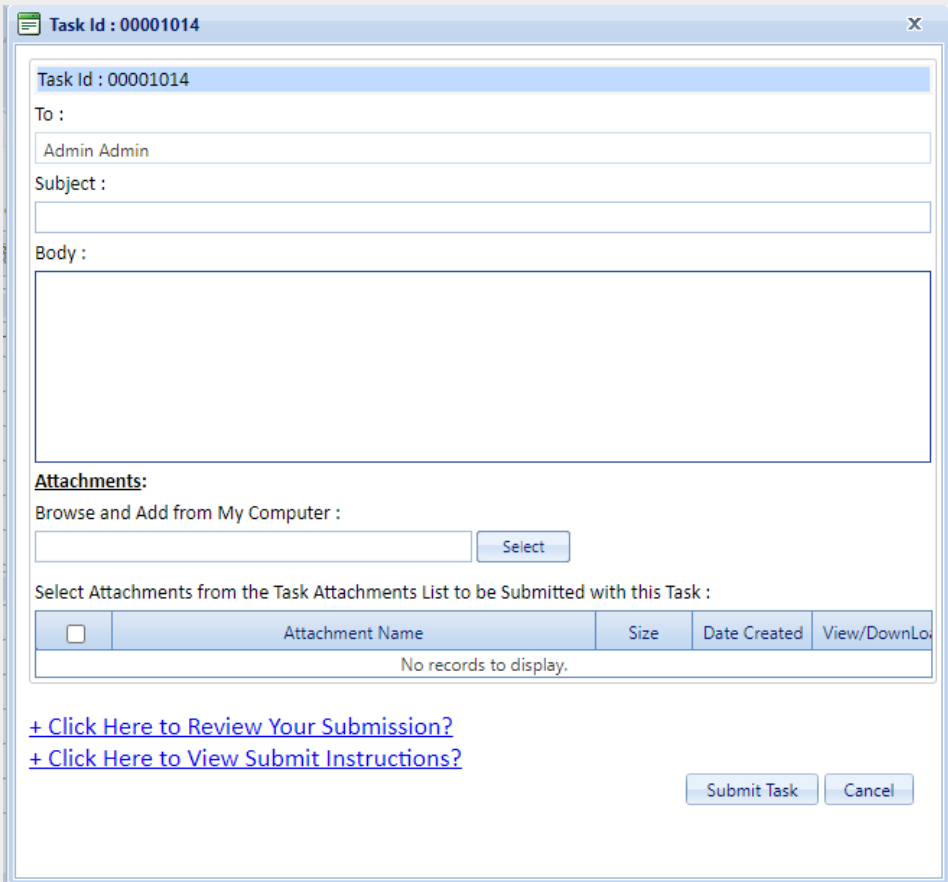
Action	Interface										
<p>Click Messages to access correspondence for this task. You can send a New message to the user who sent the request, or View/Reply to messages in your inbox.</p>	 <p>The screenshot shows the task interface with the 'Messages' section expanded. The 'Messages' dropdown menu is open, showing 'Inbox (1)', 'Sent (0)', 'Failed (0)', and 'Outbox (0)'. The 'Inbox (1)' option is selected, displaying a table of messages. The table has columns for Request ID, Task ID, Subject, Read status, and Received Date. The first message is highlighted in orange.</p> <table><tr><th>Request ID</th><th>Task ID</th><th>Subject</th><th>Read</th><th>Received Date</th></tr><tr><td>20-FOI-00060</td><td>00001013</td><td>We need information on the thing</td><td>Read</td><td>06/08/2020</td></tr></table>	Request ID	Task ID	Subject	Read	Received Date	20-FOI-00060	00001013	We need information on the thing	Read	06/08/2020
Request ID	Task ID	Subject	Read	Received Date							
20-FOI-00060	00001013	We need information on the thing	Read	06/08/2020							



Action	Interface									
<p>Click View/Add Attachments to attach documents to this RFD for submittal back to the requester.</p> <p>You can also view any attachments included with this original request.</p>										
<p>The Notes option lets you view all notes on this task. This includes both automated notes on system processes, as well as any notes added manually using the Add Note option.</p>	 <table><thead><tr><th>Action</th><th>Comments</th><th>Created Date</th></tr></thead><tbody><tr><td>Receipt Confirmed</td><td>Task Receipt Confirmed</td><td>06/08/2020:02:40:19</td></tr><tr><td>Request for Documents Received</td><td>-</td><td>06/08/2020:02:00:53</td></tr></tbody></table>	Action	Comments	Created Date	Receipt Confirmed	Task Receipt Confirmed	06/08/2020:02:40:19	Request for Documents Received	-	06/08/2020:02:00:53
Action	Comments	Created Date								
Receipt Confirmed	Task Receipt Confirmed	06/08/2020:02:40:19								
Request for Documents Received	-	06/08/2020:02:00:53								



Action	Interface
<p>Use the Update Task Status feature to track progress on this task. This status is internal to the Collaboration Portal and is not reported back to the requester. The selectable statuses are shown in the example screen.</p>	 <p>The screenshot shows a software interface window titled "Update Task Status - Request For Documents Information". At the top, it displays "Task ID: 00001013". Below this is a section labeled "Task Status" which contains a dropdown menu. The dropdown is currently open, showing a list of status options: "Accepted", "Rejected", "Need Additional Info", "In Process", and "Cost Estimate Sent". To the left of the dropdown is a text area labeled "Notes*" in red. At the bottom right of the window are two buttons: "Save" and "Close".</p>

Action	Interface
<p>Click Submit Completed Task to submit responsive materials to the requester.</p> <p>Here you can include a message, as well as select from existing attachments to include with the response package. There is also the option to add attachments by clicking Select from the <i>Browse and Add from My Computer</i> field.</p> <p>See the <i>Complete a Request for Documents</i> section for more.</p>	

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



Update Task Status - Consultation Review Information

Task ID: 00001015

Task Status

Status: Accepted

Notes*

Accepted
Rejected
Need Additional Info
In Process
Cost Estimate Sent

Save Close

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

6. If for whatever reason you cannot fulfill the request, select **Rejected**, otherwise select **Accepted**. Provide **Notes** (required regardless of the status you select), then click **Save**. In this example we will accept the request.
7. Use the tools available to collaborate and fulfill this request. This includes *Sending Messages Using the Portal*.

3.2 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**:

Home Tasks

Task ID: 00001013

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

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

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

Task Id : 00001013

Task Id : 00001013

To :
Admin Admin

Subject :

Body :

Attachments:
Browse and Add from My Computer :

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

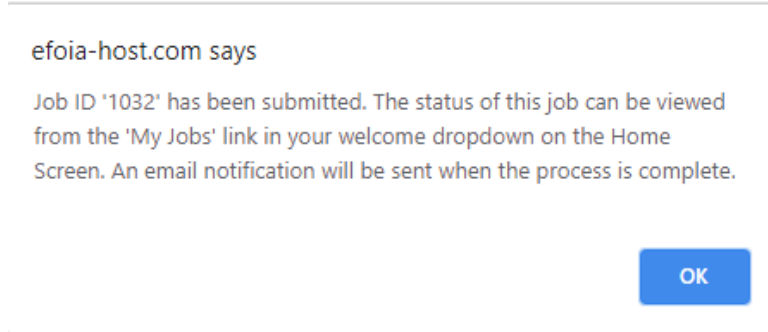
<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

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

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

4 Consultation Tasks

4.1 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.

The screenshot shows the 'Collaboration Dashboard' with a 'Tasks' tab selected. It includes a 'Task Summary' box with 'Inbox - (3)', 'Overdue - (2)', and 'Arrived Today - (1)'. A 'Message Summary' box shows 'Unread (1)', 'All (3)', and 'Outbox (0)'. A 'Tasks Summary' bar chart shows 'Request for Documents' at 2 and 'Consultations' at 1 for 'HQ'. Below these are three tables: 'Consultation Tasks', 'Request For Document Tasks', and 'Completed Tasks'. The 'Consultation Tasks' table has one row with 'Task ID' 00001015, 'Request #' 20-FOI-00062 (circled in red), 'Tasked By' HQ, 'Received Date' 06/09/2020, 'Due Date' 06/09/2020, and 'Status' Received.

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

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

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

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

tva-test.efoia-host.com says

Confirmation of receipt has been sent to sender.

OK

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

The screenshot shows the 'Task ID: 00001015' details page. It has a navigation bar with 'Download Records', 'Messages 1/1' (circled in red), 'View/Add Attachments (0)', 'Notes Log (1)', 'Change Status', 'Submit Completed Task', and 'Back'. Below is a 'Request Information' table with details for the consultation review.

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



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

Task ID: 00001015

New | **View Message** | Reply | Mark as Read | Mark as Unread | Back

Request ID	Task ID	Subject	Read	Received Date
20-FOI-00062	00001015	FOIA Request #20-FOI-00062 - Request for Records	Unread	06/09/2020

Messages: Inbox (1), Sent (0), Failed (0), Outbox (0)

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

Task Id : 00001015

Message

Subject :
FOIA Request #20-FOI-00062 - Request for Records

Body :

June 09, 2020

To: Normalville Office

Attachments :
No Attachments Found.

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**:

Update Task Status - Request For Documents Information

Task ID: 00001014

Task Status

Status: **Accepted**

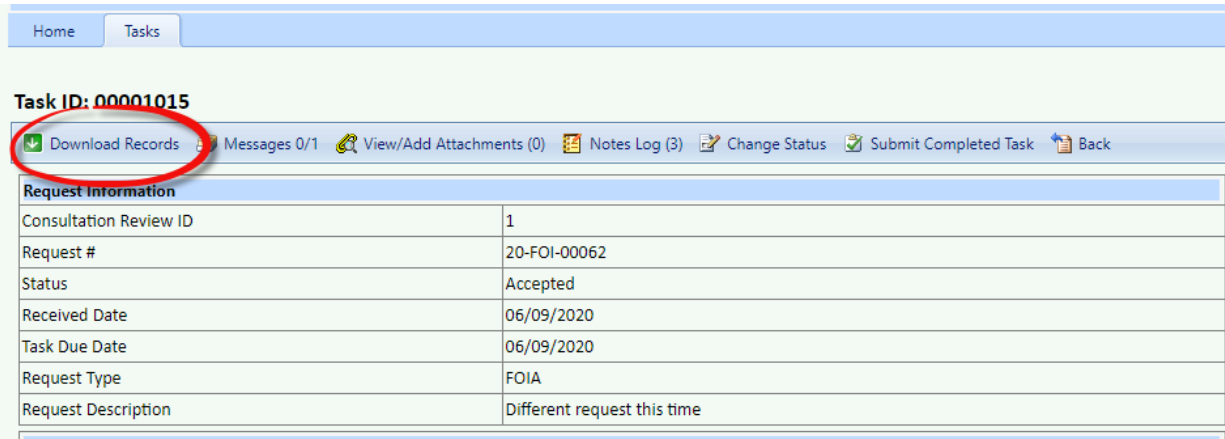
Notes*

Save Close

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



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



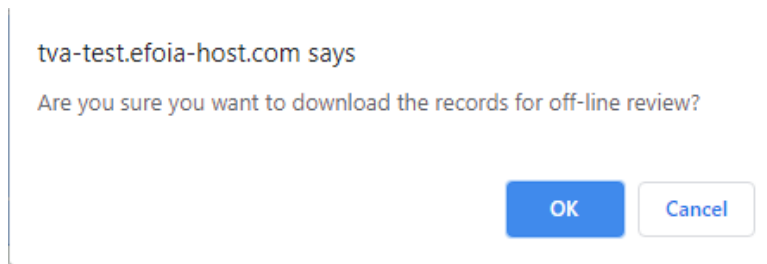
Home Tasks

Task ID: 00001015

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

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

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



tva-test.efoia-host.com says

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

OK Cancel

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

4.2 Completing a Consultation Task

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

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



Collaboration for Portal Users

Home Tasks

Task ID: 00001015

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

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

Sender Information	
First Name	Admin
Last Name	Admin

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

Task Id : 00001013

Task Id : 00001013

To :
Admin Admin

Subject :

Body :

Attachments:
Browse and Add from My Computer :

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

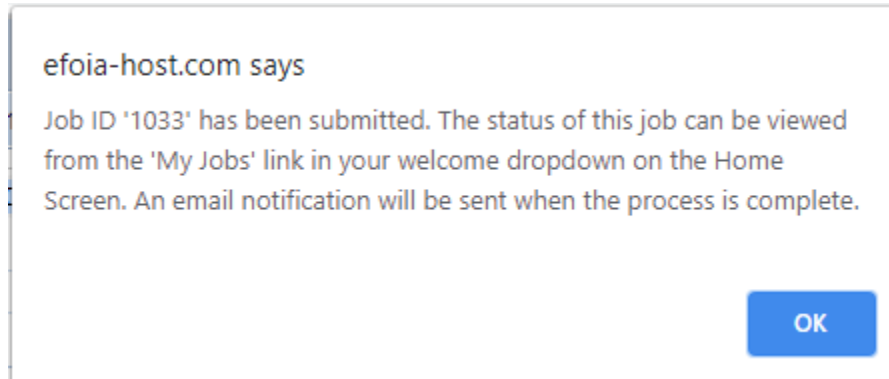
<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
No records to display.				

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

- On this screen, provide the *Subject* and *Body* for the message that accompanies the completed Consultation Task.
- In the *Attachments* field, use the **Select** button to upload the reviewed documents to be included with the completed request.
- There are also options to Click Here to Review Your Submission? and Click Here to View Submit Instructions.



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.

5 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**:



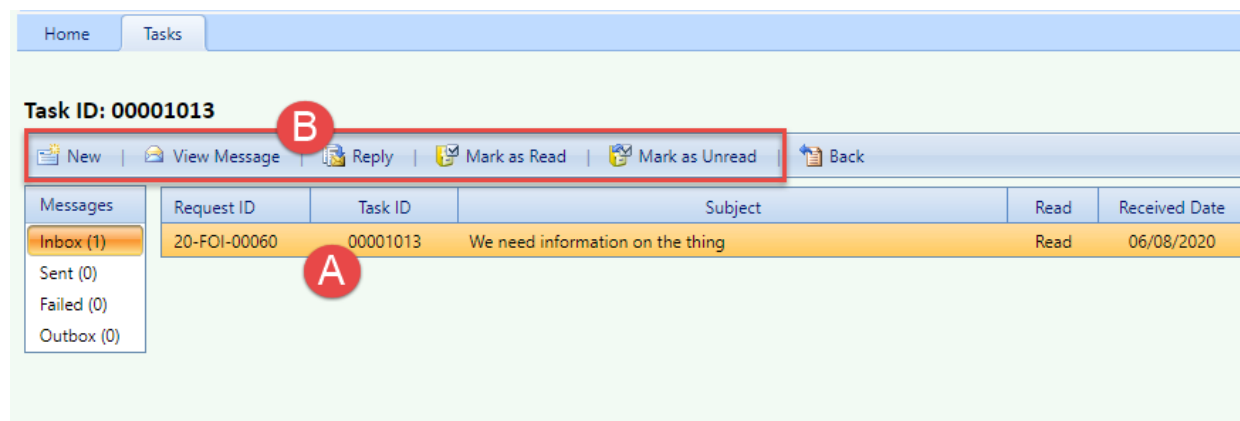
Task ID: 00001013

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

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

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

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:



Task ID: 00001013

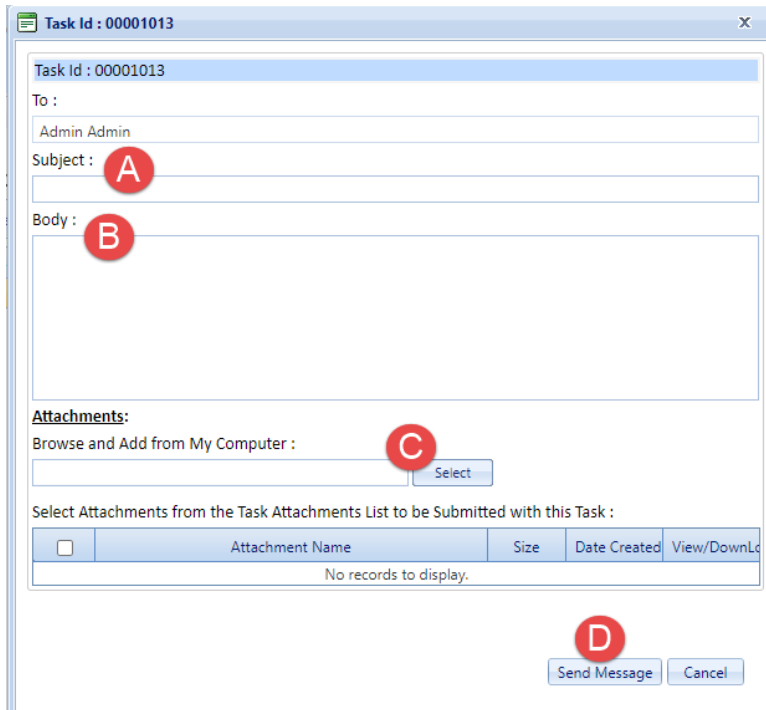
New | View Message | Reply | Mark as Read | Mark as Unread | Back

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

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:



Task Id : 00001013

To : Admin Admin

Subject : A

Body : B

Attachments:

Browse and Add from My Computer : C

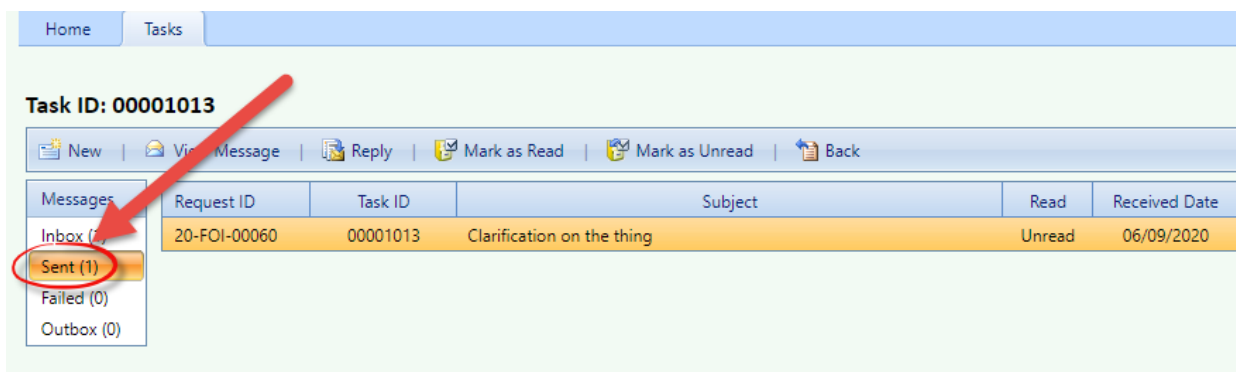
Select Attachments from the Task Attachments List to be Submitted with this Task :

	Attachment Name	Size	Date Created	View/DownLd
No records to display.				

D

Send Message Cancel

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



Home Tasks

Task ID: 00001013

New View Message Reply Mark as Read Mark as Unread Back

Messages

- Inbox (0)
- Sent (1)
- Failed (0)
- Outbox (0)

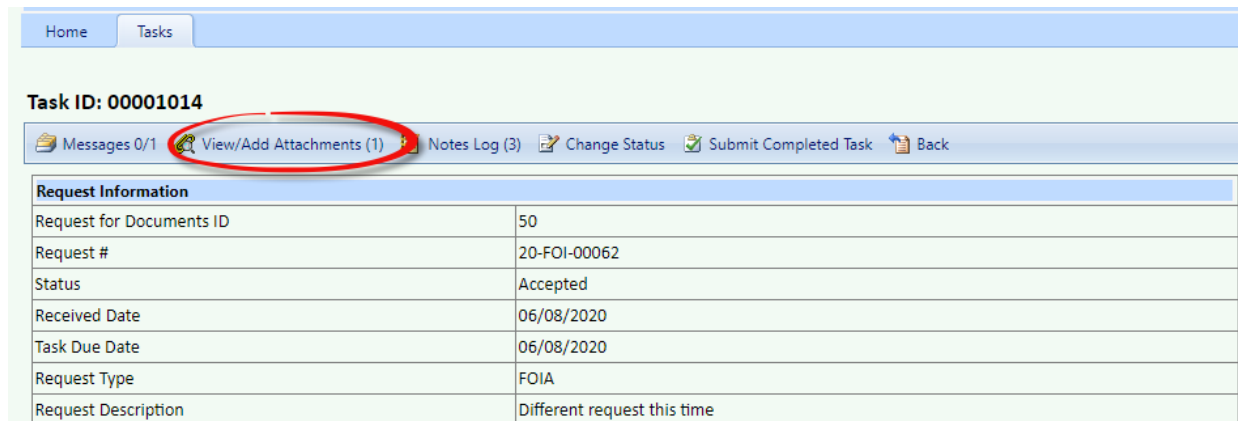
Request ID	Task ID	Subject	Read	Received Date
20-FOI-00060	00001013	Clarification on the thing	Unread	06/09/2020

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

6 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**:



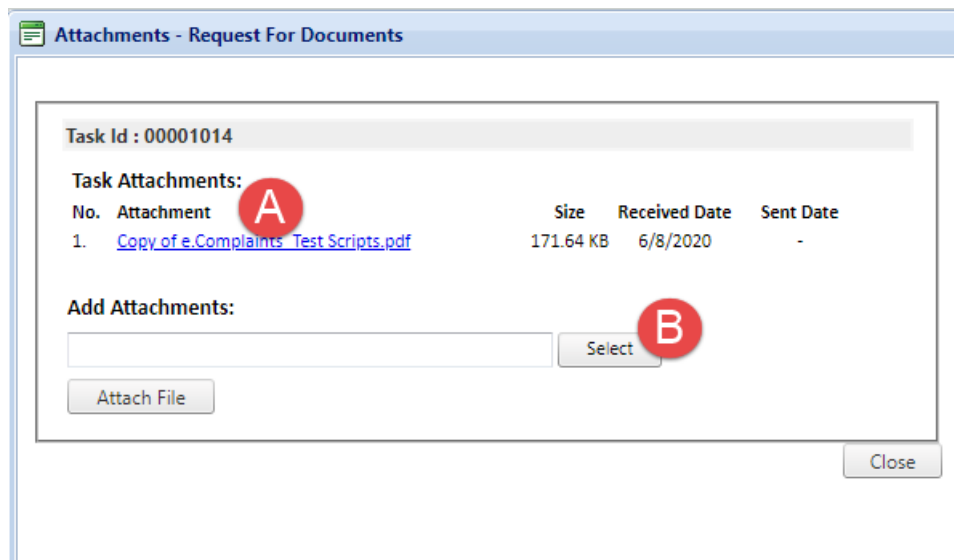
Home Tasks

Task ID: 00001014

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

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

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*:



Attachments - Request For Documents

Task Id : 00001014

Task Attachments:

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

Add Attachments:

Select **Attach File**

Close

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



Task Id : 00001014

Task Attachments:

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

Add Attachments:

● Sodium_Fact_Sheet_Edited.pdf ✕ Remove

- 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:

Task Id : 00001014

Task Attachments:

No.	Attachment	Size	Received Date	Sent Date
1.	Copy of e.Complaints Test Scripts.pdf	171.64 KB	6/8/2020	-
2.	Sodium_Fact_Sheet_Edited.pdf	1.09 MB	-	-

Add Attachments:

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

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

Task Id : 00001014

Task Id : 00001014

To :
Admin Admin

Subject :

Body :

Attachments:

Browse and Add from My Computer :

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

<input type="checkbox"/>	Attachment Name	Size	Date Created	View/DownLo
<input type="checkbox"/>	Sodium_Fact_Sheet_Edited.pdf	1121.09...	06/09/2020	

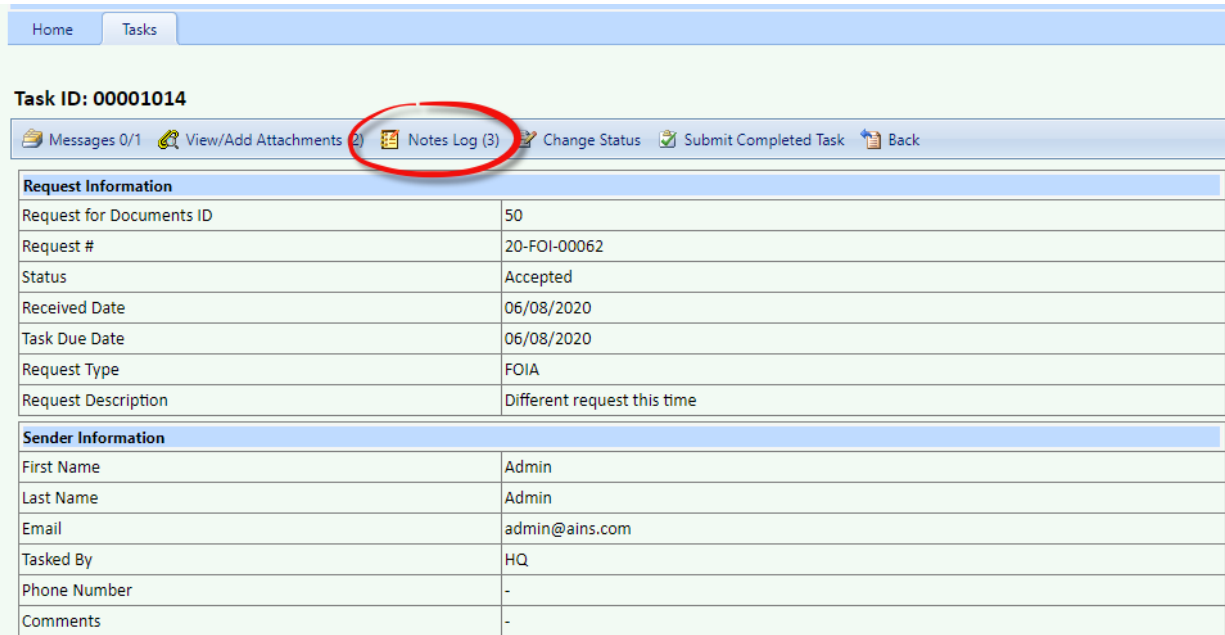
[+ Click Here to Review Your Submission?](#)
[+ Click Here to View Submit Instructions?](#)

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



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:



Home Tasks

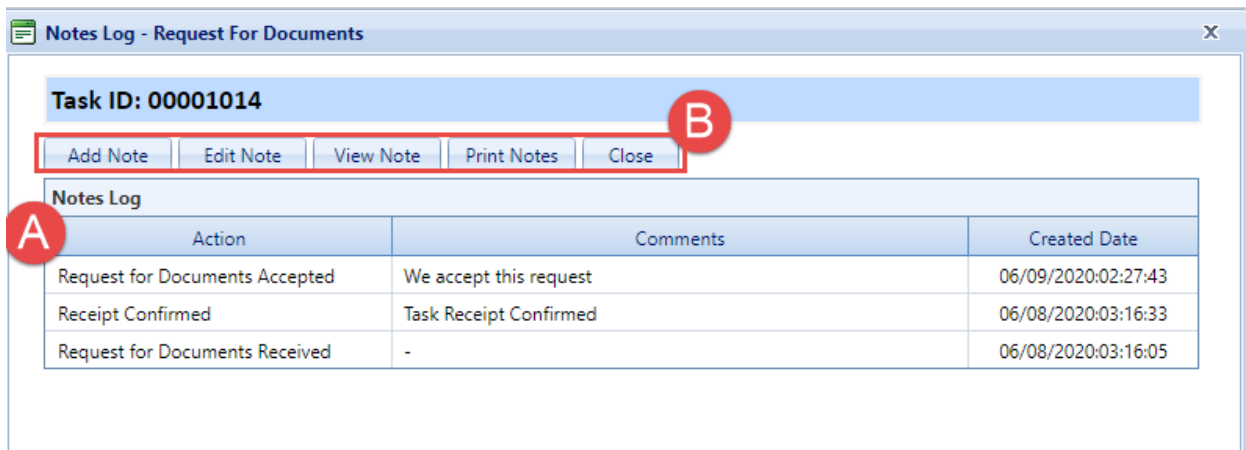
Task ID: 00001014

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

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

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

The *Notes Log* appears as shown below. This screen includes a **(A)** *Notes Log* with the actions taken in filling this request. There are also several **(B)** *Actions* you can take on the log.



Notes Log - Request For Documents

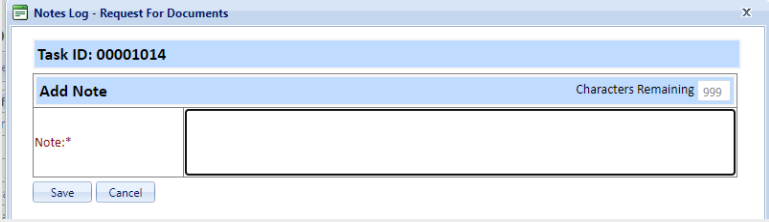
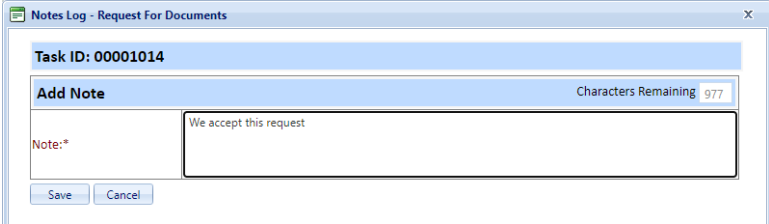
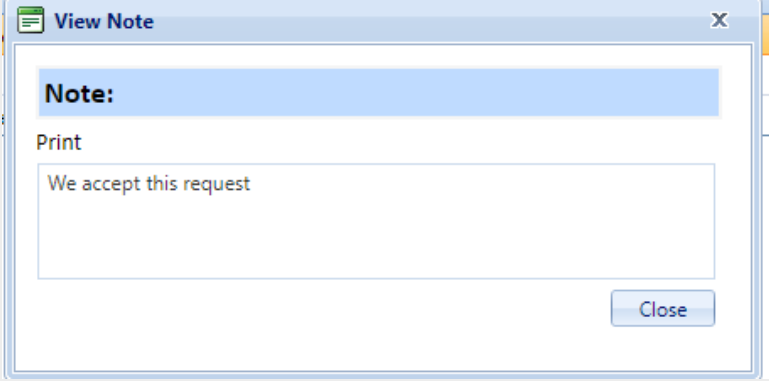
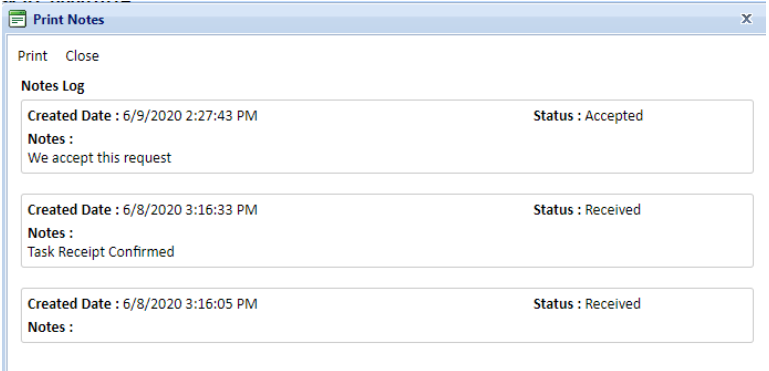
Task ID: 00001014

Add Note Edit Note View Note Print Notes Close

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

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



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

Collaboration for Portal Users

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

