

# FOIAXpress

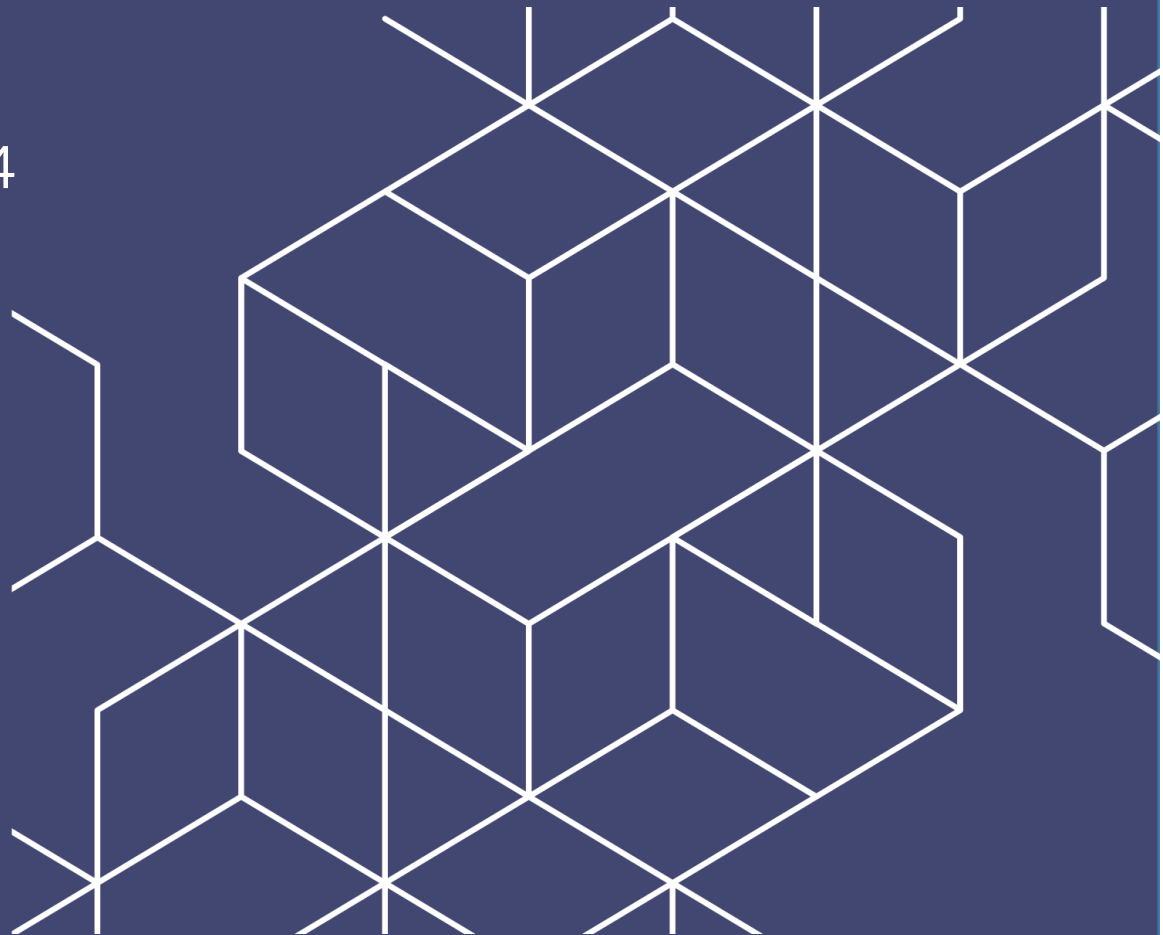


OPEXUS

## Collaboration Application User Manual

v11.7.0

May 2024



# FX 11.7.0 Collaboration Application Portal User Manual

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# 1 About this Manual

## 1.1 Introduction

Welcome to the FOIAXpress Collaboration Application User Manual. 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 and this symbol (!!) are used in *Notes* to bring attention to **crucial information**.

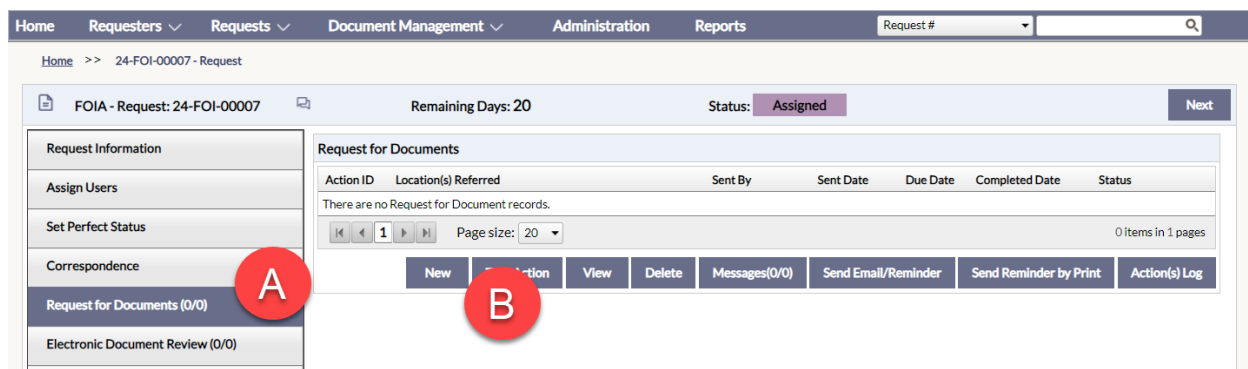


## 2 Requests for Documents

### 2.1 Sending a Request for Documents

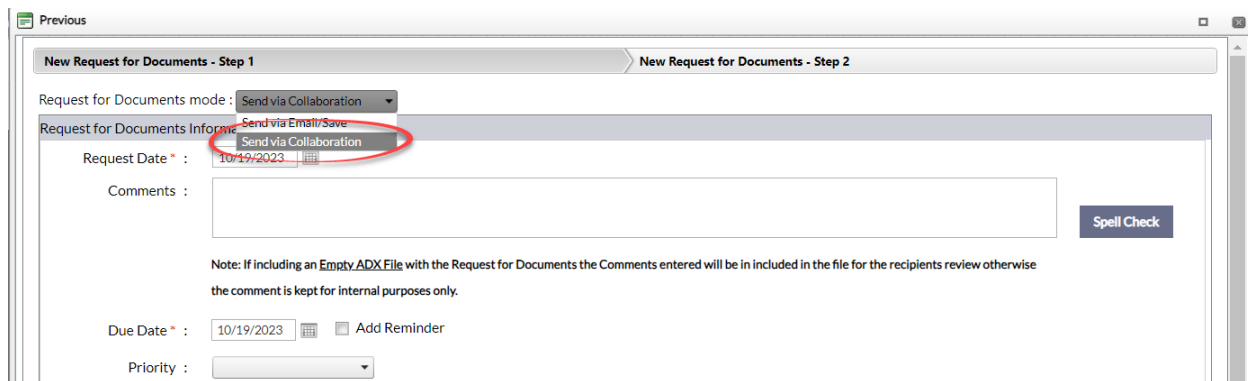
One of the main uses for Collaboration is to request documents from a source who does not have access to FOIAXpress. Follow the steps below to submit a Request for Documents to a contact using the Collaboration Portal.

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



The screenshot shows the 'FOIA - Request: 24-FOI-00007 - Request' page. The left-hand navigation menu has 'Request for Documents (0/0)' highlighted with a red circle and the letter 'A'. The main content area shows the 'Request for Documents' section with a table of records. Below the table, there is a 'New' button highlighted with a red circle and the letter 'B'. Other buttons include 'Action', 'View', 'Delete', 'Messages(0/0)', 'Send Email/Reminder', 'Send Reminder by Print', and 'Action(s) Log'.

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.



The screenshot shows the 'New Request for Documents - Step 1' screen. The 'Request for Documents mode' dropdown menu is open, and 'Send via Collaboration' is selected and highlighted with a red circle. Other options in the dropdown are 'Send via Email/Save' and 'Send via Collaboration'. Below the dropdown, there is a 'Request Date' field with a calendar icon, a 'Comments' text area, a 'Spell Check' button, a 'Due Date' field with a calendar icon and an 'Add Reminder' checkbox, and a 'Priority' dropdown menu.

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



## Collaboration for Portal Users

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:



## Collaboration for Portal Users

Previous

New Request for Documents - Step 1

New Request for Documents - Step 2

Request for Documents mode :

Request for Documents Information

Request Date \* :

Comments :

Spell Check

Note: If including an Empty ADX File with the Request for Documents the Comments entered will be included in the file for the recipients review otherwise the comment is kept for internal purposes only.

Due Date \* :  ☐ Add Reminder

Priority :

Send To: Program Offices

Add Program Offices

Action Office	Program Office	Contact Name	Phone	Contact Address	Email	Has RX?	Actions
HQ	<a href="#">Normalville Office</a>	Gatewood, John				No	<a href="#">X</a>

Dispatch Mode\*

☒ Email ☐ Print ☐ Save to Disk

Delivery Mode

Dispatch Date :

☐ Send To: Other Email Recipients

Next

Note: \* fields are mandatory

7. The *New RFD - Step 2* screen appears as shown below. First add any (A) Attachments, such as the original request letter for context:
8. You can also configure the message the end user receives with the request in the collaboration portal. First add a **Subject** for the message. You can also edit the **message body** as needed.
9. When you're ready to submit the request, click **Send Message**. A pop up message appears to confirm sending the RFD. Click **OK** to continue.
10. After the job processes, click **Close Window**. The *Request for Documents* screen refreshes with the new RFD included on the list.

## 2.2 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:



## Collaboration for Portal Users

The screenshot shows the 'Collaboration Messages' section of a web application. At the top is a navigation bar with links: Home, Requesters, Requests, Document Management, Administration, and Reports. Below this is a breadcrumb trail: Home >> Collab Messages. The main content area has a title 'Collaboration Messages' and a table with the following data:

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

Below the table are navigation controls: 'Page size: 100' and '1 items in 1 pages'. At the bottom are buttons: Print, Print All, Export, View Message, Reply, Mark as Read, and Go To Request. A footer note reads: 'Copyright © 2020 AINS, Inc. All rights reserved.'

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:

The screenshot shows a 'Message from Collaboration' window. It has a title bar with a maximize and close button. The main content area is titled 'Message Details' and contains the following information:

**Subject:** : Here are your documents

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

**Attachments:**

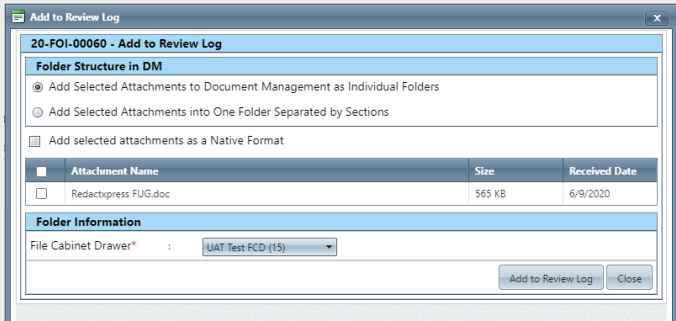
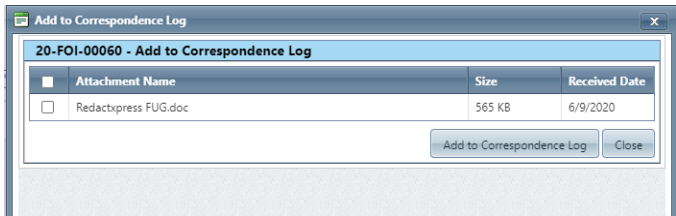
	File Size	Added To Correspondence Log	Added To Document Mgmnt
1 <a href="#">Redactxpress FUG.doc</a>	565 KB	No	No

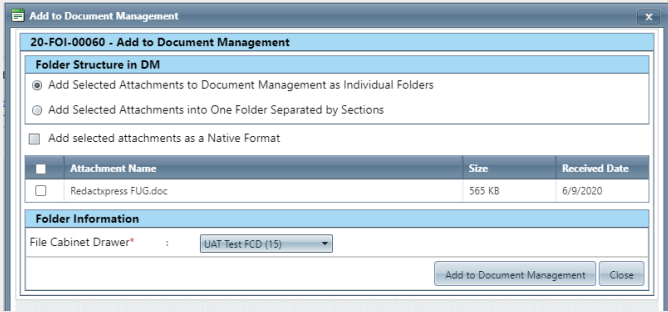
At the bottom of the window are four buttons: 'Add to Review Log', 'Add to Correspondence Log', 'Add to Document Management', and 'Close'.

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:

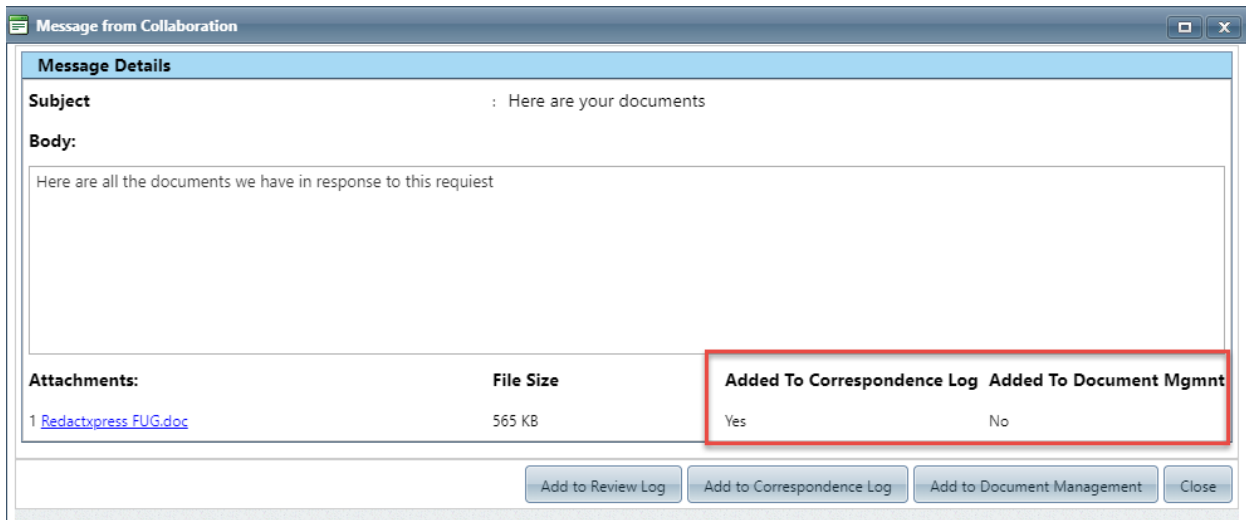




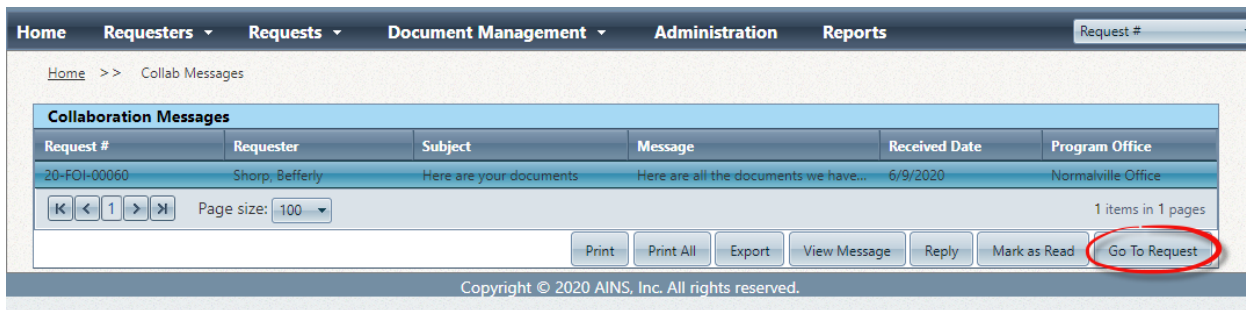
Action	Description	Image
<b>Add to Review Log</b>	<p>Add the attachments to the Review Log of the request for further processing.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	
<b>Add to Correspondence Log</b>	<p>Add the attachments to the Correspondence Log of the request.</p> <p>Select <i>Attachments</i> to include and click <b>Add to Correspondence Log</b>.</p>	

Action	Description	Image
<b>Add to Document Management</b>	<p>Add the attachments to Document Management.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	

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:




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

The screenshot shows a table titled "Request for Documents" with the following data:

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

Below the table, there are navigation buttons: New, **Take Action** (circled in red), View, Delete, Messages (0/0), Send Email/Reminder, Send Reminder by Print, and Action(s) Log. The page size is set to 100, and it shows 2 items in 1 page.

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

The screenshot shows the "Request For Documents Action" form. The "Status" dropdown is set to "Completed". The "Action Date" is 6/9/2020. The "Due Date" is 6/7/2020. The "Completed Date" is 6/9/2020. The "Comments" field is empty. The "Attachment" section has a "Drag and Drop Zone" with buttons for "Scan File", "Attach File", "Print Barcode", and a link for "Professional Referen...". The "Save" and "Cancel" buttons are at the bottom right.

- Check the **Completed** checkbox and enter the **Completed Date**.
- 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:



## Collaboration for Portal Users

Request for Documents						
Action ID	Location(s) Referred	Request Date	Sent Date	Due Date	Completed Date	Status
49	Normalville Office (jgatewood@ai...	06/07/2020	06/08/2020	06/07/2020	06/09/2020	Completed
48	Normalville Office (jgatewood@ai...	06/08/2020	06/08/2020	06/08/2020		Request for Documents Sent
<div><div><div>K</div><div>&lt;</div><div>1</div><div>&gt;</div><div>X</div></div><div>Page size: 100</div><div>2 items in 1 pages</div></div>						
<div><div>New</div><div>Take Action</div><div>View</div><div>Delete</div><div>Messages(0/0)</div><div>Send Email/Reminder</div><div>Send Reminder by Print</div><div>Action(s) Log</div></div>						

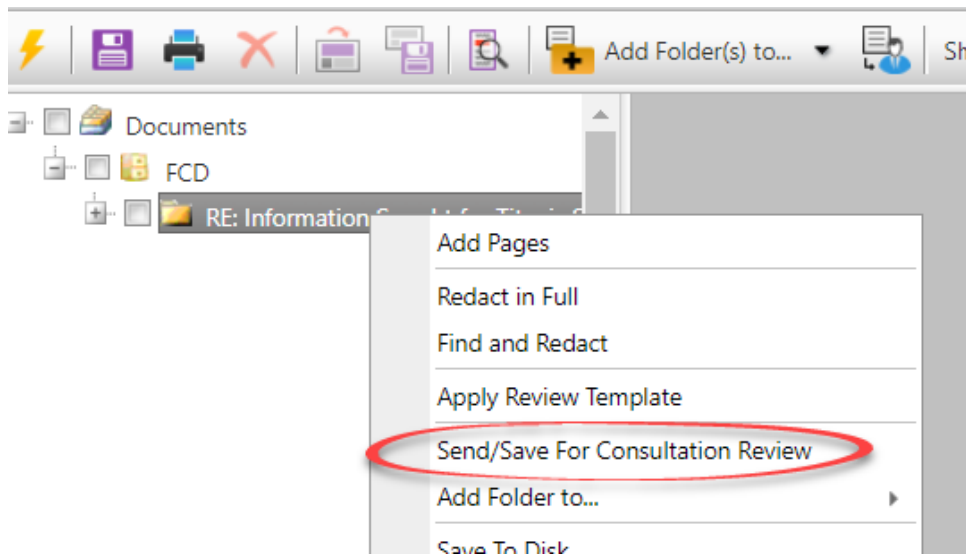


## 3 Consultation Reviews

### 3.1 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:

**Send/Save Documents for Consultation**

Consultation Contact

Consultation Type: Send via Collaboration Room

Review Information

Request ID:

Review Due Date \*:

Comments:

☐ Add Reminder

Task::

Include Document Review Flags: All

Reviewers Information

☐ Include Co  
☐ Select a M

Include Review  
☐ Comment  
☐ Highlight

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

**Customize Email Template**

Subject\*

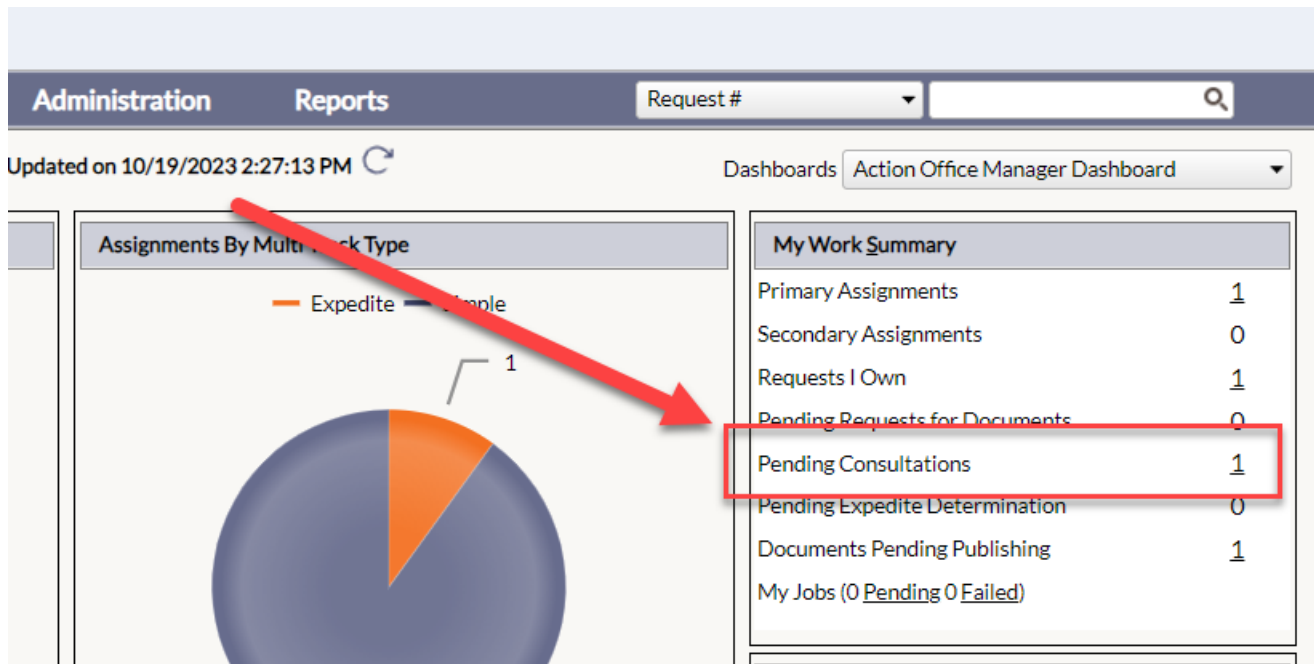
Email Body\*

Lato 3 **B** *I* U **abc** **A**

text

Note: \* fields are mandatory

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

## 3.2 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:

## Collaboration for Portal Users

The screenshot shows a web application interface with a top navigation bar containing links: Home, Requesters, Requests, Document Management, Administration, and Reports. A search bar for 'Request #' is on the right. Below the navigation bar, a breadcrumb trail reads 'Home >> Collab Messages'. The main content area is titled 'Collaboration Messages' and contains a table with the following data:

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

Below the table, there are navigation controls: a set of arrows with the number '1' in the center, a 'Page size: 100' dropdown, and a status indicator '1 items in 1 pages'. At the bottom right of the table area, there are several action buttons: Print, Print All, Export, View Message, Reply, Mark as Read, and Go To Request.

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:

The screenshot shows a window titled 'Message from Collaboration'. Inside, there is a section for 'Message Details' with the following information:

**Subject:** : Reviewed Documents

**Body:**

Made some minor changes, otherwise looks good!

Below the body text is an 'Attachments' table:

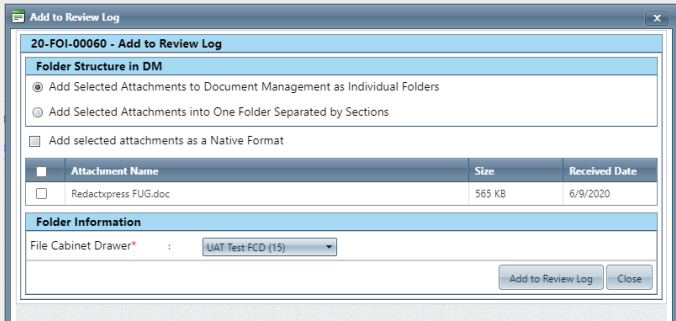
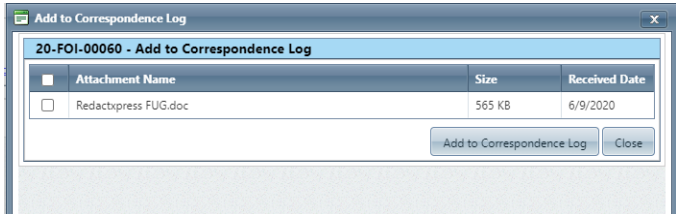
Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 <a href="#">Sodium Fact Sheet Edited.pdf</a>	1.09 MB	No	No

At the bottom of the window, there are four buttons: 'Add to Review Log', 'Add to Correspondence Log', 'Add to Document Management', and 'Close'.

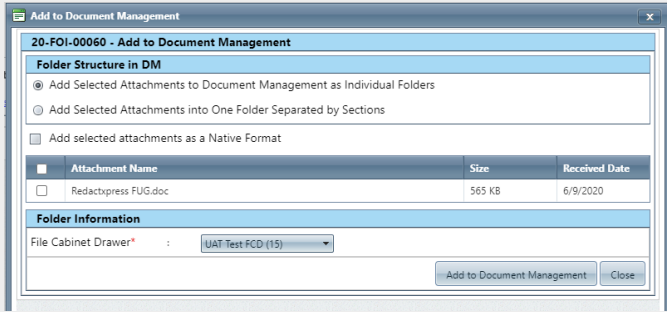
3. There are three options for moving the documents into FOIAXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:



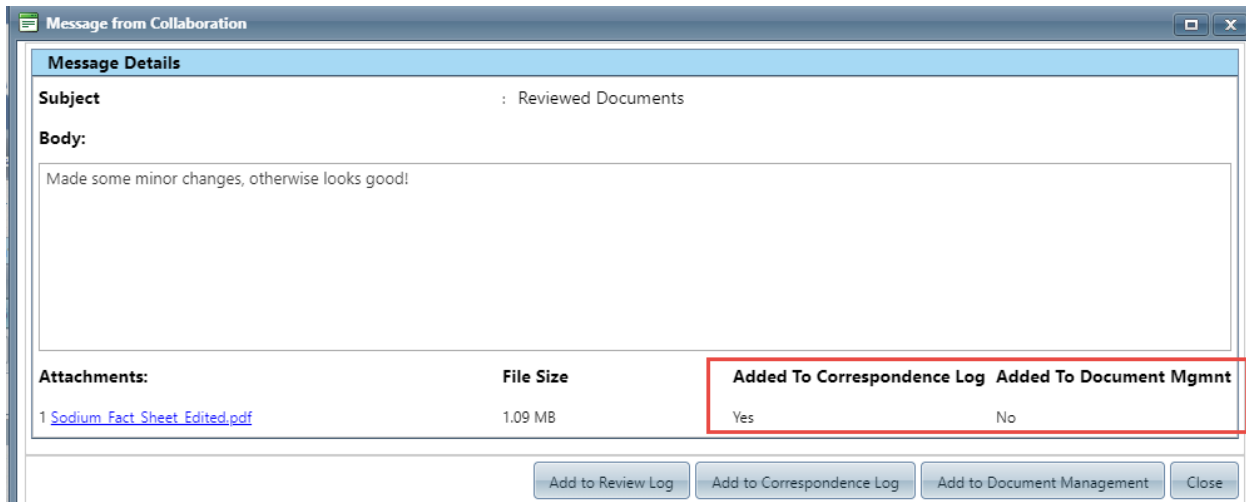


Action	Description	Image
<b>Add to Review Log</b>	<p>Add the attachments to the Review Log of the request for further processing.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	
<b>Add to Correspondence Log</b>	<p>Add the attachments to the Correspondence Log of the request.</p> <p>Select <i>Attachments</i> to include and click <b>Add to Correspondence Log</b>.</p>	



Action	Description	Image
<b>Add to Document Management</b>	<p>Add the attachments to Document Management.</p> <p>Select the <i>Attachments</i> to include, the <i>Folder Information</i> and the <i>Folder Structure</i>.</p>	

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

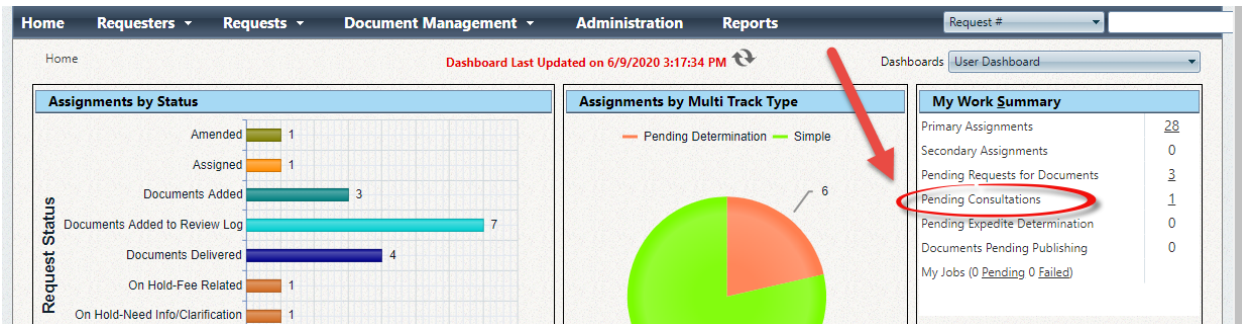


Attachments:	File Size	Added To Correspondence Log	Added To Document Mgmt
1 <a href="#">Sodium Fact Sheet Edited.pdf</a>	1.09 MB	Yes	No

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



## Collaboration for Portal Users



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

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

Page size: 100
2 items in 1 pages


7. On the *Take Action* screen, under *Status* select **Review Complete**.



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





**New Action - Consultation Review Log -1**

Location : Normalville Office


Action Date\* : 6/9/2020 

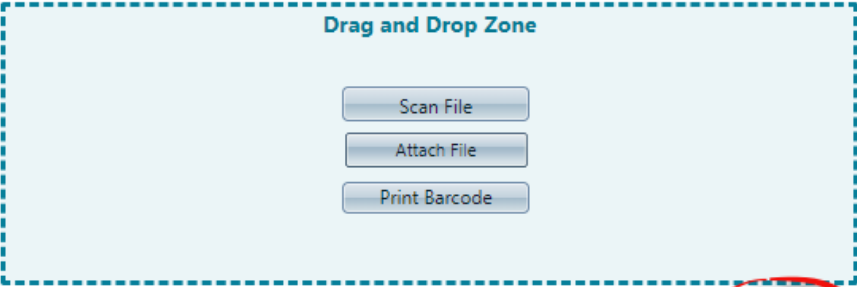
Status\* : Review Complete  

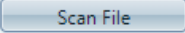
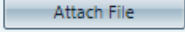
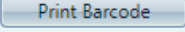
Comments : 



Due Date\* : 6/9/2020 

☒ Completed

Completed Date\* : 6/9/2020 

Attachment : 

Note: \* fields are mandatory

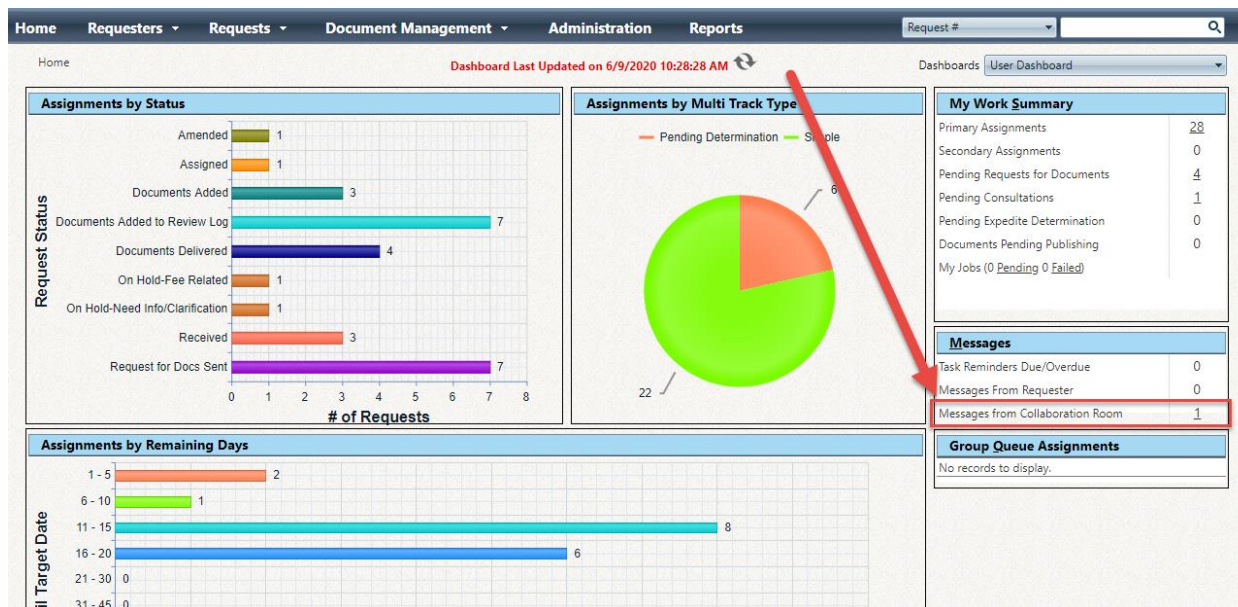
9. Click **Save** to save the action.



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

The screenshot shows the Collaboration Messages screen with the following table:

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

Page size: 100

2 items in 1 pages

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

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



The screenshot shows a window titled "Message from Collaboration". It has a "Message Details" section with a "Subject" field containing "Example attachment" and a "Body" field containing "Here's an attachment, as an example." Below this is an "Attachments" table with one row: "1 10.6 Cover Page.pdf", "1.04 MB", "No", and "No". At the bottom are four buttons: "Add to Review Log" (labeled B), "Add to Correspondence Log" (labeled C), "Add to Document Management" (labeled D), and "Close". A red circle labeled A is next to the "Attachments" header.

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

Buttons: Add to Review Log (B), Add to Correspondence Log (C), Add to Document Management (D), Close.

- The *Message Details* includes the message *Subject* and *Body*. If the message includes any (A) *Attachments*, there are options to take these attachments and (B) **Add to Review Log**, (C) **Add to Correspondence Log**, or (D) **Add to Document Management**.
- You can also click **Reply** to respond to the portal. The correspondence interface appears as shown below:
- The (A) *Original Message* is present in the top portion of the screen. Enter your response in the *Compose Message* fields, providing both the (B) **Subject** and (C) **Body**, as well as (optionally) any *Attachments*. When you're ready to send it, click (D) **Send**:

The screenshot shows the "Message from Collaboration" window with two main sections. The "Original Message" section (labeled A) shows "Subject : Clarification on the thing" and "Body : Do you mean THE thing, or THAT thing? This is an i...". The "Compose Message" section has "Subject\*" (labeled B) with "Re:" and "Body\*" (labeled C) with a text area. Below is an "Attachment" section with "Attach From Disk" and a "Select" button, or "Attach from Request Correspondence Log". At the bottom right are "Send" (labeled D) and "Back" buttons. A note at the bottom left says "Note: \* fields are mandatory".

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

Compose Message:  
 Subject\* (B): Re:  
 Body\* (C):  
 Attachment: Attach From Disk (Select) OR Attach from Request Correspondence Log  
 Send (D) Back

Note: \* fields are mandatory

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

