FOIAXpress

OPEXUS

Collaboration Application User Manual

v11.7.0

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FX 11.7.0 Collaboration Application Portal User Manual

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Contents

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:

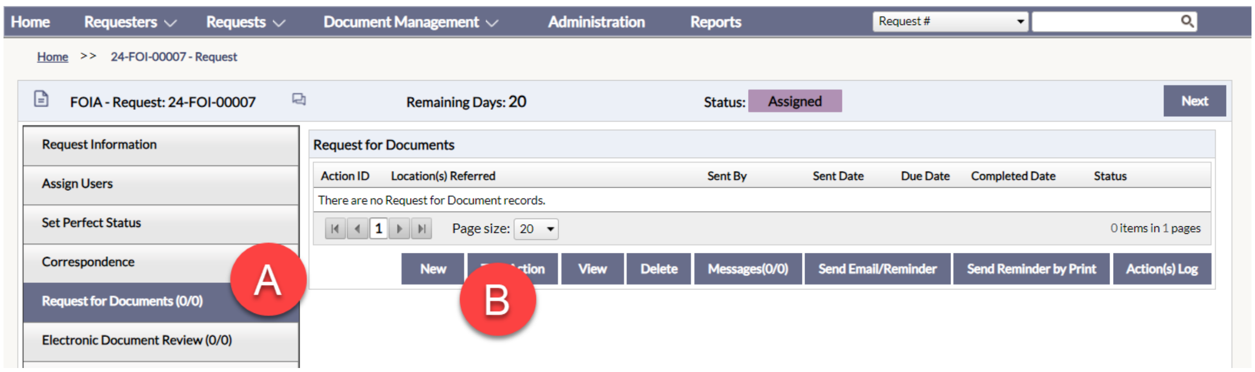
- *Italicized* text indicates a location, for example a particular *Folder*, *Tab*, or *Window*.
- **Bold** text indicates a specific user action, such as clicking a **button**.
- **Red** text and this symbol **(!!)** are used in *Notes* to bring attention to **crucial information**.

2 Requests for Documents

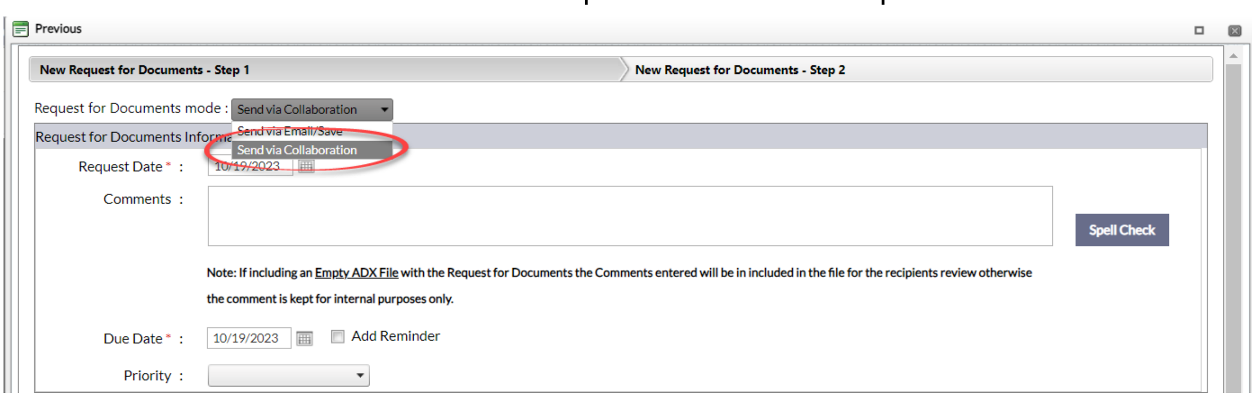
2.1 Sending a Request for Documents

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.

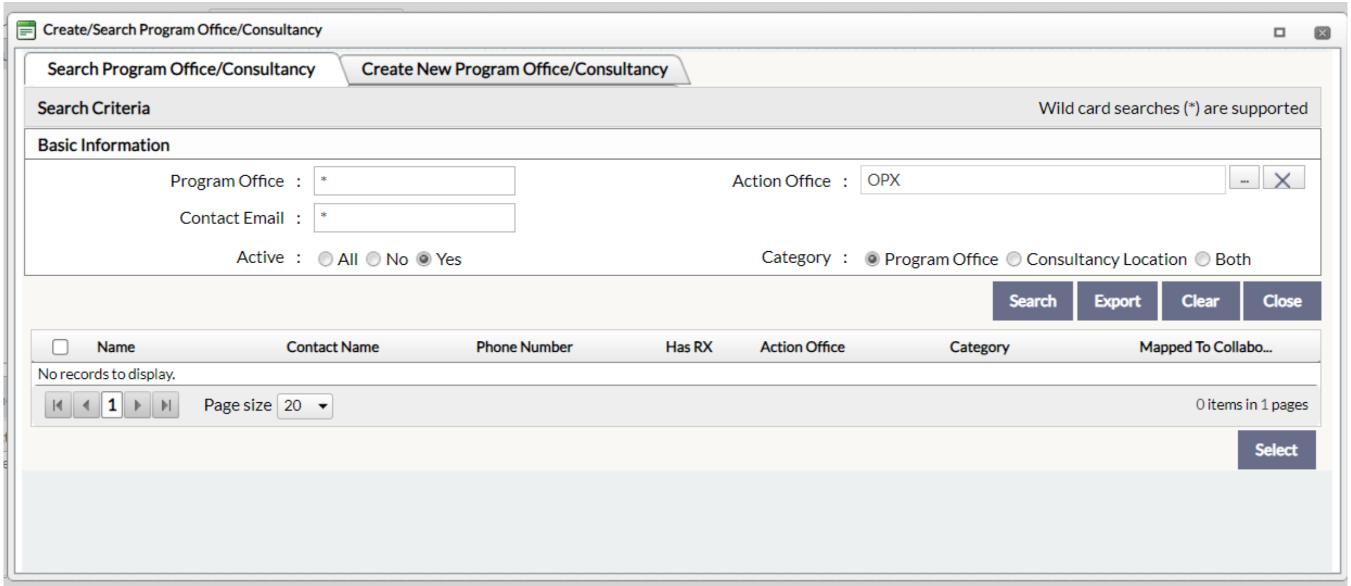
1. Open a request that has been assigned. Requests that are not assigned are not eligible for submitting RFDs.
2. Select (**A**) **Request for Documents** from the left-hand navigation, then click (**B**) **New**:



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.

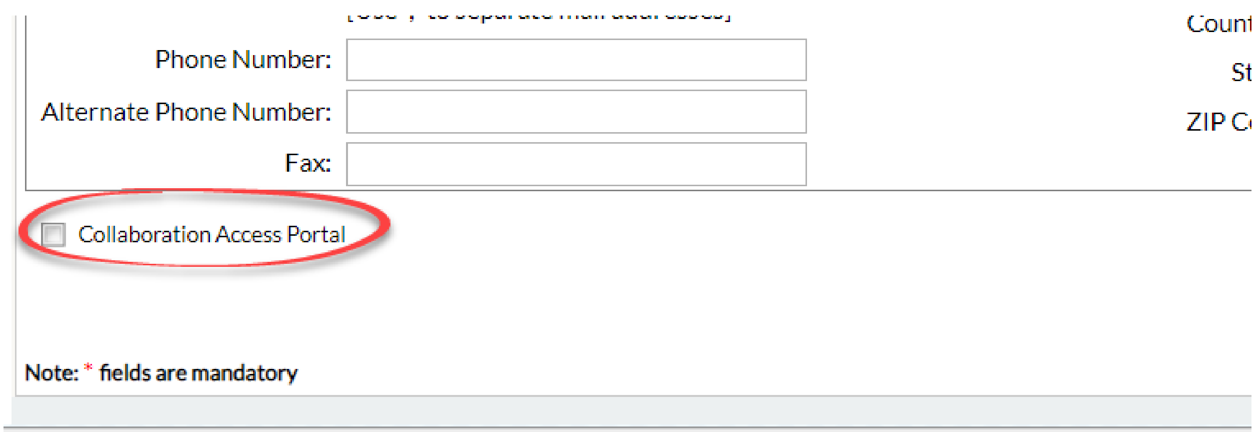


4. In the *Send to: Program Offices* section, click **Add Program Offices**. The *Create/Search Program Office/Consultancy* screen appears as shown below:

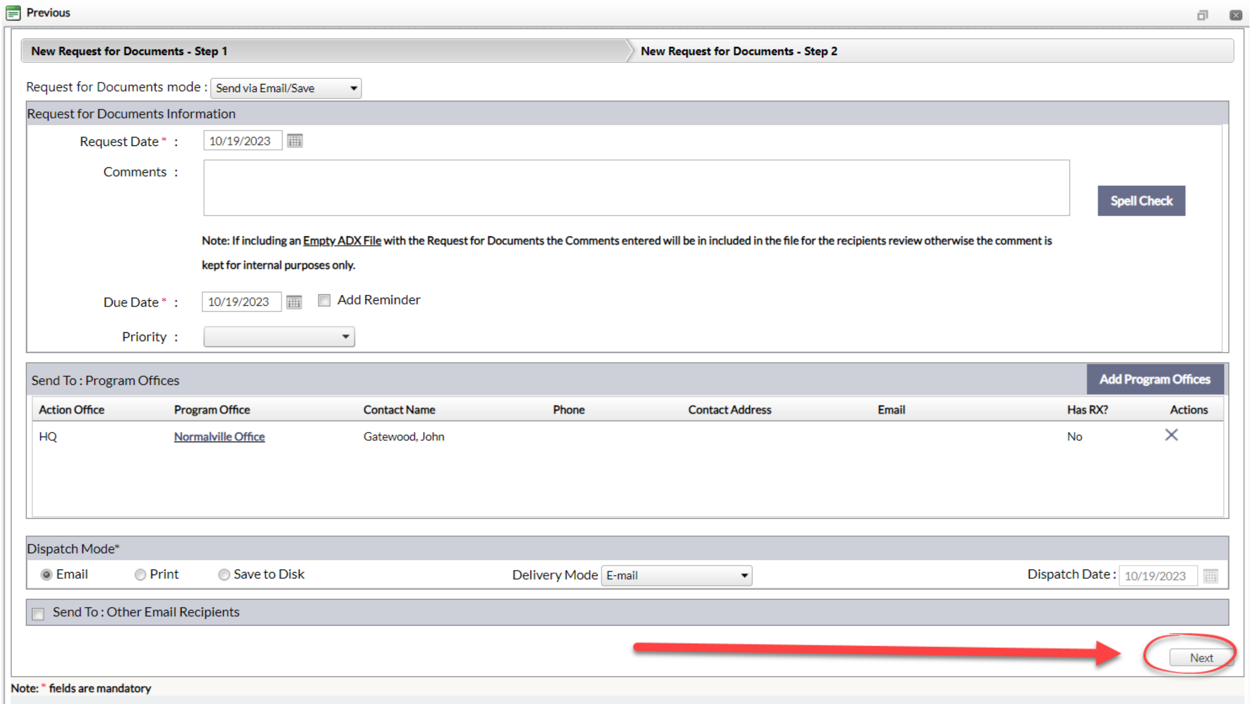


5. Here you can search for and select from existing Program Offices/Consultancies, or **Create New Program Office/Consultancy**.

(!!) 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:

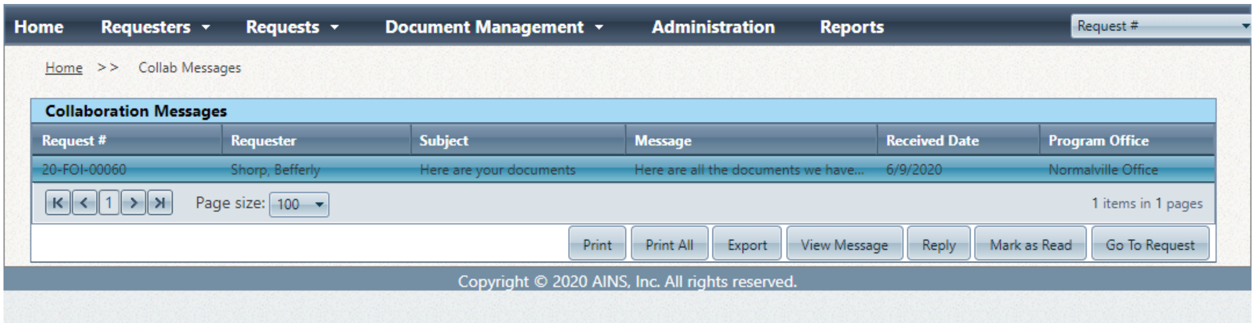


7. The *New RFD – Step 2* screen appears as shown below. First add any (A) Attachments, such as the original request letter for context:
8. You can also configure the message the end user receives with the request in the collaboration portal. First add a **Subject** for the message. You can also edit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

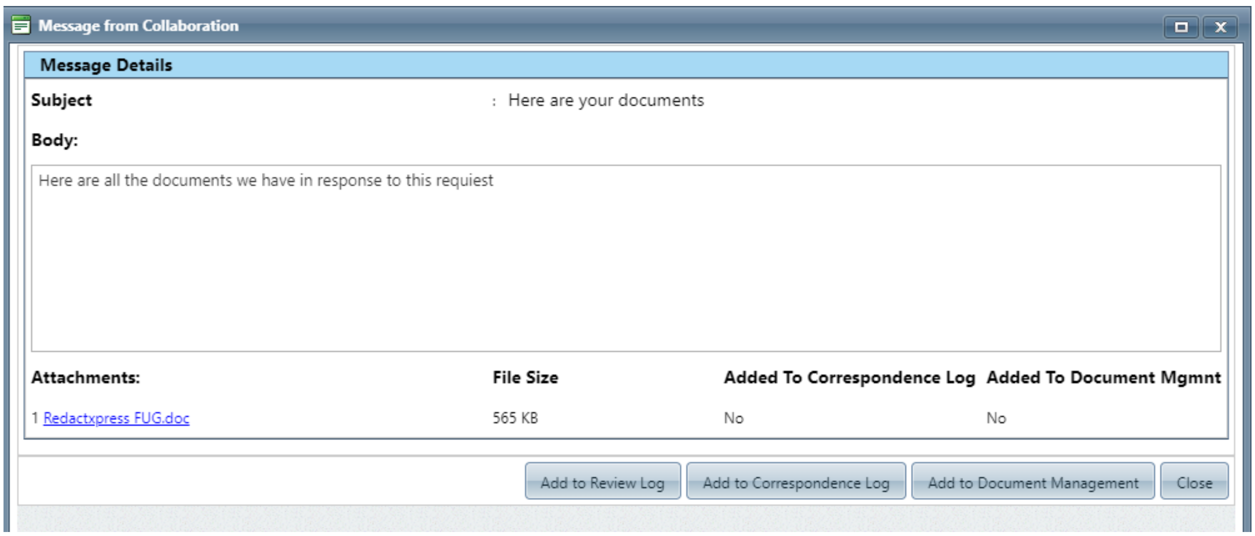
2.2 Receiving an RFD Response

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.

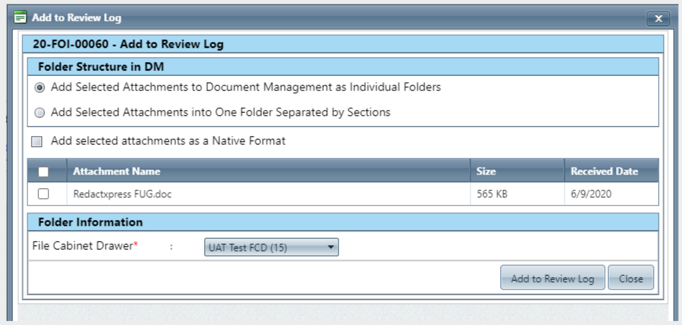
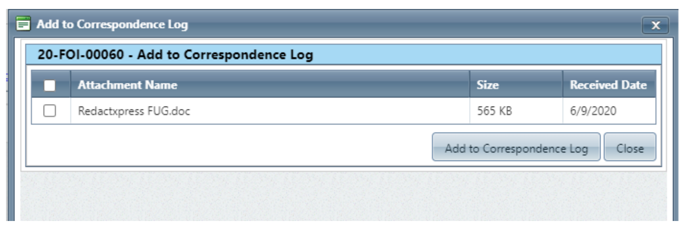
1. Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:

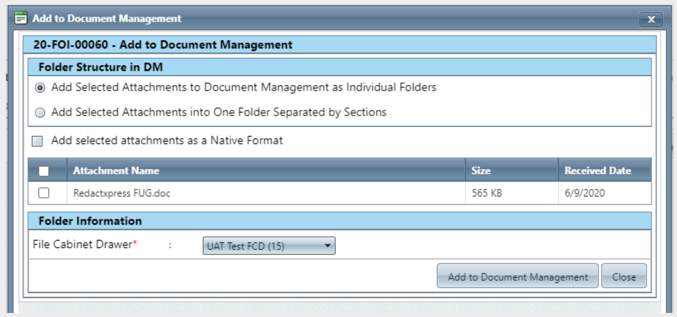


2. Select the new message and click **View Message**. The subject/body of the message should alert you that this message contains the responsive documents:

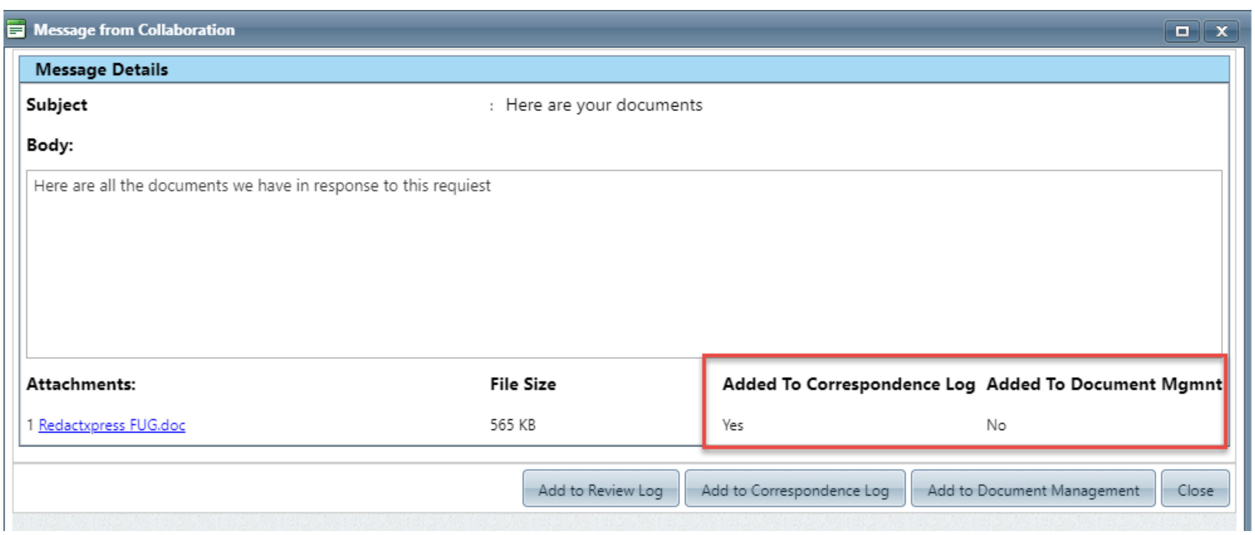


3. There are three options for moving the documents into FOIAXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

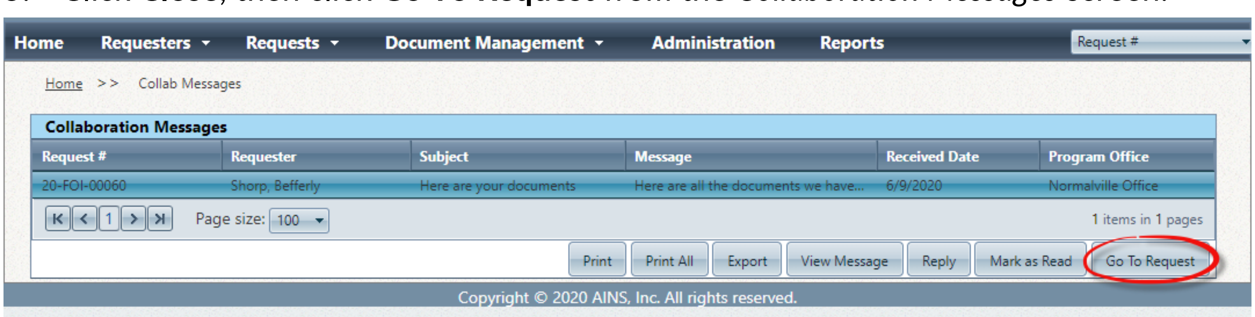
Action	Description	Image
Add to Review Log	Add the attachments to the Review Log of the request for further processing. Select the *Attachments* to include, the *Folder Information* and the *Folder Structure.*	
Add to Correspondence Log	Add the attachments to the Correspondence Log of the request. Select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

Action	Description	Image
Add to Document Management	Add the attachments to Document Management. Select the *Attachments* to include, the *Folder Information* and the *Folder Structure.*	

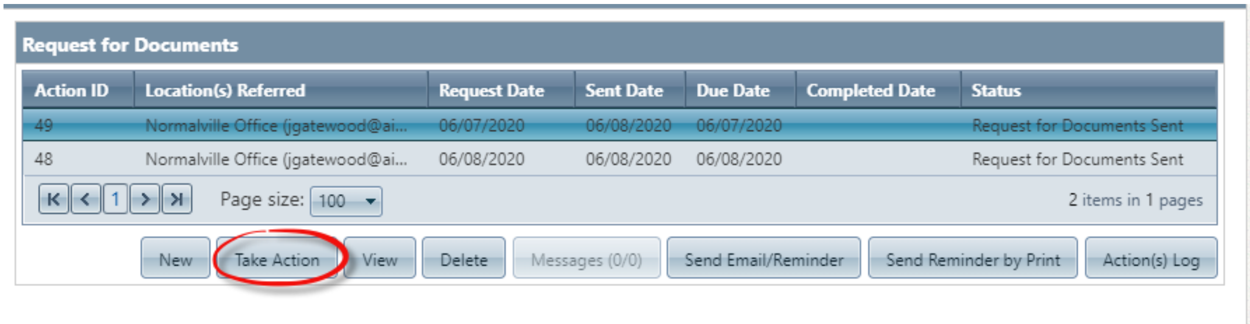
4. After adding attachments, the action is reflected on the *Message Details* screen as shown below:



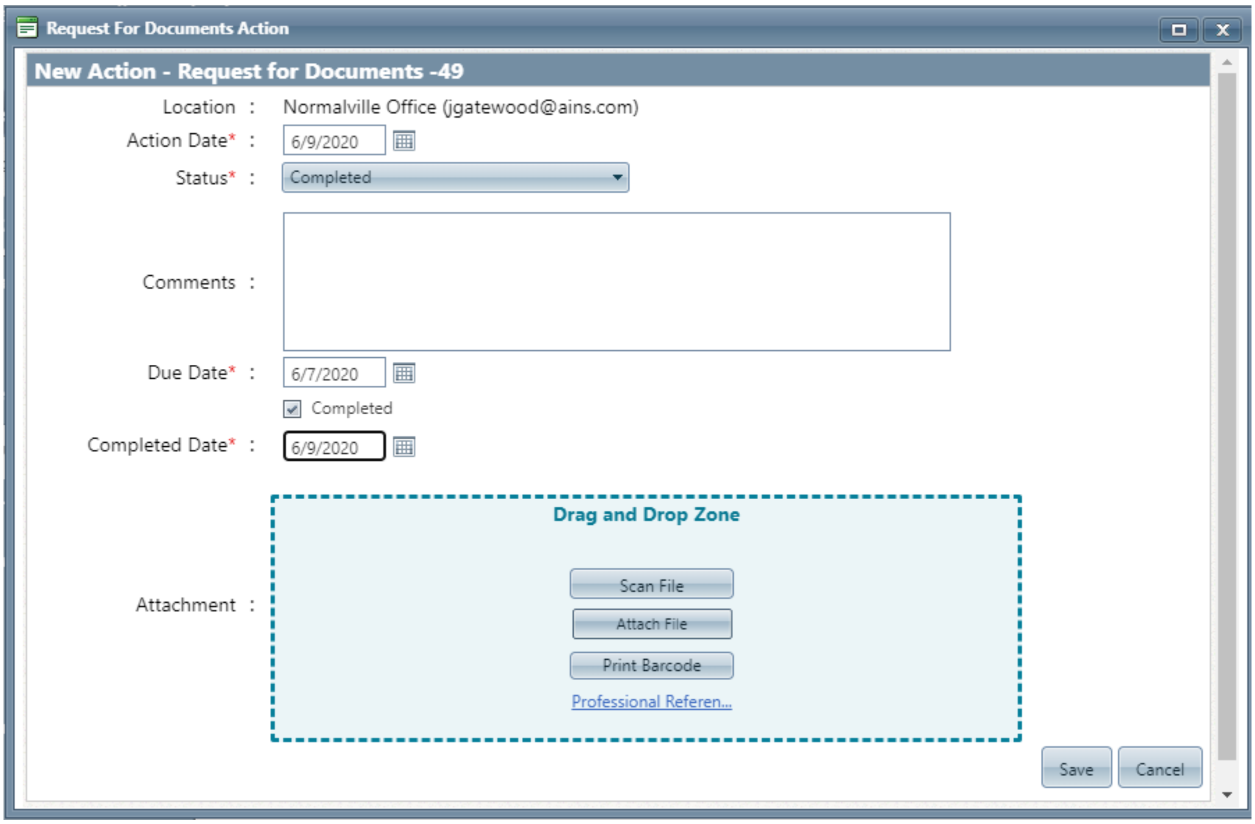
5. Click **Close**, then click **Go To Request** from the *Collaboration Messages* screen:



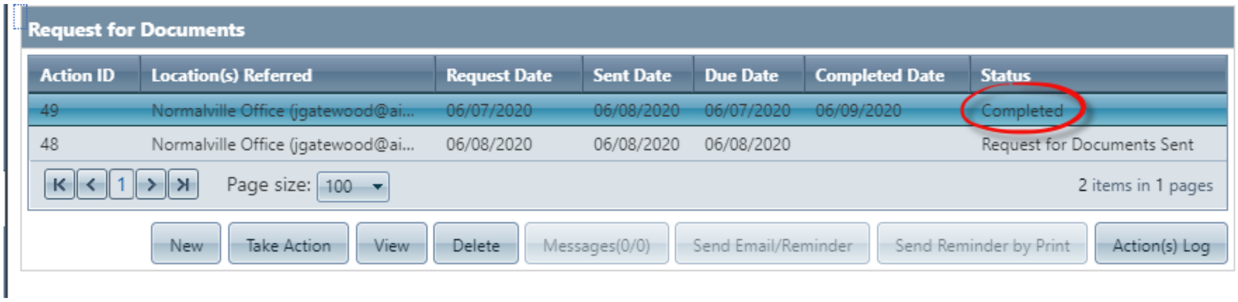
6. Click **Request for Documents** then select the request you just completed and click **Take Action**:



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:



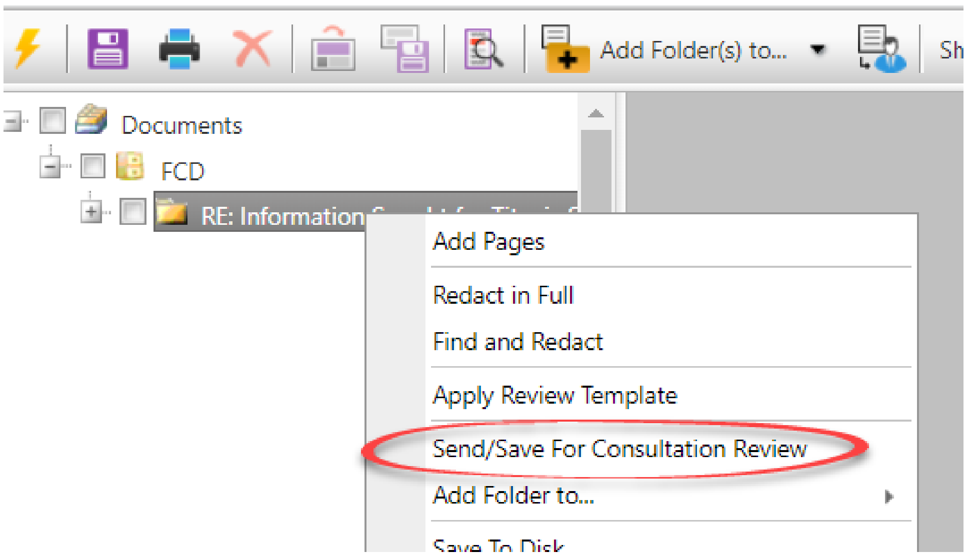
Action ID	Location(s) Referred	Request Date	Sent Date	Due Date	Completed Date	Status
49	Normalville Office (jgatewood@ai...	06/07/2020	06/08/2020	06/07/2020	06/09/2020	Completed
48	Normalville Office (jgatewood@ai...	06/08/2020	06/08/2020	06/08/2020		Request for Documents Sent

3 Consultation Reviews

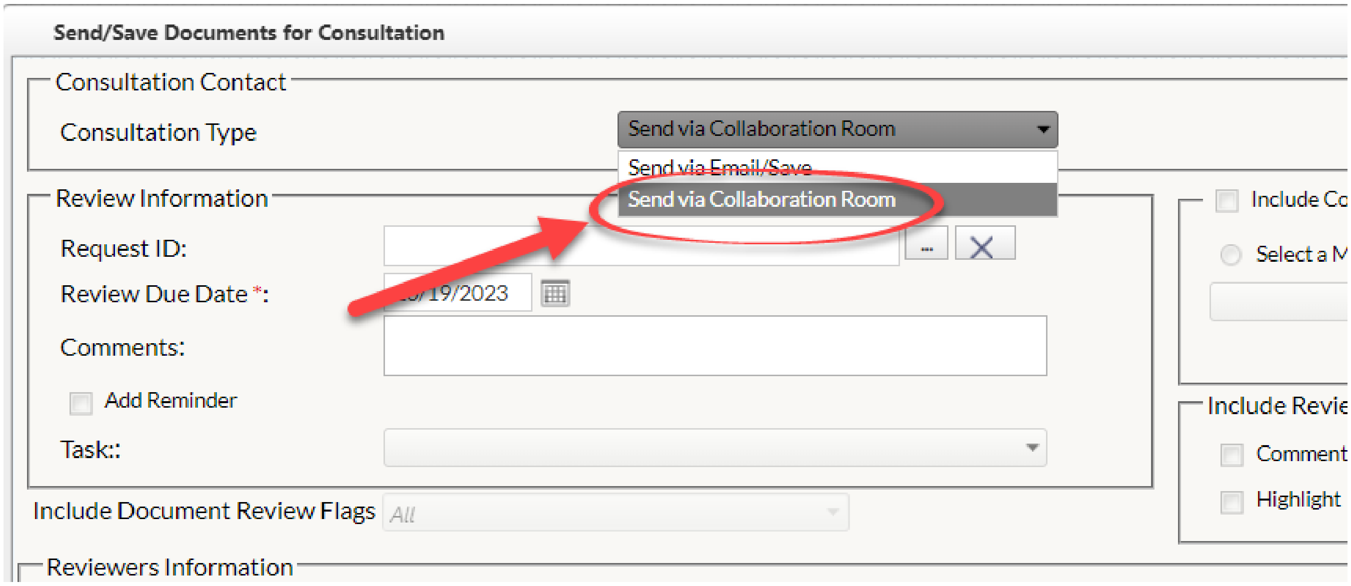
3.1 Send Documents for Consultation Review

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:

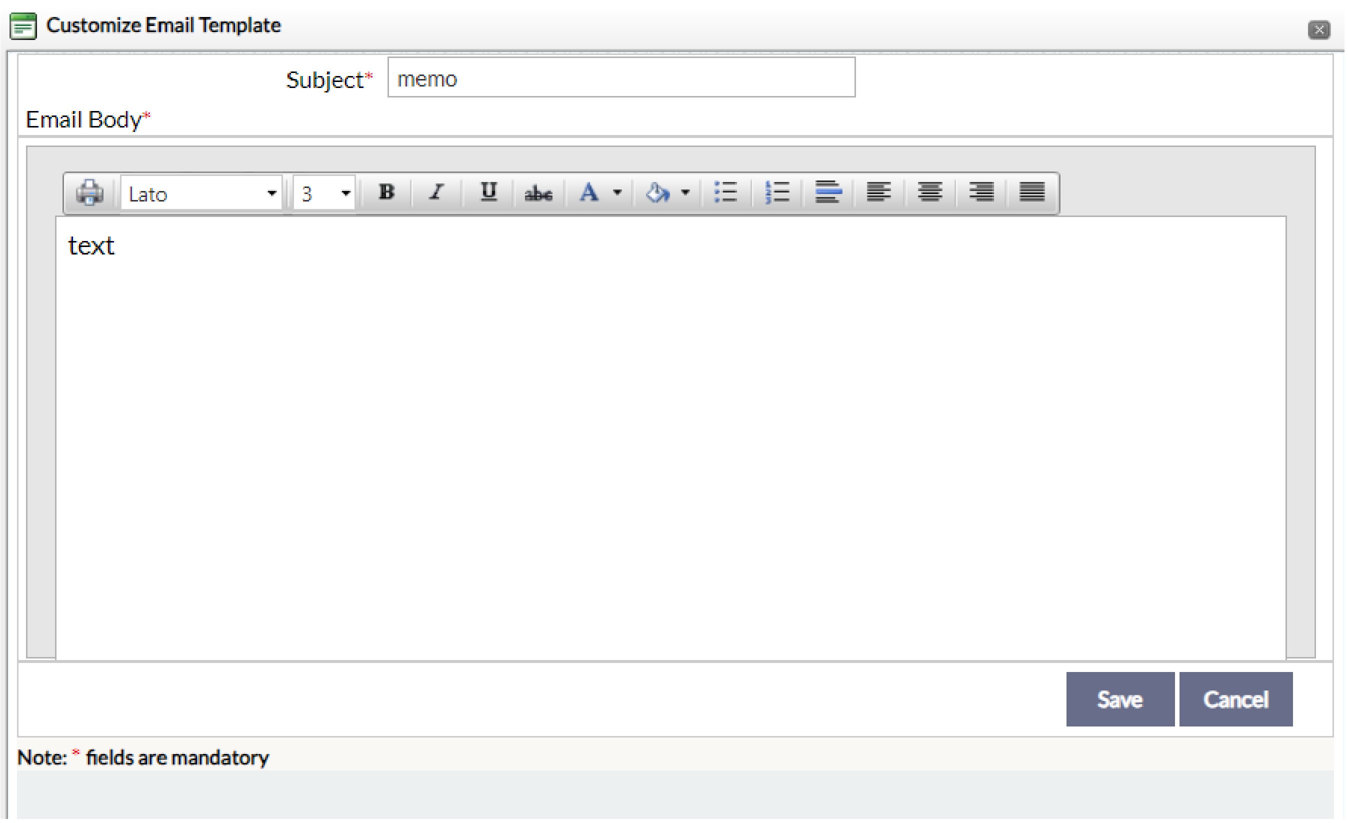
1. First, open the folder you'd like to send in Document Management. In *Document Management*, select the **Document/Folder** to send for review and load any review layer you'd like to include.
2. Right click the Document/Folder and click **Send/Save for Consultation Review**:



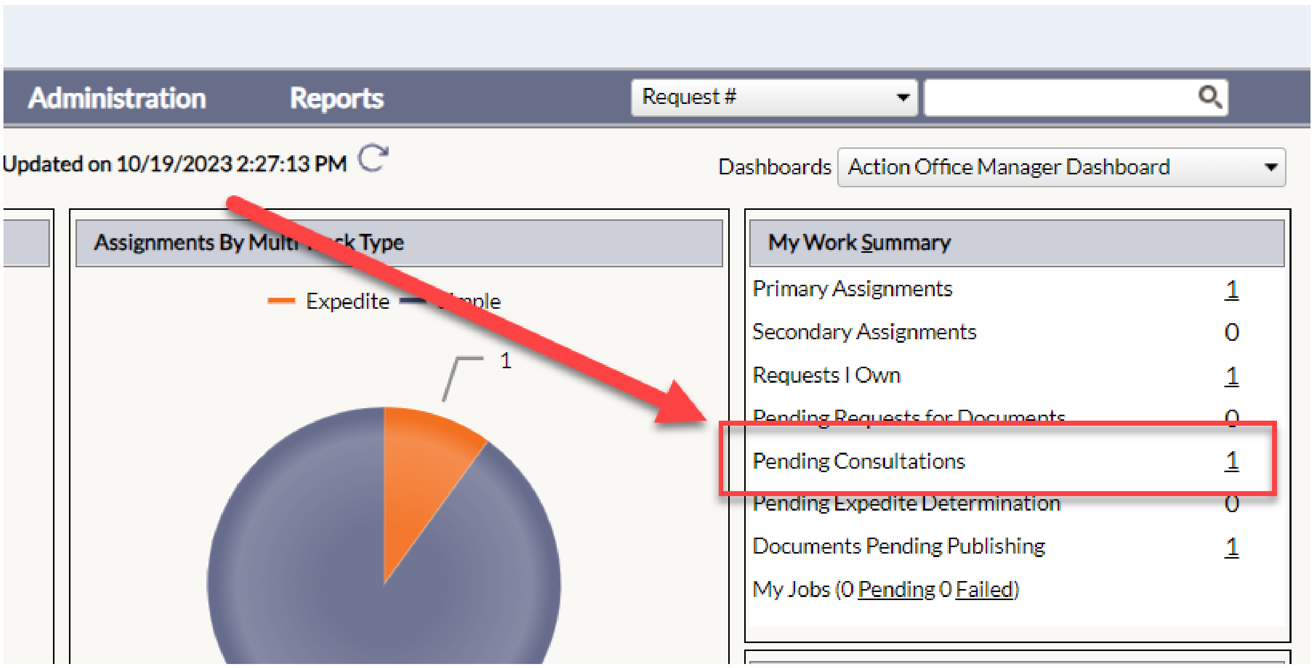
3. The *Send/Save Documents for Consultation* screen appears as shown below. First, under *Consultation Type*, you must select **Send via Collaboration Room.** This ensures the request is sent to the portal for consultation review:



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**:

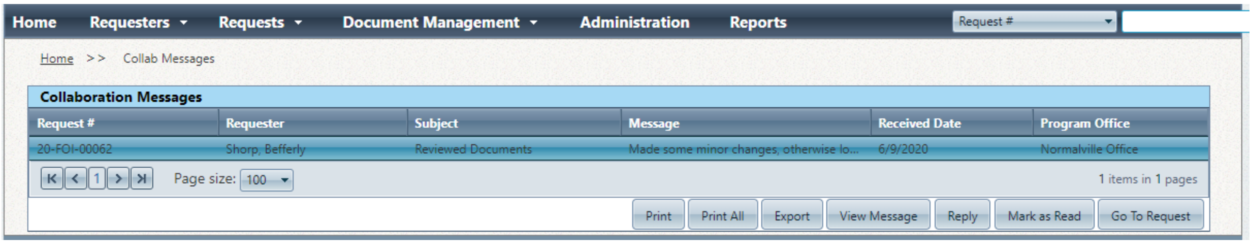


10. Follow the steps in the *Receiving Responsive Documents* section for details on receiving a Consultation Review from the portal.

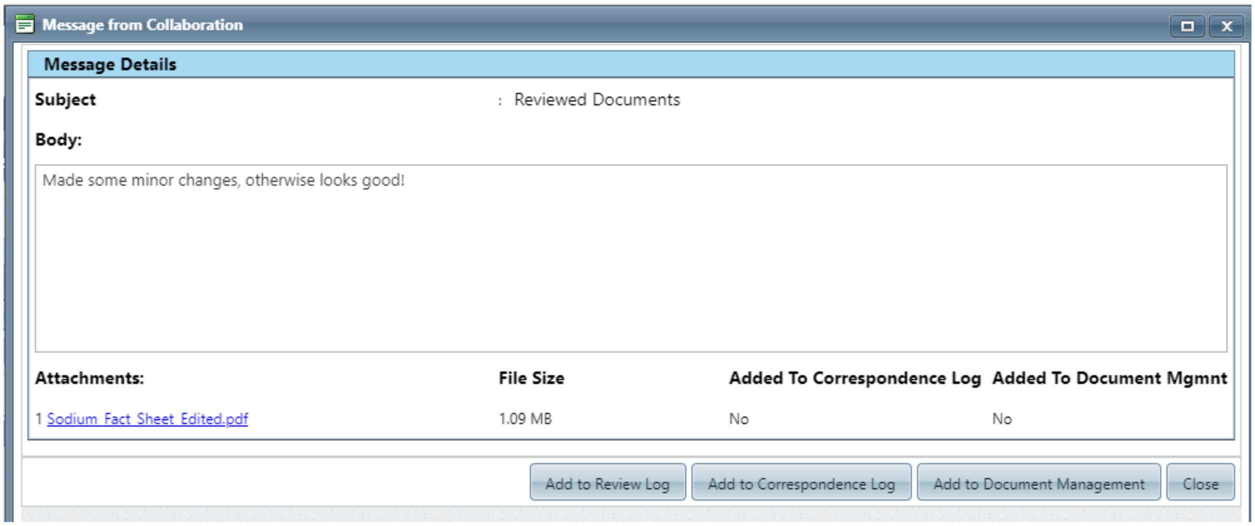
3.2 Receiving a Consultation Review

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*.

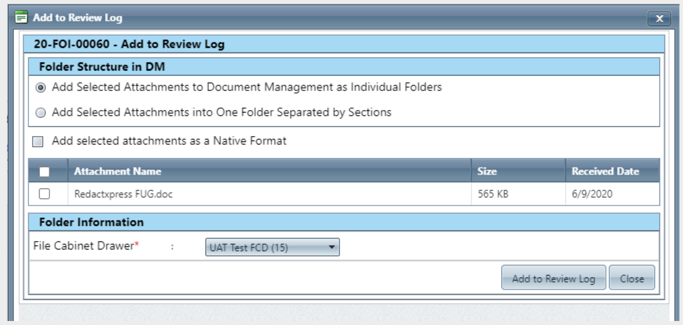
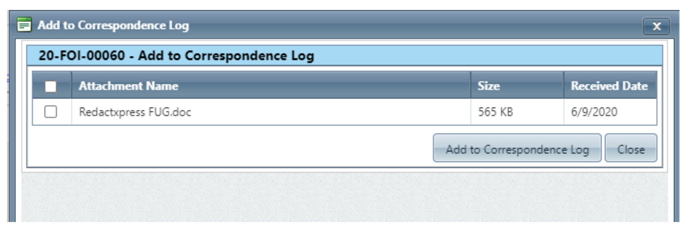
1. Click the **Messages from Collaboration Room** link on the *Home Page* to access your Collaboration Messages. The *Collaboration Messages* screen appears as shown below:

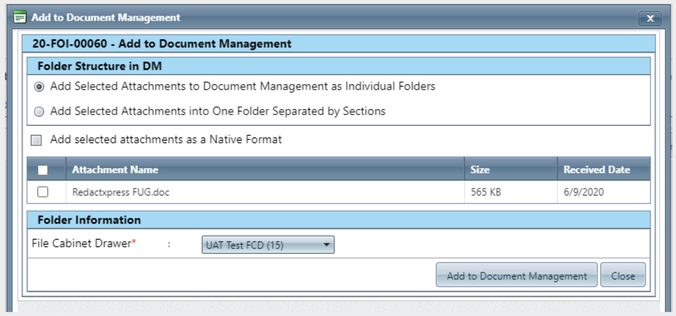


2. Select the new message and click **View Message**. The subject/body of the message should alert you that this message contains the responsive documents:

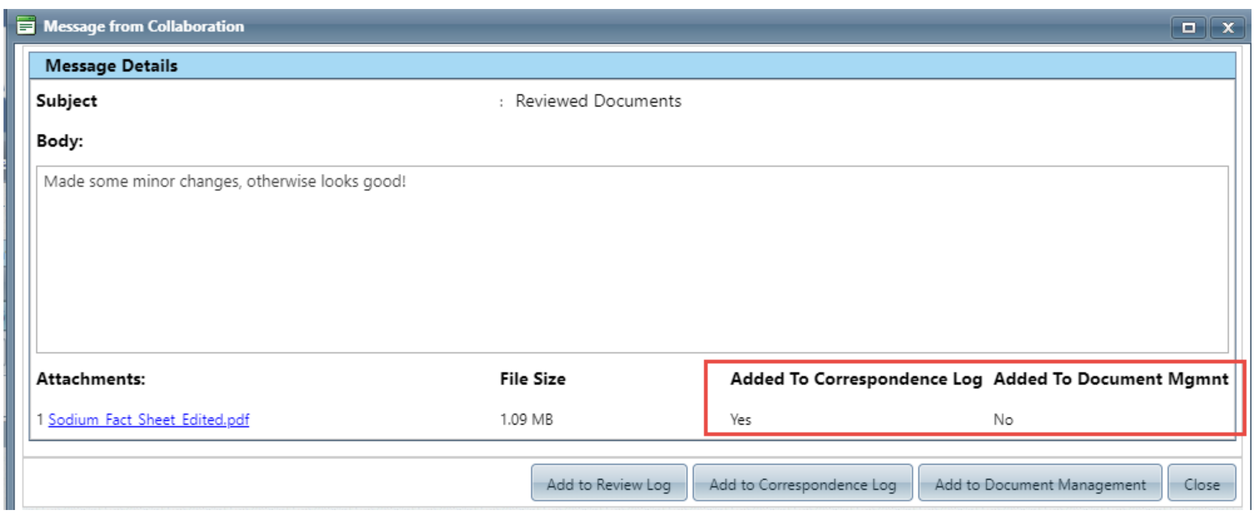


3. There are three options for moving the documents into FOIAXpress: **Add to Review Log**, **Add to Correspondence Log**, and **Add to Document Management**. Each is detailed in the following table:

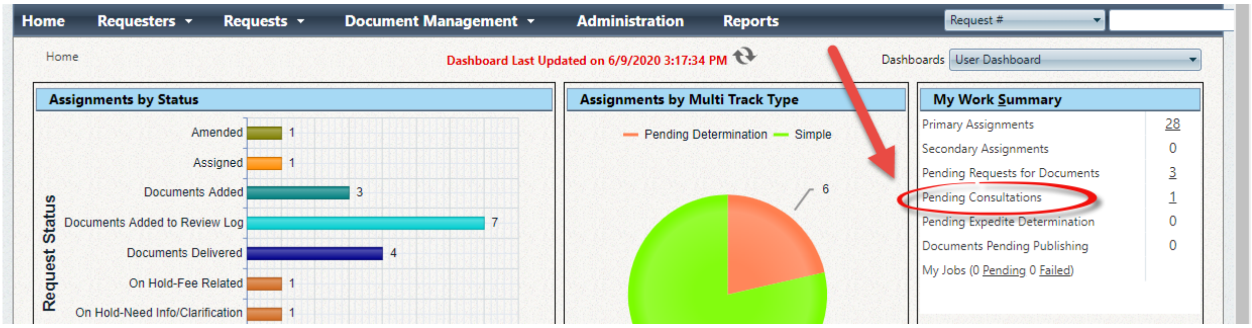
Action	Description	Image
Add to Review Log	Add the attachments to the Review Log of the request for further processing. Select the *Attachments* to include, the *Folder Information* and the *Folder Structure.*	
Add to Correspondence Log	Add the attachments to the Correspondence Log of the request. Select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

Action	Description	Image
Add to Document Management	Add the attachments to Document Management. Select the *Attachments* to include, the *Folder Information* and the *Folder Structure.*	

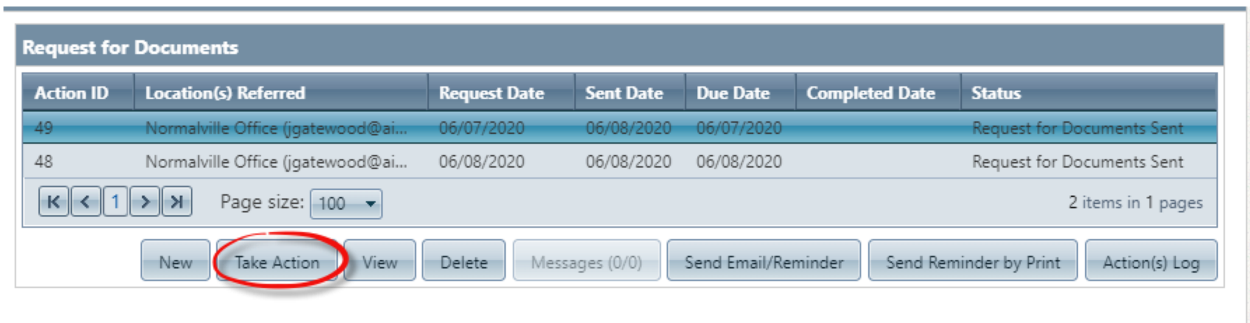
4. After adding attachments, the action is reflected on the *Message Details* screen as shown below:



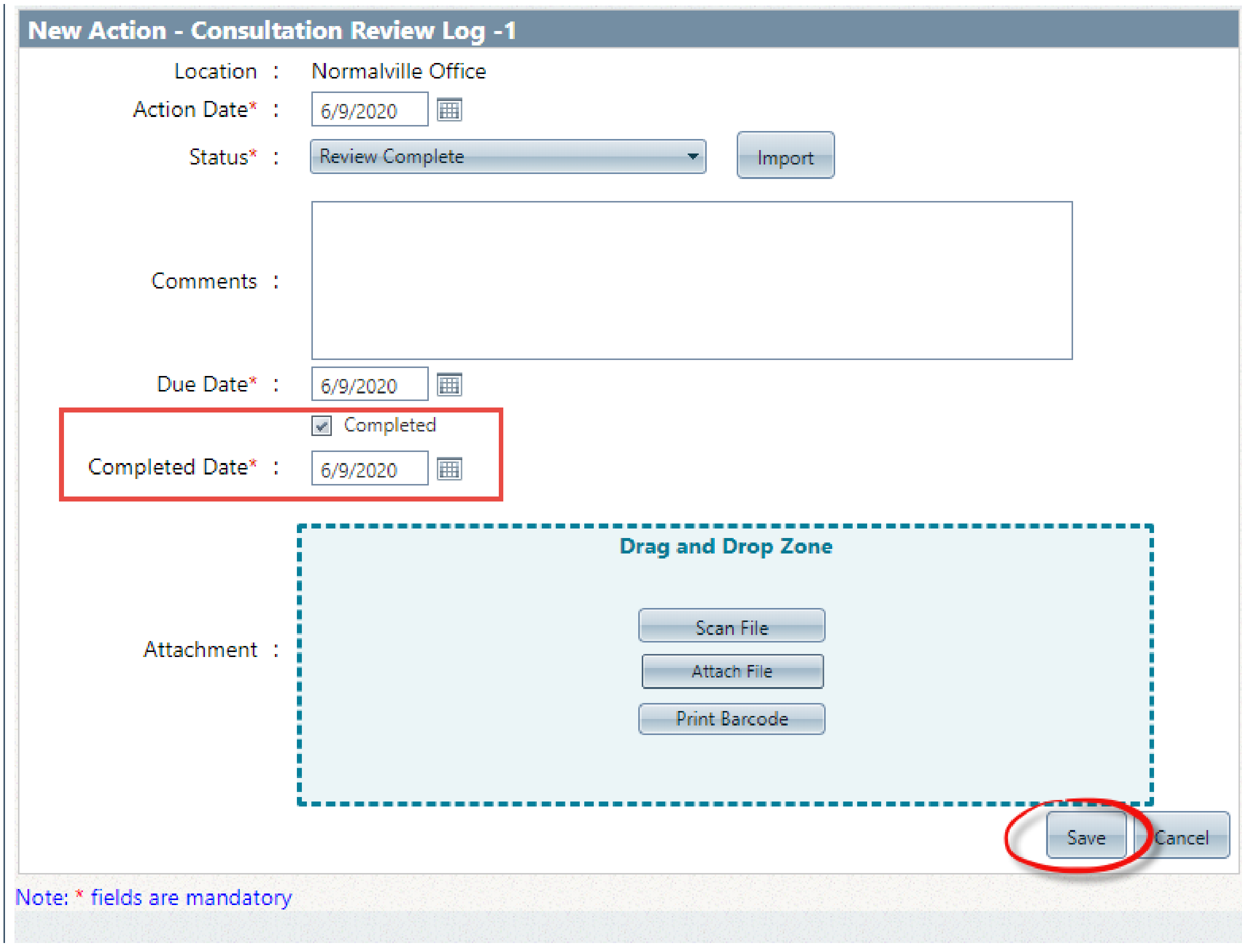
5. Click **Close**, then click **Home** to access the home screen. Under *My Work Summary*, select **Pending Consultations**:



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**.

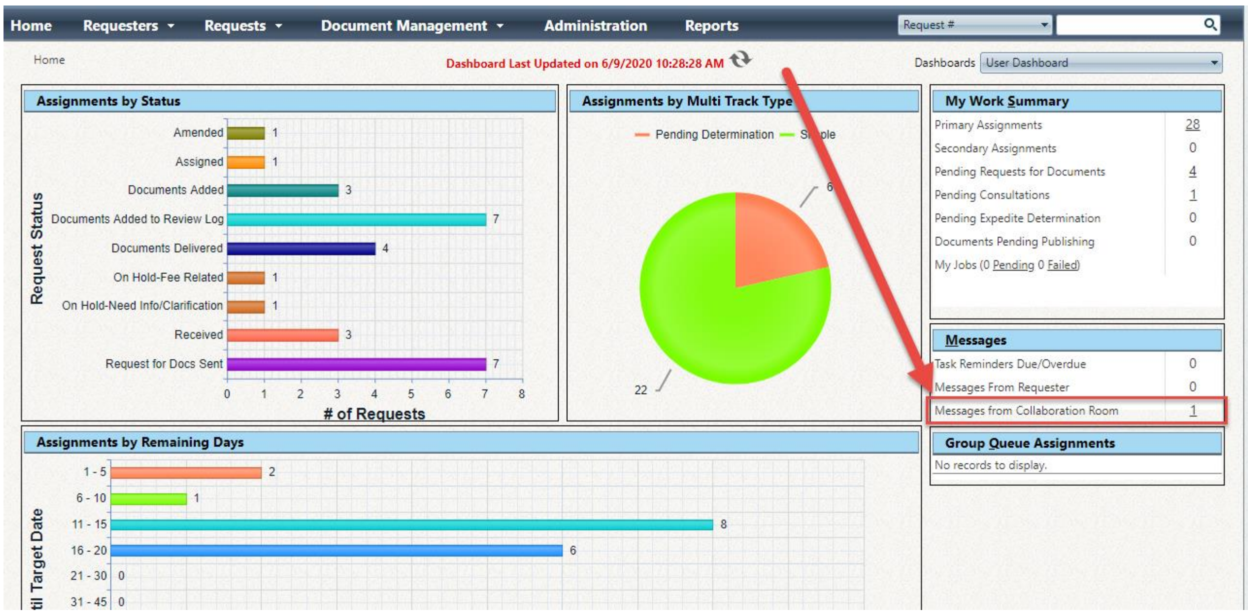


9. Click **Save** to save the action.

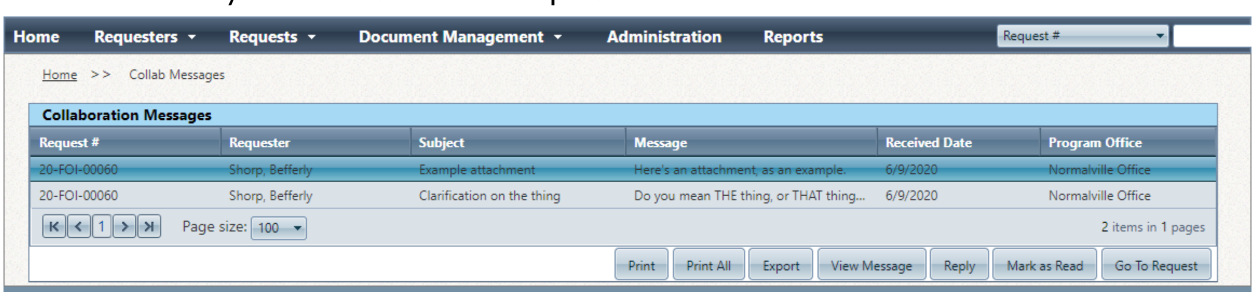
4 Correspondence

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**.

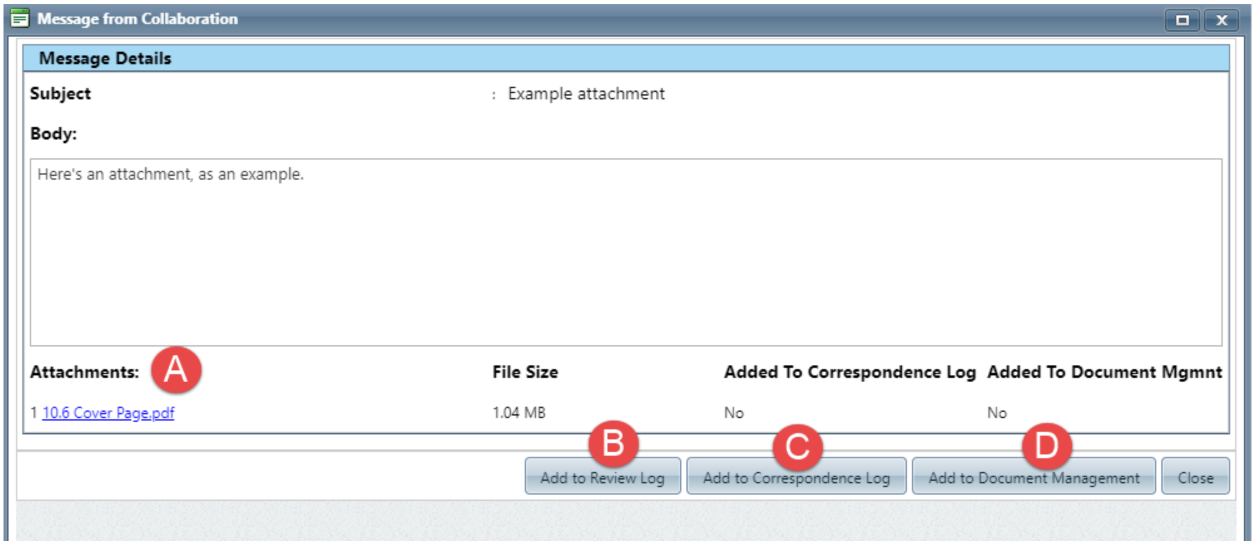
1. From the Home Page, click the **Messages from Collaboration Room** link to view messages received from the Collaboration Room.



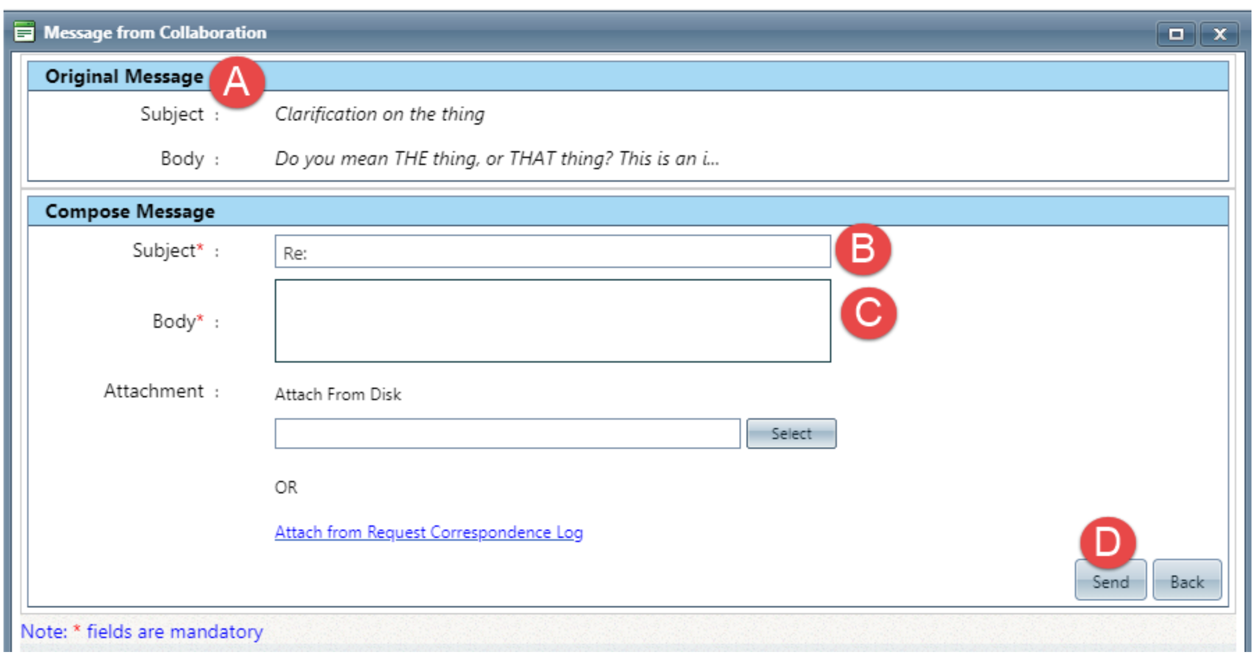
2. The *Collaboration Messages* screen appears as shown below. The screen includes a (**A**) list of messages received from the Collaboration Portal, as well as (**B**) Actions you can take on the messages, including **View Message**, **Reply, Mark as Read**, and **Go To Request**, which links directly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



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.