

# FOIAXpress

## Collaboration Admin Manual

v11.8.0

October 2024



OPEXUSTECH.COM

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# FOIAExpress v11.8.0 Collaboration Admin Manual

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# 1 Introduction

Welcome to the Collaboration Portal Administration Manual. This manual provides easy reference information to help Collaboration Portal Administrators utilize the system features to best suit your organization's needs.

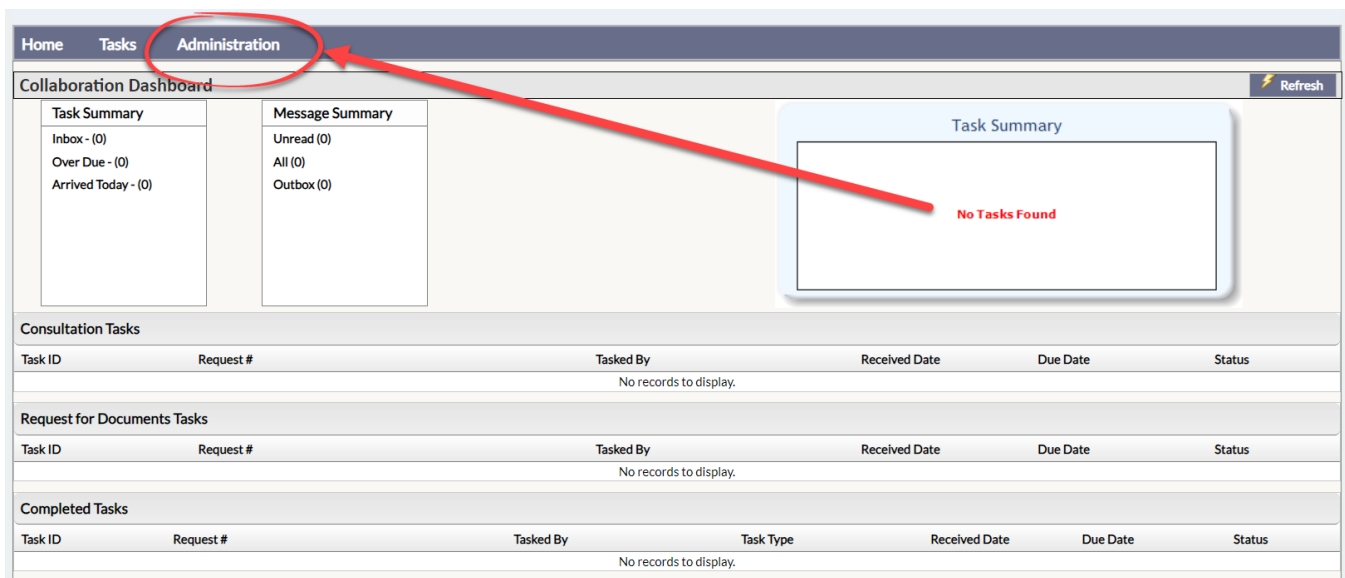
## 1.1 In This Manual

This manual includes the following topics:

- System Configuration: Set up Portal application/email templates, error messages, Find and Redact patterns, and more
- System Administration: Adjust *Global Address List Settings*, *Scheduler Configuration*, and other system settings
- Security: Configure Portal security options
- Organization Setup: Configure enterprise-wide settings and manage users
- Jobs: View and manage *Email Log* and *Failed OCR Job* entries

## 1.2 Accessing Portal Administration

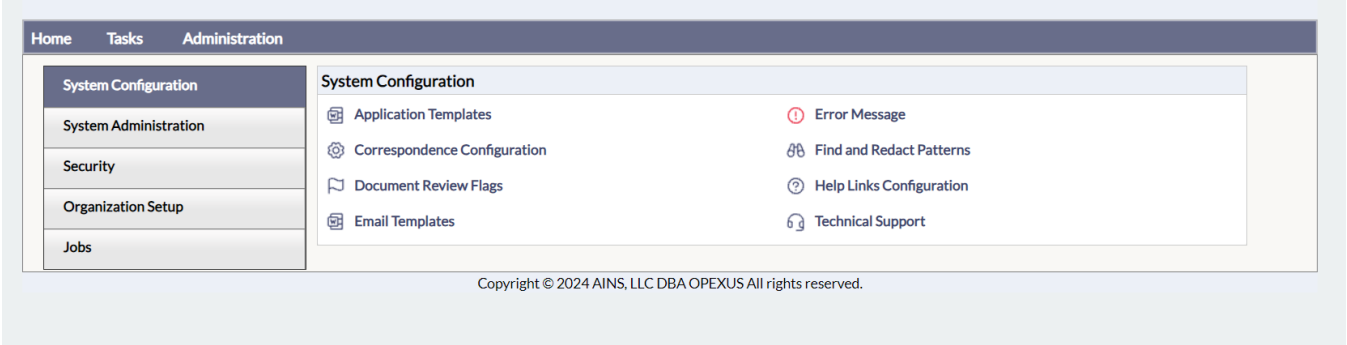
Portal users with Administrator access can click the *Administration* tab on their Collaboration Portal Home Screen.



The *Administration* tab opens to the *System Configuration* screen.



# Introduction

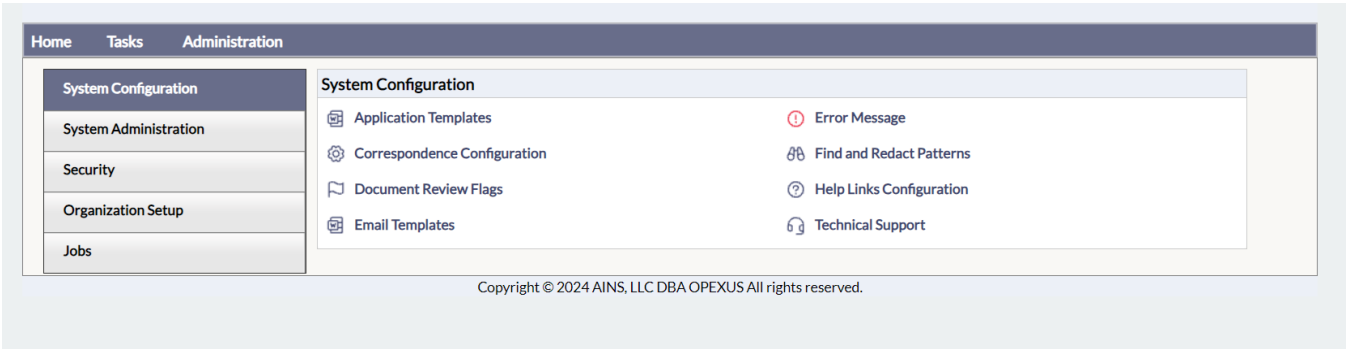


Within the Administration folder, you will find *System Configuration*, *System Administration*, *Security*, *Organization Setup*, and *Jobs* configuration pages. See the following sections for details on each.



# 2 System Configuration

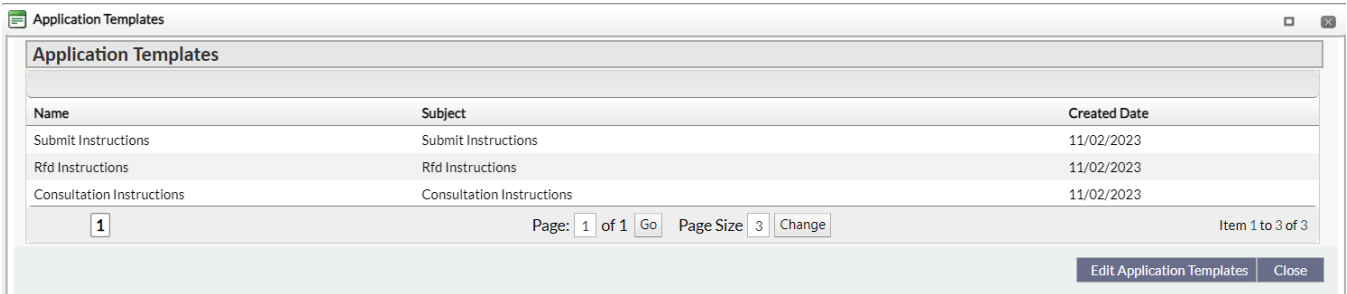
The *System Configuration* page allows Administrators to configure the topics listed below. Access *System Configuration* by navigating to **Administration > System Configuration**.



The following subsections cover each component of the *System Configuration* page.

## 2.1 Application Templates

Open the *Application Templates* page (**Administration > System Configuration > Application Templates**) to view and edit email templates used in Collaboration Portal.



To make changes to an application template:

1. Select the template, then click **Edit Application Templates**.
2. The *Edit Application Template* screen appears. From here, you can rename the **Email Template** and/or set the **Email Subject**.




## System Configuration

**Edit Application Template**

Email Template\*

Email Subject\*

Email Body



Normal

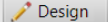

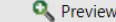
**Task Types:**

**Request for Document Task** ? is a request for a record search for records responsive to a request under the Access to Information and Privacy Act.

**Consultation Task** ? is a request for the review of collected records that may contain trade secrets of a third party or contains information the disclosure of which could reasonably be expected to be injurious to the conduct of international affairs, the defence of Canada or any state allied or associated with Canada or the detection, prevention or suppression of subversive or hostile activities.

**Request for Documents Task**

1. Locate the responsive records

 Design  HTML  Preview

Words: 262 Characters: 1647

3. In the main text field, edit the content of the email body.
4. Make sure to click **Save** when you're finished.

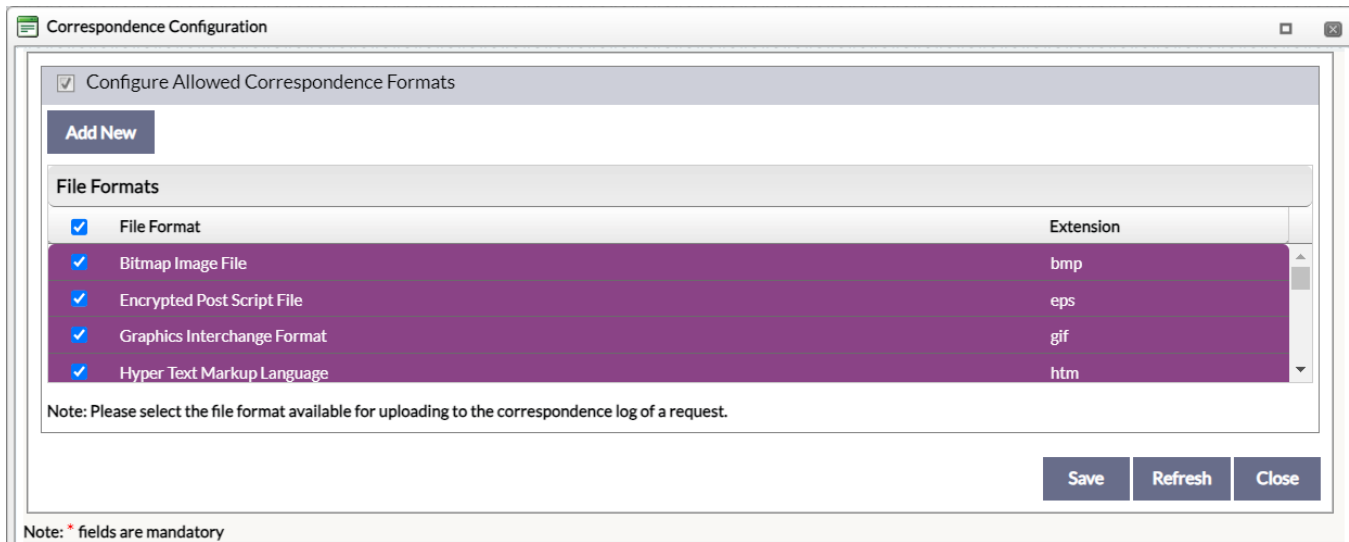
## 2.2 Correspondence Configuration

The *Correspondence Configuration* page has options to configure allowed Correspondence formats. Use the checkboxes to indicate which file formats should be available when uploading an attachment to the Correspondence Log of a request.





## System Configuration



Correspondence Configuration

☒ Configure Allowed Correspondence Formats

**Add New**

**File Formats**

<input checked="" type="checkbox"/> File Format	Extension
<input checked="" type="checkbox"/> Bitmap Image File	bmp
<input checked="" type="checkbox"/> Encrypted Post Script File	eps
<input checked="" type="checkbox"/> Graphics Interchange Format	gif
<input checked="" type="checkbox"/> Hyper Text Markup Language	htm

Note: Please select the file format available for uploading to the correspondence log of a request.

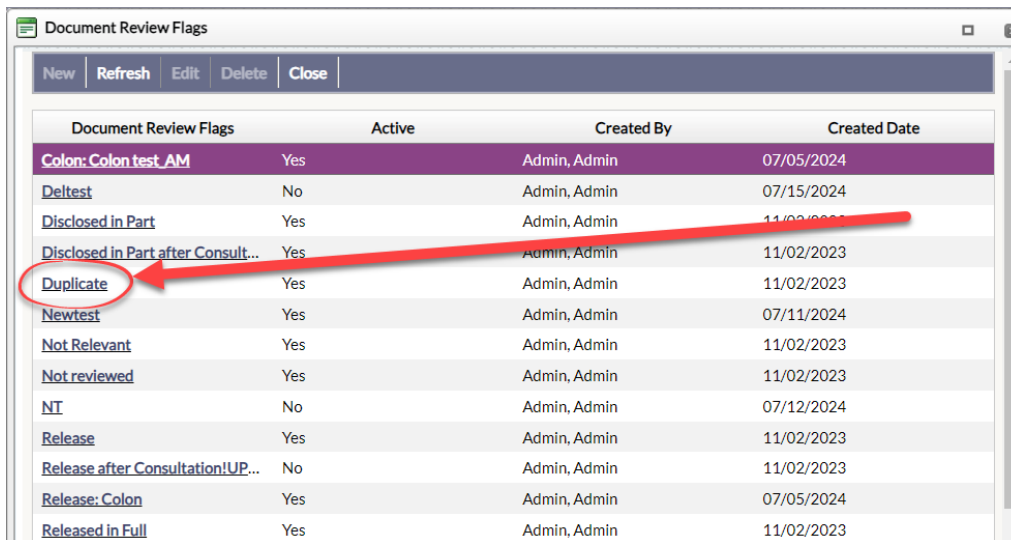
**Save** **Refresh** **Close**

Note: \* fields are mandatory

Make sure to click **Save** when you're finished making changes.

## 2.3 Document Review Flags

You can view the list of system Document Review Flags and add/remove flags in Administration. Navigate to **Administration > System Configuration > Document Review Flags**.



Document Review Flags	Active	Created By	Created Date
<a href="#">Colon: Colon test_AM</a>	Yes	Admin, Admin	07/05/2024
<a href="#">Deltest</a>	No	Admin, Admin	07/15/2024
<a href="#">Disclosed in Part</a>	Yes	Admin, Admin	11/02/2023
<a href="#">Disclosed in Part after Consult...</a>	Yes	Admin, Admin	11/02/2023
<a href="#">Duplicate</a>	Yes	Admin, Admin	11/02/2023
<a href="#">Newtest</a>	Yes	Admin, Admin	07/11/2024
<a href="#">Not Relevant</a>	Yes	Admin, Admin	11/02/2023
<a href="#">Not reviewed</a>	Yes	Admin, Admin	11/02/2023
<a href="#">NT</a>	No	Admin, Admin	07/12/2024
<a href="#">Release</a>	Yes	Admin, Admin	11/02/2023
<a href="#">Release after Consultation!UP...</a>	No	Admin, Admin	11/02/2023
<a href="#">Release: Colon</a>	Yes	Admin, Admin	07/05/2024
<a href="#">Released in Full</a>	Yes	Admin, Admin	11/02/2023

To make changes to an existing flag, click its title. The *Document Review Flag Details* screen opens. Here, you can change the flag title or mark it active/inactive using the *Active* checkbox. When you're finished, click **Save**.



## System Configuration

**Document Review Flag Details**

Document Review Flag\* : Duplicate

Active : ☒

Spell Check

Save

Back

Note: \* fields are mandatory

## 2.4 Email Templates

Collaboration Portal includes several built-in email templates to alert users when certain events occur in the system.

### 2.4.1 Email Template Descriptions

Open the *Email Templates* page (**Administration > System Configuration > Email Templates**) to access system email templates.

Email Templates		
Name	Subject	Created Date
Program Office Notification of Portal User ID	[APPLICATION_TITLE] Login Information	11/02/2023
Password Information	[APPLICATION_TITLE] Password Information	11/02/2023
Forgot Password	[APPLICATION_TITLE] Password Information	11/02/2023
Forgot Password Identification Code Notification	[APPLICATION_TITLE] Identification Code	11/02/2023
Consultation Assignment Notification	[APPLICATION_TITLE] Consultation Assignment Notification	11/02/2023
Request for Documents Assignment Notification	[APPLICATION_TITLE] Request for Documents Assignment Notification	11/02/2023
Request Message Notification	[APPLICATION_TITLE] Request Message Notification	11/02/2023
Deactivation Reason	[APPLICATION_TITLE] Deactivation Reason	11/02/2023
Completed Task Notification	Completed [TASK_TYPE] Task Notification - Request # [REQUEST_ID]	11/02/2023
Message Notification To FX	Message Notification For Request# [REQUEST_ID][TASK_TYPE] - [ITEM_ID]	11/02/2023
Message Notification To Portal	Message Notification For Request# [REQUEST_ID][TASK_TYPE] - [ITEM_ID]	11/02/2023
Receipt Confirmed	Receipt Confirmed For [TASK_TYPE] - [ITEM_ID] from [PROGRAM_OFFICE]	11/02/2023
OTP Notification	[APPLICATION_TITLE] One Time Passcode	11/02/2023
Request for Documents Task Deletion	Request #[REQUEST_ID] Collaboration Portal Task Deleted	11/02/2023
Consultation Task Deletion	Request #[REQUEST_ID] Collaboration Portal Task Deleted	11/02/2023

1

Page: 1 of 1 Go Page Size 15 Change

Item 1 to 15 of 15

Edit Templates

Close

Template	Description
<b>Program Office Notification of Portal User ID</b>	Notification sent to the Program Office contact when an account is created for that office; includes the user login ID.



Template	Description
<b>Password Information</b>	Notification sent to the Program Office contact when an account is created for that office; includes the login password.
<b>Forgot Password</b>	When a portal user forgets their password, this notification is sent with a temporary password.
<b>Forgot Password Identification Code Notification</b>	A security token provided with a Forgot Password request. The code is only valid during the current session.
<b>Consultation Assignment Notification</b>	Notification sent to the Program Office contact when a consultation assignment is sent to the portal.
<b>Request for Documents Assignment Notification</b>	Notification sent to the Program Office contact when a request for documents assignment is sent to the portal.
<b>Request Message Notification</b>	Notification sent relating to request messages.
<b>Deactivated Reason</b>	When a user account is deactivated, this message is sent to their email stating the reason for the deactivation.
<b>Completed Task Notification</b>	Notification sent when a task is completed in the portal.
<b>Message Notification to FX</b>	Notification sent to FX when a message is logged on a request.
<b>Message Notification to Portal</b>	Message sent to portal user email when a message is sent to the portal from FOIAXpress.



Template	Description
Receipt Confirmed	Notification sent to the originating office when a request is received in the portal.
OTP Notification	Notification sent when a user requests a one-time passcode.
Request for Documents Task Deletion	Message sent to user when a document is removed from their assigned RFD Tasks.
Consultation Task Deletion	Message sent to user when a document is removed from their assigned Consultation Tasks.

## 2.4.2 Edit an Existing Email Template

To make changes to an email template:

1. Select the template, then click **Edit Templates**.
2. The *Edit Email Template* screen appears. From here, you can rename the **Email Template** and/or set the **Email Subject**.



## System Configuration

**Edit Email Template**

Email Template\* Request for Documents Task Deletion Insert Fields

Email Subject\* Request #[REQUEST\_ID] Collaboration Portal Task Deleted

Email Body

Task ID #[ITEM\_ID] for request #[REQUEST\_ID] has been deleted and removed from your assigned tasks in the [ENTERPRISE\_NAME].

Design HTML Preview

Words: 18 Characters: 124

Save Close

3. In the main text field, you can edit the content of the email body.

**Note:** Click **Insert Fields** to add a field that will auto-populate based on the request data, such as the Request ID or Sender Last Name.

**Insert Fields**

Application Title
Application Url
Email
Enterprise Name
First Name
Item ID

4. Click **Save** when you're finished.



## 2.5 Error Message

You can customize the text that appears when a Collaboration Portal user encounters an error. Navigate to **Administration > System Configuration > Error Message**. The *Error Message Configuration* screen opens.

**Error Message Configuration**

The default configuration for the message that is displayed to a user when an Error Message occurs in the application can be customized below to provide instruction to the user and direct them to the appropriate in-house support desk in order to control the usage of purchased support calls. By default the configuration will direct the user to the Opexus Support Desk.

Error Message\* : Operation could not be performed.

TechnicalSupport

When an error is generated the user will be provided with an option to send an email that contains the error message details to the address provided below along with an email message. Multiple email addresses can be entered using (,) as separator.

Email Address\* : TechnicalSupport@AINS.COM

Email Body\* : TechnicalSupport

Save Refresh Close

Note: \* fields are mandatory

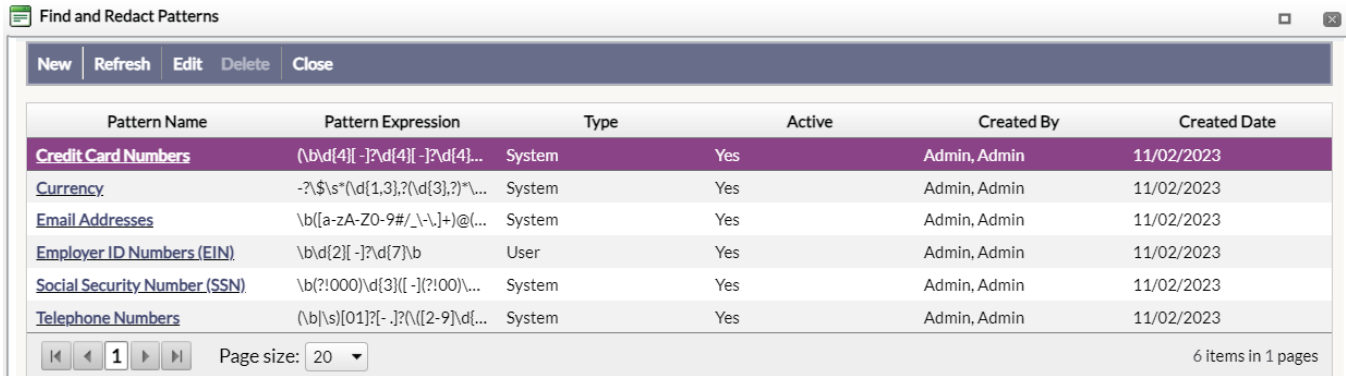
1. Enter the message you'd like to appear along with the system error message in the **(A) Error Message** field.
2. In the **(B) Email Address** and **Email Body** fields, enter the email address(es) that should receive error messages from the system and the message content.
3. When you're finished, click **(C) Save**.

## 2.6 Find and Redact Patterns

Review and edit the Find and Redact Patterns used by Collaboration Portal in the *Find and Redact Patterns* page of the Administration folder.



## System Configuration



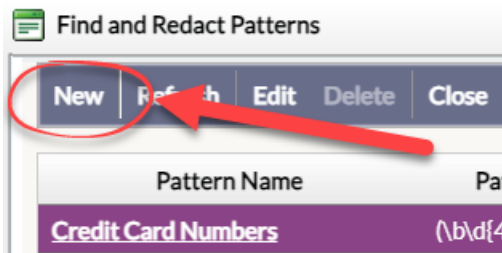
Pattern Name	Pattern Expression	Type	Active	Created By	Created Date
Credit Card Numbers	\b\d{4}[-]? \d{4}[-]? \d{4}[-]? \d{4}	System	Yes	Admin, Admin	11/02/2023
Currency	-?\\$[s*]\d{1,3}?(?!\d{3},?)^...	System	Yes	Admin, Admin	11/02/2023
Email Addresses	\b([a-zA-Z0-9#/_\.\-]+)@{1}...	System	Yes	Admin, Admin	11/02/2023
Employer ID Numbers (EIN)	\b\d{2}[-]? \d{7}	User	Yes	Admin, Admin	11/02/2023
Social Security Number (SSN)	\b(?:000)\d{3}[(?!\d{3})^]...	System	Yes	Admin, Admin	11/02/2023
Telephone Numbers	\b\s{0,1}[01]?[-]? \d{2-9}\d{3}	System	Yes	Admin, Admin	11/02/2023

Page size: 20 6 items in 1 pages

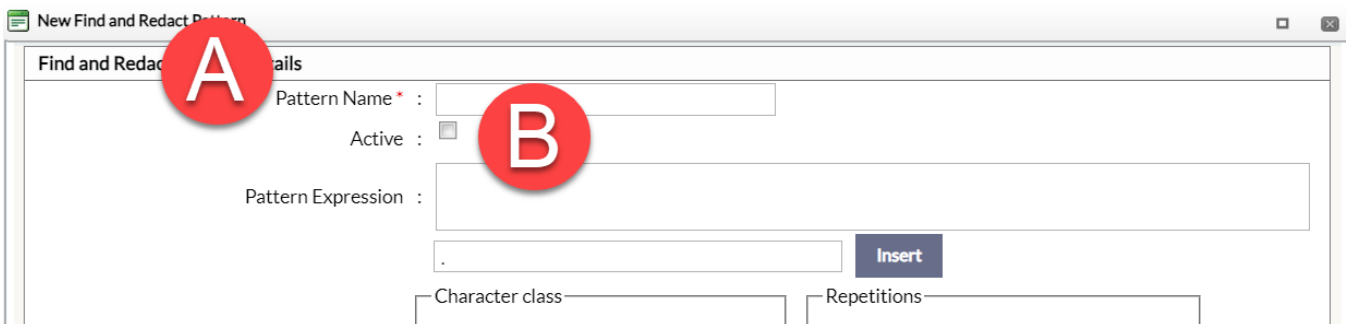
### 2.6.1 Create a Find and Redact Pattern Link

To create a new pattern, navigate to **Administration > System Configuration > Find and Redact Patterns**.

1. Click **New**.



2. The *New Find and Redact Pattern* window appears. Enter the (A) **Pattern Name**. Click the (B) **Active** checkbox if applicable.



Find and Redact Pattern

Find and Redact Pattern Details

Pattern Name \* :

Active : ☐

Pattern Expression :

Character class ☐ Repetitions ☐

3. Next, configure the **Pattern Expression**. Use the radio buttons to select a **Character class** and **Repetitions**, then click **Insert** to add the character.



## System Configuration

Pattern Expression :

Character class

☒ Any Character .

☐ Alphanumeric \w

☐ Digit \d

☐ Whitespace \s

☐ Specific character >

☐ Specified set [a-zA-Z]

☐ Word Boundary \b

Repetitions

☐ As few as possible?

☒ Just Once

☐ Any Number \*

☐ One or more +

☐ Zero or one ?

☐ Exactly n {n}      n

☐ At least n {n,}      m

☐ Between n and m {n,m}

4. When you're finished, click **Save**.

## 2.6.2 Edit an Existing Find and Redact Pattern

To edit an existing Find and Redact Pattern, navigate to **Administration > System Configuration > Find and Redact Patterns**.

1. Select the pattern you'd like to change, then click **Edit**.

Find and Redact Patterns

New Refresh **Edit** Delete

Pattern Name	Pattern Expression	Type	Active	Created By	Created Date
<b>Credit Card Numbers</b>	(\b\d{4}[ -]?d{4}[ -]?d{4}...	System	Yes	Admin, Admin	11/02/2023
<b>Currency</b>	-?\\$s*(\d{1,3},?\d{3},?)^*...	System	Yes	Admin, Admin	11/02/2023
<b>Email Addresses</b>	\b([a-zA-Z0-9#\_-\.\+])@(...	System	Yes	Admin, Admin	11/02/2023
<b>Employer ID Numbers (EIN)</b>	\b\d{2}[ -]?d{7}\b	User	Yes	Admin, Admin	11/02/2023
<b>Social Security Number (SSN)</b>	\b(?:000)\d{3}([ -]?00)\b...	System	Yes	Admin, Admin	11/02/2023
<b>Telephone Numbers</b>	(\b\s)[01]?[ -]?([2-9])d{...	System	Yes	Admin, Admin	11/02/2023

Page size: 20 6 items in 1 pages

2. The *New Find and Redact Pattern* window appears. Enter the **(A) Pattern Name**. Click the **(B) Active** checkbox if applicable.





## System Configuration

Find and Replace

Pattern Name \* :

Active : ☐

Pattern Expression :

☐ Character class ☐ Repetitions

3. Next, configure the **Pattern Expression**. Use the radio buttons to select a **Character class** and **Repetitions**, then click **Insert** to add the character.

Pattern Expression :

**Character class**

- ☒ Any Character .
- ☐ Alphanumeric \w
- ☐ Digit \d
- ☐ Whitespace \s
- ☐ Specific character >
- ☐ Specified set [a-zA-Z]
- ☐ Word Boundary \b

**Repetitions**

- ☐ As few as possible?
- ☒ Just Once
- ☐ Any Number \*
- ☐ One or more +
- ☐ Zero or one ?
- ☐ Exactly n {n} n
- ☐ At least n {n} m
- ☐ Between n and m {n,m}

4. When you're finished, click **Save**.

## 2.7 Help Links Configuration

The *Help Links Configuration* page is where you can create and edit help links.

Help Links Configuration

New Refresh Edit Delete Close

Display Name	Help URL
Folaxpress	https://qa-fx-daily.ains-inc.com/FOIAXpress/

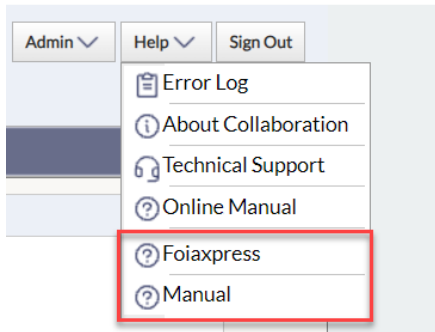
[Manual](#)

Page Size 20 2 items in 1 pages

Note: To Edit click on hyperlink or click Edit in the toolbar.



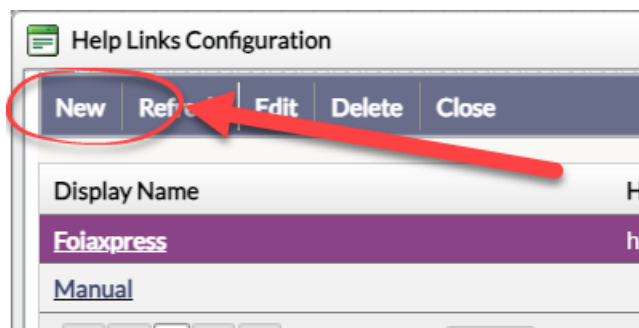
Help links are the options available in the application *Help* drop-down menu, as shown below.



## 2.7.1 Create a New Help Link

To create a new help link, navigate to **Administration > System Configuration > Help Links Configuration**.

1. Click **New**.



2. The *New Help Link* window appears. Enter a **(A) Display Name**, the text that will appear in the drop-down menu. Then, select a **(B) Type**, either URL or Attachment. Depending on your selection, you will be prompted to add the URL or attach the file.

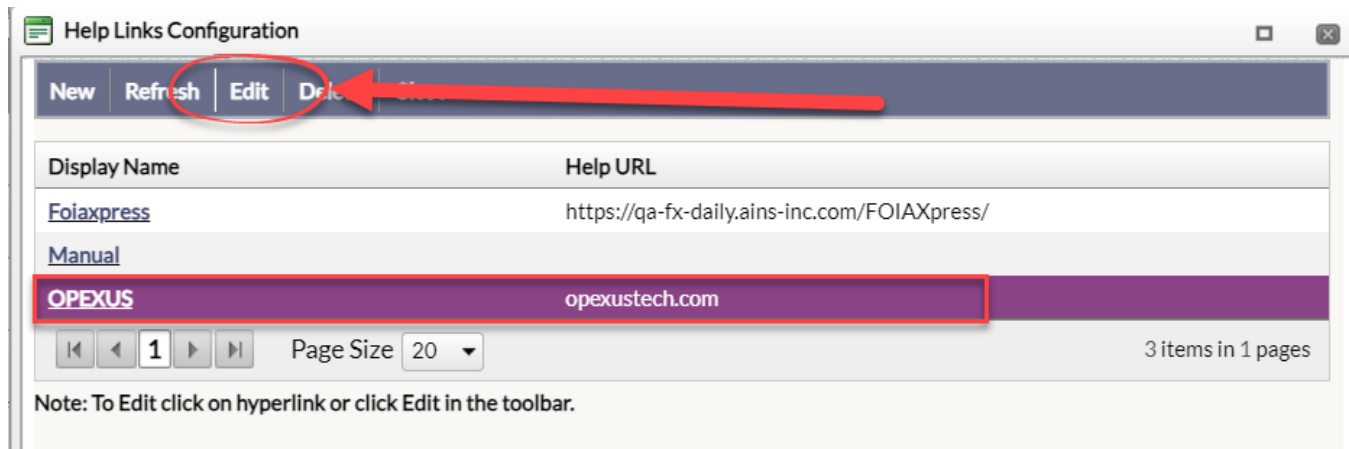
**Note: You can only add PDFs as help link attachments.**

- When you're finished, click **(C) Save** to create the new help link. Once you've closed out of the window and refreshed the application, the help link will appear in the *Help* drop-down menu.

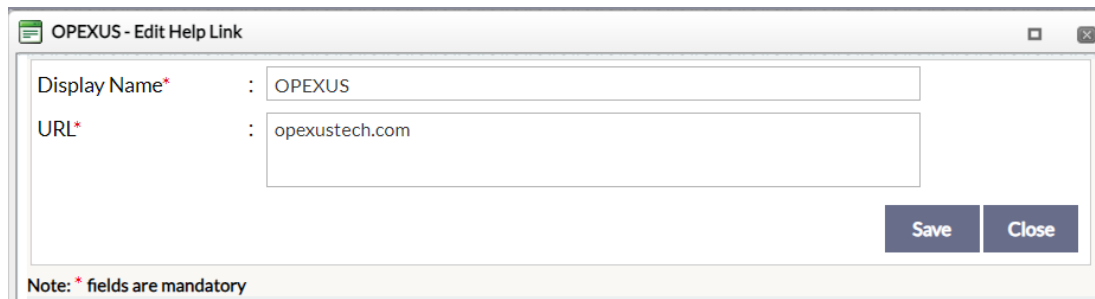
## 2.7.2 Edit an Existing Help Link

To edit an existing help link, navigate to **Administration > System Configuration > Help Links Configuration**.

- Select the help link you'd like to change, then click **Edit**.



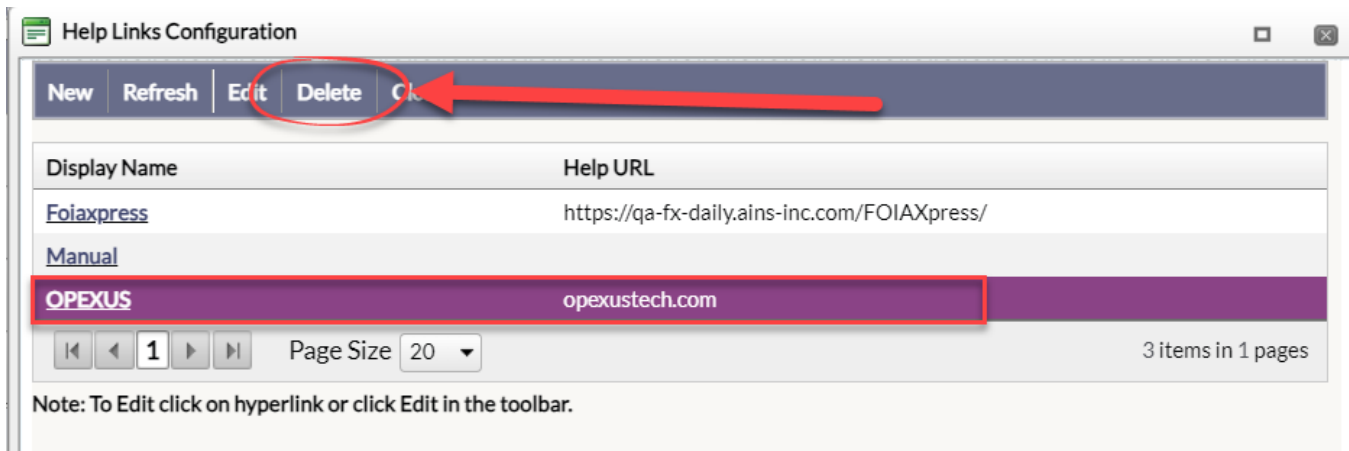
- The *Edit Help Link* window appears and you can make changes to the Display Name and URL/Attachment. Click **Save** when you're finished.



## 2.7.3 Remove a Help Link

To delete a help link, navigate to **Administration > System Configuration > Help Links Configuration**.

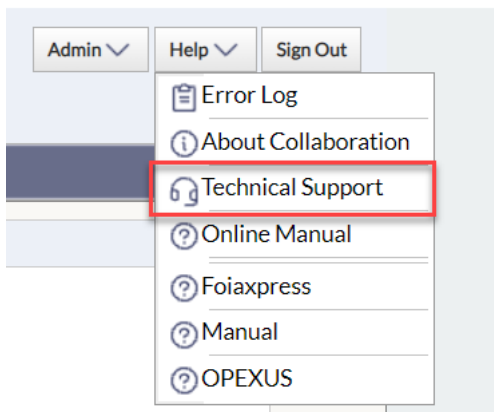
- Select the help link you'd like to remove, then click **Delete**.



- Click **OK** in the confirmation box. The list of help links will refresh, and the deleted link will be removed from the drop-down menu.

## 2.8 Technical Support

On the *Technical Support* page, Admin users can customize the Technical Support Link found on the Collaboration Portal Home Page, shown below.

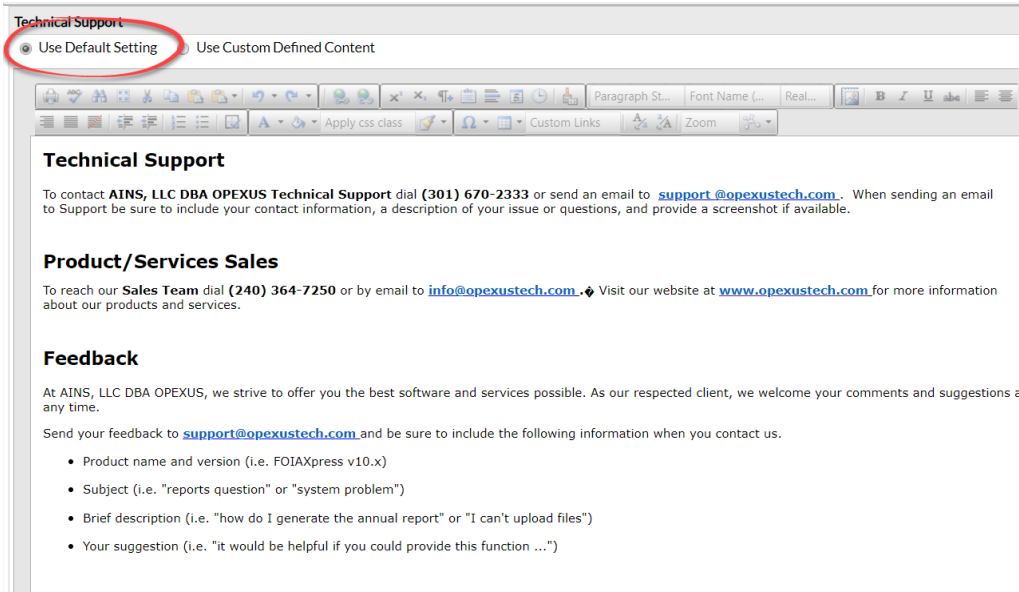


The Technical Support page details can be modified if you'd like to instruct users to call your agency administrator, rather than OPEXUS support.

**Note: OPEXUS technical support is dependent on your agency maintaining active software maintenance and customer support agreements. Support agreements are required for responding to “how-to” questions and customer premise infrastructure-related issues. Maintenance agreements are required for software version updates, service releases and software-related issues.**

## System Configuration

The application includes a default Technical Support template setting, shown below.



**Technical Support**

☒ Use Default Setting ☐ Use Custom Defined Content

**Technical Support**

To contact **AINS, LLC DBA OPEXUS Technical Support** dial (301) 670-2333 or send an email to [support@opexustech.com](mailto:support@opexustech.com). When sending an email to Support be sure to include your contact information, a description of your issue or questions, and provide a screenshot if available.

**Product/Services Sales**

To reach our **Sales Team** dial (240) 364-7250 or by email to [info@opexustech.com](mailto:info@opexustech.com). Visit our website at [www.opexustech.com](http://www.opexustech.com) for more information about our products and services.

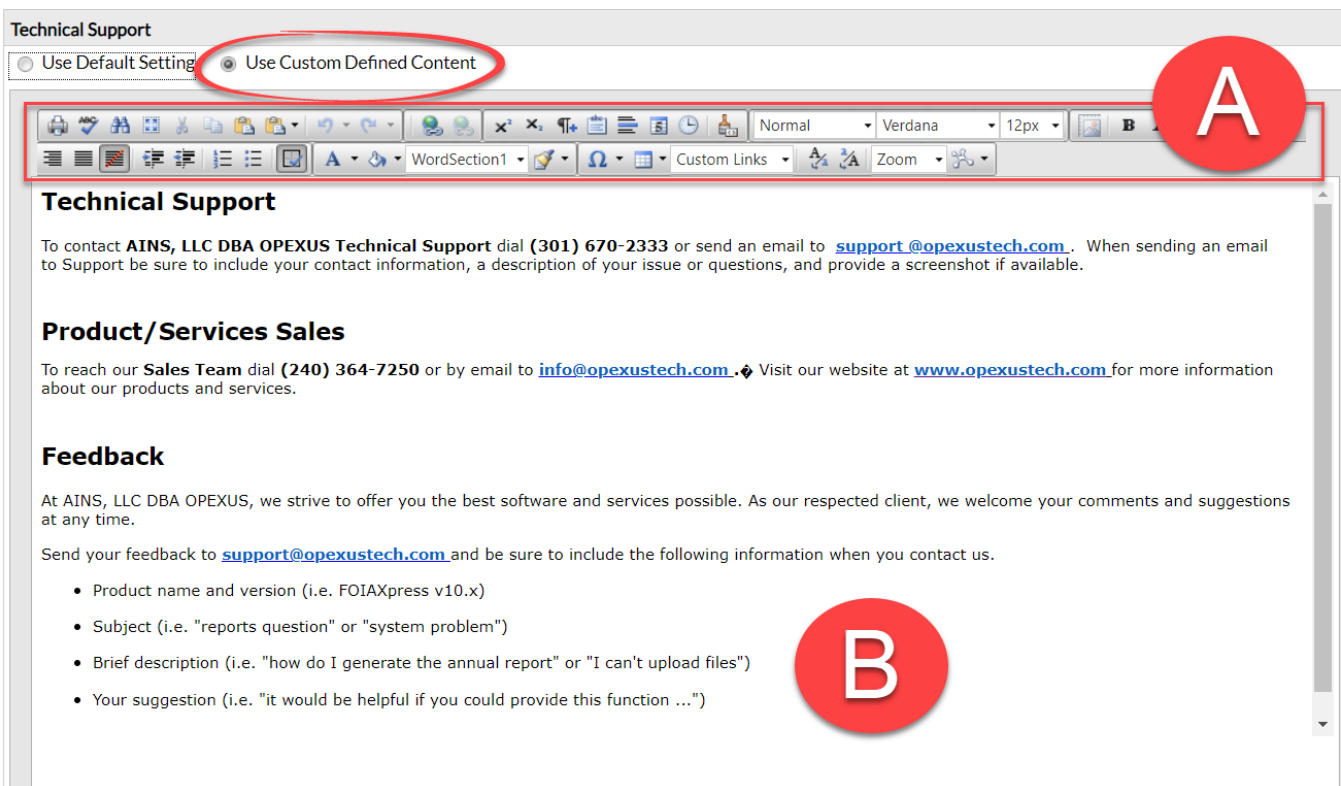
**Feedback**

At AINS, LLC DBA OPEXUS, we strive to offer you the best software and services possible. As our respected client, we welcome your comments and suggestions at any time.

Send your feedback to [support@opexustech.com](mailto:support@opexustech.com) and be sure to include the following information when you contact us.

- Product name and version (i.e. FOIAXpress v10.x)
- Subject (i.e. "reports question" or "system problem")
- Brief description (i.e. "how do I generate the annual report" or "I can't upload files")
- Your suggestion (i.e. "it would be helpful if you could provide this function ...")

If you'd like to modify the content, select the **Use Custom Defined Content** radio button.



**Technical Support**

☐ Use Default Setting ☒ Use Custom Defined Content

**Technical Support**

To contact **AINS, LLC DBA OPEXUS Technical Support** dial (301) 670-2333 or send an email to [support@opexustech.com](mailto:support@opexustech.com). When sending an email to Support be sure to include your contact information, a description of your issue or questions, and provide a screenshot if available.

**Product/Services Sales**

To reach our **Sales Team** dial (240) 364-7250 or by email to [info@opexustech.com](mailto:info@opexustech.com). Visit our website at [www.opexustech.com](http://www.opexustech.com) for more information about our products and services.

**Feedback**

At AINS, LLC DBA OPEXUS, we strive to offer you the best software and services possible. As our respected client, we welcome your comments and suggestions at any time.

Send your feedback to [support@opexustech.com](mailto:support@opexustech.com) and be sure to include the following information when you contact us.

- Product name and version (i.e. FOIAXpress v10.x)
- Subject (i.e. "reports question" or "system problem")
- Brief description (i.e. "how do I generate the annual report" or "I can't upload files")
- Your suggestion (i.e. "it would be helpful if you could provide this function ...")

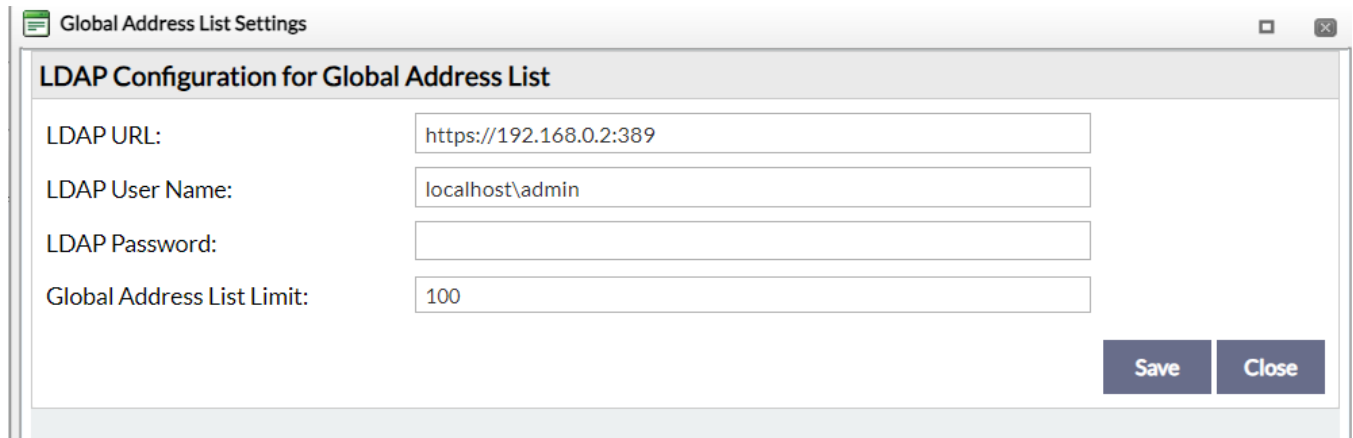
You can use the (A) toolbar to edit the (B) page content. When you're finished making changes, be sure to click **Save** at the bottom of the page.



## 3 System Administration

### 3.1 Global Address List Settings

The *Global Address List Settings* page (**Administration > System Administration > Global Address List Settings**) includes fields related to LDAP configuration. You can configure the **LDAP URL**, **LDAP User Name**, **LDAP Password**, and **Global Address List Limit**. When you're finished making changes, click **Save**.



The screenshot shows a web browser window titled "Global Address List Settings". Inside the window, there is a section titled "LDAP Configuration for Global Address List". This section contains four labeled input fields: "LDAP URL:" with the value "https://192.168.0.2:389", "LDAP User Name:" with the value "localhost\admin", "LDAP Password:" which is empty, and "Global Address List Limit:" with the value "100". At the bottom right of the form area, there are two buttons: "Save" and "Close".

### 3.2 Scheduler Configuration

On the *Scheduler Configuration* page, you can view and edit scheduler jobs. Click the X (**Remove** column) to remove the job from the system. To add a job back to the system, use the drop-down menu and click **Add New Jobs**. You can also change the number of **Instances**.

When you're finished making changes, click **Save**.



**Scheduler Configuration**

Schedulers: eCaseScheduler@QA-FX-DAILY Remove Scheduler

eCaseScheduler@QA-FX-DAILY Allowed Jobs

Job Name	Is System Job?	Instances	Remove
Save To Disk	No	<input type="text" value="1"/>	×
Delete Job	No	<input type="text" value="1"/>	×
Move Pages Job	No	<input type="text" value="1"/>	×
Image Operation Job	No	<input type="text" value="1"/>	×
Job Retention	Yes	<input type="text" value="1"/>	×
Replace Redaction Code	No	<input type="text" value="1"/>	×
Apply Review Template	No	<input type="text" value="1"/>	×

Add New Jobs Save Refresh Close

### 3.3 System Jobs

Administrators can view system jobs on the *System Jobs* page (**Administration > System Administration > System Jobs**).

**System Jobs**

Refresh Edit Close

Job Name	Description	Last Run Date/Time	Next Run Date/Time	Active
<a href="#">Delete Scheduler Trace Files</a>	Delete Scheduler Trace Files	9/9/2024 12:00:04 AM	9/10/2024 12:00:00 AM	Yes
<a href="#">Job Retention</a>	Job Retention (Job to delete retention expired job f...	9/8/2024 4:25:21 PM	9/9/2024 4:25:17 PM	Yes
<a href="#">OCR</a>	OCR	9/9/2024 4:20:02 PM	9/9/2024 4:20:58 PM	Yes
<a href="#">Send Email</a>	Sends all outgoing email messages	9/9/2024 11:17:27 AM	9/9/2024 11:20:40 AM	Yes

Page Size: 20 4 items in 1 pages

To edit a system job, click the *Job Name* or select the job you'd like to edit and click **Edit**. The *Job Information* page opens, where you can customize certain job details including the description.

## System Administration

Job Information	
Job Name*	Delete Scheduler Trace Files
Description	Delete Scheduler Trace Files
Active	<input checked="" type="checkbox"/>
Last Run Date	9/9/2024 12:00:04 AM
Next Run Date	9/10/2024 12:00:00 AM
Frequency Mode	Days
Frequency	1
Status	Ready
Scheduler Name	eCaseScheduler@QA-FX-DAILY
Trace Level	On
Last Reported Error	

[Refresh](#) [Save](#) [Clear Job Log](#) [Back](#)

Make sure to click **Save** when your edits are finished.

### 3.4 System Settings

The *System Settings* page of Administration contains miscellaneous system configurations including SMTP settings, the application URL, and more.

The following table includes a description of each section. After you've made changes, make sure to click **Save**.





## System Administration

**System Settings**

**Locations**

Correspondence\* : C:\Temp\CollabDocs\AFXWCORL\  
Example: C:\AFXWCORL\  
Original Document Location\* : C:\Temp\CollabDocs\AFXWDOCS\  
Example: C:\AFXWDOCS\  
PNG Cache Location\* : C:\Collab\AFXWPNG\  
Example: C:\AFXWPNG\  
Note: Location paths are with respect to the web server.

**Mail Server Address**

SMTP Mail Server\* : 192.168.0.25 Port\* : 25  
Use SMTP SSL : ☐

**PNG Cache Management**

PNG Cache limit\* : 20 GB  
Delete PNG Cache if the folder has not been accessed in more than\* : 30 Days

**General Settings Information**

Application URL : https://qa-fx-daily.ains-inc.com/collaboration  
Application Title : COLLABORATION PORTAL TEST COLLABORATION PORT  
Application Email : ambica.mekala@opexustech.com

**General Settings Information**

☒ Enable Document Management

Save Close

Note: \* fields are mandatory

Ref	Name	Description
A	Locations	Configure a disk location for storing and retrieving <i>Correspondence</i> , <i>Documents</i> , and <i>Temp</i> files.
B	Mail Server Address	Provide the <i>SMTP Mail Server</i> address, and the <i>Port</i> number for your email server.
C	PNG Cache Management	Set the <i>PNG Cache Limit</i> , measured in gigabytes, and the frequency (measured in days) at which the PNG Cache is cleared if not accessed.



Ref	Name	Description
D	General Settings Information	<p>Configure the <i>Application URL</i>, <i>Application Title</i>, and <i>Application Email</i> as needed for your organization.</p> <p><b>Note: If configured for HTTPS on the FOIAXpress Administration side, this application URL must also be configured for HTTPS.</b></p>
E	General Settings Information – Document Management	Check this box to enable Document Management.



## 4 Security

The *Security* page allows administrators to manage the system security settings. To access the page, navigate to **Administration > Security**.

### 4.1 Audit Log

In the *Audit Log* section (**Administration > Security > Audit Log**), administrators can access two Audit Logs: session and user action. Each is described in the following subsections.

#### 4.1.1 Session Audit Log

The session audit log logs all user sessions, including the IP of the workstation where the portal was accessed and the access times. To view the *Session Audit Log*, navigate to **Administration > Audit Log(s)**.

Audit Log

☒ Session Audit Log

☐ User Action Audit Log

Filters

First Name :

Last Name :

Login From :

9/3/2024

To :

9/9/2024

Filters

Search

Export

Clear Log

Clear Filters

Results

Full Name	Work Station	Login Time	Logout Time	Login Name
Admin Admin	10.10.10.99	09/09/2024:11:35:16		Admin
Admin Admin	10.10.10.99	09/09/2024:11:31:31	09/09/2024:11:32:05	Admin
Admin Admin	10.10.10.99	09/09/2024:11:13:58	09/09/2024:08:51:05	Admin
Admin Admin	10.251.2.38	09/06/2024:11:11:42	09/06/2024:10:40:47	Admin
Admin Admin	10.251.2.24	09/06/2024:09:17:49	09/06/2024:10:15:29	Admin
Admin Admin	10.251.2.6	09/05/2024:05:14:37	09/05/2024:05:14:47	Admin
Admin Admin	10.251.2.6	09/05/2024:05:13:01	09/05/2024:05:14:13	Admin

1

Page: 1 of 1 Go

Page Size 7 Change

Item 1 to 7 of 7

Use the *Filters* to search for users using the *First Name*, *Last Name*, or *Login From* dates, then click **Search** to display matching results.



## 4.1.2 User Action Log

The user audit log tracks user actions in the application. To view the *User Audit Log*, navigate to **Administration > Audit Log(s)**.

**Audit Log**

☐ Session Audit Log ☒ User Action Audit Log

**Filters**

Action Type :

First Name :

Last Name :

Action From :

To :

Filters

**Results**

Action Performed By	Action Type	Action Performed	Time of Action	Program Office
There are no Logs to display				

1 Page: 1 of 1 Go Page Size 20 Change Item 0 to 0 of 0

## 4.2 Security Configuration

The *Security Configuration* page includes various settings related to logins, session timeouts, and other application security features. The following table outlines each of the fields. Be sure to click **Save** after making changes to this screen.



## Security

Security Configuration

Default Values

Passwords Never Expire : ☒

Passwords are Valid for :  Days

Remind User :  Days before Password Expiration

Do not Allow Reuse of Last :  1 Passwords (Including Current)\*

Password can Contain up to :  2 Repeating Characters\*

Minimum Password Length :  8 Characters\*

Password must Contain at least :  0 Upper Case Letters\*

Password must Contain at least :  0 Lower Case Letters\*

Password must Contain at least :  0 Special Characters\*

Password must Contain at least :  0 Numeric Characters\*

Login Fails after :  30 Invalid Login Attempts\*

Session Time out after :  150 Minutes\*

Alert User :  1 Minute(s) before Session Expires\*

Temporary Password Update after login : ☒

User Account Inactivation : ☐

Inactivate User Account after :  Days of Non-Usage of Application

Send Inactivity Notification :  Days Prior to Inactivation

Deleted User Login can be Reused :  0 Days after Deletion\*

Restrict using numeric at beginning/ending of the password : ☐

Separate Database Error Log from Application Error Log : ☒

Enable Audit Log API : ☐

Send User Account Update Notifications : ☐

Enable Multi-factor Authentication : ☐

Save

Refresh

Close

Field	Description
<b>Passwords Never Expire</b>	Select this checkbox to prevent user passwords from ever expiring.
<b>Passwords are valid for X days</b>	Enter the number of days a user's password is valid before expiration.



Field	Description
<b>Remind user X days before password expiration</b>	Enter the number of days before the user's password expires that they should be reminded to reset their password.
<b>Do not allow reuse of last X passwords (including current)</b>	Enter a number of previous passwords to disallow reuse of when changing a password.
<b>Passwords can contain up to X repeating characters</b>	Enter the maximum number of repeating characters allowed in user passwords.
<b>Minimum password length</b>	Enter the minimum length required for user passwords in characters.
<b>Password must contain at least X uppercase letters</b>	Enter the minimum number of uppercase characters required in the password.
<b>Password must contain at least X lowercase letters</b>	Enter the minimum number of lowercase characters required in the password.
<b>Password must contain at least X special characters</b>	Enter the minimum number of special characters required in the password.
<b>Password must contain at least X numeric characters</b>	Enter the minimum number of numeric characters required in the password.
<b>Login fails after X invalid login attempts</b>	Enter the maximum number of unsuccessful logins a user is allowed before their user account is locked.



Field	Description
<b>Session time-out after X minutes</b>	Enter in minutes the time a user can be inactive in their current session before the session times out and the user is logged out.
<b>Alert user X minutes before session expires</b>	Enter in minutes the amount of time before session termination that the user receives a timeout alert.
<b>Require Temporary Password Update after login</b>	Select this checkbox to require any user logging in with a temporary password to update their password after login.
<b>User Account Inactivation</b>	Checked to denote an inactive user.
<b>Inactivate user account after X days of inactivity</b>	Enter the number of days a user account is inactive before it is formally inactivated in the system.
<b>Send inactivity notification X days prior to inactivation</b>	Enter in days the amount of time before inactivation that a user should receive an inactivity notification email.
<b>Deleted user login can be reused X days after deletion</b>	Enter the time period (in days) after which a deleted user's login can be reused.
<b>Restrict using numeric at beginning/end of the password</b>	Check this to restrict use of numbers at the beginning and end of Collaboration Portal passwords.
<b>Separate Database Error Log from Application Error Log</b>	Check this box to separate the Database Error Log from the Application Error Log.



Field	Description
<b>Enable Audit Log API</b>	Check this box to enable Audit Log API.
<b>Send User Account Update Notifications</b>	Check this box to enable user account notifications. When checked, another field appears where you can include the email address(es) to receive these notifications.
<b>Enable Multi-factor Authentication</b>	Check this box to enable multi-factor authentication (MFA). When checked, a drop-down field appears where you can select a notification type.
<b>OTP expires in X minutes</b>	Enter the number of minutes the OTP will be active before expiration.





# 5 Organization Setup

You can make changes to user accounts, configure organization information, and more on the *Organization Setup* tab in Administration.

## 5.1 Enterprise

On the *Enterprise* page (**Administration > Organization Setup > Enterprise**) you can update organization contact details, customize the appearance of the Collaboration Portal, and set certain system messages.

The Enterprise tab is split into a few sections, described in the following subsections.

### 5.1.1 Organization Information

Here, you can update your organization’s contact information and addresses. Make sure to click **Save** before closing.

Organization InformationBannerLogoDisclaimerSystem NoticeConsultation InstructionsRFD Instructions

Basic Information

Organization Name\* : OPEXUS

Phone Number :

Contact Name : Ambica Mekala

Fax :

Contact Email : ambica.mekala@opexustech.com

☐ Keep Remittance Address same as Correspondence Address Information

Correspondence Address

Address 1:

Address 2: xd

City:

Country\*: Aruba

State: Select a State

ZIP Code:

Remittance Address

Address 1:

Address 2:

City:

Country\*: Ashmore and Cartier Islands

State: Select a State

ZIP Code:

Spell Check

Save

Close

### 5.1.2 Banner

You can add a banner and some header text on the *Banner* tab. They will display in the top left corner of the Collaboration Portal.



## Organization Setup

To add a banner image, click **(A) Add Banner** and upload your file. To add header text, use the **(B) Header Line** fields.

When you're finished making changes, click **(C) Save**.

### 5.1.3 Logo

Use the *Logo* tab to add a logo to Report headers, invoices, and the Collaboration Portal login page.

Click **(A) Add logo** to upload your image. You can also use the **(B) radio buttons** to select whether you'd like the logo to appear on the Login page. When you're finished, click **(C) Save**.

#### Notes:

- Recommended logo dimensions are 120 x 120.
- Supported file formats are .jpg, .gif, .jpeg, and .svg.



## 5.1.4 Disclaimer

Edit the disclaimer that appears when users first access the Collaboration Portal on the *Disclaimer* page. Click **Save** when you're finished making changes.

## 5.1.5 System Notice

If you need to display a system-wide notice, such as to alert users about a scheduled maintenance outage, you can configure it on the *System Notice* tab.

First, set the date you'd like the message to **(A) Display Through**. Then, enter the **(B) message content** in the text box. When you're done, click **(C) Save**.

## 5.1.6 Consultation Instructions

On the *Consultation Instructions* tab, you can configure the text that appears on Consultations. Make sure to click **Save** when you're done.



## Organization Setup

The screenshot shows the 'Consultation Instructions' tab selected. The interface includes a top navigation bar with tabs: Organization Information, Banner, Logo, Disclaimer, System Notice, Consultation Instructions, and RFD Instructions. Below the tabs is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, link, unlink, list, and image. The editor content includes the heading 'Task Types:', followed by two paragraphs explaining 'Request for Document Task' and 'Consultation Task'. Below these is a section titled 'Request for Documents Task' with a numbered list starting with '1. Locate the responsive records'. At the bottom of the editor, there are buttons for 'Design', 'HTML', and 'Preview'. A status bar at the bottom left shows 'Words: 262 Characters: 1647'. At the bottom right, there are 'Save' and 'Close' buttons.

Organization Information Banner Logo Disclaimer System Notice Consultation Instructions RFD Instructions

**Consultation Instructions**

**Task Types:**

**Request for Document Task** ? is a request for a record search for records responsive to a request under the Access to Information and Privacy Act.

**Consultation Task** ? is a request for the review of collected records that may contain trade secrets of a third party or contains information the disclosure of which could reasonably be expected to be injurious to the conduct of international affairs, the defence of Canada or any state allied or associated with Canada or the detection, prevention or suppression of subversive or hostile activities.

**Request for Documents Task**

1. Locate the responsive records

Design HTML Preview

Words: 262 Characters: 1647

Save Close

### 5.1.7 RFD Instructions

Lastly, on the *RFD Instructions* tab, you can configure the text that appears when making a Request for Documents in Collaboration Portal. Make sure to click **Save** when you're done.

The screenshot shows the 'RFD Instructions' tab selected. The interface is similar to the previous one, with the same top navigation bar. The 'RFD Instructions' tab is active. The rich text editor content is identical to the 'Consultation Instructions' tab, including the 'Task Types:' heading, the definitions for 'Request for Document Task' and 'Consultation Task', and the 'Request for Documents Task' section with the numbered list. The status bar at the bottom left shows 'Words: 262 Characters: 1649'. The 'Save' and 'Close' buttons are at the bottom right.

Organization Information Banner Logo Disclaimer System Notice Consultation Instructions RFD Instructions

**RFD Instructions**

**Task Types:**

**Request for Document Task** ? is a request for a record search for records responsive to a request under the Access to Information and Privacy Act.

**Consultation Task** ? is a request for the review of collected records that may contain trade secrets of a third party or contains information the disclosure of which could reasonably be expected to be injurious to the conduct of international affairs, the defence of Canada or any state allied or associated with Canada or the detection, prevention or suppression of subversive or hostile activities.

**Request for Documents Task**

1. Locate the responsive records

Design HTML Preview

Words: 262 Characters: 1649

Save Close



## 5.2 Users

On the *Users* page (**Administration > Organization Setup > Users**) you can view and manage Collaboration Portal accounts.

The screenshot shows the 'Search User' window. Callout A points to the 'Search Criteria' section, which includes 'Personal Information' (First Name, Last Name, Email) and 'User Information' (Login, Action Office, Group). Callout B points to the 'Search' button. Callout C points to the 'Users' table, which lists users with columns: Last Name, First Name, Login, Group Name, Action Office, Active, Login Status, and Created. Callout D points to the 'Edit' button.

Last Name	First Name	Login	Group Name	Action Office	Active	Login Status	Created
Admin	Admin	Admin	General	HQ	Yes	Not Logged In	11/02/2023
M	AMBICA	ambica.mekala@opexustec...	General	HQ	Yes	Not Logged In	11/08/2023
Milbourne	Marcus	marcus.milbourne@opexus...	General	HQ	Yes	Not Logged In	11/13/2023

To search for specific user, enter **(A) Search Criteria**, then click **(B) Search**. The search results will display in the **(C) Users** list.

To edit a user account, click the Last Name in the list, or select the user and click **(D) Edit**. The *Edit User* page opens where you can add/change/remove the user's account details, including their personal information and login. Click **Save**.

The screenshot shows the 'Admin, Admin - User' edit page. It has sections for 'Personal Information' (Prefix, First Name, Middle Name, Last Name, Suffix, Code, Job Title, Email, Location, Govt Level, Supervisor, Time Zone, Phone Number), 'Login Information' (Login, Program Office, Change Password button, Status), and 'Other Information' (Shift, Part/Full Time, Lock, Active). A red arrow points from the 'Save' button in the bottom right corner to the 'Other Information' section.

# 6 Jobs

Administrators can access Collaboration Portal jobs via **Administration > Jobs**. This includes Find and Redact jobs, Save to Disk jobs, Add Documents jobs, and more.

## 6.1 All Jobs

Navigate to **Administration > Jobs > All Jobs** to view a full list of Collaboration Portal jobs.

Jobs View

All Jobs

Filter by

Status : All Scheduler : All User : Job Type : All

Refresh

Close

Job Id	Job Name	Job Type	Created By	Scheduler	Started	Completed	Status	Duration	Download	Actions
319	Titanic Survivor Stories.pdf	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/30/2024 1:39:...	8/30/2024 1:40:...	Completed	19 s		
318	Titanic Survivor Stories.pdf	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/30/2024 1:38:...	8/30/2024 1:39:...	Completed	22 s		
317	Print Preview Job	Export Preview J...	Soileau, Nick	eCaseScheduler@Q...	8/30/2024 1:37:...	8/30/2024 1:37:...	Completed	6 s		
316	Titanic Survivor Stories.pdf	Export Preview J...	Soileau, Nick	eCaseScheduler@Q...	8/30/2024 1:36:...	8/30/2024 1:36:...	Completed	7 s		
315	Page 1 [08/21/2024] of "Titanic...	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/29/2024 3:40:...	8/29/2024 3:40:...	Completed	12 s		
314	Titanic Survivor Stories.pdf	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/29/2024 3:38:...	8/29/2024 3:38:...	Completed	19 s		
313	Page 1 [08/21/2024] of "Titanic...	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/29/2024 3:35:...	8/29/2024 3:35:...	Completed	14 s		
312	RFD - 100	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/27/2024 10:19:...	8/27/2024 10:20:...	Completed	9 s		
311	RFD - 95	Save To Disk	Soileau, Nick	eCaseScheduler@Q...	8/27/2024 10:18:...	8/27/2024 10:18:...	Completed	17 s		

1

Page size: 20

9 items in 1 pages

Refresh

Close

You can use the Filter options to narrow the results to only include specific status, scheduler, user, and/or job type. After entering your filter criteria, click **Refresh**. Click the **Status** line to view further details about the job. You can also download a job's files (when applicable), or remove it from the list.

## 6.2 Email Log

For a full list of Collaboration Portal emails, you can navigate to **Administration > Jobs > Email Log**. You can use the Filters to limit the results to a specific subject, sender, receiver, etc. Click **Search** to update the list based on your filter.



## Jobs

**Filter By** Wild card searches (\*) are supported

Subject :

Sender :

Created From :  12 AM 00

To :  12 AM 00

Receiver :

Source :

Status : ☒ All ☐ Success ☐ Failure ☐ Pending

[Search](#) [Clear](#)

<input type="checkbox"/>	Subject	Sender	Receiver	Source	Created	Scheduled	Sent	Status
<input type="checkbox"/>	COLLABORATION PORTAL TEST COL...	ambica.mekala@o...	thanh.phu.ctr@op...	Request for Doc...	9/5/2024 3:40:56 PM	9/5/2024 3:40:56 PM	9/5/2024 3:41:01 PM	Success
<input type="checkbox"/>	COLLABORATION PORTAL TEST COL...	ambica.mekala@o...	mmilbourne@ains...	Request for Doc...	9/5/2024 3:40:56 PM	9/5/2024 3:40:56 PM	9/5/2024 3:41:01 PM	Success
<input type="checkbox"/>	COLLABORATION PORTAL TEST COL...	ambica.mekala@o...	marcus.milbourne...	Request for Doc...	9/5/2024 3:40:56 PM	9/5/2024 3:40:56 PM	9/5/2024 3:41:01 PM	Success
<input type="checkbox"/>	Job #319: Save To Disk job successfully ...	nsolleau@ains.com	nsolleau@ains.com	Save To Disk	8/30/2024 1:40:11 ...	8/30/2024 1:40:11 ...	8/30/2024 1:40:19 ...	Success
<input type="checkbox"/>	Job #318: Save To Disk job successfully ...	nsolleau@ains.com	nsolleau@ains.com	Save To Disk	8/30/2024 1:39:12 ...	8/30/2024 1:39:12 ...	8/30/2024 1:39:17 ...	Success
<input type="checkbox"/>	Job #315: Save To Disk job successfully ...	nsolleau@ains.com	nsolleau@ains.com	Save To Disk	8/29/2024 3:40:22 ...	8/29/2024 3:40:22 ...	8/29/2024 3:40:30 ...	Success
<input type="checkbox"/>	Job #314: Save To Disk job successfully ...	nsolleau@ains.com	nsolleau@ains.com	Save To Disk	8/29/2024 3:38:19 ...	8/29/2024 3:38:19 ...	8/29/2024 3:38:25 ...	Success
<input type="checkbox"/>	Job #313: Save To Disk job successfully ...	nsolleau@ains.com	nsolleau@ains.com	Save To Disk	8/29/2024 3:35:44 ...	8/29/2024 3:35:44 ...	8/29/2024 3:35:53 ...	Success
<input type="checkbox"/>	Job #312: Save To Disk job successfully ...	nsolleau@ains.com	nsolleau@ains.com	Save To Disk	8/27/2024 10:19:58...	8/27/2024 10:19:58...	8/27/2024 10:20:09...	Success
<input type="checkbox"/>	Job #311: Save To Disk job successfully ...	nsolleau@ains.com	nsolleau@ains.com	Save To Disk	8/27/2024 10:18:41...	8/27/2024 10:18:41...	8/27/2024 10:18:47...	Success
<input type="checkbox"/>	Job #310: Save To Disk job successfully ...	nsolleau@ains.com	nsolleau@ains.com	Save To Disk	8/26/2024 5:12:14 ...	8/26/2024 5:12:14 ...	8/26/2024 5:12:18 ...	Success

Page size: 20 424 items in 22 pages

[View Email Details](#) [Resend](#) [Close](#)

To learn more about a specific email, select the email from the list and click **View Email Details**.

<input type="checkbox"/>	Job #302: Delete Job successfully comp...	marcus.milbourne...	marcus.milbourne...	Delete Job	8/22/2024 2:35:01 ...	8/22/2024 2:35:01 ...	8/22/2024 2:35:07 ...	Success
<input checked="" type="checkbox"/>	Job #301: Delete Job successfully comp...	marcus.milbourne...	marcus.milbourne...	Delete Job	8/22/2024 2:34:16 ...	8/22/2024 2:34:16 ...	8/22/2024 2:34:17 ...	Success
<input type="checkbox"/>	Job #299 - Document(s) successfully 'Ad...	marcus.milbourne...	marcus.milbourne...	Add Documents ...	8/22/2024 2:33:02 ...	8/22/2024 2:33:02 ...	8/22/2024 2:33:05 ...	Success

Page size: 20 424 items in 22 pages

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## 6.3 Failed OCR Jobs

The last page in the *Jobs Administration* tab is *Failed OCR Jobs*. Here, Administrators can view a list of failed OCR jobs and retry them if needed.

**Failed OCR Jobs** Wild card searches (\*) are supported

**Folder Information**

Folder Name :  ☐ Include Sections

OCR Status :

Created Date :

Folder GUID :

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