

# FOIAXpress

## Collaboration Release Notes

v11.8.0

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OPEXUSTECH.COM

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# FOIA<sup>X</sup>press v11.8.0 Collaboration Release Notes

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# 1 Collaboration Portal 11.8.0

## 1.1 What's New in Collaboration for 11.8.0?

You'll see the changes from the first time you log in to the Collaboration Portal.

The biggest upgrade to Collaboration for 11.8.0 is the addition of Document Management to the features list. With Document Management, Collaboration Portal users have access to the same DM tools enjoyed by FOIAXpress users, including creating and managing the document tree, review and redaction capabilities, review flags, comments and annotations, everything needed to comprehensively review documentation.

Beyond DM, we revamped the Administration side

## 1.2 Important Note on 11.8.0 Upgrades

We've made significant changes to the deployment process for Collaboration v11.8.0. These changes apply to new and upgrading customers.

The inputs.json file used for previous installations CANNOT be used to upgrade to v11.8.0. There is a new file for this deployment included in the installation package. You must use this new file for the upgrade; however, you can copy data over from a previously used file to the new one as needed.

If your organization is using the new Document Management features, a few additional configuration steps are required. You'll need to manually create and configure the PNG cache location (**Administration > System Administration > System Settings**), and add all the required system jobs to the scheduler (**Administration > System Administration > Scheduler Configuration**).

## 1.3 Collaboration Portal Installation

*ID# 72975*

Collaboration Portal can now be installed from the FOIAXpress source code. The same pre-requisites for FOIAXpress apply, and the AppPoolAccount user should have permissions at the application installation location.



## 2 Document Management

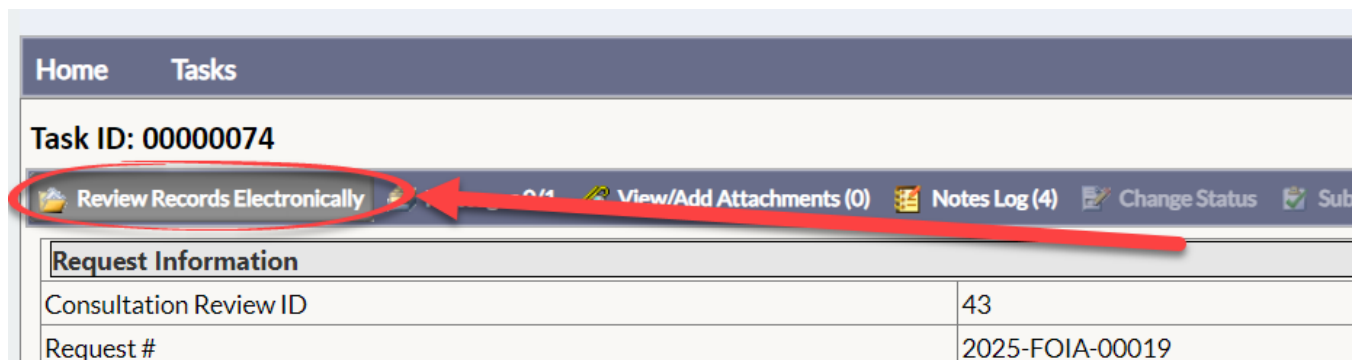
ID# 69640, 76474

New to v11.8.0, Document Management is available for the Collaboration Portal. This integration enables collaborators to upload and manage documents directly from the Collaboration Portal, rather than utilizing a third-party site.

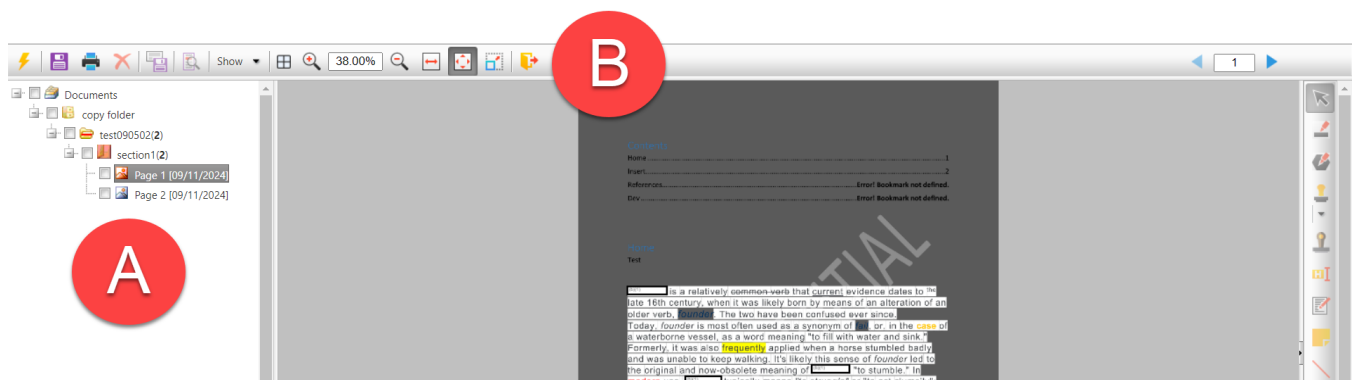
Users completing Consultation tasks can manage folders and document uploads within Document Management. Users tasked with a Request for Document task can also use Document Management to add redactions and annotations directly to the files.

### 2.1 Consultations

Document Management enables enhanced folder management and simplified document review for Consultation requests. When a Collaboration Portal user receives a Consultation task, they have the option to **Review Records Electronically**.



This opens the Document Management interface, as shown below.



From here, users can navigate through folder(s) in the (A) document tree and review each document/page. Use the (B) toolbar to edit the page view and save to disk/print the



document. Once the documents are reviewed, users can return to the Task page and submit the completed task back to the requester.

## 2.2 Request for Documents

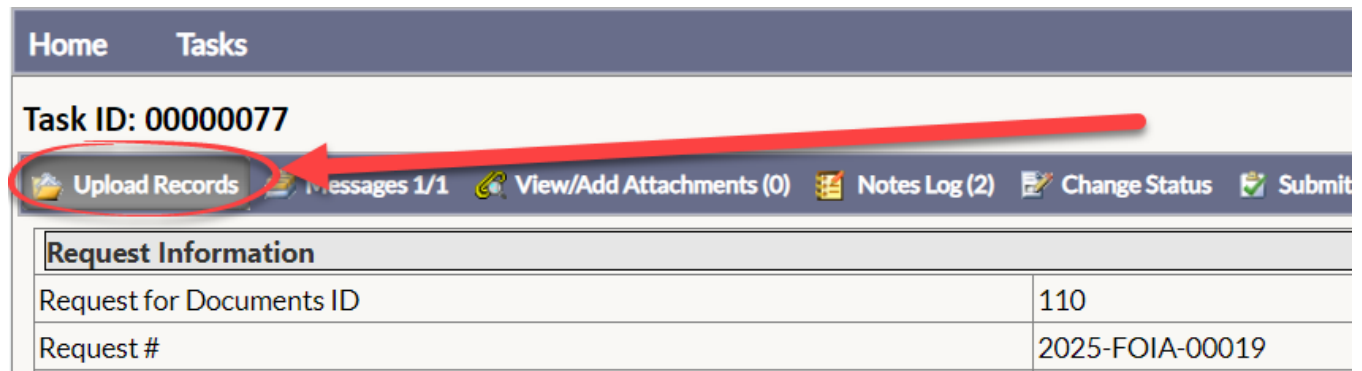
Document Management provides all the same functionality for Request for Document tasks, plus users can make redactions and manage folder structures directly within the platform.

If a FOIAXpress user needs records from an external source, they can send a Request for Documents (RFD) through Collaboration Portal. The RFD recipient can then log onto Collaboration Portal and upload, review, and redact documents using Document Management.

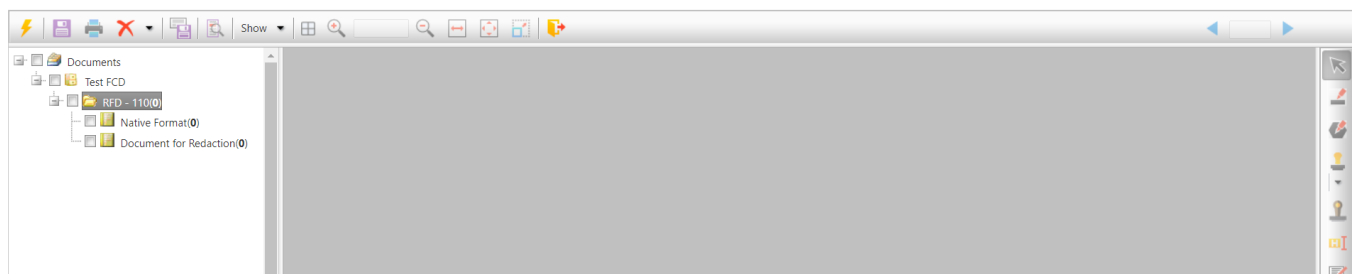
### 2.2.1 Uploading Records

ID# 78736

To add records to an RFD task, navigate to the Task page and click **Upload Records**.

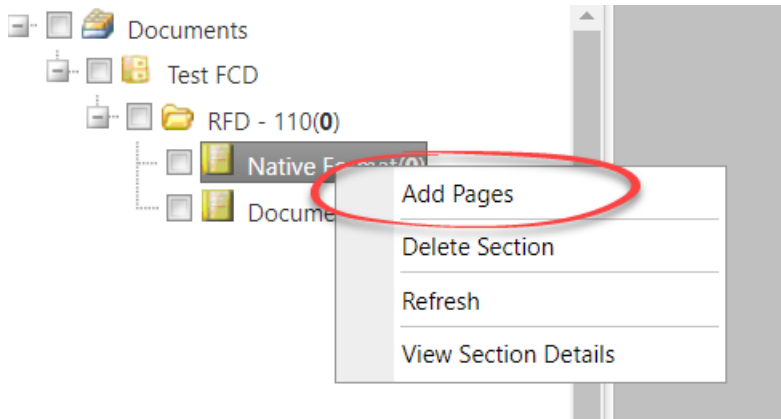


The Document Management interface opens in a new tab, as shown below.



Use the document tree in the left panel to navigate between folders, sections, and pages. Create a new section by right-clicking on a folder, then **Add Section**. Once the desired file structure is established, upload documents by right-clicking on a section and selecting **Add Pages**.

## Document Management



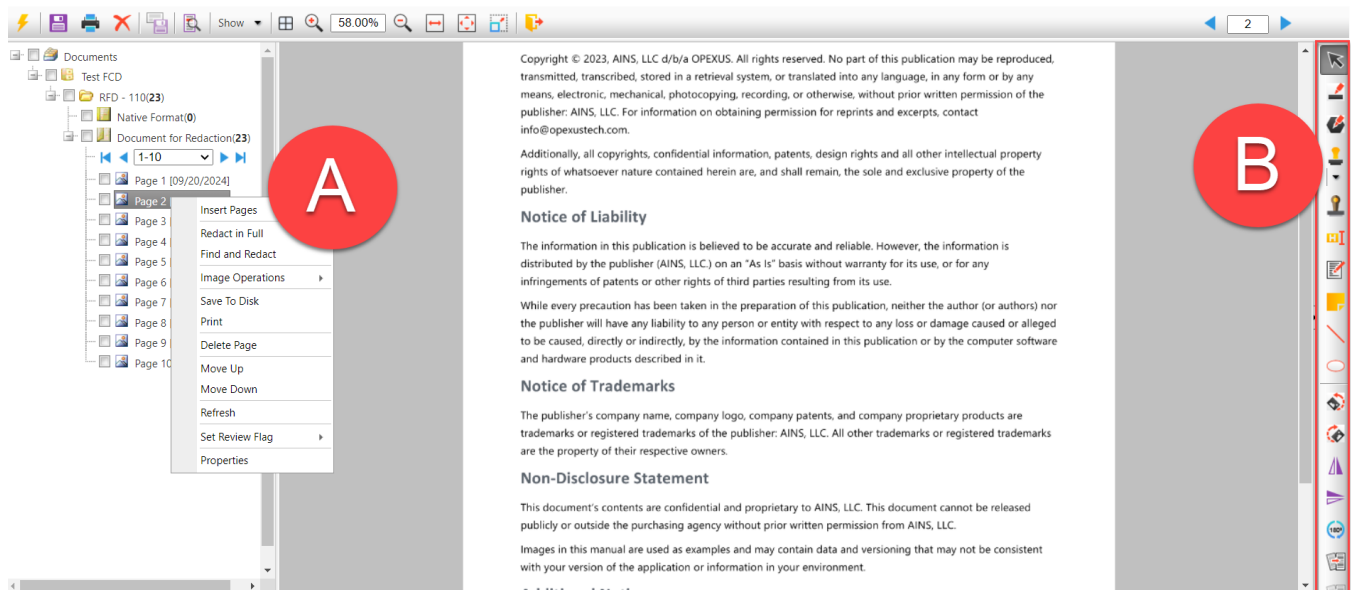
The *Add Documents* screen appears, prompting users to upload the requested documents. Once the job has completed, the pages will populate in the document tree.

### 2.2.2 Add Redactions

ID# 70230, 76471, 76979

Users can also add redactions to RFD files via Document Management tools, and view annotations and redactions in separate review layer and pin review objects before they are returned to the requester.

To create redactions, right click on the page, section, folder, or file cabinet drawer. There are two redaction methods available via the **(A) menu**: Redact in Full and Find and Redact. You can also use the **(B) toolbar** to add redactions and annotations manually.



The Redact in Full option allows users to redact the entire page. To redact specific content within a page, such as email addresses, words/phrases, or telephone numbers, use the Find and Redact feature.

**Find & Redact**

**Find** **Advanced**

**Find What**

Word/Phrase

OPEXUS -> Help

**Redact**

Redaction Code(s)

(b)(1) Select Codes Clear Codes

**Page Range**

☐ All Pages

☒ Current Page

☐ Selection

☐ Pages List

Enter page numbers and/or page ranges separated by commas. For example: 1,3,5-12.

Find & Strikethrough Find & Create Highlight for Review Find & Redact Cancel

Document Management also includes Find and Replace functionality for bulk replacement of redaction codes. To use Find and Replace, right-click on any folder with redactions and select **Find and Replace Redaction Codes** from the menu. Then, configure the replacement criteria and click **Find and Replace**.





**Replace Redaction Codes**

Page Range

☒ All Pages  
☐ Selection  
☐ Page List

Enter page numbers and/or page ranges separated by commas. For example: 1,3,5-12.

Find and Replace Redaction Code\*

Find What:

☐ Remove Selected Code

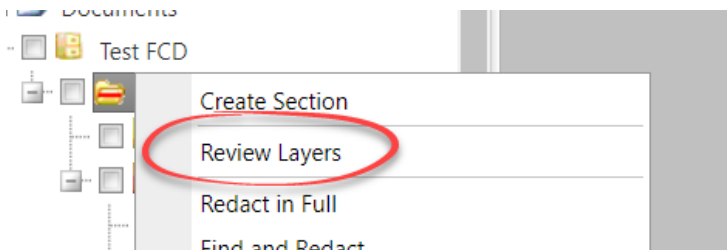
Replace With:

## 2.2.3 Review Actions Report for Redaction Layer

ID# 76726

Users can also create a Review Actions Report for each reaction layer in order, including the folder/section, page number, user, date, and action.

To open the report, right click on any folder with redactions and select **Review Layers**.



Select a layer from the list, then click **Review Actions**.

**Review Layers of 'RFD - 110'**

Created Date	User Name	Review Layer Name	Modified Date
09/20/2024 12:22:17 PM	Admin, Admin	Shannon PO - RFD - 110 - RFD Id: 110	09/20/2024 12:22:24 PM
09/20/2024 12:20:47 PM	Admin, Admin	Shannon PO - RFD - 110 - RFD Id: 110	09/20/2024 12:20:54 PM

The Review Actions Report opens, and the report can be exported or printed.



Document Review Actions Report - COLLABORATION PORTAL TEST COLLABORATION PORTAL TESTCOLLABORATION PORTAL TESTCOLLA...

Print Export Date Filter Close

OPEXUS  
xd  
Aruba

Report Date : 09/20/2024  
Time : 3:17 PM

**Document Review Actions Report**

Folder Name : RFD - 110  
Review Layer Name : Shannon PO - RFD - 110 - RFD Id: 110

Folder/Section	Page	Created By	Created Date	Action
RFD - 110	2	Admin, Admin	9/20/2024 12:22:23 PM	Redaction Changed

## 2.2.4 Lock Redactions

ID# 78944

We've added the ability to lock redactions, allowing FOIAXpress users to "pin" redactions on documents containing confidential information that should not be shared with collaborators. When Collaboration Portal user opens a document with locked redactions, they are unable to move the redaction or make it transparent/translucent, protecting sensitive information during the collaboration process.

## 2.3 Read Only Mode for Submitted Tasks

ID# 76407

When a task is sent from Collaboration Portal back to FOIAXpress, the documents are delivered in read-only mode. FOIAXpress users are not able to modify or redact the attachments; they can only view, print, or save the documents.

## 2.4 Review Flag Sync Between Collaboration Portal & FOIAXpress

ID# 77182



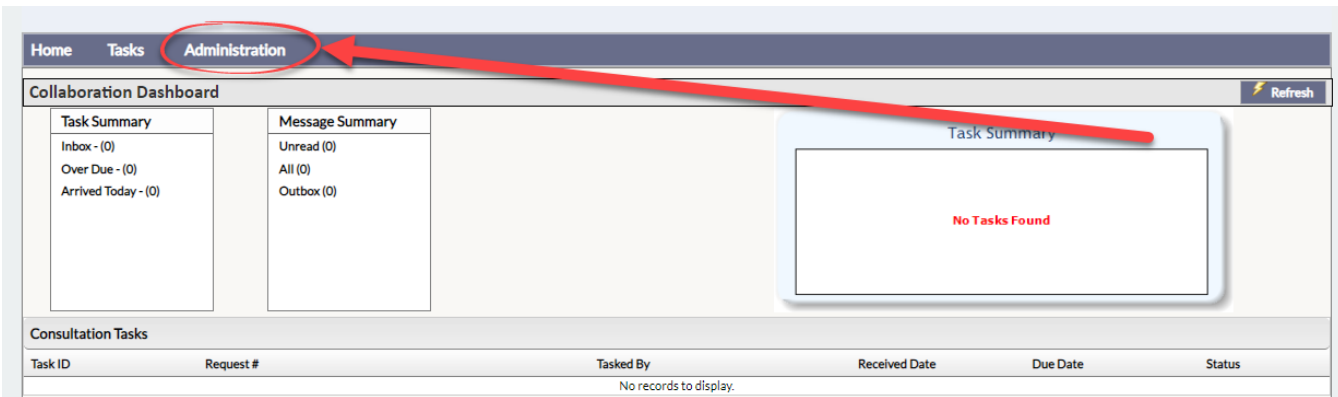
## Document Management

Review flags applied in Collaboration Portal Document Management will be preserved when the document is synced to FOIAXpress, along with layer data.



# 3 Collaboration Portal Administration

The Collaboration Portal Administration folder has been completely redesigned and modernized. Now, it looks and functions similarly to the FOIAXpress Administration page. Administrators have access to an **Administration** tab in their Collaboration Portal environment.



The **Administration** folder opens to the *System Configuration* page. You can navigate through the **(A) pages** and click into each **(B) subpage**.



In addition to design enhancements, 11.8.0 includes new configuration options as described in the following subsections.

## 3.1 Consultation and RFD Instruction Configuration

ID# 70560

You can now modify **Consultation Instructions** and **RFD Instructions** by navigating to **Administration > Organization Setup > Enterprise**.



The screenshot shows the 'Enterprise' application window with several tabs: 'Organization Information', 'Banner', 'Logo', 'Disclaimer', 'System Notice', 'Consultation Instructions' (selected), and 'RFD Instructions'. The 'Consultation Instructions' tab is active, displaying a rich text editor with the following content:

**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

At the bottom of the editor, there are buttons for 'Design', 'HTML', and 'Preview'. Below the editor, a status bar shows 'Words: 262 Characters: 1647'. At the very bottom right of the window are 'Save' and 'Close' buttons.

## 3.2 System Settings

ID# 73413

The **System Settings** page (**Administration > System Administration > System Settings**) has additional options, including **General Settings** fields and a **Document Management Settings** checkbox, where Administrators can enable Document Management in their agency's environment.

The screenshot shows the 'System Settings' application window. It contains several sections for configuration:

- Locations:** Contains three text input fields for file paths:
  - 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\)
 A note below states: 'Note: Location paths are with respect to the web server.'
- Mail Server Address:** Contains fields for 'SMTP Mail Server\* : 192.168.0.25' and 'Port\* : 25'. There is a checkbox for 'Use SMTP SSL : ☐'.
- PNG Cache Management:** Contains fields for 'PNG Cache limit\* : 20 GB' and 'Delete PNG Cache If the folder has not been accessed in more than \* : 30 Days'.
- General Settings Information:** Contains three text input fields:
  - 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:** A section at the bottom with a checkbox for 'Enable Document Management' which is checked.

At the bottom right of the window are 'Save' and 'Close' buttons.



## 3.3 Application and Email Templates

ID# 73427

We've added two new subpages under **Administration > System Configuration: Application Templates** and **Email Templates**.

Application Templates

Application Templates

Name	Subject	Created Date
Submit Instructions	Submit Instructions	11/02/2023
Rfd Instructions	Rfd Instructions	11/02/2023
Consultation Instructions	Consultation Instructions	11/02/2023

1

Page: 1 of 1 Go Page Size 3 Change

Item 1 to 3 of 3

Edit Application Templates Close

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

On these pages, Administrators can edit Application and Email templates, respectively. Select the template you'd like to edit, then click the **Edit** button.



**Edit Application Template**

Application Template\*

Instruction Subject\*

Instruction Body

Submit Instructions!!@! test

Words: 3 Characters: 28

Save Close

The *Edit Template* page opens, where Administrators can edit the template name, subject, and body text.

### 3.4 Search Users

ID# 73421

We've also updated the *Users* page (**Administration > Organization Setup > Users**). Here, you can view Collaboration Portal accounts, search for specific users, and edit account information.



Search User

Search Users

Search Criteria

Wild card searches (\*) are supported

Personal Information

First Name : \*

Last Name : \*

Email : \*

User Information

Login : \*

Action Office : All

Group : All

+ Advanced

Search

Clear

Close

Edit

Users

Last Name	First Name	Login	Group Name	Action Office	Active	Login Status	Created Date
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

## 3.5 Session Audit Log

ID# 73426

The *Audit Log* is now available under **Administration > Security > Audit Log**. On this page, administrators can access two different Audit Logs: the Session Audit Log and the User Action Audit Log.

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





The session audit log lists all user sessions, including the IP of the workstation where the portal was accessed and the access times. The user action audit log lists user actions including task views, message views, and task submissions. 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 Bug Fixes

We've corrected the following bugs in v11.8.0:

ID	Description
<b>69742</b>	Addressed a bug in which non-Admin users were able to access the Administration folder in Collaboration Portal via the Administration URL.
<b>76259</b>	Resolved a bug in which non-Admin users could access Email Log details.

