Description of document:	Department of the Treasury FOIAXpress Record Custodian Guide, Training Guide and Dashboard Management, 2020
Requested date:	19-September-2021
Release date:	23-September-2021
Posted date:	21-February-2022
Source of document:	FOIA Request Department of the Treasury 1500 Pennsylvania Ave. NW Washington D.C. 20220 Submit a FOIA Request Online Email: FOIA@treasury.gov FOIAonline

DEPARTMENT OF THE TREASURY
WASHINGTON, D.C.

9/23/2021

RE: Your FOIA Request to Treasury, Case Number 2021-FOIA-00900

This is the Department of the Treasury's (Treasury) final response to your Freedom of Information Act (FOIA) request submitted on September 19, 2021. You requested "A copy of the guide, handbook or manual to the new Treasury Department FOIA tracking system established during the last year or two."

Your request has been processed under the provisions of the FOIA, 5 U.S.C. § 552. Treasury Departmental Offices conducted a search and located 8 documents, totaling 179 pages.

After reviewing the information, 78 pages are fully released, 24 pages are partially released, and 77 pages are fully withheld pursuant to Exemptions (b)(4) and (b)(6) as identified below.

FOIA Exemption 4 exempts from disclosure "trade secrets and commercial or financial information obtained from a person that is privileged or confidential."

FOIA Exemption 6 exempts from disclosure "personnel and medical files and similar files the disclosure of which would constitute a clearly unwarranted invasion of personal privacy."

There are no fees assessed since allowable charges fell below $25.

You have the right to appeal this decision within 90 days from the date of this letter. By filing an appeal, you preserve your rights under FOIA and give the agency a chance to review and reconsider your request and the agency's decision. Your appeal must be in writing, signed by you or your representative, and should contain the rationale for your appeal. Please also cite the FOIA reference number noted above. Your appeal should be addressed to:

FOIA Appeal
FOIA and Transparency
Office of Privacy, Transparency, and Records
Department of the Treasury
1500 Pennsylvania Ave., N.W.
Washington, D.C. 20220

If you submit your appeal by mail, clearly mark the letter and the envelope with the words "Freedom of Information Act Appeal." Your appeal must be postmarked or electronically transmitted within 90 days from the date of this letter.

If you would like to discuss this response before filing an appeal to attempt to resolve your dispute without going through the appeals process, you may contact our FOIA Public Liaison for assistance via email at FOIAPL@treasury.gov, or via phone at (202) 622-8098. A FOIA Public Liaison is a supervisory official to whom FOIA requesters can raise questions or concerns about the agency's FOIA process. FOIA Public Liaisons can explain agency records, suggest agency offices that may have responsive records, provide an estimated date of completion, and discuss how to reformulate and/or reduce the scope of requests in order to minimize fees and expedite processing time.

If the FOIA Public Liaison is unable to satisfactorily resolve your question or concern, the Office of Government Information Services (OGIS) also mediates disputes between FOIA requesters and federal agencies as a non-exclusive alternative to litigation. If you wish to contact OGIS, you may contact the agency directly by email at OGIS@nara.gov, by phone at (877) 684-6448, by fax at (202) 741-5769 or by mail at the address below:

Office of Government Information Services
National Archives and Records Administration
8601 Adelphi Road – OGIS
College Park, MD 20740-6001

Please note that contacting any agency official (including the FOIA analyst, FOIA Requester Service Center, FOIA Public Liaison) and/or OGIS is not an alternative to filing an administrative appeal and does not stop the 90-day appeal clock

If any questions arise, please contact Samuel Giovannucci at (202) 622-1391, or by e-mail at samuel.giovannucci@treasury.gov. Please reference FOIA case number 2021-FOIA-00900 when contacting our office about this request.

Sincerely,

Mark Bittner
Director, FOIA & Transparency
Office of Privacy, Transparency, and Records

Enclosure:
Responsive Documents (179 pages)

FOIAXpress
Record Custodian Guide

V1.0

September 2020

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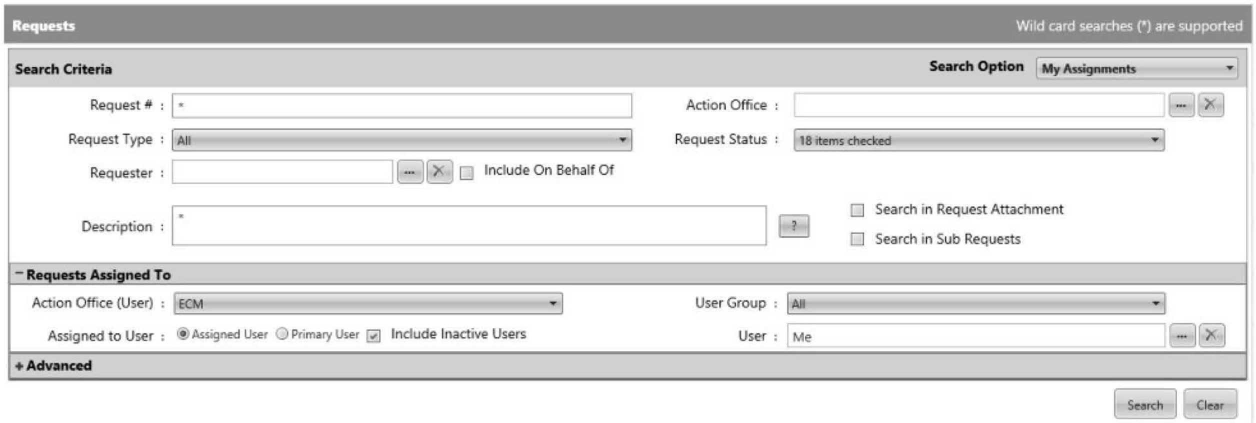
1. Search for Request

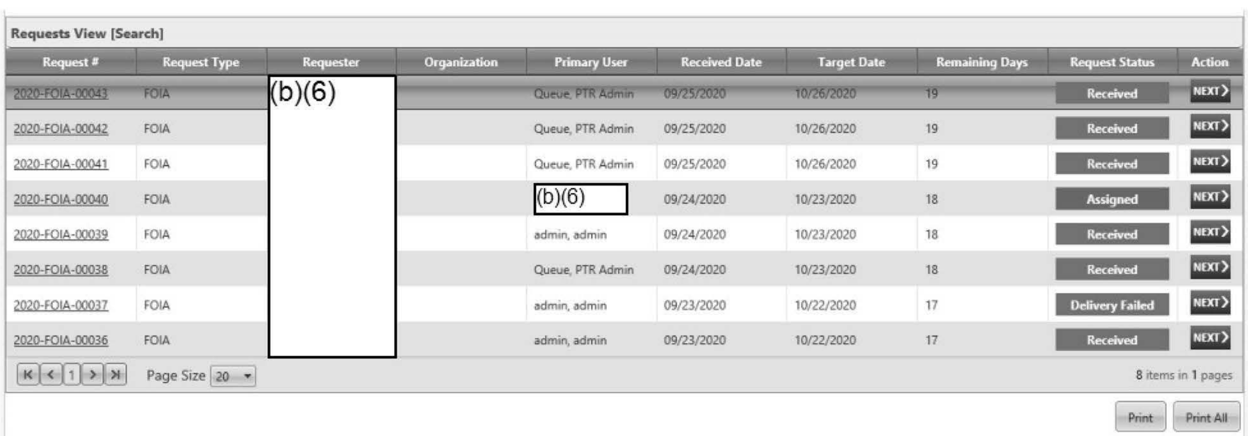
Search Requests Using Full Text Search

1. Click **Requests > Search Requests**. The *Search Requests* screen displays as shown below:



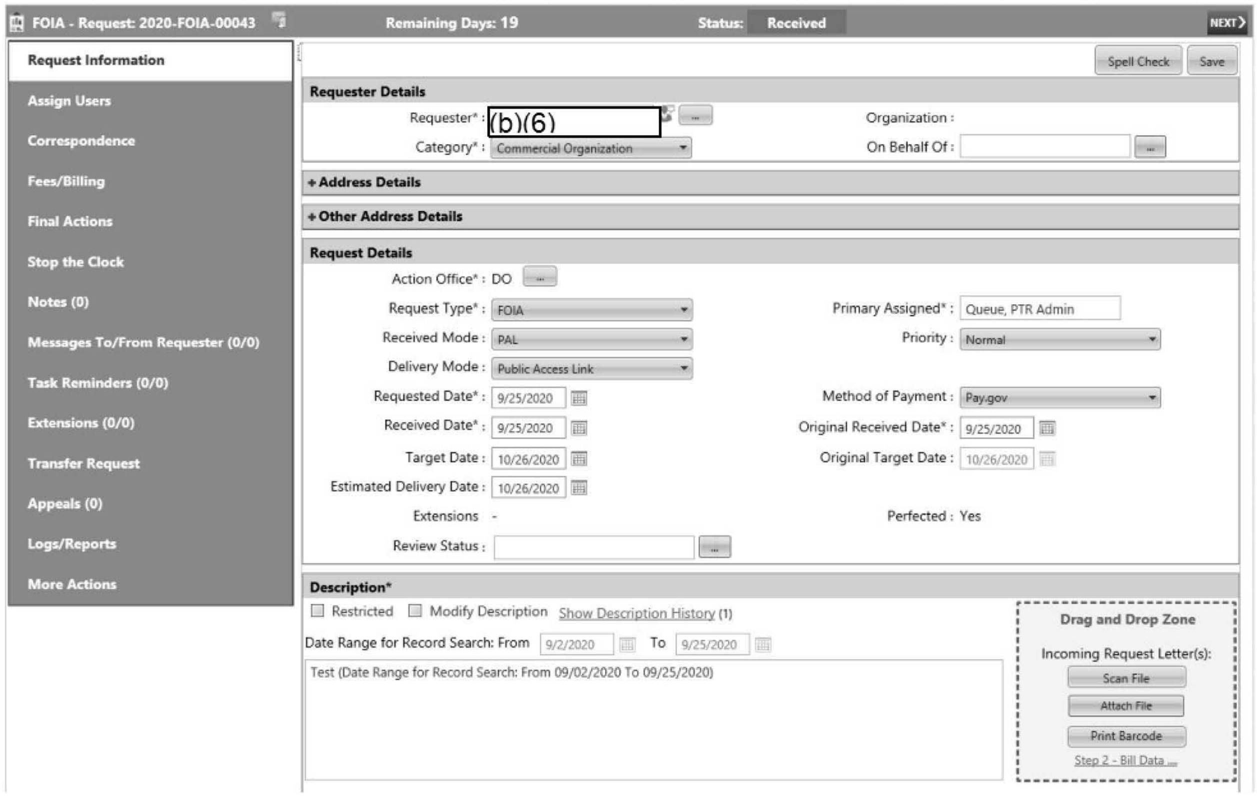
2. Enter information in the fields as necessary

3. Click **Search**. The search results displays as shown below:


Requests View [Search]

Request #	Request Type	Requester	Organization	Primary User	Received Date	Target Date	Remaining Days	Request Status	Action
2020-FOIA-00043	FOIA	(b)(6)		Queue, PTR Admin	09/25/2020	10/26/2020	19	Received	NEXT
2020-FOIA-00042	FOIA			Queue, PTR Admin	09/25/2020	10/26/2020	19	Received	NEXT
2020-FOIA-00041	FOIA			Queue, PTR Admin	09/25/2020	10/26/2020	19	Received	NEXT
2020-FOIA-00040	FOIA			(b)(6)	09/24/2020	10/23/2020	18	Assigned	NEXT
2020-FOIA-00039	FOIA			admin, admin	09/24/2020	10/23/2020	18	Received	NEXT
2020-FOIA-00038	FOIA			Queue, PTR Admin	09/24/2020	10/23/2020	18	Received	NEXT
2020-FOIA-00037	FOIA			admin, admin	09/23/2020	10/22/2020	17	Delivery Failed	NEXT
2020-FOIA-00036	FOIA			admin, admin	09/23/2020	10/22/2020	17	Received	NEXT

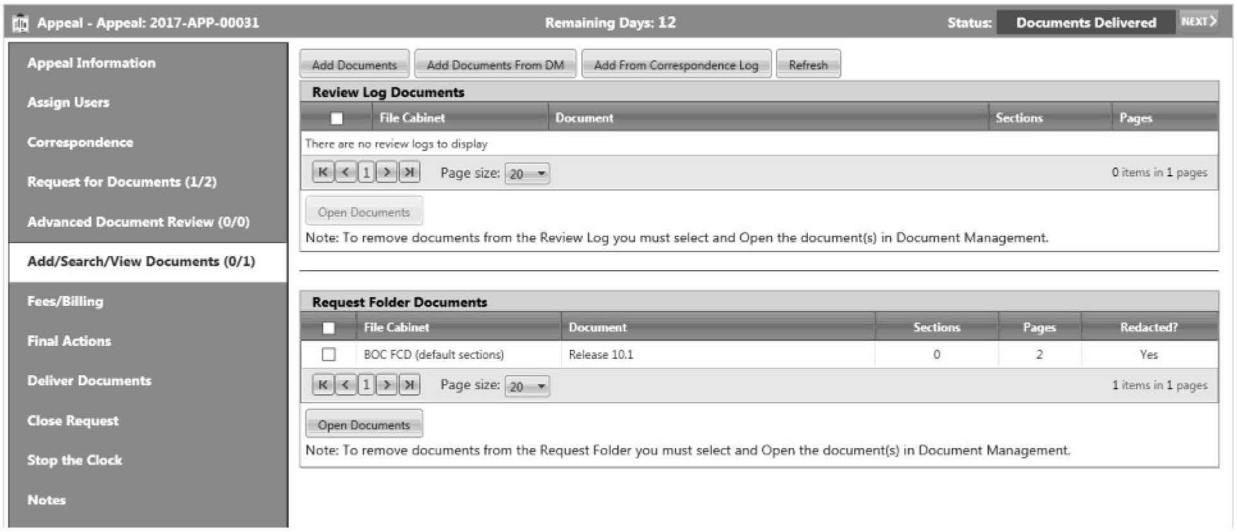
4. Select the FOIA Request number to access the Request and see a similar screen to what displays below:



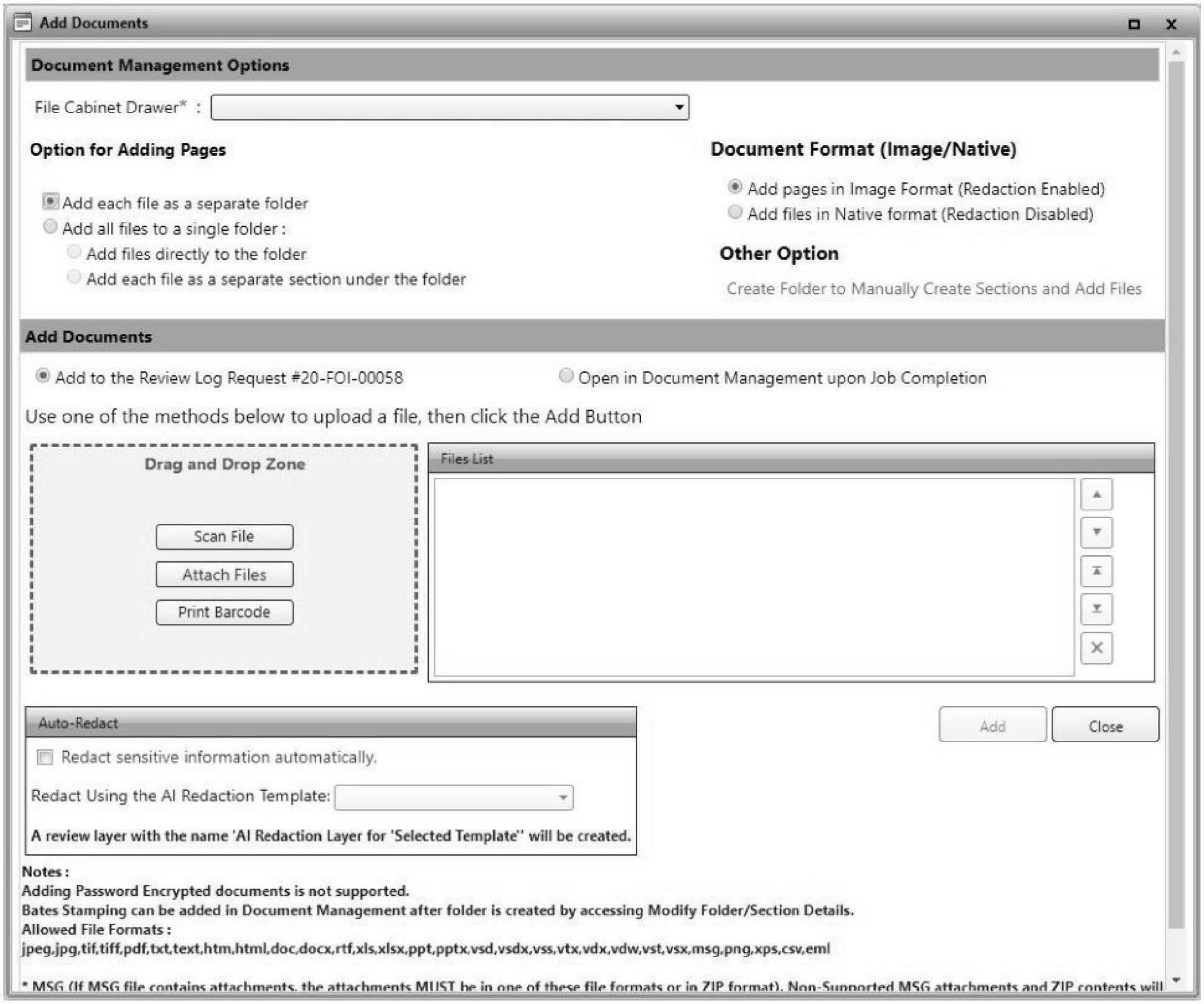
2. Add/View Documents

Steps to Add Documents to Review Log

1. Open a Request for which to add documents to the Review Log.
2. Click **Add/Search/View Documents**. The *Add/Search/View Documents* screen displays as shown below.



3. Click **Add Documents** (add documents from a local drive), **Add Documents from DM** (add documents from Document Management), or **Add Documents from Correspondence Log** (add documents from the Correspondence Log of the request). The *Add Documents* screen displays. The sample below shows the *Add Documents* screen, but your options may differ depending on where you are adding documents from.



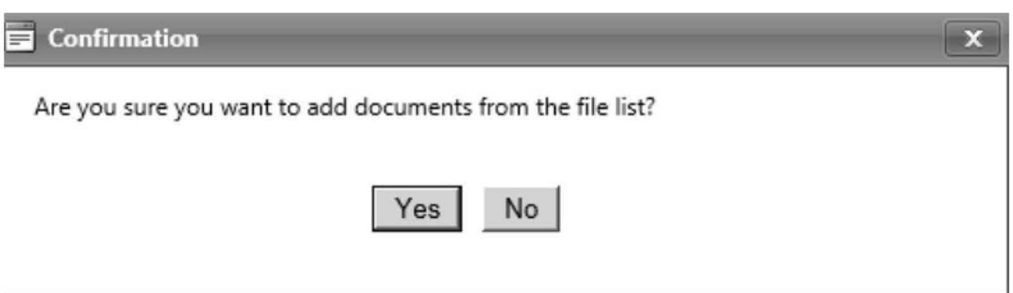
4. Enter information in the fields described below as necessary.

Field	Description
Document Management Options	
File Cabinet Drawer	The File Cabinet Drawer to which documents will be added.

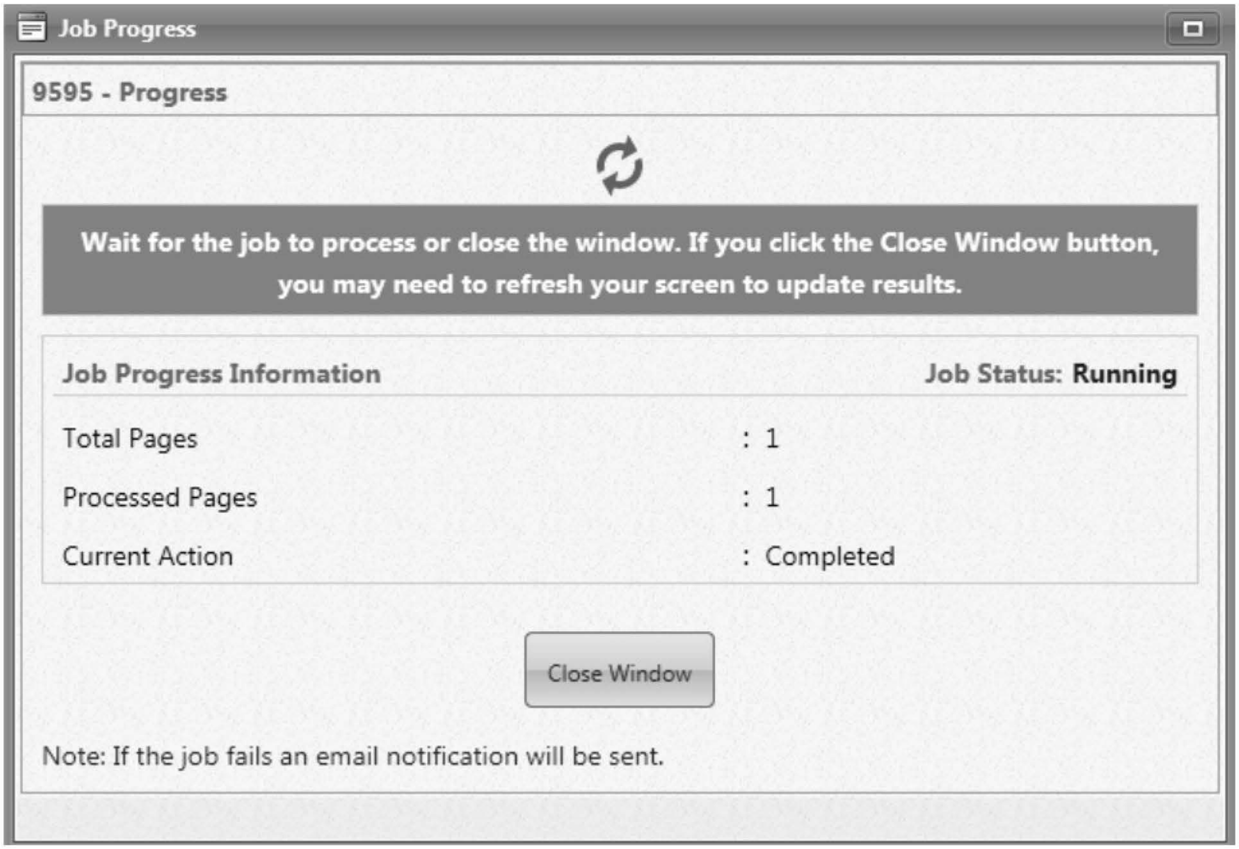
Option for Adding Pages	◦ **Add each file as a separate folder**: If selected, each file will be added as a separate folder) or ◦ **Add all files to a single folder**: If selected, enter a folder name and select one of the two following options): ▪ **Add files directly to the folder:** If selected, files will be added directly to the folder) ▪ **Add each file as a separate section under the folder**: If selected, each file will be added as a separate section under the folder)
Document Format (Image/Native)	◦ **Add pages in Image Format (Redaction Enabled**: If selected, pages will be added in redaction-enabled format or ◦ **Add files in Native format (Redaction Disabled)**: If selected, documents will be added in native format, with redaction disabled
Create Folder to Manually Create Sections and Add Files	Create a placeholder folder where folders and files can be added manually. Click **Create Folder to Manually Create Sections and Add Files** under *Other Option*, enter all information as necessary, then click **Create Folder**. The fields are described under the Create New Folder section.
Add Documents (content seen here depends on the method used to add documents)	
Add Documents	◦ **Add to the Review Log Request #** or

	○ **Open in Document Management upon Job Completion**
Drag and Drop Zone	If **Add Documents** is selected: **Attach Files** allows users to attach files, **Scan File** scans files, and the **Drag and Drop Zone** allows files to be dragged and dropped to upload. All added files displays under the *Files List*.
Auto-Redact	
Redact Sensitive Information Automatically	Select the **Redact sensitive information automatically** checkbox to redact these documents automatically using the AI Assistant feature.
Redact Using the AI Redaction Template	Selecting the **Redact sensitive information automatically** checkbox enables the *Redact Using the AI Redaction Template* drop-down, where you can select an **AI Redaction Template** to apply to the incoming documents.

5. Click **Add**. If the request status will be changes as a result of this action, the program will prompt if this change is OK before proceeding. After confirming, a verification message displays as shown below.



6. Click **Yes**. The *Job Progress* window displays as shown below.



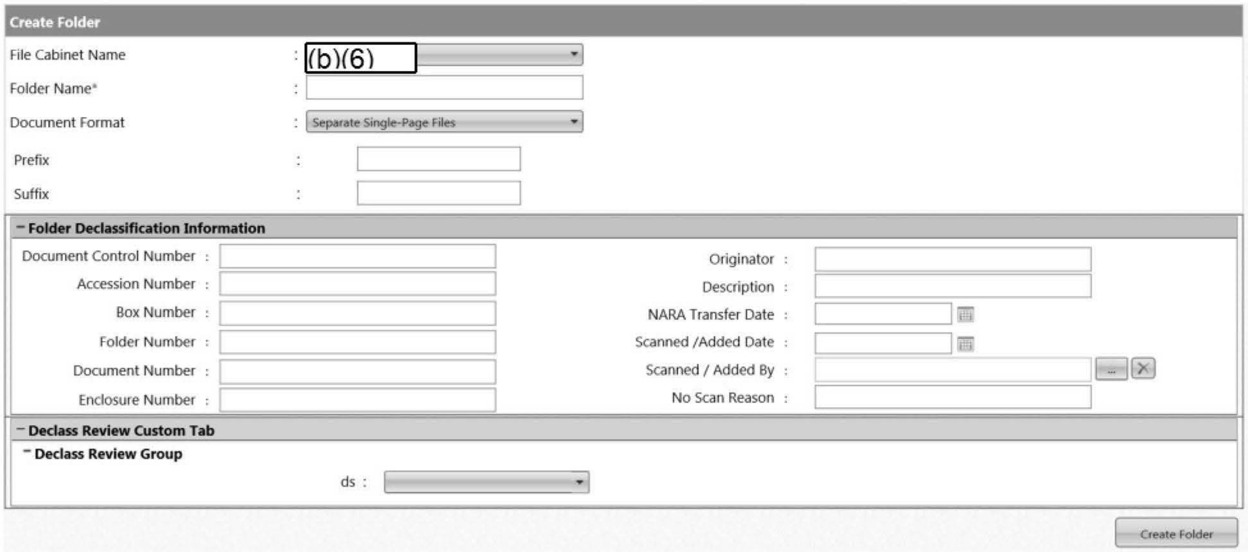
(!!) Note: After the job is completed, the Job Progress window will close automatically, and the added documents displays in the Review Log.

3. Create Folder

FOIAXpress offers an intuitive user interface that allows content to be structured at any level of complexity. Normal operations, such as creating and editing folders, can be performed directly from the navigation tree. Users can arrange Folders in a hierarchy with as many levels as desired. The folders you create are presented to users in a similar fashion to the familiar Windows Explorer format and interface. Once folders are created, documents can be associated with a folder.

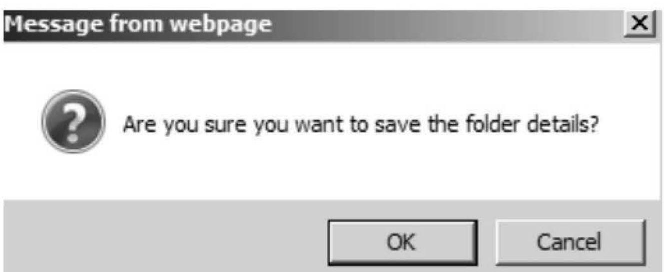
(!!) Note: In Document Management, all related folders are grouped under a File Cabinet Drawer. Folders are divided into Sections, while Sections provide groupings for related Pages. Therefore, the structure is **File Cabinet Drawer > Folder > Section (optional) > Pages.**

1. Click **Document Management > Create New Folder**. The *Create Folder* screen displays as shown below. Note, the image below contains some custom-specific fields:



2. Fill out the fields and ensure that you have selected the File Cabinet Drawer

3. Click **Create Folder**. A verification message displays as shown below:

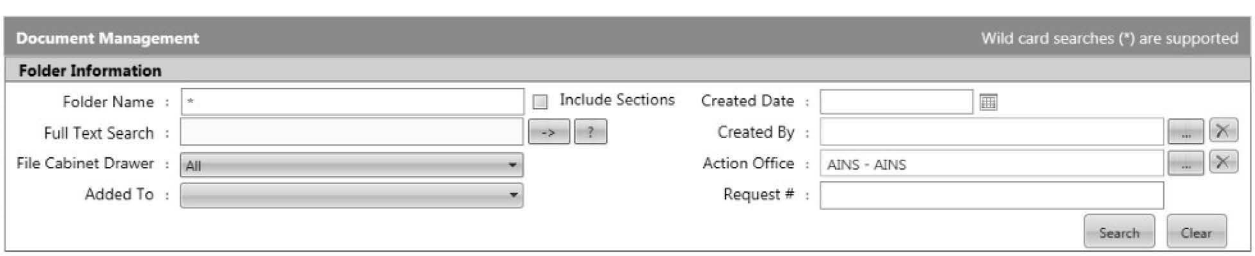


4. Click **OK**

3.1 Add Documents to Folder

Documents are represented as Pages in Document Management and are imported from a location on your system into FOIAXpress. The Pages are then added to a Folder where document review and processing can occur. The imported page files types are automatically converted into TIFF during the import process. FOIAXpress also allows native file formats such as .doc, .xls, .ppt, and .wpd to be imported into Document Management, however users will not be able to draw redactions for these file types. In order to store a file in its native format, the user must select the appropriate option when creating the Folder.

1. Click **Document Management > Search Folders**. The following screen displays:

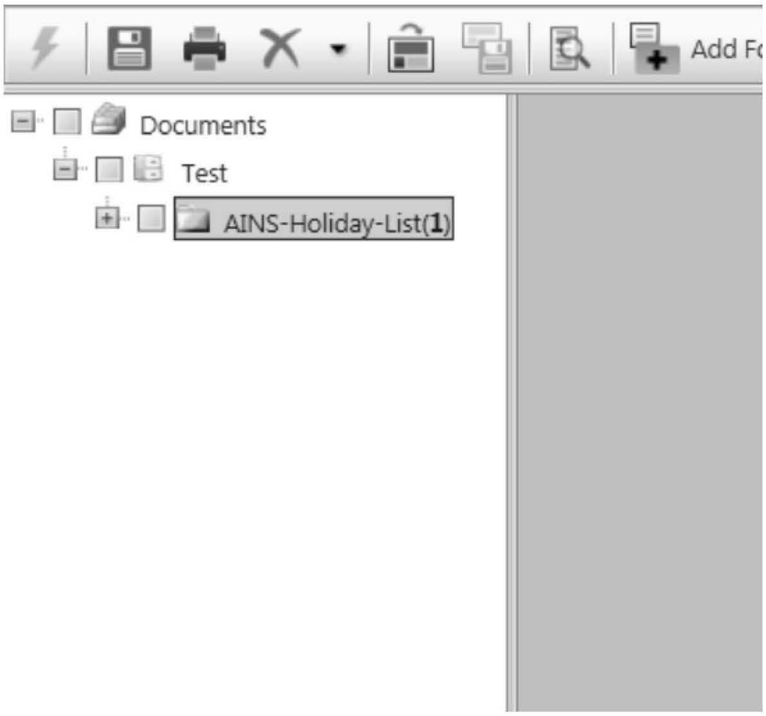


2. Enter search criteria as necessary to locate the Folder you want to add Pages to

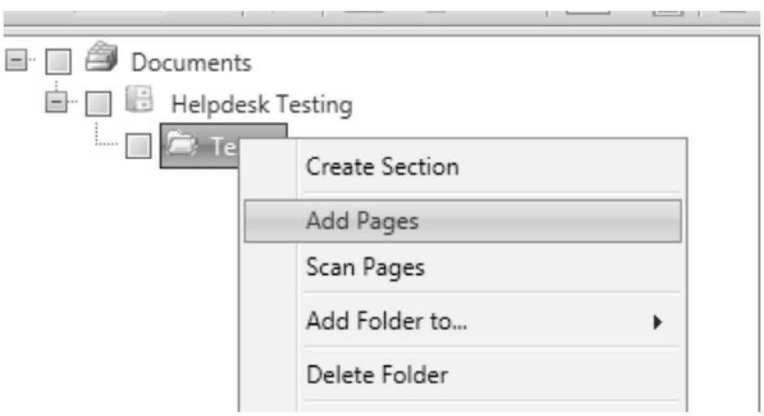
3. Click **Search**

4. From the search results, select the checkbox next to the Folder you want to add pages to

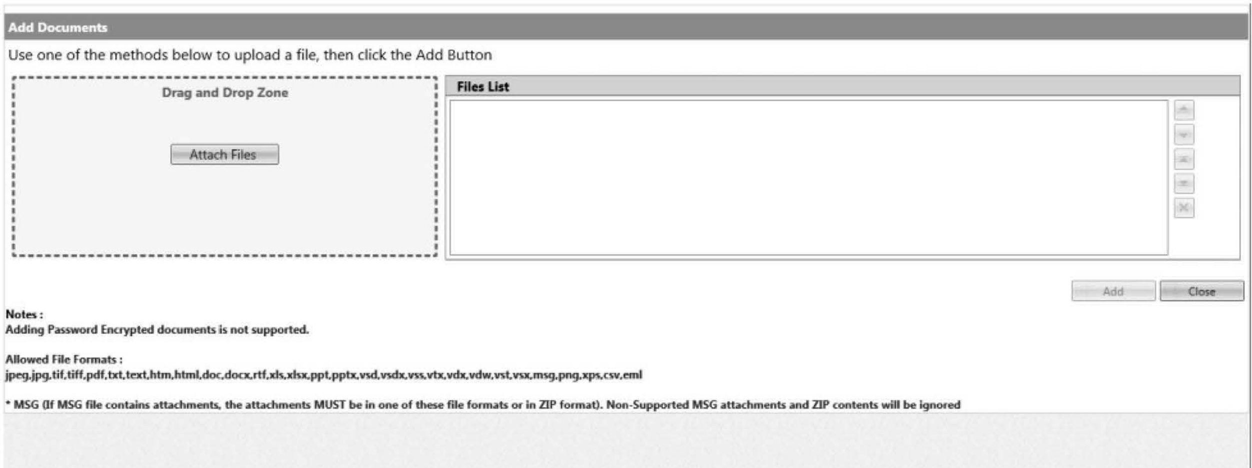
5. Click **Open Folders**. The *Document Management* screen displays as shown below:

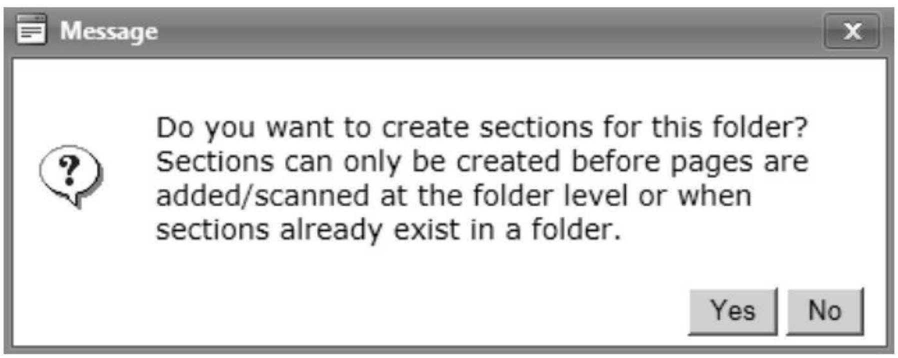


6. Right-click the Folder or Section within the Folder. A menu displays as shown below:



7. Click **Add Pages**. The *Add Pages* screen displays as shown below:

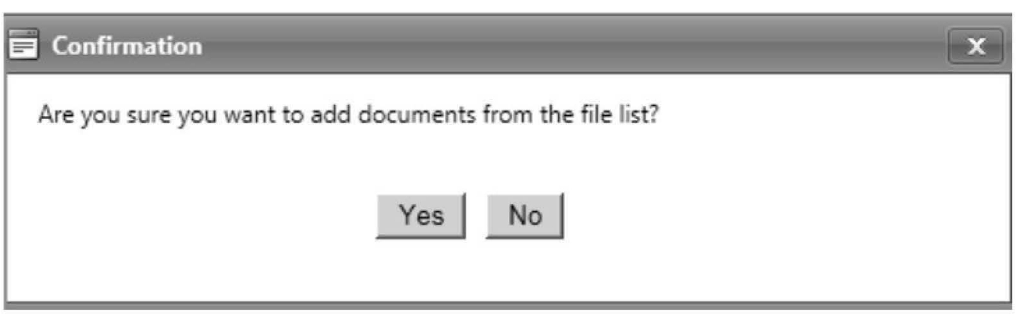




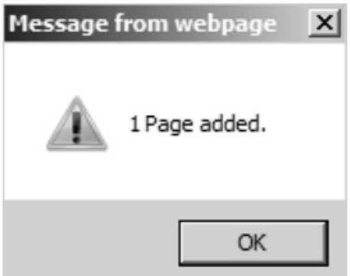
8. Click **Attach Files** or drag and drop the files containing the Pages you want to add to the *Drag and Drop Zone*

9. If you clicked **Attach Files**, select the files you want to add, then click **Open**. If you dragged and dropped the files, skip this step and proceed to step 10

10. Click **Add**. A verification message displays as shown below:



11. Click **Yes**. A confirmation message displays as shown below:

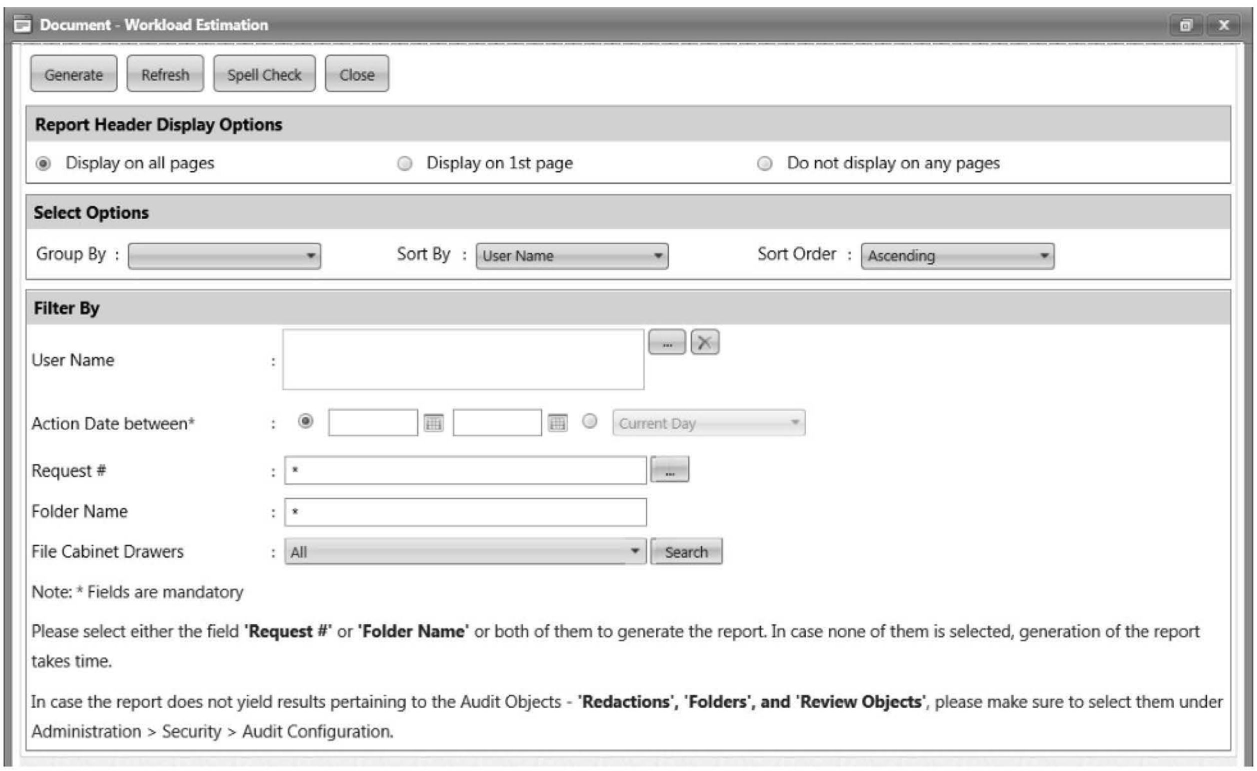


12. Click **OK**. The Page(s) added display under the Folder or Section

4. Reports

Steps to Generate a Document-Workload Estimation Report

1. Click **Reports > Document Reports > Document-Workload Estimation**. The *Document-Workload Estimation* screen displays as shown below:

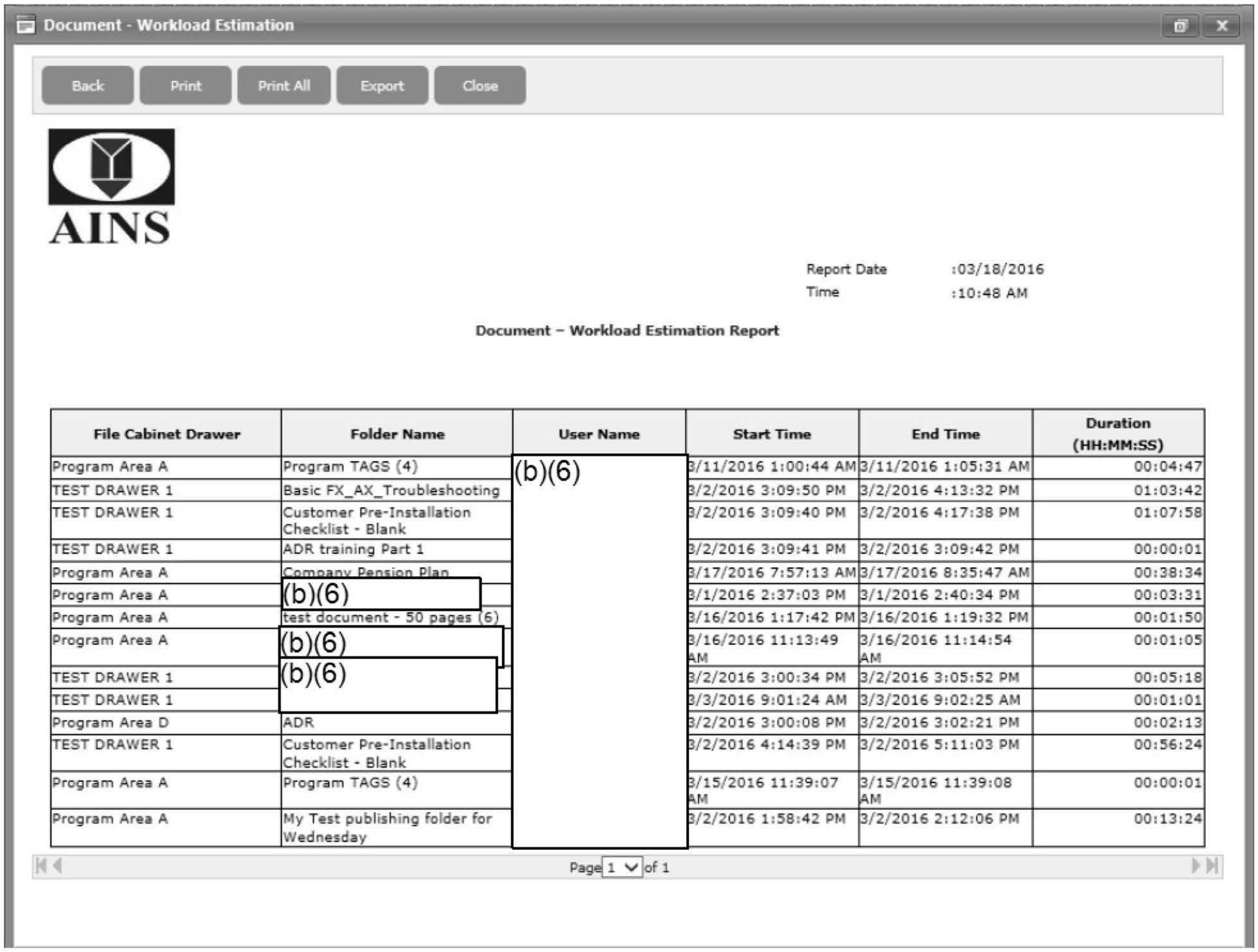


2. Enter information in the following fields as necessary

Field	Description
Report Header Display Options	

Display on all pages	Display the report header on all pages of the report.
Display on 1st page	Only display the report header on the first page of the report.
Do not display on any pages	Do not display the report header on any pages of the report.
Select Options	
Group By	The criteria you want to group by.
Sort By	The criteria you want to sort by.
Sort Order	Sort the report in **Ascending** or **Descending** order.
Filter By	
User Name	The user(s) to include in the report.
Action Date between	Date range within which actions were taken. Optionally, select the **Current Day** option and select an option from the menu.
Request #	Request number to be included in the report
Folder Name	Name of a Folder to be included in the report
File Cabinet Drawers	File Cabinet Drawer(s) to include in the report. Optionally, you can select which Folders within the File Cabinet Drawer(s) will be included by clicking **Search**, selecting Folder(s), then clicking **Generate**.

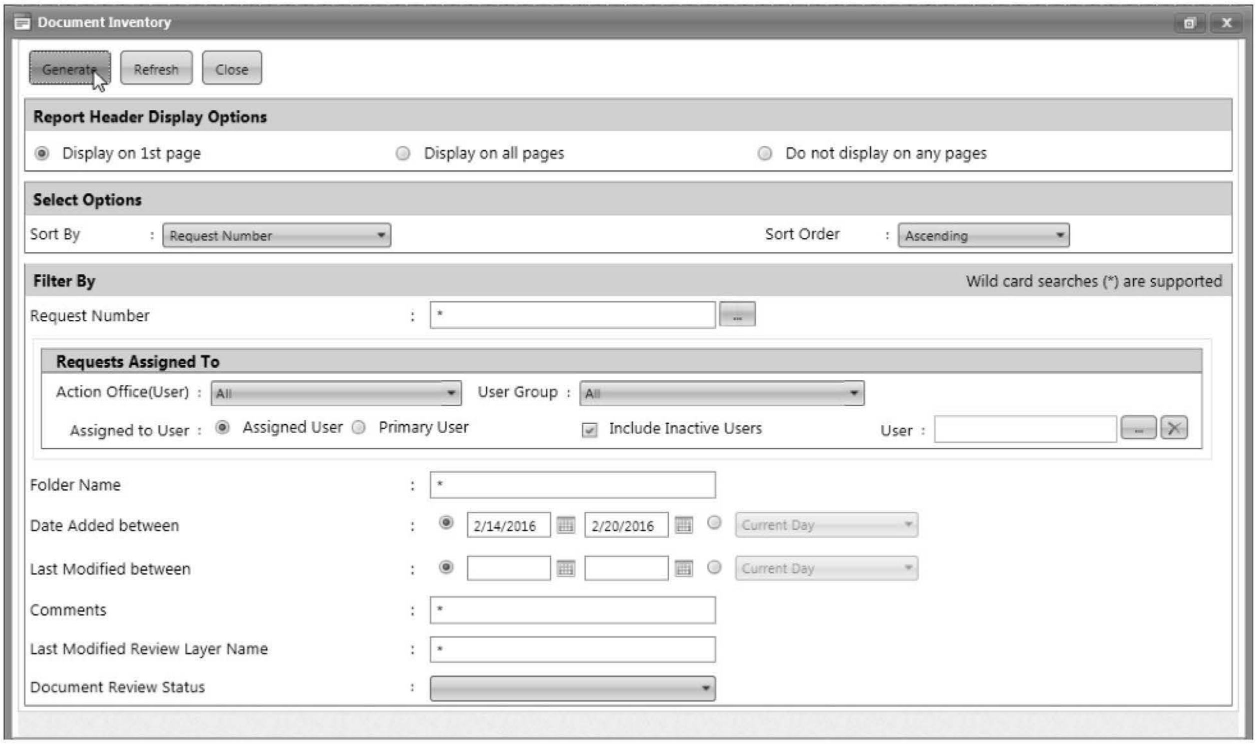
3. Click **Generate**. The Document Workload Estimation Report displays as shown below:



File Cabinet Drawer	Folder Name	User Name	Start Time	End Time	Duration (HH:MM:SS)
Program Area A	Program TAGS (4)	(b)(6)	3/11/2016 1:00:44 AM	3/11/2016 1:05:31 AM	00:04:47
TEST DRAWER 1	Basic FX_AX_Troubleshooting		3/2/2016 3:09:50 PM	3/2/2016 4:13:32 PM	01:03:42
TEST DRAWER 1	Customer Pre-Installation Checklist - Blank		3/2/2016 3:09:40 PM	3/2/2016 4:17:38 PM	01:07:58
TEST DRAWER 1	ADR training Part 1		3/2/2016 3:09:41 PM	3/2/2016 3:09:42 PM	00:00:01
Program Area A	Company Pension Plan		3/17/2016 7:57:13 AM	3/17/2016 8:35:47 AM	00:38:34
Program Area A	(b)(6)		3/1/2016 2:37:03 PM	3/1/2016 2:40:34 PM	00:03:31
Program Area A	test document - 50 pages (6)		3/16/2016 1:17:42 PM	3/16/2016 1:19:32 PM	00:01:50
Program Area A	(b)(6)		3/16/2016 11:13:49 AM	3/16/2016 11:14:54 AM	00:01:05
TEST DRAWER 1	(b)(6)		3/2/2016 3:00:34 PM	3/2/2016 3:05:52 PM	00:05:18
TEST DRAWER 1			3/3/2016 9:01:24 AM	3/3/2016 9:02:25 AM	00:01:01
Program Area D	ADR		3/2/2016 3:00:08 PM	3/2/2016 3:02:21 PM	00:02:13
TEST DRAWER 1	Customer Pre-Installation Checklist - Blank		3/2/2016 4:14:39 PM	3/2/2016 5:11:03 PM	00:56:24
Program Area A	Program TAGS (4)		3/15/2016 11:39:07 AM	3/15/2016 11:39:08 AM	00:00:01
Program Area A	My Test publishing folder for Wednesday		3/2/2016 1:58:42 PM	3/2/2016 2:12:06 PM	00:13:24

Steps to Generate a Document Inventory Report

1. Click **Reports > Document Reports > Document Inventory.** The *Document Inventory* screen displays as shown below:



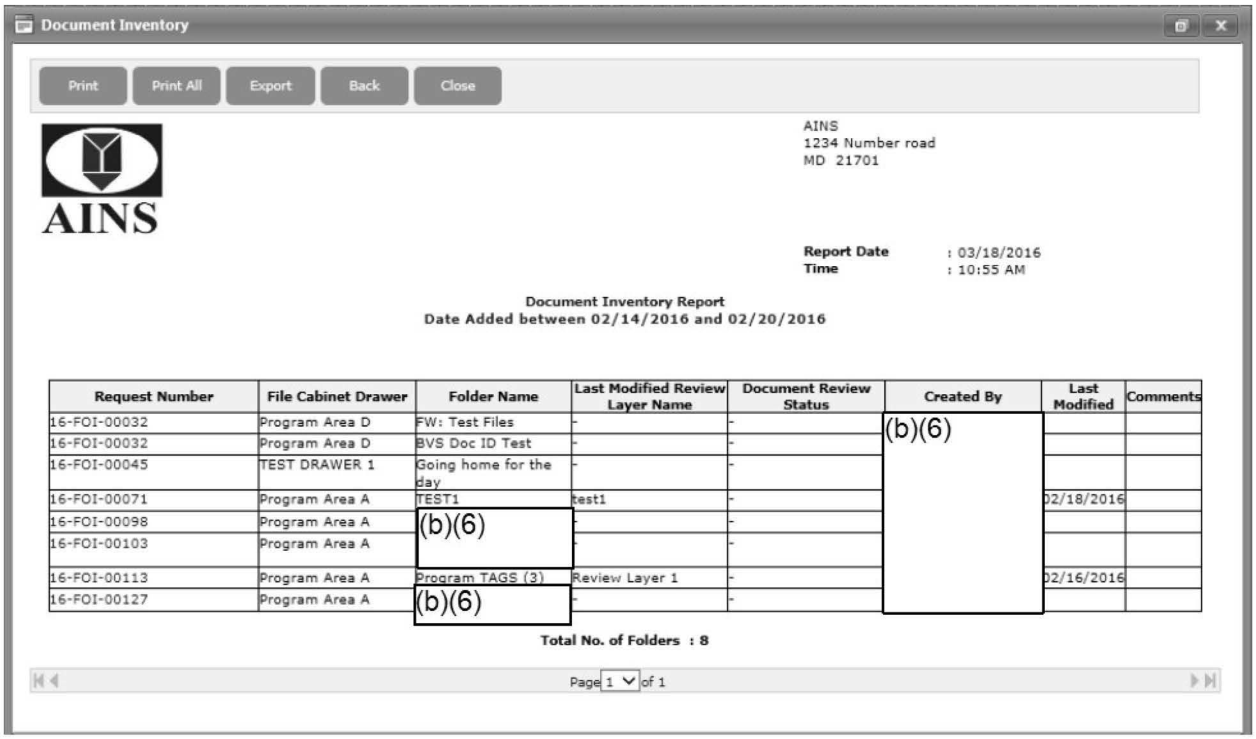
2. Enter information in the following fields as necessary:

Field	Description
Report Header Display Options	
Display on 1st page	Only display the report header on the first page of the report.
Display on all pages	Display the report header on all pages of the report.
Do not display on any pages	Do not display the report header on any pages of the report.
Select Options	

Sort By	The criteria you want to sort by.
Sort Order	Sort the report in **Ascending** or **Descending** order.
Filter By	
Request Number	Request number to be included in the report
Folder Name	Name of a Folder to be included in the report
Date Added between	Date range within which documents were added. Optionally, select the **Current Day** option and select an option from the menu.
Last Modified between	Date range within which documents were modified. Optionally, select the **Current Day** option and select an option from the menu.
Comments	**Comments** from the document review process to filter the report by comments.
Last Modified Review Layer Name	Name of the last modified Review Layer.
Document Review Status	Status, as selected from the drop-down menu.
Requests Assigned To	
Action Office (User)	Action Office, as selected from the drop-down menu. **All** will be selected by default.
User Group	User Group, as selected from the drop-down menu. **All** will be selected by default.
Assigned to User	**Assigned User** or **Primary User** the Requests are assigned to

Include Inactive Users	Include inactive users in the report.
User	Search for and select a user the Requests are assigned to

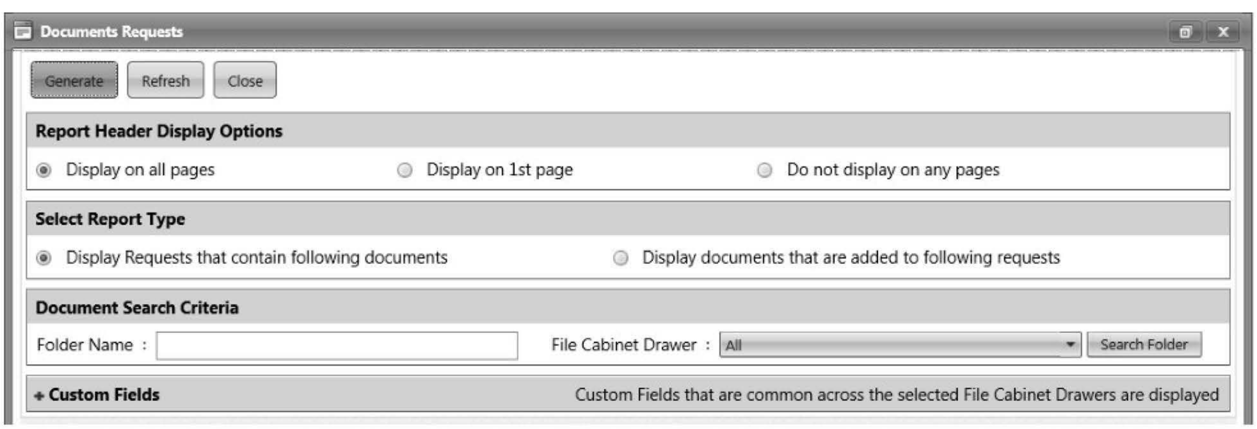
3. Click **Generate**. The Document Inventory Report displays as shown below:



Request Number	File Cabinet Drawer	Folder Name	Last Modified Review Layer Name	Document Review Status	Created By	Last Modified	Comments
16-FOI-00032	Program Area D	FW: Test Files	-	-	(b)(6)		
16-FOI-00032	Program Area D	BVS Doc ID Test	-	-			
16-FOI-00045	TEST DRAWER 1	Going home for the day	-	-			
16-FOI-00071	Program Area A	TEST1	test1	-		02/18/2016	
16-FOI-00098	Program Area A	(b)(6)	-	-			
16-FOI-00103	Program Area A		-	-			
16-FOI-00113	Program Area A	Program TAGS (3)	Review Layer 1	-		02/16/2016	
16-FOI-00127	Program Area A	(b)(6)	-	-			

Steps to Generate a Documents Requests Report

1. Click **Reports > Document Reports > Documents Requests**. The *Documents Requests* screen displays as shown below:



2. Enter information in the following fields as necessary:

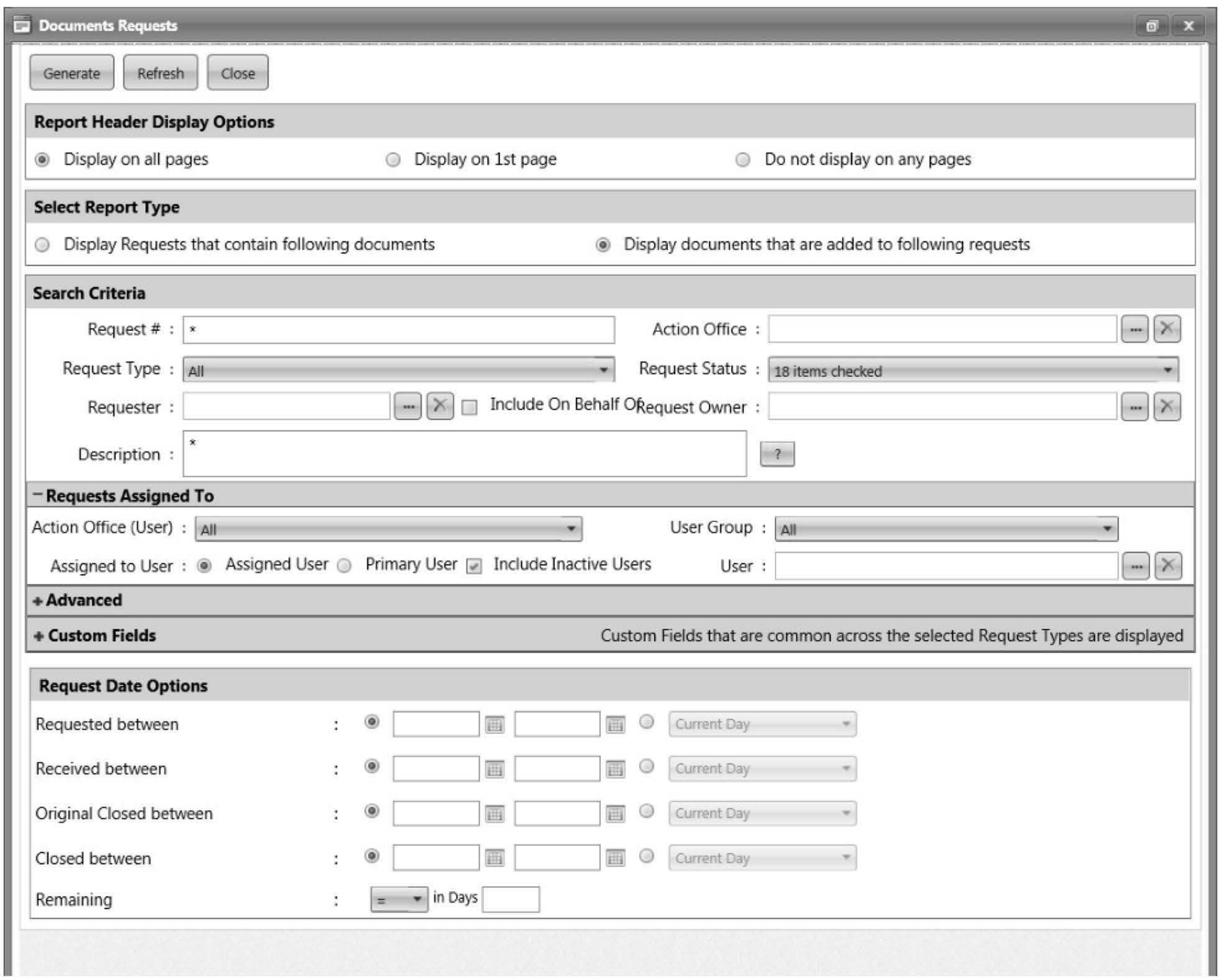
Field	Description
Report Header Display Options	
Display on all pages	Display the report header on all pages of the report.
Display on 1st page	Only display the report header on the first page of the report.
Do not display on any pages	Do not display the report header on any pages of the report.
Select Report Type	
Display Requests that contain following documents	Display Requests that contain documents from a specified Folder and File Cabinet Drawer.
Display documents that are added to following requests	Display documents that are added to selected Request(s).
Document Search Criteria (displayed if Display Requests that contain following documents was selected as the Report Type)	
Folder Name	The name of a Folder.
File Cabinet Drawer	File Cabinet Drawer(s), as selected from the drop-down menu. Click **Search Folder** to

	select specific Folder(s) from the selected File Cabinet Drawer(s), then click **Generate** to generate the report.
Search Criteria (displayed if Display documents that are added to following requests was selected as the Report Type)	
Request #	Identification number for a Request to be included
Request Type	**Request Type**, as selected from the drop-down menu. **All** will be selected by default.
Requester	Requester(s).to be included in the report
Include On Behalf Of	Include the **On Behalf Of** field in the search criteria.
Description	All or part of the Request **Description**.
Action Office	Action Office(s), as selected from the drop-down menu.
Request Status	Request Status(es) you want to include in the search criteria.
Request Owner	**Request Owner** to be included in the report
Requests Assigned To (displayed if Display documents that are added to following requests was selected as the Report Type)	

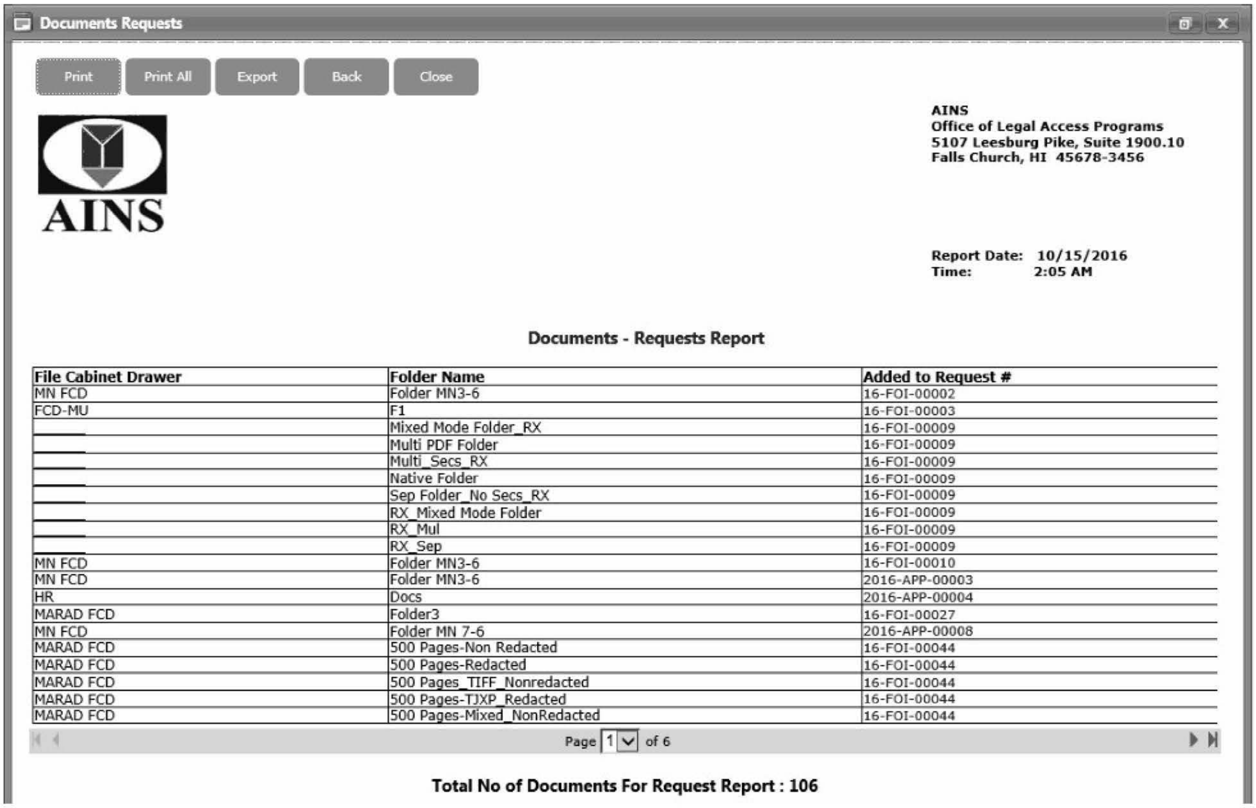
Action Office (User)	Action Office, as selected from the drop-down menu. **All** will be selected by default.
Assigned to User	**Assigned User** or **Primary User** the Requests are assigned to
Include Inactive Users	Include inactive users in the report.
User Group	User Group Requests are assigned to, as selected from the drop-down menu. **All** will be selected by default.
User	**User** the requests are assigned to
Request Date Options (displayed if Display documents that are added to following requests was selected as the Report Type)	
Requested between	Date range within which a Request was requested. Optionally, select the **Current Day** option and select an option from the drop-down menu.
Received between	Date range within which a Request was received. Optionally, select the **Current Day** option and select an option from the drop-down menu.
Original Closed between	Date range within which an original Request was closed. Optionally, select the **Current Day** option and select an option from the drop-down menu.

Closed between	Date range within which a Request was closed. Optionally, select the **Current Day** option and select an option from the drop-down menu.
Remaining	Number of days remaining in the Request

If you select Display documents that are added to following requests in the Select Report Type section, additional fields displays as shown below:



3. Click **Generate**. The Documents Requests Report displays as shown below:



File Cabinet Drawer	Folder Name	Added to Request #
MN FCD	Folder MN3-6	16-FOI-00002
FCD-MU	F1	16-FOI-00003
	Mixed Mode Folder_RX	16-FOI-00009
	Multi PDF Folder	16-FOI-00009
	Multi_Secs_RX	16-FOI-00009
	Native Folder	16-FOI-00009
	Sep Folder_No Secs_RX	16-FOI-00009
	RX_Mixed Mode Folder	16-FOI-00009
	RX_Mul	16-FOI-00009
	RX_Sep	16-FOI-00009
MN FCD	Folder MN3-6	16-FOI-00010
MN FCD	Folder MN3-6	2016-APP-00003
HR	Docs	2016-APP-00004
MARAD FCD	Folder3	16-FOI-00027
MN FCD	Folder MN 7-6	2016-APP-00008
MARAD FCD	500 Pages-Non Redacted	16-FOI-00044
MARAD FCD	500 Pages-Redacted	16-FOI-00044
MARAD FCD	500 Pages_TIFF_Nonredacted	16-FOI-00044
MARAD FCD	500 Pages-TJXP_Redacted	16-FOI-00044
MARAD FCD	500 Pages-Mixed_NonRedacted	16-FOI-00044

Page 1 of 6

Total No of Documents For Request Report : 106

5. Contact Information

5.1 FOIA - Point of Contact and Resources

If you have any questions related to FOIA processing, please contact the FOIA team at FOIA@treasury.gov.

For all other FOIA-related resources, please visit Treasury's Freedom of Information Act page

5.2 FOIAXpress User Support

- All FOIAXpress training and demonstration related materials are posted on myTreasury's FOIAXpress page
- To request technical support, please submit a Service Desk ticket
  - All access requests require PTR's approval and the completion of *Access Request and Rules of Behavior* forms
- For all other FOIAXpress related inquiries, please contact the support team at FOIAXpressSupportTeam@treasury.gov

FOIAXpress
PTR Admin Guide

V1.0

September 2020

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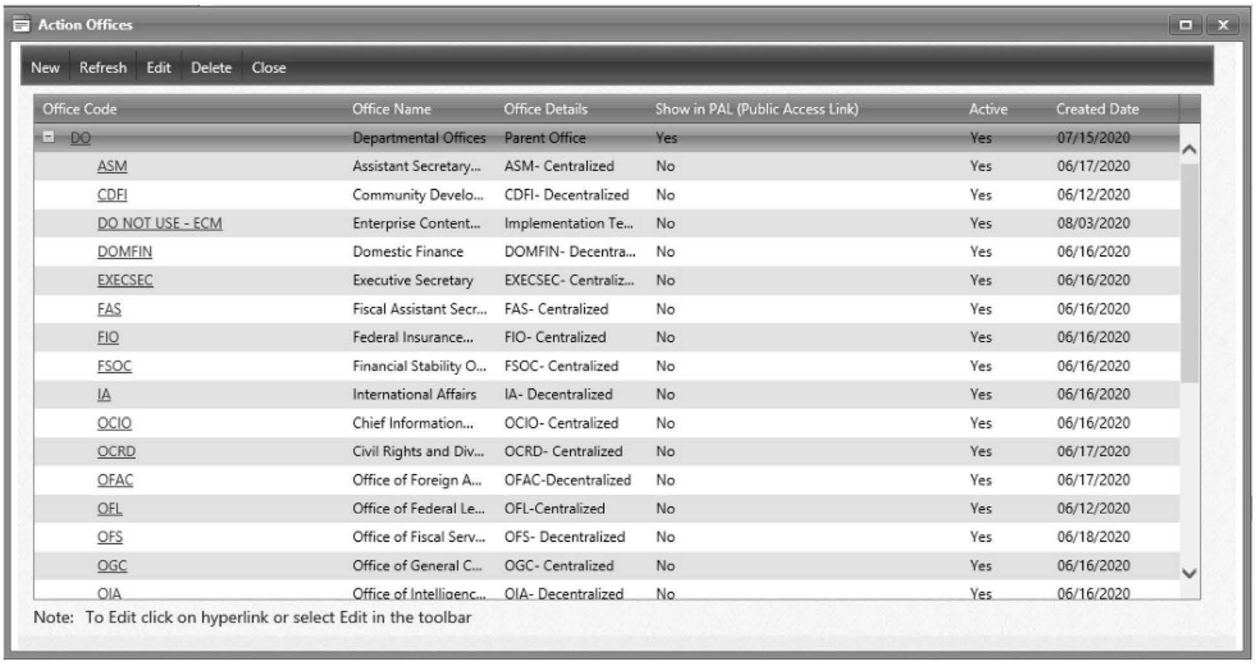
1. Organization Setup

1.1 Action Offices

Action Offices represent bureaus and offices that process their own FOIA request and that share your instance of FOIAXpress for receiving and responding to requests. FOIAXpress can be associated and filtered by Action Office, including User Groups, Users, File Cabinet Drawers, Correspondence Templates, and Program Offices.

The sample screen below shows the Action Offices configuration (accessible via **Organization Setup > Action Offices**).



Office Code	Office Name	Office Details	Show in PAL (Public Access Link)	Active	Created Date
DO	Departmental Offices	Parent Office	Yes	Yes	07/15/2020
ASM	Assistant Secretary...	ASM- Centralized	No	Yes	06/17/2020
CDFI	Community Develo...	CDFI- Decentralized	No	Yes	06/12/2020
DO NOT USE - ECM	Enterprise Content...	Implementation Te...	No	Yes	08/03/2020
DOMFIN	Domestic Finance	DOMFIN- Decentra...	No	Yes	06/16/2020
EXECSEC	Executive Secretary	EXECSEC- Centraliz...	No	Yes	06/16/2020
FAS	Fiscal Assistant Secr...	FAS- Centralized	No	Yes	06/16/2020
FIO	Federal Insurance...	FIO- Centralized	No	Yes	06/16/2020
FSOC	Financial Stability O...	FSOC- Centralized	No	Yes	06/16/2020
IA	International Affairs	IA- Decentralized	No	Yes	06/16/2020
OCIO	Chief Information...	OCIO- Centralized	No	Yes	06/16/2020
OCRD	Civil Rights and Div...	OCRD- Centralized	No	Yes	06/17/2020
OFAC	Office of Foreign A...	OFAC-Decentralized	No	Yes	06/17/2020
OFL	Office of Federal Le...	OFL-Centralized	No	Yes	06/12/2020
OFS	Office of Fiscal Serv...	OFS- Decentralized	No	Yes	06/18/2020
OGC	Office of General C...	OGC- Centralized	No	Yes	06/16/2020
OIA	Office of Intelligenc...	OIA- Decentralized	No	Yes	06/16/2020

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

Click **New** to create a new action office or select an existing office and click **Edit** to rename the office and populate the office details.

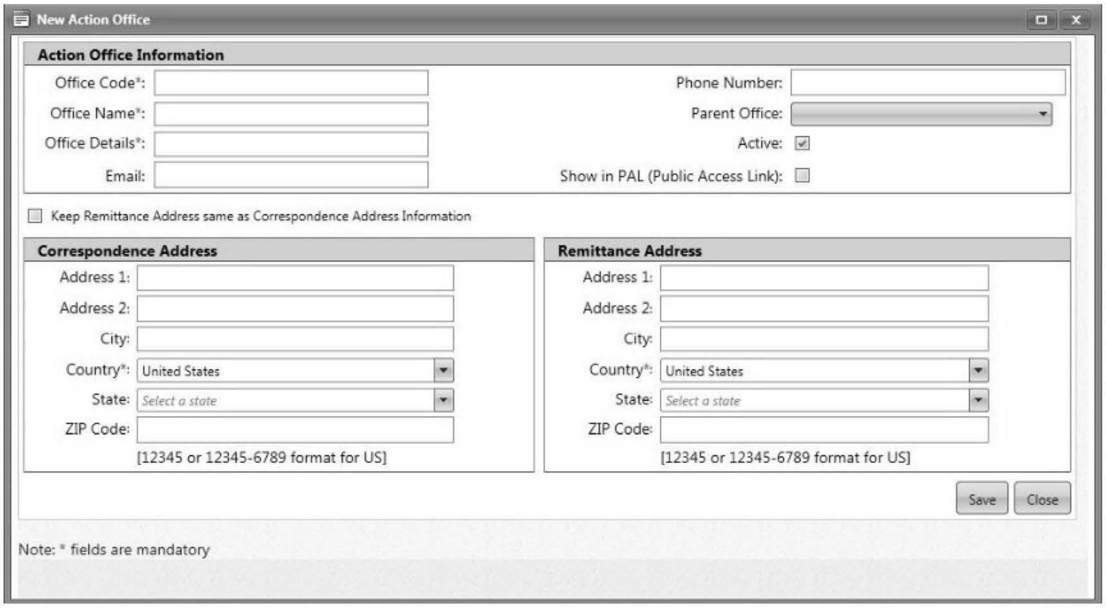
1.1.1 Create an Action Office

Follow the steps below to create an action office:

1. Click **Administration > Organization Setup > Action Offices**. The *Action Offices* window displays as shown below.

Office Code	Office Name	Office Details	Show in PAL (Public Access Link)	Active	Created Date
AINS	AINS	AINS	No	Yes	02/10/2016

2. Click **New**. The *New Action Office* window displays as shown below.



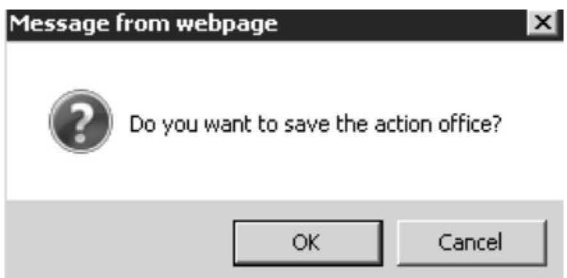
3. Enter information in the fields described below per your agency's requirements.

Field	Description
Action Office Information	
Office Code	An identifier or symbol assigned to an office that may/may not relate to the Action Office.
Office Name	The name of the Action Office.
Office Details	A brief description of the Action Office.
Email	The electronic mail address assigned to the Action Office.
Phone Number	The telephone number assigned to the Action Office.
Parent Office	The office under which the Action Office is assigned.

Active	When selected, activates the Action Office for use in the application.
Show in PAL (Public Access Link)	When selected, displays the Action Office in PAL.
Keep Remittance Address same as Correspondence Address Information	Enables the Address 1, Address 2, City, States (US), and Zip Code fields to be automatically populated with the same information as **Correspondence Address**, once saved. The United States is automatically populated as the default Country. The **Remittance Address** represents the location where an invoice is sent for services rendered.
Correspondence Address	
Address 1	The street location of the Action Office.
Address 2	The subsequent location of the Action Office, such as Suite, Building, Province, etc.
City	The name of the city where the Action Office is located.
Country	The name of the country where the Action Office is located.
State (US)	The two-digit representation of the state where the Action Office is located.
Zip Code	The five or nine-digit postal code where the Action Office is located.
Remittance Address	
Address 1	The street location of the Action Office.

Address 2	The subsequent location of the Action Office, such as Suite, Building, Province, etc.
City	The name of the city where the Action Office is located.
Country	The name of the country where the Action Office is located.
State (US)	The two-digit representation of the state where the Action Office is located.
Zip Code	The five or nine-digit postal code where the Action Office is located.

4. Click **Save**. A verification message displays as shown below.



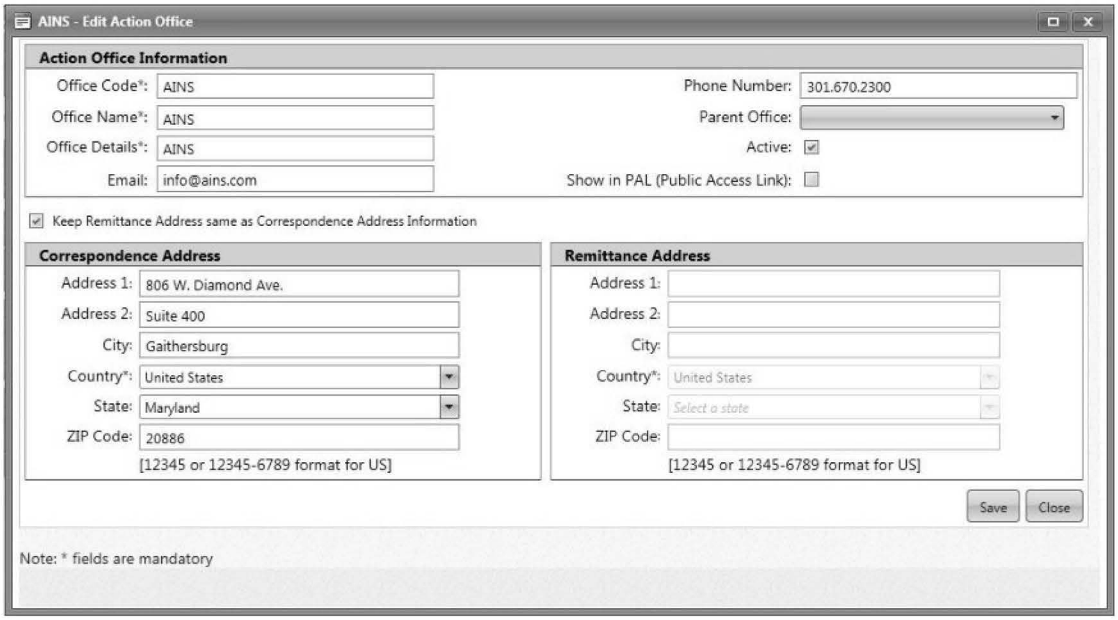
5. Click **OK**.

1.1.2 Edit Action Office

Users with the required Permissions can edit *Action Office Information.*

Follow the steps below to edit an action office:

1. Click **Administration > Organization Setup > Action Offices**. The *Action Offices* screen displays.
2. Select an Action Office from the list. The first Action Office is selected by default.
3. Click **Edit**. The *Edit Action Office* screen displays for the selected Action Office as shown below.



4. Make any necessary changes to the fields. See Create Action Office for a descriptions of these fields.
5. Click **Save**. A verification message appears
6. Click **OK**. A confirmation message displays
7. Click **OK**.

1.1.3 Delete Action Office

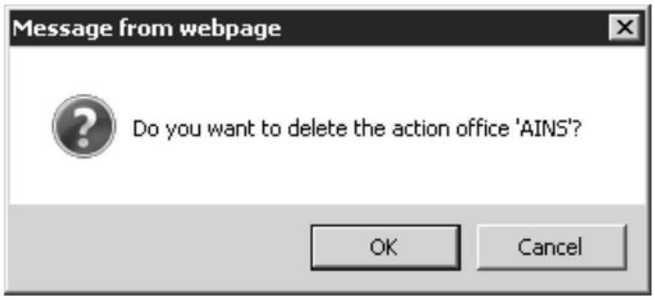
Users with the required Permissions can delete an Action Office. However, an Action Office cannot be deleted if it is associated with a User Group or open request.

Follow the steps below to delete an action office:

1. Click **Administration > Organization Setup > Action Offices**. The *Action Offices* screen displays as shown below.

2. Select the Action Office to delete.

3. Click **Delete**. A verification message displays as shown below.

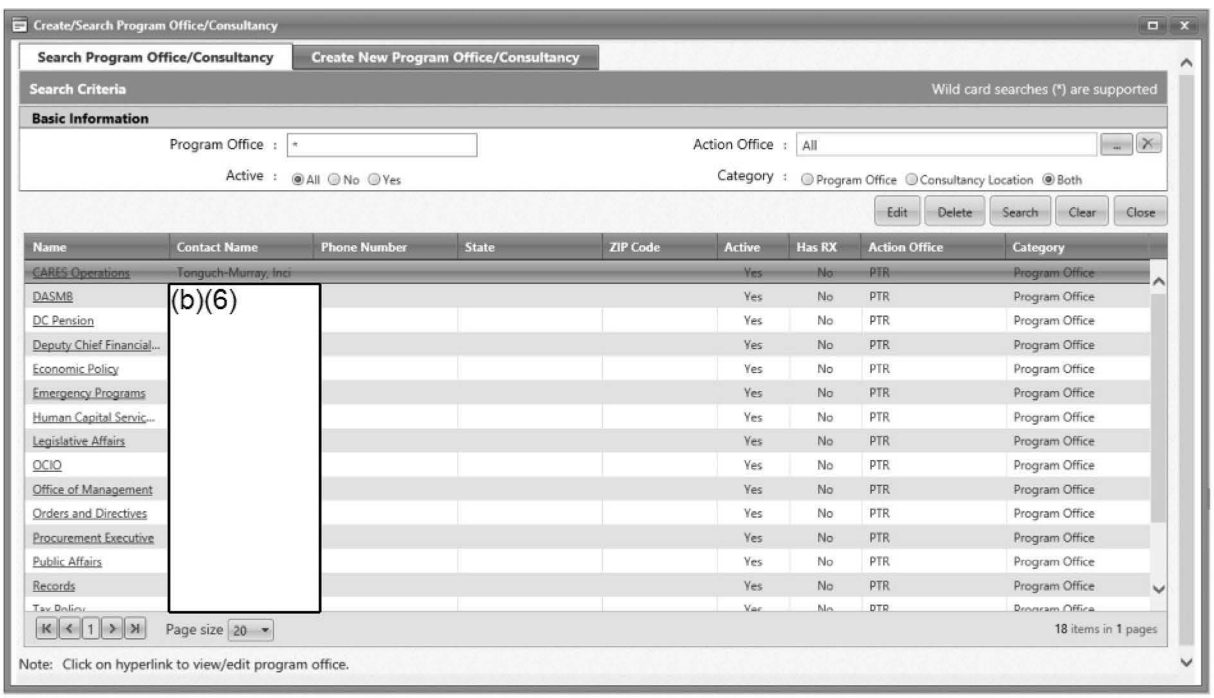


4. Click **OK**.

1.2 Program Offices

Program Offices are lists of places or people (**non-users of FOIAXpress** within or outside your organization) that can be tasked to complete records searches. You can use the Program Offices configuration to add both Consultation Locations and Record Locations. Offices listed as a Consultation Locations are available in the *Send/Save for Consultation* feature in Document Management.

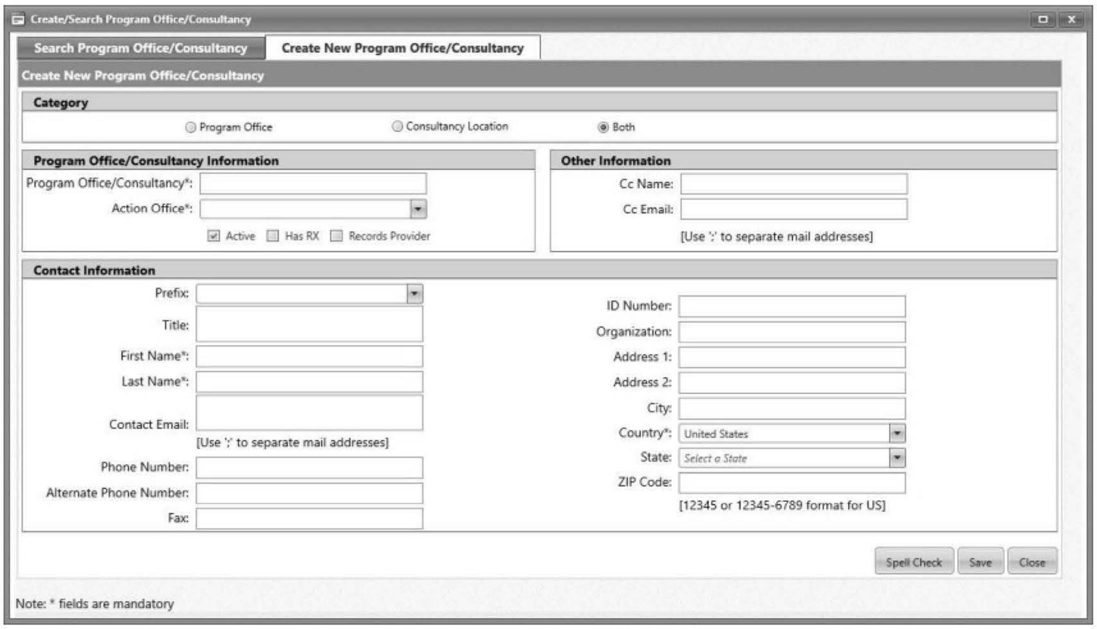
Program Offices can be manually added and can be edited from the **Organization Setup > Program Offices/Consultancies** section.



1.2.1 Create a Program Office/Consultancy

Follow the steps below to create a Program Office/Consultancy:

1. Click **Administration > Organization Setup > Program Offices > Create New Program Office/Consultancy**. The *Create New Program Office/Consultancy* screen displays as shown below.



2. Enter information in the fields described below per your agency's requirements.

Field	Description
Category	
Category	The type of office being created. You can select **Program Office** if the office is located within your organization, **Consultancy Location** if the office is located outside your organization, or **Both**.
Program Office/Consultancy Information	
Program Office/Consultancy	The name of the Program Office/Consultancy.

Action Office	The Action Office associated with the Program Office/Consultancy.
Active	When selected, activates the Program Office/Consultancy.
Has RX	If this checkbox is selected, the Program Office/Consultancy's *Has RX* field will indicate "Yes" when sending documents for consultation review or when requesting documents. This allows you to know whether or not the Program Office/Consultancy has RedactXpress to support an ADX file (if sent).
Records Provider	Use this checkbox to mark the Program Office/Consultancy as a Records Provider. Offices/Consultancies denoted as Records Providers have additional configuration options under **Administration > System Administration > Request for Documents Record Provider Settings**
Other Information	
Cc Name	An alternate representative's name for the Program Office/Consultancy.
Cc Email	The alternative representative's electronic mail address.
Contact Information	
Prefix	An abbreviation used before the surname.
Title	The Program Office/Consultancy representative's official position.
First Name	The first name of the Program Office/Consultancy representative.

Last Name	The last name of the Program Office/Consultancy representative.
Contact Email	The Program Office/Consultancy representative's electronic mail address.
Phone Number	The Program Office/Consultancy representative's telephone number.
Alternate Phone Number	The Program Office/Consultancy representative's alternate phone number.
Fax	The Program Office/Consultancy representative's fax number.
ID Number	A unique identifier assigned to the Program Office/Consultancy.
Organization	The name of the Program Office/Consultancy representative's organization.
Address 1	The street location of the Program Office/Consultancy.
Address 2	The subsequent location of the Program Office/Consultancy, such as Suite, Building, Province, etc.
City	The city where the Program Office/Consultancy is located.
Country	The country where the Program Office/Consultancy is located.
State/Province	The state/province where the Program Office/Consultancy is located.

ZIP Code	The five or nine-digit postal code where the Program Office/Consultancy is located.
Collaboration Access Portal	Enable access to the Collaboration Portal within this Program Office/Consultancy

3. Click **Save**. A verification message displays.
4. Click **OK**. A confirmation message displays.
5. Click **OK**.

1.2.2 Edit Program Office/Consultancy

Users with the required Permissions can edit a Program Office/Consultancy. Follow the steps below to edit a Program Office/Consultancy:

1. Click **Administration > Organization Setup > Program Offices**. The *Create/Search Program Office/Consultancy* screen displays.
2. Select the Program Office/Consultancy you want to edit, then click **Edit**. The *Edit Program Office/Consultancy* screen for the selected Program Office/Consultancy displays
3. Make any necessary modifications to the fields. These fields are described in the Create Program Office/Consultancy section above.
4. Click **Save**. A verification message displays.
5. Click **OK**. A confirmation message displays.
6. Click **OK**.

(!!) Note: Click Print Program Office Address to edit and copy the address to a printing device for mailing purposes.

1.2.3 Delete a Program Office/Consultancy

Users with the required Permissions can delete a Program Office/Consultancy.

(!!) Note: A Program Office/Consultancy cannot be deleted if it is associated with a request for documents or consultation review of documents.

Follow the steps below to delete a Program Office/Consultancy:

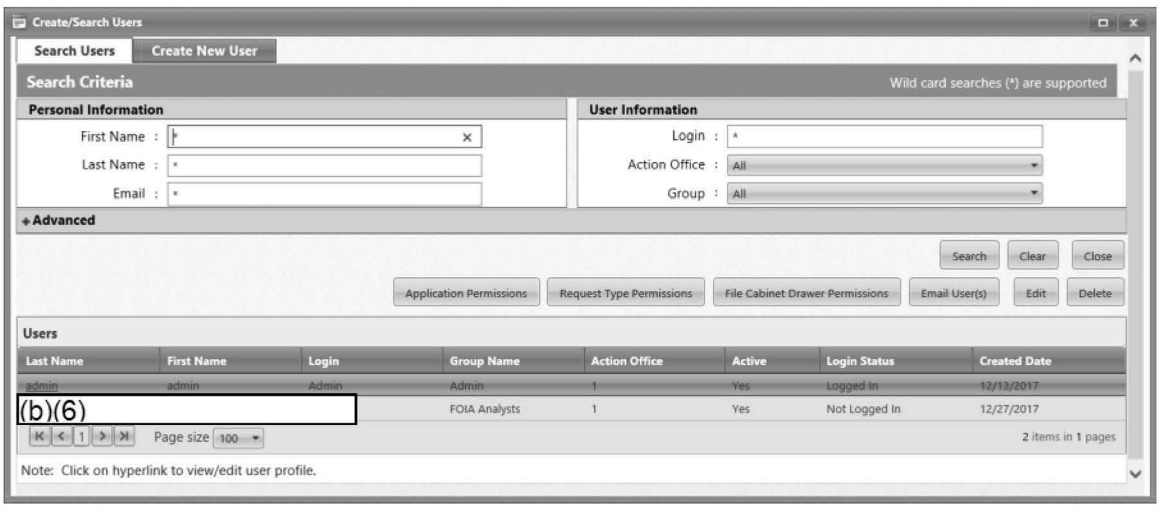
1. Click **Administration > Organization Setup > Program Office**s. The *Create/Search Program Office/Consultancy* screen displays.

2. Select a **Program Office/Consultancy** to delete.
3. Click **Delete**. A verification message displays.
4. Click **OK** to delete the Program Office/Consultancy. A confirmation message displays.
5. Click **OK**.

1.3 Users

A User is a person in your organization who is licensed to use FOIAXpress. Each User is provisioned by applying their Treasury email to the account to allow for Single Sign-On (SSO) login. Permissions are granted to each user using the roles associated with the User or User Group.

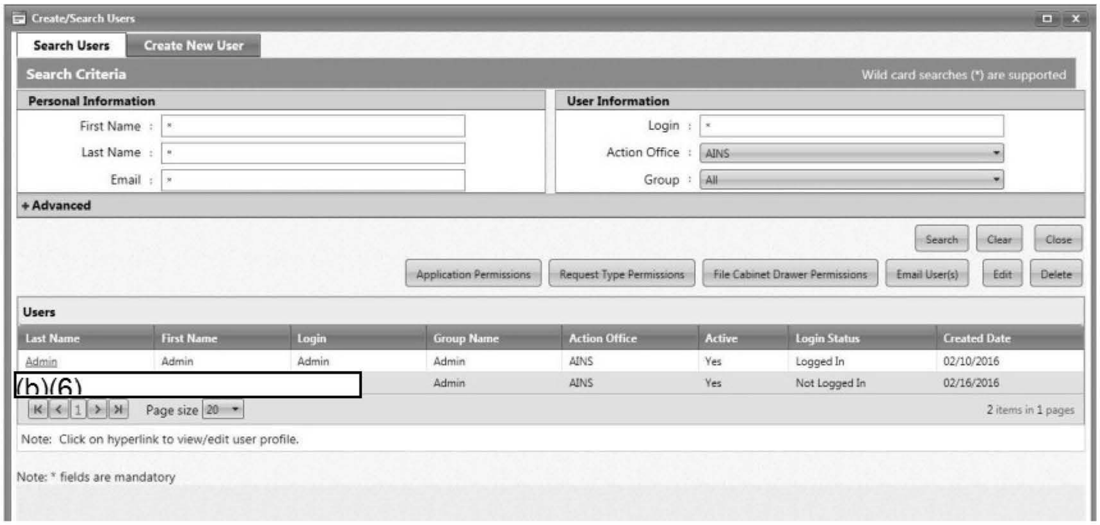
The Users section of the Organization Setup module allows administrators to search for existing users and create new users.



When creating a new user, you're required to select the user's Group, Action Office, Application Roles, and Dashboard. These Groups and Roles will have been configured by time of deployment.

1.3.1 Search Users

1. Click **Administration > Organization Setup > Users**. The *Create/Search Users* screen displays with the *Search Users* tab selected by default, as shown below.



2. Enter *Search Criteria* as necessary in the *Personal Information* and *User Information* sections.

3. To add advanced search filters, click **Advanced > Add new filter**, select a **Field** and **Operator**, and then enter a **Value**.

4. Click **Search**.

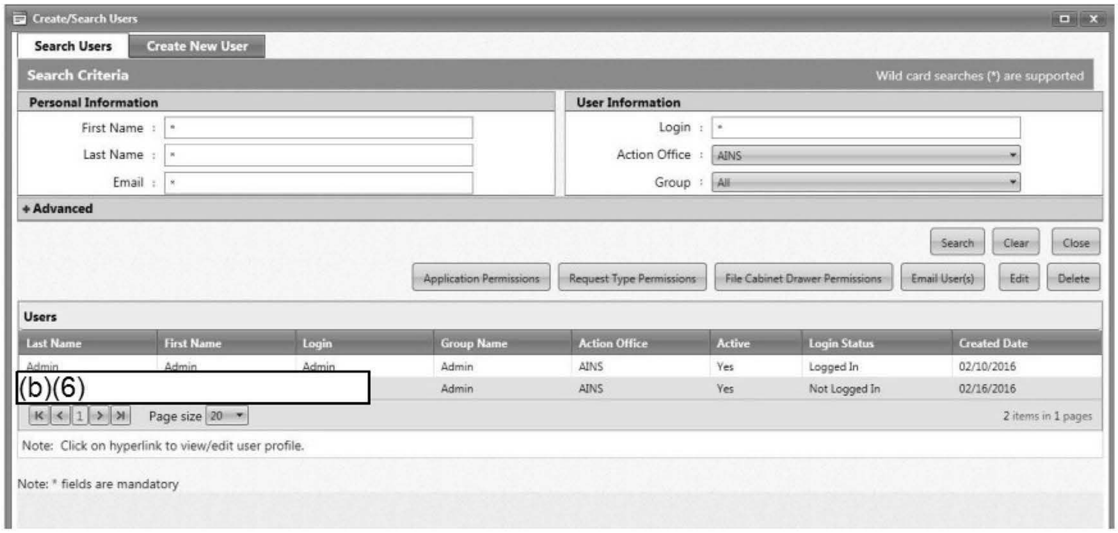
See the sections below for additional information.

1.3.2 Create a User

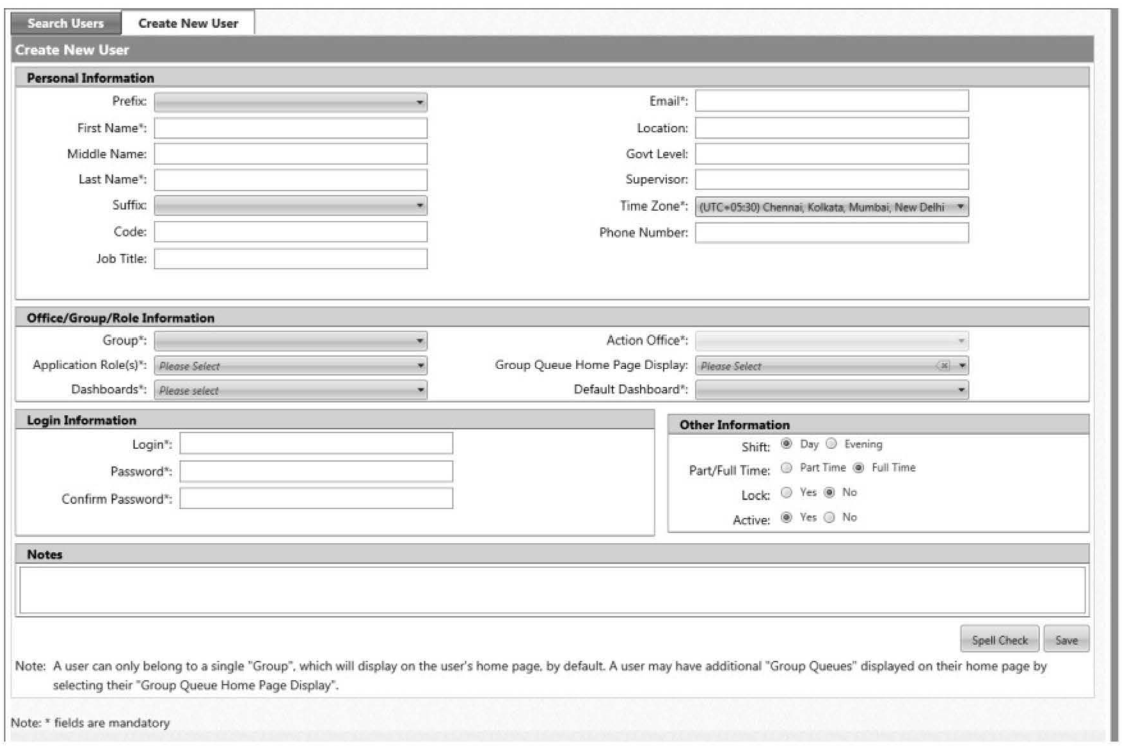
You can create as many users as required by your agency. The users will be the FOIA analysts who will process Requests and deliver documents to Requesters. You can divide tasks among users by assigning different Permissions to each user. You can also assign all of the Permissions for a Request to a single user, who will then be known as the primary user for that Request. PTR will be the primary user for all Departmental Office Requests.

Follow the steps below to create a user:

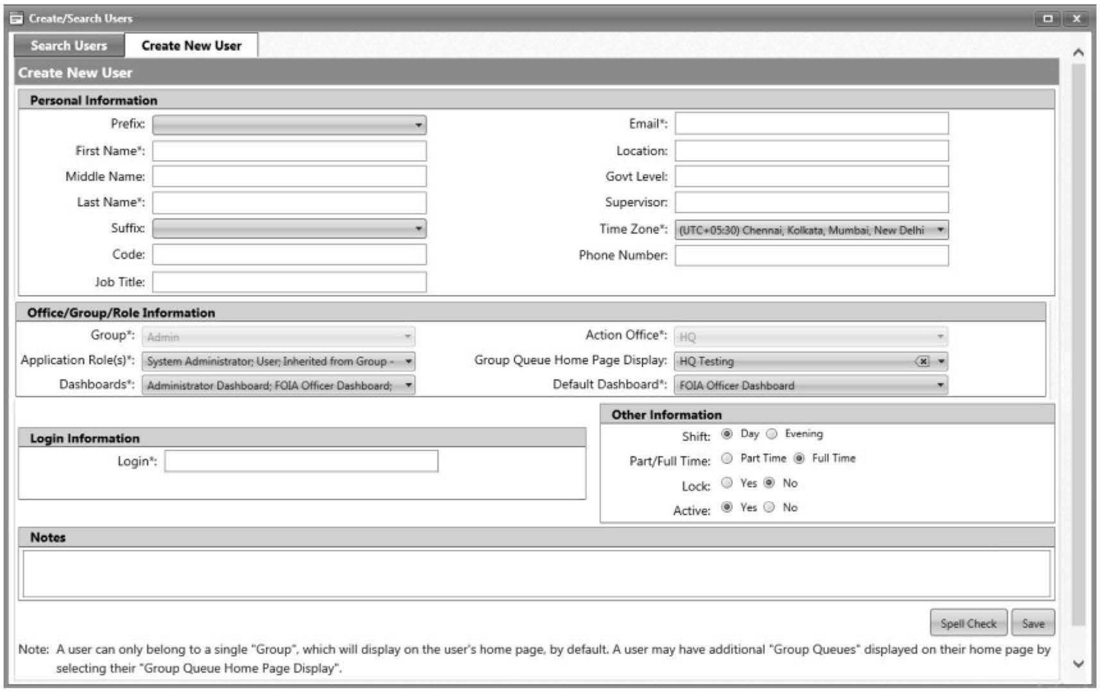
1. Click **Administration > Organization Setup > Users**. The *Create/Search Users* screen displays as shown below



2. Click **Create New User**. The *Create New User* tab displays as shown below:



(!!) Note: If using Single sign-on, this screen displays as shown below:



3. Enter information in the fields described below per your agency's requirements.

Field	Description
Personal Information	
Prefix	An abbreviation used before the user's surname.
First Name	The first name of the user.
Middle Name	The name between the first and last name of the user.
Last Name	The surname of the user.
Suffix	The abbreviation used after the users's surname.
Code	The user's abbreviated name that will be used in case Insert Fields. This data is automatically populated after the First and Last Names are entered.

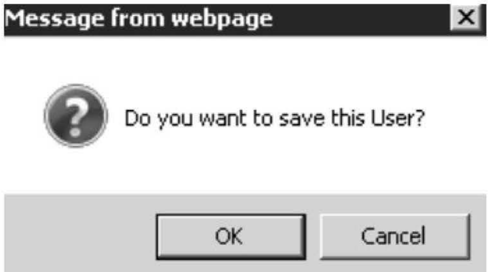
Job Title	The user's official position in the agency.
Email	The electronic address of the user.
Location	The place where the user works or is assigned to.
Govt Level	The user's rank for the position held.
Supervisor	The name of the person the user reports to.
Time Zone	A region that has a uniform standard time. The system's current time zone is selected by default.
Phone Number	The telephone number assigned to the user.
Office/Group/Role Information	
Group	The User Group the user is assigned to.
Application Role(s)	The Application Role(s) assigned to the User Group.
Dashboards	The dashboards assigned to the user, who may select from any of the assigned options to view from their home screen
Default Dashboard	The dashboard to display by default when logging in to FOIAXpress
Action Office	The Action Office the user is assigned to. This field is not editable and by default, displays the Action Office associated with the selected User Group.
Group Queue Home Page Display	The Group Queue(s) displayed on the Home Page.

Login Information	
Login	The unique identifier that verifies the user's identity.
Password	The security credential associated with the user to gain access to the application.
Confirm Password	Same as above.
Other Information	
Shift	The period of time the user works.
Part/Full Time	The standard or non-standard working hours.
Lock	Determines the user's access to the system. Used in conjunction with the amount of login attempts configured under **Administration > Security > Security Configuration**. **Yes** will be selected if the user fails to login to the system using their assigned credentials. Only users with the "User Management" Permission can select **No** for this field.
Active	Allows the user to use the application.
Notes	Any notes about the user.

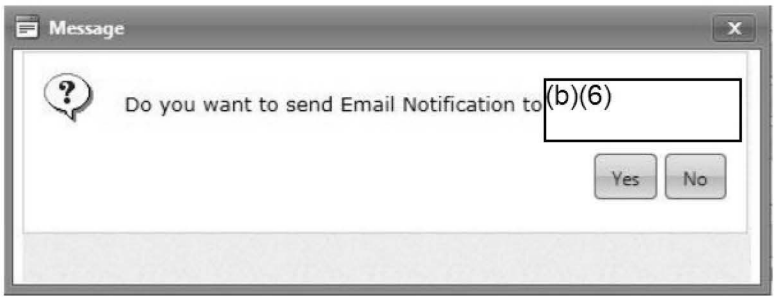
(!!) Note: The First Name, Last Name, Phone Number, and Job Title are provided as insert fields, and appears in future correspondence.

(!!) Note: You cannot edit the Login once it is created. The Password should include alphanumeric characters and at least one character of a different case or one special character.

4. Click **Save**. A verification message displays as shown below.



5. Click **OK**. A message displays as shown below.



6. Click **Yes** to send the email notification, or click **No** to abort.
7. If **Yes** is clicked, you will be directed to the *Send Email Notification* window where you can prepare and send the email notification to the new user. If **No** is clicked, the message window will close and you will be directed to the *Users* screen where the newly created user displays.

(!!) Note: A user can only belong to a single User Group, which will display on the user's Home Page by default. A user may have additional "Group Queues" displayed on their home page by selecting their "Group Queue Home Page Display".

1.3.3 Edit a User

Users with the required Permissions can edit a user's information. User Logins and Action Offices cannot be changed. The Login Status is visible when editing User details. Follow the steps below to edit a user:

1. Click **Administration > Organization Setup > Users**. The *Create/Search Users* screen displays.
2. Enter search criteria as necessary to locate the user you want to edit, then click **Search**. The *Users* window displays with a list of users that satisfied the search criteria.

(!!) Note: To retrieve all user accounts in the system, select All from the Action Office drop-down menu, then click Search without entering any criteria. The user's Action Office will be selected by default.

3. Select a user, then click **Edit**. The *Edit* screen for the selected user displays.
4. Make any necessary modifications to the fields. These are described under the Create User section.
5. Click **Save**. A verification message displays.
6. Click **OK**. A confirmation message displays.
7. Click **OK**.

(!!) Note: Click Close to display the *Create/Search Users* window and perform another search for user accounts.

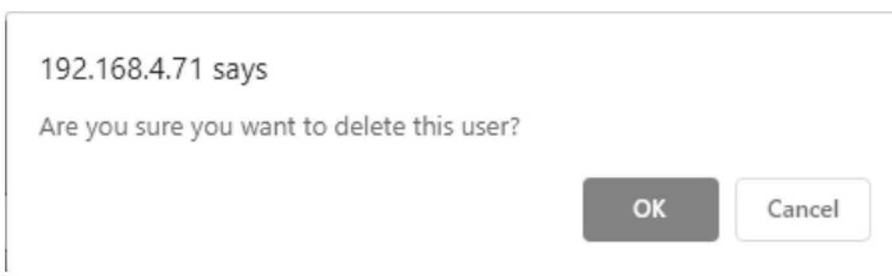
(!!) Note: If a user changes office, you can change the office in the user account by simply changing their User Group.

1.3.4 Delete a User

Users with the required Permissions can delete a user's account from the system. However, a user account cannot be deleted if assigned to a Request. Also, Admin User accounts cannot be deleted.

Follow the steps below to delete a User:

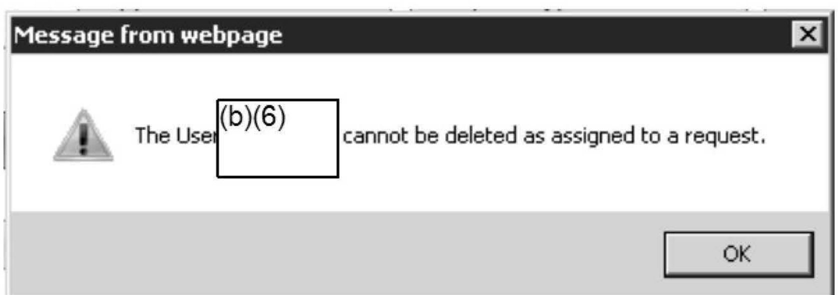
1. Click **Administration > Organization Setup > Users**. The *Create/Search Users* screen displays.
2. Enter *Search Criteria* for the user to be deleted, then click **Search**. The *Users* screen displays with a list of users that satisfy the search criteria.
3. Select a **user**, then click **Delete**. A verification message displays as shown below:



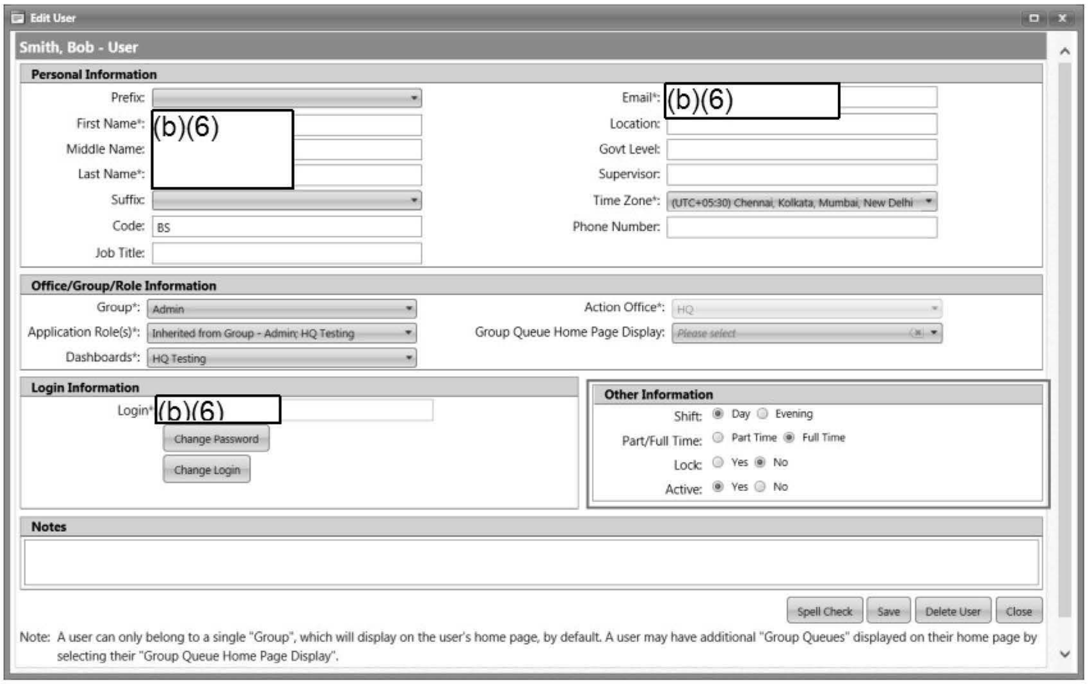
4. Click OK to delete the user account. A confirmation message displays showing the user is deleted.

5. Click **Close**.

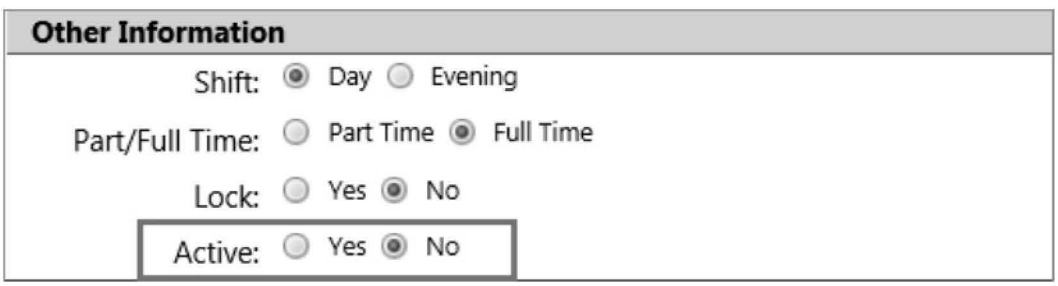
(!!) Note: If attempting to delete a user who is assigned to a Request, the following notification message displays, informing you that the user cannot be deleted.



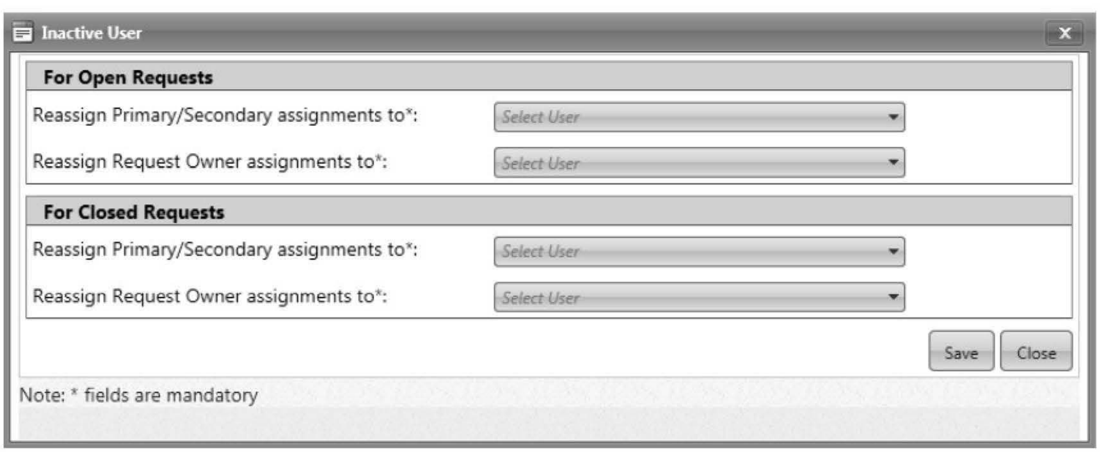
6. To delete a user with an assigned Request, you will need to reassign any Requests they were assigned. With the user selected, click **Edit**. The *Edit User* screen displays as shown below.



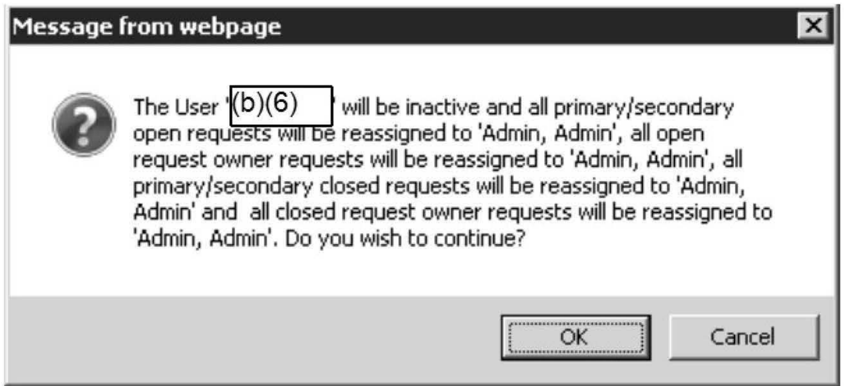
7. In the *Other Information* box, select **No** as the *Active* status, as shown below.



8. The *Inactive User* screen displays as shown below. Click the **Select User** drop-down menus under *For Open Requests* and *For Closed Request* and select the users for reassignment:



9. Click **Save**. A verification message displays as shown below.

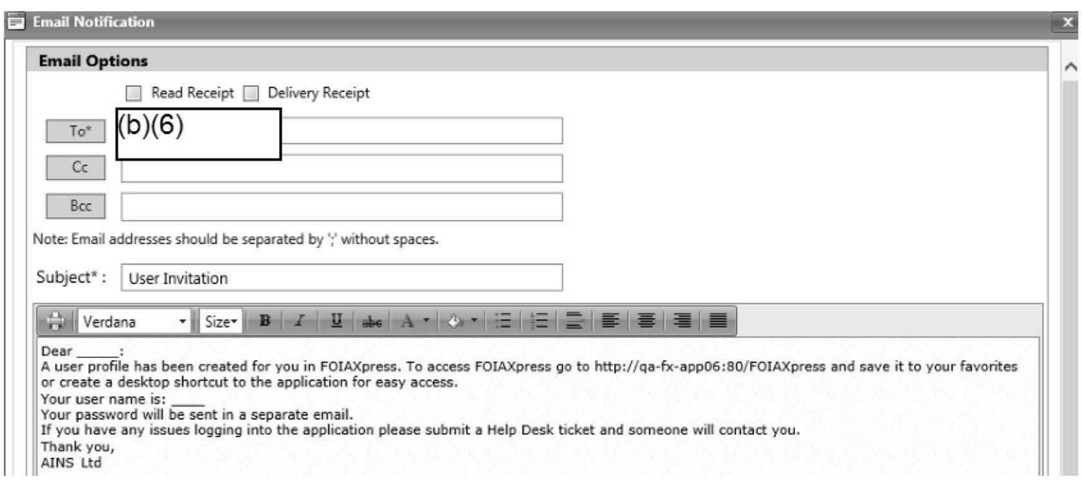


10. Click **OK** to accept the reassignments, or click **Cancel** to abort.

1.3.5 Send Email Notification

(!!) Note: Email notifications are sent when a new user is created in the system. Admin users or users with the required Permissions can configure notifications under Administration > System Configuration > New User Notifications.

1. Click **Yes** when the New User - Email Notification message is displayed. A user notification email displays on the *Email Notification* screen as shown below.

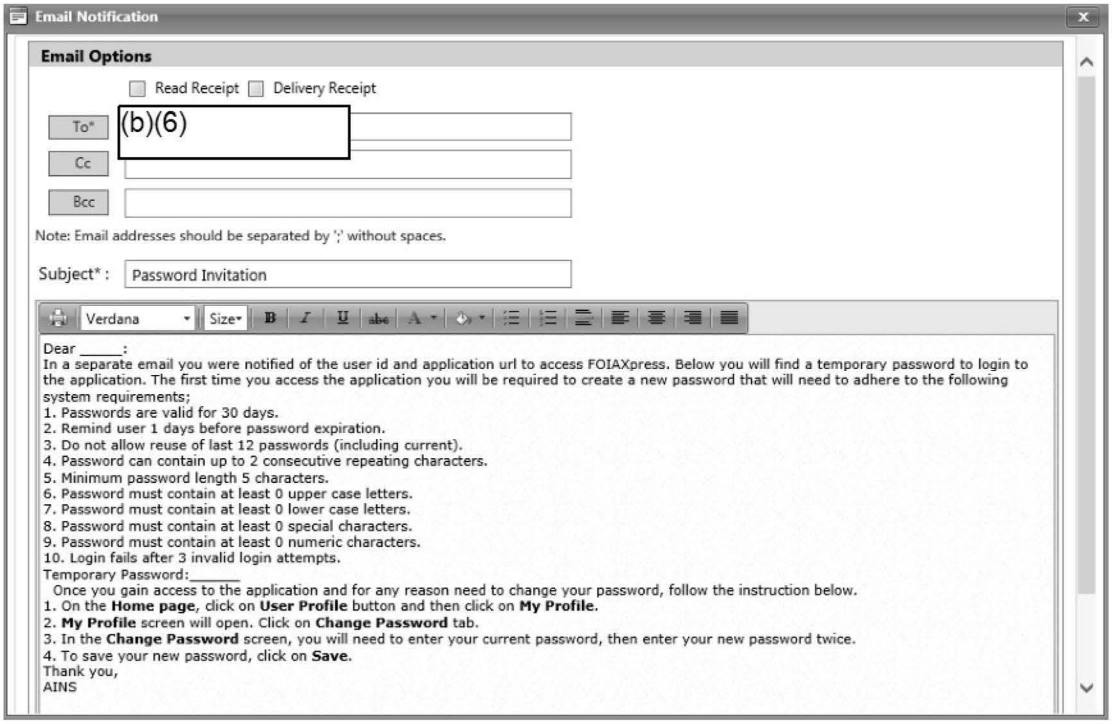


2. Enter information in the fields described below per your agency's requirements.

Field	Description
Read Receipt	When selected, notifies the sender once the message is read by the new user.

Delivery Receipt	When selected, notifies the sender once the message is received by the new user.
To Email	The email address of the new user.
Cc Email	The email address of another person/user that should receive this message.
Bcc Email	The email address of another person/user that should receive this message which will be anonymous to other recipients.
Subject	The subject of the email notification. This field is automatically populated based on the default template used. This is configured under **Administration > System Configuration > New User Notifications**. There are two choices: **Password Invitation** and **User Invitation**.
Email Body	This pre-defined message is based on the default email template configured under **Administration > System Configuration > New User Notifications**.

3. Click **Send Email**. A Password Invitation email displays on the *Email Notification* screen as shown below.



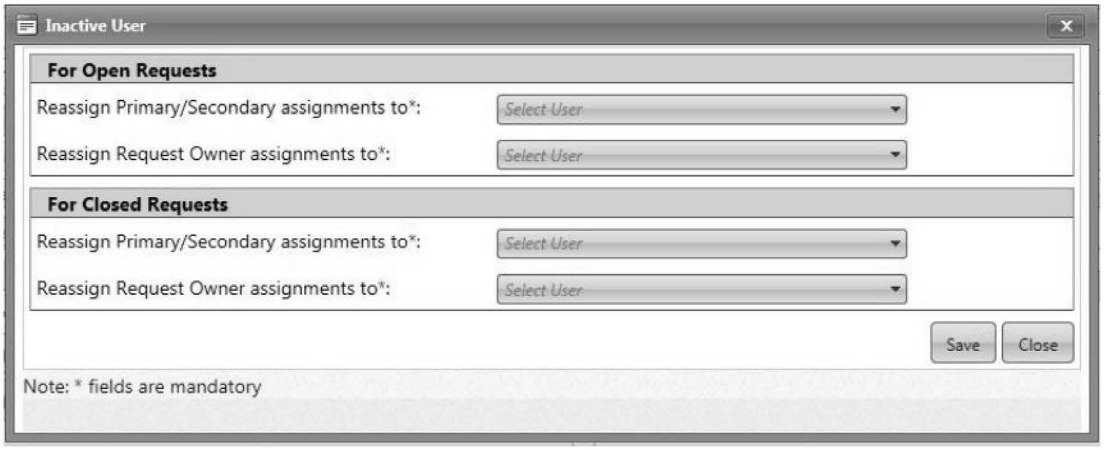
4. Edit the email notification as necessary.
5. Click **Send Email**.

(!!) Note: When sending an email, click To, Cc, or Bcc to display the *Global Address List* window, where you can select users to add as email recipients. To send a notification to a user from the *Create/Search Users* screen, select a user, then click Email Users to display the *Email User(s)* window.

1.3.6 Reassign Requests

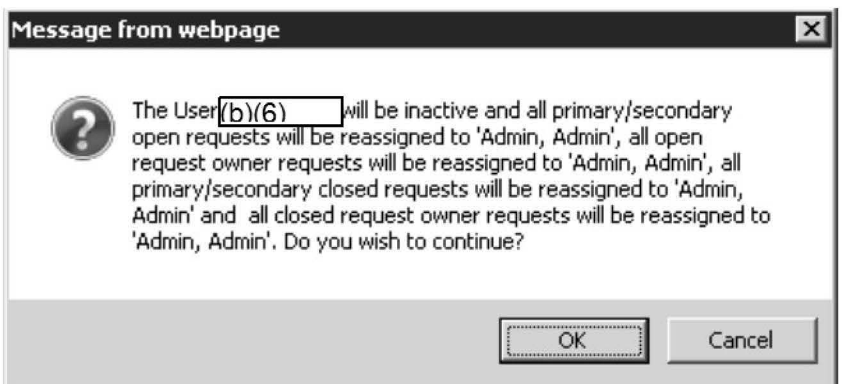
While inactivating a user, all open and closed Requests can be reassigned to a designated user.

1. Select **No** in the **Active** field. The *Inactive User* window displays as shown below.



2. Click the **Select User** drop-down menus under *For Open Requests* and *For Closed Request* and select the users you want to reassign to.

3. Click **Save**. A verification message displays as shown below.



4. Click **OK** to accept the reassignments, or click **Cancel** to abort.

1.4 Dashboard Templates

Dashboards display Request details based on the dashboards assigned to individual users. Currently there are four system defined dashboards: **Administrator**, **Action Office Manager**, **FOIA Officer**, and **User**. Each user can be assigned any or all of the available Dashboards, along with a default dashboard that will automatically display upon login. Users can be assigned multiple dashboards on creation, or have dashboards added later.

(!!) Note: Users with multiple assigned dashboards can select the dashboard they want to view by clicking the Dashboards drop-down menu on the home page and selecting from the available options.

Dashboard	Description

Administrator Dashboard	The Administrator Dashboard displays commonly accessed System Administrator options from the Administration module of the application.
Action Office Manager Dashboard	The Action Office Manager Dashboard displays a high level view of Requests assigned to the Action Office the user is associated with. The dashboard includes four graphs of data, providing drill down details of *Open Requests by Requests Status*, *Open Requests by Multi-Track Type*, *Open Requests by Remaining Days* and *Open Request Workload by Primary User* for the respective Action Office.
FOIA Officer Dashboard	The FOIA Officer Dashboard displays a high level view of Requests for the entire enterprise (agency). The dashboard includes four graphs providing drill down details of *Open Requests by Request Status*, *Open Requests by Multi-Track Type*, *Open Requests by Remaining Days* and *Workload* for the respective Action Office.
User Dashboard	The User Dashboard displays Request data for the logged-in user's primary assigned Requests. The dashboard includes four graphs providing drill down details of *My Primary Assignment* Requests filtered by *My Primary Assignments by Status*, *My Primary Assignments by Multi-Track Type* and *My Primary Assignments by Remaining Days*.

2. System Configuration

2.1 Correspondence Templates

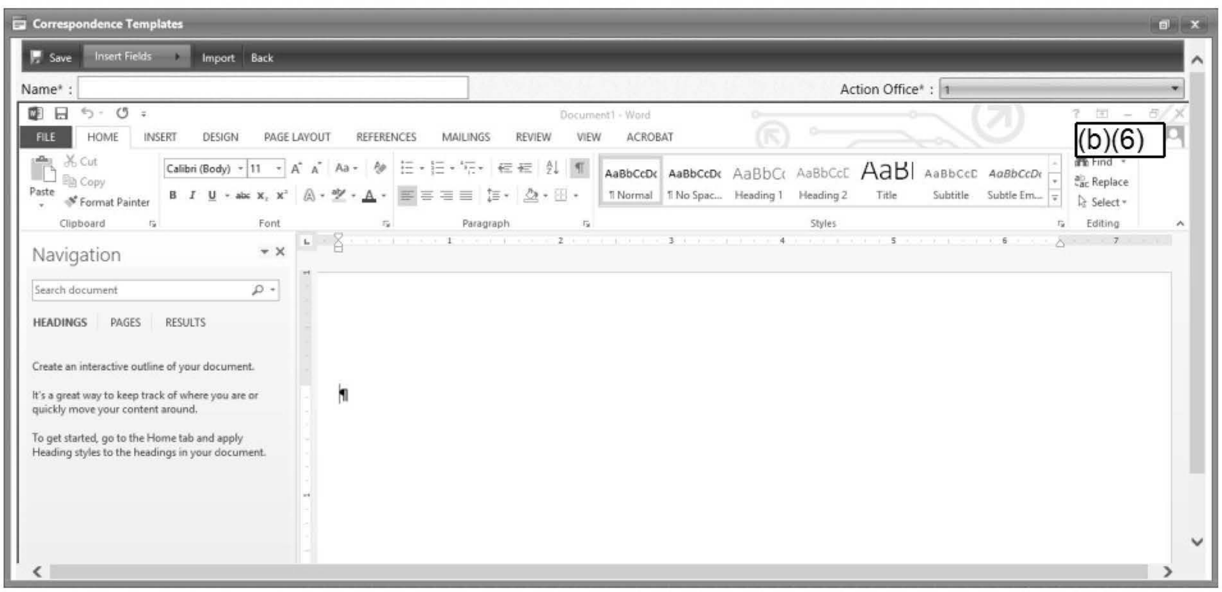
Correspondence Templates are used to generate letters and emails to send to requesters or program offices. The templates connect with request fields to include request-specific information in templates automatically, without user input. FOIAXpress divides the templates into three groups, available in different parts of the application: Request, Memo, and Email templates. The Correspondence Templates window is displayed below:

There are three types of Correspondence Templates in FX:

Type	Description

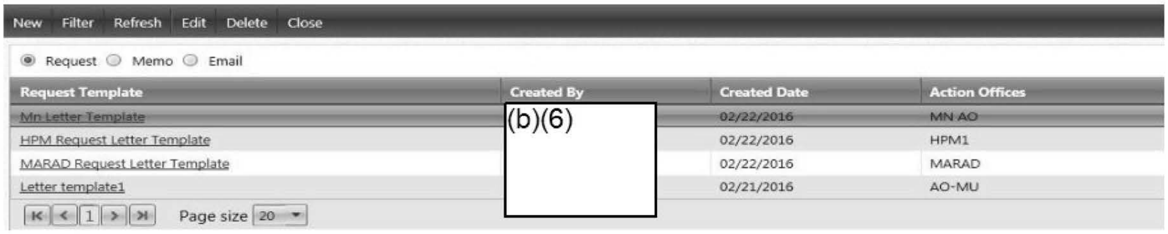
Request Templates	Request templates are used to communicate with requesters. Some commonly used request templates are Acknowledgement Letters, Clarification Letters, or Final Response Letters. Templates can be shared across an entire organization or only available to a specific Action Office. Templates in MS Word format can be imported into the application. If the template is not in MS Word format, the **New** option will open a MS Word editor allowing a user to create a template.
Memo Templates	Memo templates are correspondence templates meant for internal use, typically used to communicate with Program Offices. They are only available in the *Request for Documents* section of a request.
Email Templates	Email templates are used to communicate with users via email and can be used wherever you have the option to send an email. For ease of use, they are categorized under Request, Admin, Memo, and Users.

Here's an example of blank correspondence template. This MS-based interface should be immediately familiar, and provides nearly all of Word's functionality for creating these templates.



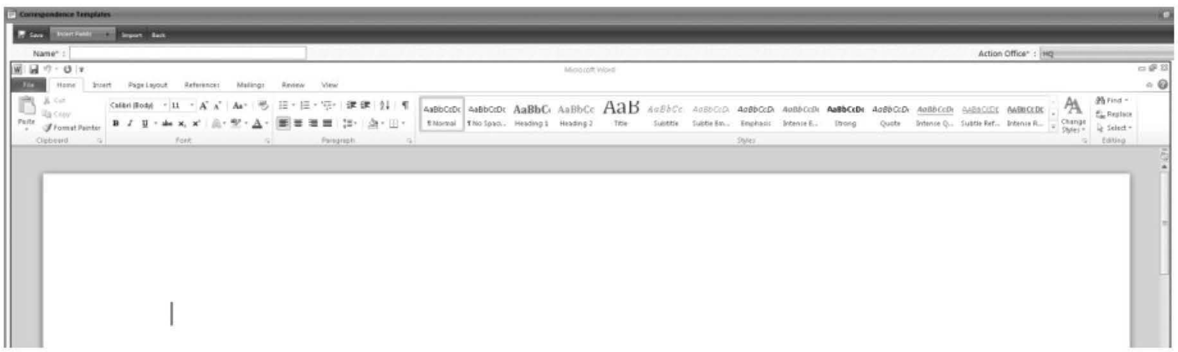
2.1.1 Create a Request/Memo Correspondence Template

1. Click **Administration > System Configuration > Correspondence Templates**. The *Correspondence Templates (Request)* screen displays as shown below.



2. Accept the default value **Request** or select **Memo**.

3. Click **New**. The system will begin the process of activating the appropriate application to bring the Correspondence Template into view. This may take several seconds.



(!!) Note: To import an existing template, click the Import button on the toolbar and select a file to import. For more information, see the <u>Import Correspondence Template</u> section. The import feature is only available for Request and Memo Templates.

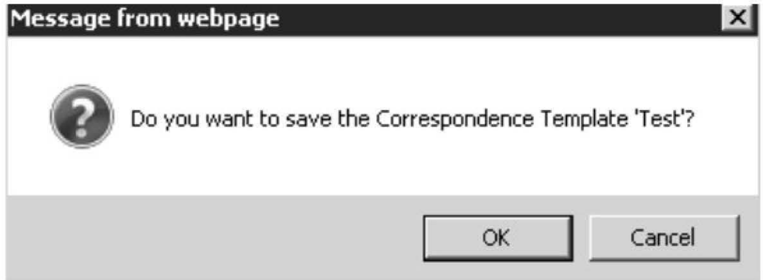
4. Enter a **Name** for the Correspondence Template.

5. From the **Action Office** drop-down, select the appropriate Action Office to associate with the Correspondence Template.

6. Type the body of the letter using the available tools provided by the Editor program and preset fields found on the *Insert Fields* menu.

   (!!) Note: Use import fields to draw information from any documents within the request folder or review log of the associated request.

7. Click **Save**. A verification message displays as shown below.



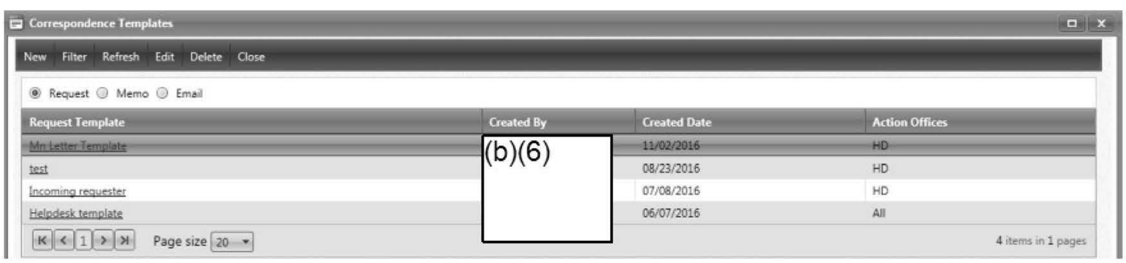
8. Click **OK**.

2.1.2 Create an Email Template

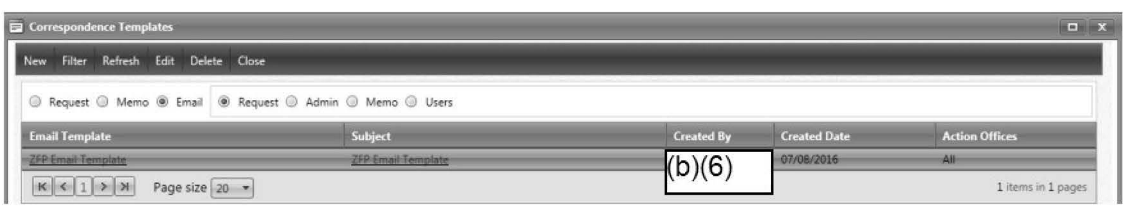
Frequently used text can be structured and made into an email template to facilitate communication and expedite the process of sending correspondence. These templates can be shared with other users to avoid duplication of work. Any changes made in the template body will not update the content in other emails based on this template. You can create as many templates as you want and store them for future use.

Follow the steps below to create an Email template:

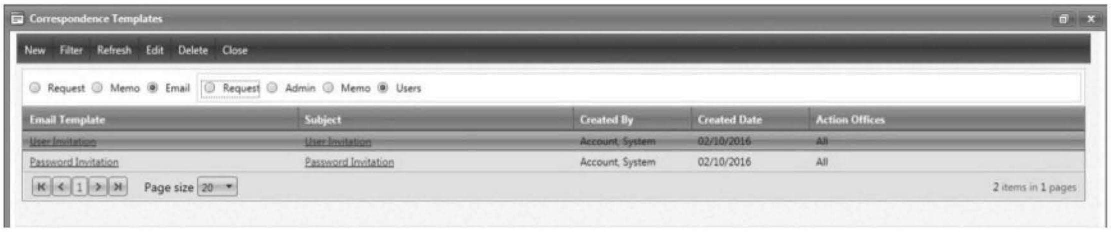
1. Click Admi**nistration > System Configuration > Correspondence Templates**. The *Correspondence Templates* screen displays as shown below.



2. Select **Email**. The *Correspondence Templates* screen will display Email Templates as shown below.



3. Select **Request**, **Admin**, **Memo**, or **Users**. By default, **Request** will be selected. For the example below, **Users** is selected.

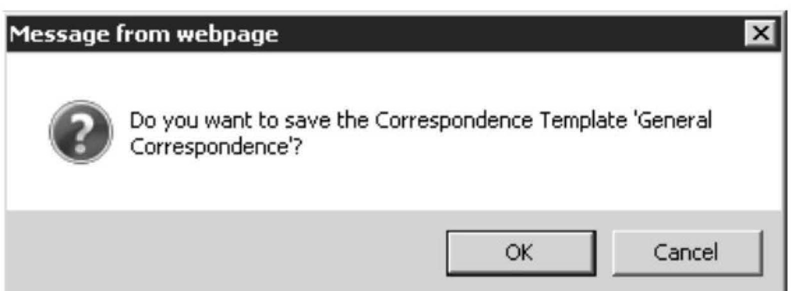


4. Click **New**. The *New Email Template (User)* screen displays as shown below.

5. Enter a **Name** and **Subject** for the template.
6. Type the body of the letter using the available tools provided by the Editor program and preset fields found in the *Insert Fields* menu.

   (!!) Note: You can use import fields to draw information from any documents within the request folder or review log of the associated request.

7. Click **Save**. A verification message displays as shown below.



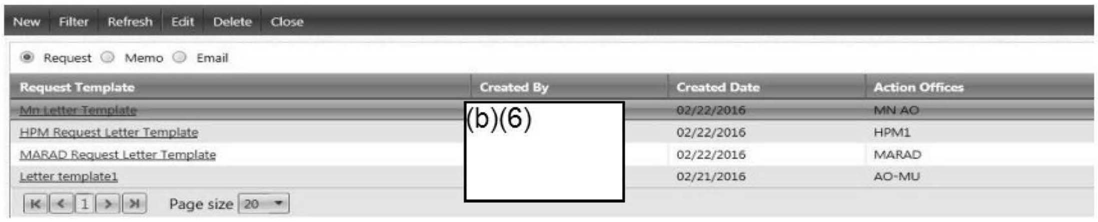
9. Click **OK**.

2.1.3 Edit Correspondence Template

Users with the required Permissions can edit Correspondence Templates at any time. However, changes to the body text will not be applied automatically to other correspondence associated with the template. For such occasions, manual updates/customized text can be applied when sending the correspondence.

Steps to Edit a Request/Memo Correspondence Template

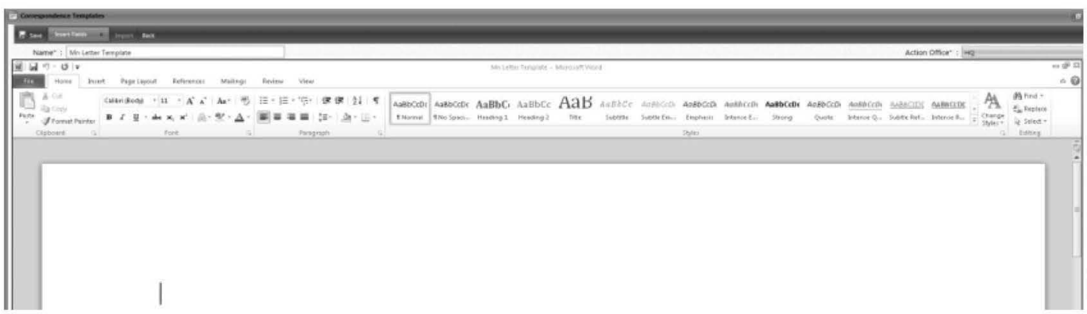
1. Click **Administration > System Configuration > Correspondence Templates**. The *Correspondence Templates* screen displays as shown below.



2. By default, **Request** will be selected as the Correspondence Template type. Alternatively, you can select **Memo** or **Email**.

3. Select the template you want to modify. The first template is selected by default.

4. Click **Edit**. The following screen displays:

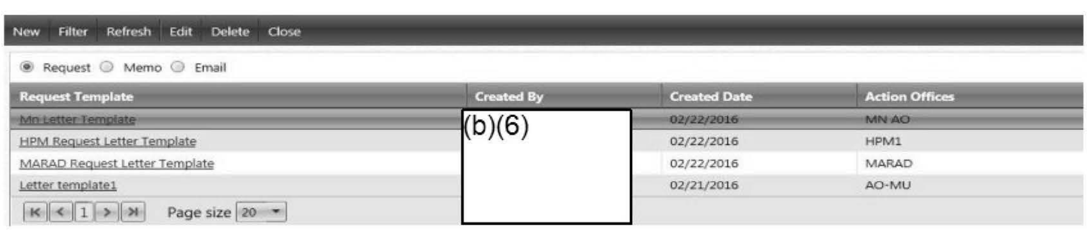


5. Make any necessary modifications to the **Name**, **Action Office**, or body of the template using the available tools provided by the Editor program and preset fields found in the **Insert Fields** menu.

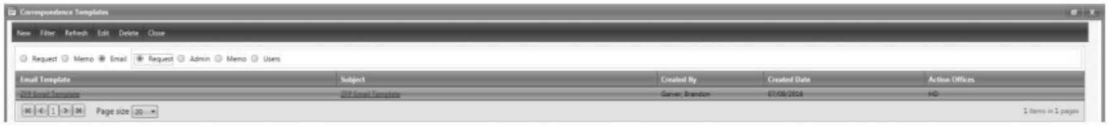
6. Click **Save**. A verification message will be display asking "Do you want to save the template?" Click **OK** to save the changes, or click **Cancel** to abort.

2.1.4 Steps to Edit an Email Template

1. Click **Administration > System Configuration > Correspondence Templates**. The *Correspondence Templates* screen displays as shown below.



2. From the available correspondence template options, select **Email**. The *Correspondence Templates (Email)* screen displays as shown below.



3. Select the desired template type from the template menu (**Admin**, **Memo**, **Users**), or accept the default value.

4. Select the template you wish to modify. The first template will be selected by default.

5. Click **Edit**. The *Edit* screen displays as shown below.

6. Make any necessary modifications to the **Name**, **Subject**, **Action Office**, or body of the template using the available tools provided by the Editor program and preset fields found in the **Insert Fields** menu.

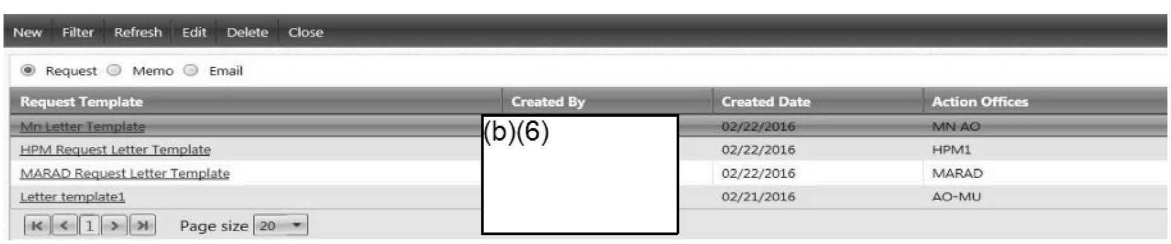
7. Click **Save**. A verification message will display asking if you want to save the correspondence template. Click **OK** to save the template.

2.1.5 Delete Correspondence Template

Users with the required Permissions can delete a template that is no longer needed.

Steps to Delete a Correspondence Template

1. Click **Administration > System Configuration > Correspondence Templates**. The *Correspondence Templates* screen displays as shown below.



2. Select the template type (**Request**, **Memo**, or **Email**). The list of templates corresponding with the selected type appears.

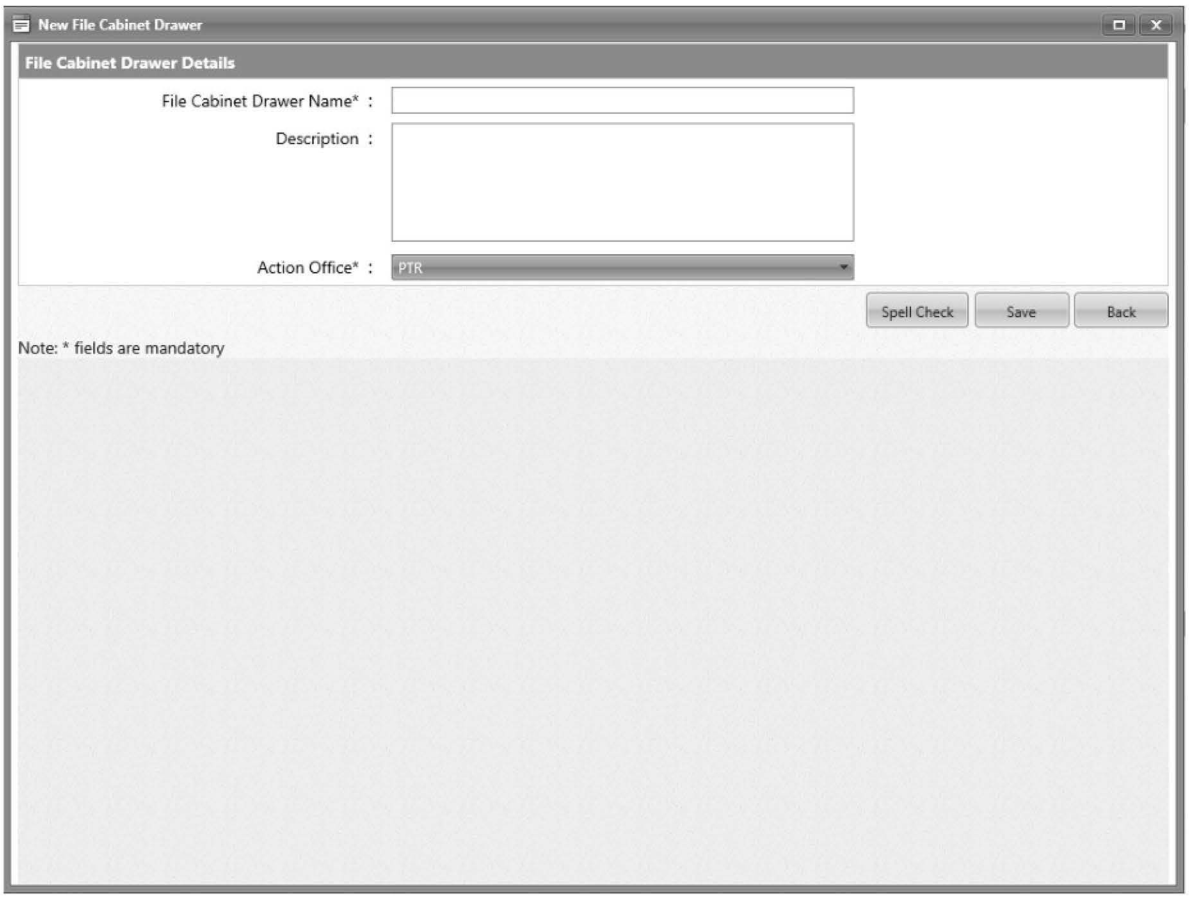
3. Select the template you want to delete. The first template will be selected by default.

4. Click **Delete**. A verification message will display asking "Do you want to delete the template? Click **OK** to delete the template or **Cancel** to abort.

3. Document Management

3.1 File Cabinet Drawers

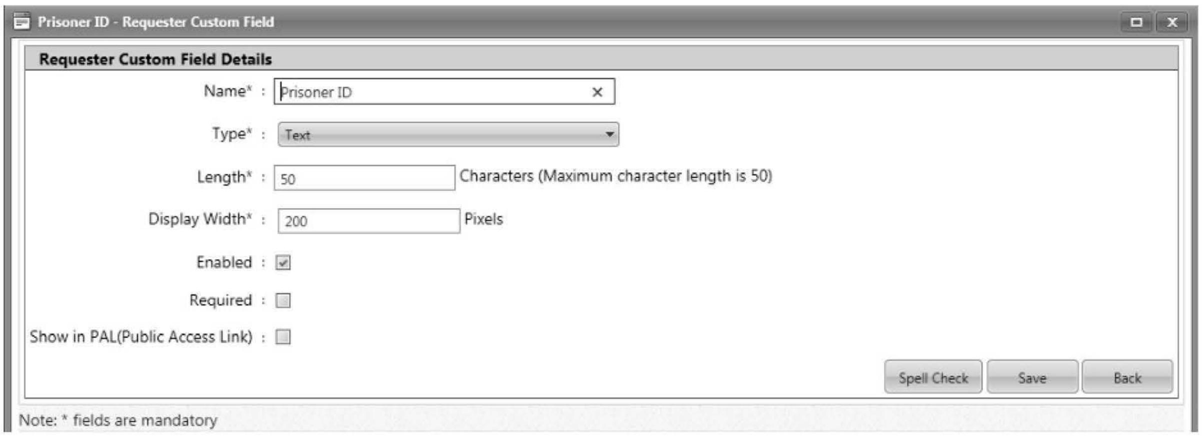
Filing Cabinet Drawers can be organized in whatever way works best for your organization. Filing Cabinet Drawers enable users to reuse responsive documents. To that end, FOIAXpress features a robust search capability that allows users to search for words and attributes from the File Cabinet Drawer level down to individual words on a page. It is recommended that File Cabinet Drawers be organized so that you can easily search and identify what you are looking for.



4. Custom Fields

4.1 Requester Custom Fields

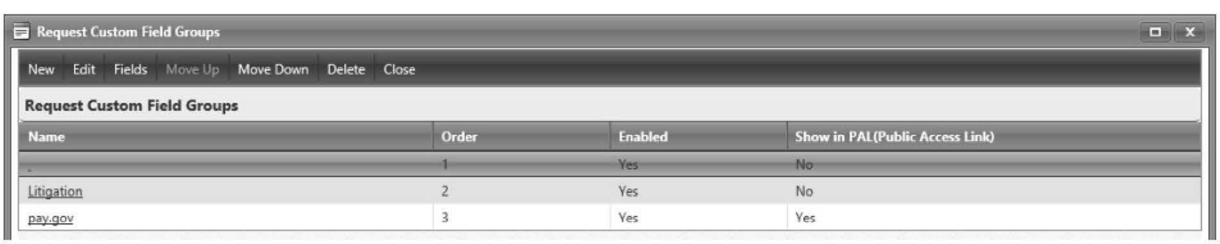
FOIAXpress is pre-loaded with common requester information fields which are used to track requesters. If there is organization-specific information that you need to capture for requesters, the application allows you to create your own requester custom fields. These fields will appear in the Requester Information screen, and they can be selected in reports and searches. There are several types of fields to choose from: text, text boxes, number, date, and list fields. Because custom fields are organized into field groups, you must create a field group first. The Requester Custom Field window is displayed below:



4.2 Request Custom Fields

FOIAXpress comes pre-loaded with the most common request information fields used to track FOIA requests. If there is additional specific information you need to capture for requests, the application allows you to create your own request custom fields. These fields appear in the Request Information screen and are available in reports and searches (when enabled).

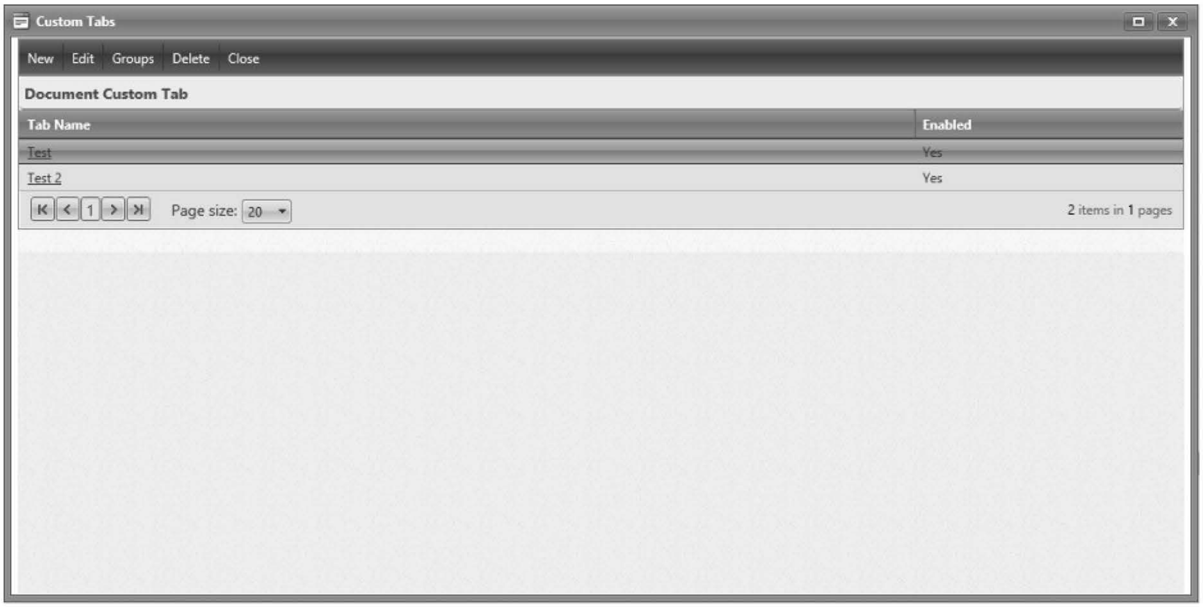
Custom field types include text, text boxes, numbers, dates, and list fields. When creating new fields, you first create a Field Group (unless the group already exists), as custom fields must be organized in Field Groups. These are usually grouped by similarity, and there are no hard limits on the number of custom fields and groups you can create. Here's a sample of the Request Custom Field Groups screen. From here, you can create a new group, edit a group, view the fields in the group and more.



4.3 Document Custom Fields

If there is organization-specific document information that needs to be captured, the application allows you to create your own Document Custom Fields. These fields will appear in the Request

Information screen, and will be available to select in reports and searches. These fields can apply to specific File Cabinet Drawers or all File Cabinet Drawers. There are several types of fields to choose from: text, text boxes, number, date, and list fields. Custom fields are organized into field groups, and as a result you must create a field group before creating custom fields.



5. Jobs

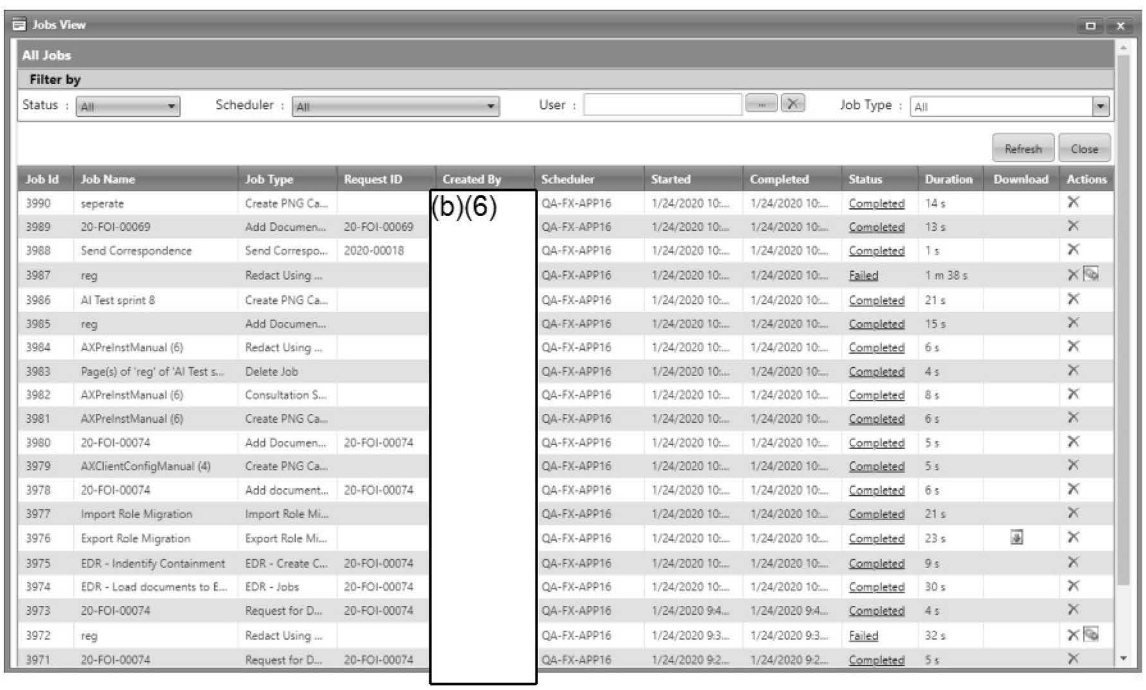
5.1 All Jobs

Jobs are actions that are performed during the processing of a Request. When actions such as Document Delivery, Publishing, and Save to Disk are performed by a user, they are submitted as jobs in the system. These jobs can be viewed from the All Jobs screen by the System Administrator and users with the required Permissions.

Regular Users of the system can view jobs from the **My Jobs** link found on the FOIAXpress Home Page. Additionally, users can (in some cases) view jobs in a processing area of the application, such as Document Management. In such cases, users can select an option to display the My Jobs screen in that environment.

When a job is finished, users are notified via an email message from the system. This message provides a summary of the action submitted, including the time the job started, the time the job finished, the action performed by the user, and the name of the user who performed the action.

System Administrators and users with the required Permissions can view the status of a job, download documents contained in a job, and delete a job. To access the All Jobs screen shown below, click **Administration> Jobs > All Jobs.**



The information displayed on this screen is described below

Field	Description

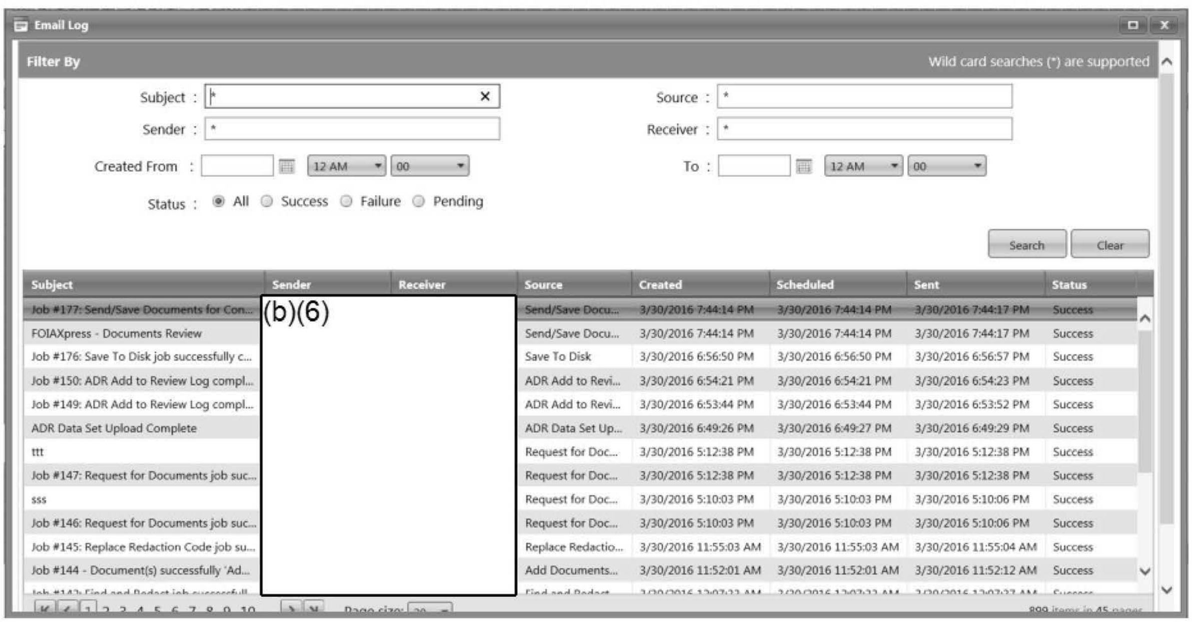
Filter By	
Status	The status of the job being processed. By default, all statuses will be selected from the drop-down menu.
Scheduler	The name of the scheduler which has processed the job. By default, all schedulers will be selected from the drop-down menu.
User	The user associated with a job.
Job Type	The type of action performed by the user. Click on the drop-down menu to view the types of jobs that can be submitted.
Column	
Job ID	The unique identifier assigned to the job. This is automatically generated internally by the system when a user performs an action. Users receive a notification message once an action is performed, which includes the Job ID.
Job Name	The name given to the job.
Job Type	The type of action performed by the user.
Request ID	Displays the Request ID of the processed job.
Created By	The name of the user that submitted the job.
Scheduler	The name of the scheduler which has processed the job.
Started	The date and time the job began.
Completed	The date and time the job ended.
Status	The current status of the job.

Duration	The amount of time it took for the job to complete processing. This is measured in hours (h), minutes (m) and seconds (s).
Download	When a job has an available download, a link displays in this column, which when clicked, prompts the user to **Open** the document or **Save** the document to their local or network drive.
Actions	Displays available actions for each job.

(!!) Note: Click Refresh to reload information displayed on the screen and to obtain the current status of a job currently being processed. Click the Resubmit icon in the Actions column to resubmit a job for processing. A job can only be resubmitted if the status is Failed.

5.2 Email Log

Users can use the Email Log to track and view email information for a specific time period. **Click Administration> Jobs >Email Log**. The Email Log window displays as shown below:



5.2.1 Steps to Filter Email Log

Users can filter the *Email Log* screen using various search filters.

1. Enter search criteria as necessary in the fields described below.

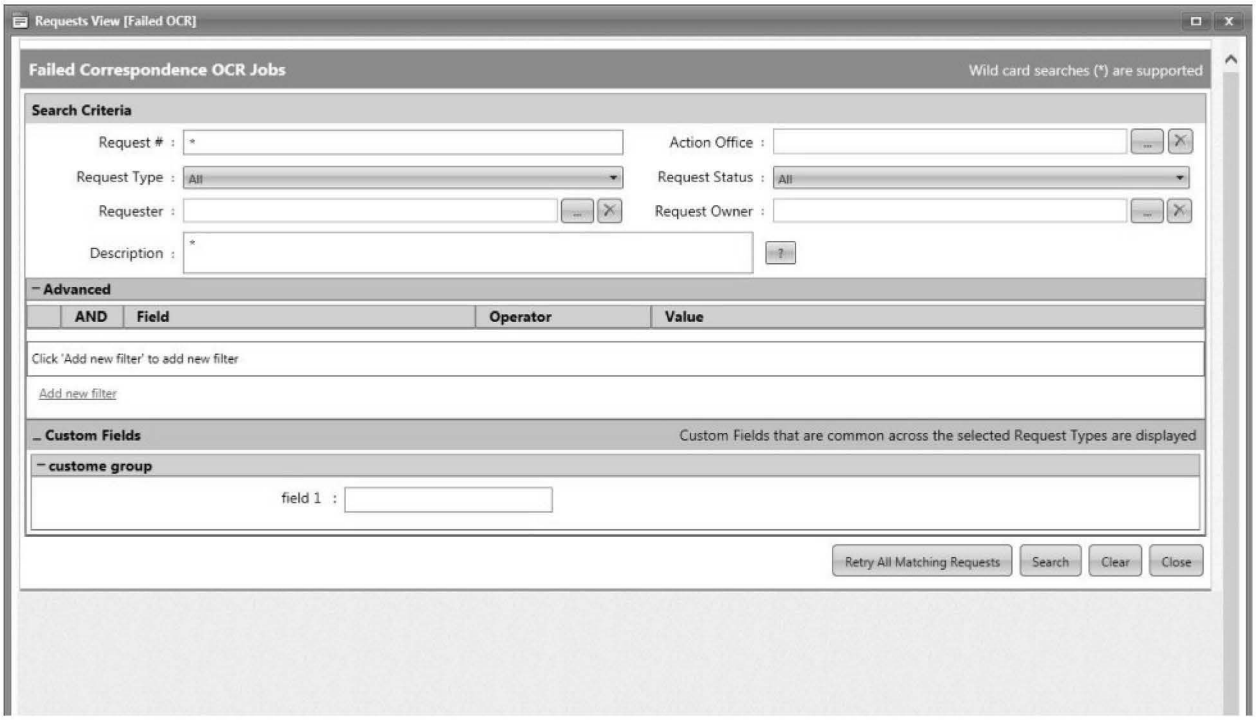
Field	**Description**

Filter By	
Subject	The subject of the email.
Sender	The person who sent the email.
Created From	The date and time after which the email was created.
Status	The status of the email.
Source	The location within the application from which the email was sent.
Receiver	The email address of the person who received the email.
To	The date and time up to which the email was created.

2. Click **Search**. The Email Log will be filtered based on the search criteria entered.

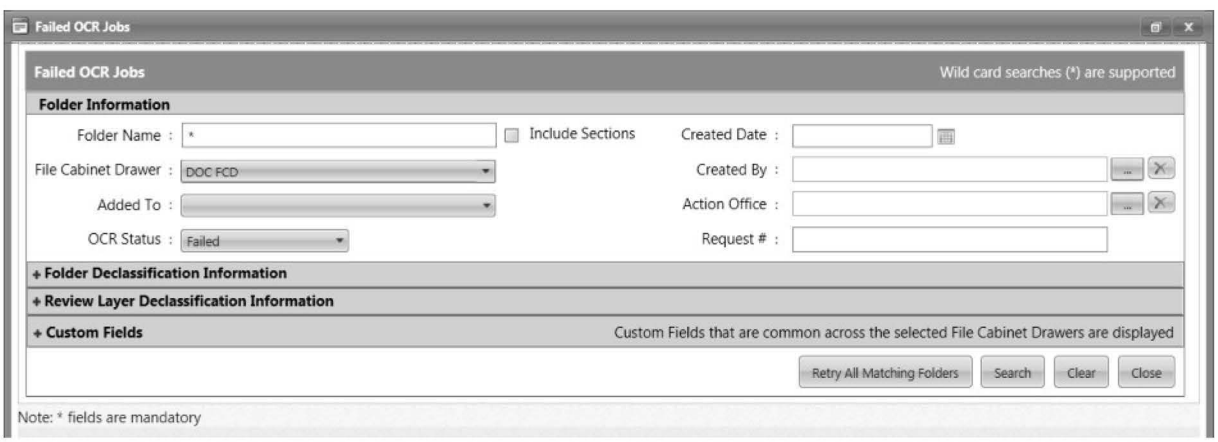
5.3 Failed Correspondence OCR

Users can view any Failed Correspondence OCR jobs for a Request and take corrective actions, such as retrying the failed jobs. Click **Administration > Jobs > Failed Correspondence OCR Jobs**. The *Requests View [Failed OCR]* window displays as shown below:



5.4 Failed OCR Jobs

Users can view any failed OCR jobs for a Folder and implement possible solutions, such as retrying failed jobs. 1.Click **Administration> Jobs > Failed OCR Jobs**. The *Failed OCR Jobs* window displays as shown below:



Available search criteria described in the fields described below:

Field	Description
Folder Information	

Folder Name	The name of the Folder containing the failed OCR job.
File Cabinet Drawer	The File Cabinet Drawer containing the failed OCR job.
Added To	The location where the OCR job was added.
OCR Status	Filter results by OCR Status. Selections are **Failed, Rejected** and **All**
Created Date	The date on which the OCR job was created.
Created By	The name of the user who submitted the job.
Action Office	The Action Office associated with the OCR job.
Request #	The identification number assigned to the Request associated with the OCR job.

(!!) Note: The search filters available on this screen may be different, depending on how your application was configured.

6. Contact Information

6.1 FOIA - Point of Contact and Resources

If you have any questions related to FOIA processing, please contact the FOIA team at FOIA@treasury.gov.

For all other FOIA-related resources, please visit Treasury's Freedom of Information Act page

6.2 FOIAXpress User Support

- All FOIAXpress training and demonstration related materials are posted on myTreasury's FOIAXpress page

- To request technical support, please submit a Service Desk ticket
    - All access requests require PTR's approval and the completion of *Access Request and Rules of Behavior* forms

- For all other FOIAXpress related inquiries, please contact the support team at FOIAXpressSupportTeam@treasury.gov

Treasury FOIAXpress

Frequently Asked Questions

V1.1

May 2021

Version History

Version #	Issuance Date	Description of Change
1.0	12/3/2019	Initial document
1.1	5/25/2021	Added Bureau Questions
1.2	6/1/2021	Updated browser compatibility to reflect text editor change, and added notes on how to close request without delivering documents

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1. Application

Question	Answer
What web browsers are compatible with FOIAXpress?	Internet Explorer 11, Edge, and Chrome are compatible with FOIAXpress. Rich Text Editor has been enabled in Treasury's instance of FOIAXpress, allowing for the correspondence feature to be used across all browsers. (If using Internet Explorer, XAML must be enabled in the browser settings and the application URL must added to your trusted sites)
How can I access the FOIAXpress User Manual?	From the upper right-hand corner of the application, click **Help > Online Manual**.
How can I modify my application preferences?	From the upper right-hand corner of the application, click your **User Name** then **Preferences**. From here, you can review preferences by clicking the *General, Request, Document,* or *Review Object* tabs. After modifying preferences, click **Save**.
How can I view different home screen dashboards?	There are four system-defined dashboards: *User, Action Office Manager, FOIA Officer,* and *System Administrat*or. To toggle between any dashboards made available to you, simply click the **Dashboards** drop down (located underneath the *Search* field). Administrators can also create custom dashboards tailored for different users, with easy access to the information and controls they use most frequently.
How do you perform a wildcard search in FOIAXpress?	Asterisks (*) are used as a wildcard character when searching. The wild cards are used as a placeholder for missing or unknown information.

Question	Answer
How can I search for requests from the home screen?	There are multiple ways to search for and view requests: • Use the *Quick Search* box to the far right of the main navigation bar in the application. Type the full (or partial) request number in the search bar to retrieve a view of all requests matching the request number. You can also expand the search drop down to search for requests using the request description, requesters, or documents. To find tips for searching under each category, hover your mouse in the text box and a popup displays helpful tips. From the search results, click the **link** provided under the *Request #* column to open the request. • More robust searching is conducted from the main navigation bar by clicking **Requests > Search Requests**. From here you can search requests using many filters, including Request Status, Assignee, Action Office, Request Custom Fields, and more. If wildcard searching is supported, you will see an asterisk (*) in the field. Click **Search** to execute the search; from the search results, click the **link** provided under the *Request #* column to open the request.
Why doesn't my number of primary assignments match the request count in the Action Officer or FOIA Officer dashboard graphs?	The *FOIA Officer* dashboard represents all open requests for the entire enterprise, while the *Action Officer* reflects all open requests for your specific Action Office. Switch to the *User Dashboard* to view your primary/secondary requests in the dashboard view.
Why do I keep getting email job notifications? How can I turn off job notifications?	Because FOIAXpress is a Zero-Footprint (ZFP) application, user actions are sent to the server as 'jobs.' For example, when you *Save to Disk* or *Deliver Documents*, you are submitting a job to the server. To help you keep track of your jobs and their status, you will receive email notifications for each processed job. Go to **User Name > Preferences** and uncheck the *Receive Job Email Notifications* field to turn job notifications off. If you turn off notifications it is a good idea to monitor your jobs using the **My Jobs** link located under the *User Name* menu in the upper-right corner of the application.

2. Requests

Question	Answer
How can I perform a mass assignment of requests?	Instead of assigning open requests one at a time, multiple requests can be combined and assigned to another user, user group, or group queue in a single action. Bear in mind, performing a mass assignment override all existing user assignments. You must have *Mass Assignment* permissions in order to perform this action. To mass assign requests, click **Administration > Request Management> Mass Request Assignments**, then follow the prompts to search and assign requests.

I'm creating a request, but I can't type in the name of the requester. How do I do that?	When creating a request, the Requester details cannot be typed manually in the request form. Instead, the Requester must be retrieved from the requester database and associated to the request. Click the **Lookup button (...)** next to the Requester field to search for an existing Requester in the database. Locate the requester, highlight their name and click **Select** to add to the Request. If the requester is not found, click the *Create Requester* tab to add the requester to the database. The requester automatically populates in the request form after saving.
How can I manage the disposition of multiple items requested in a single request?	If a requester submits a request for multiple items, use the sub-requests feature in the request description. Create a sub-request for each part/category of the request you would like to track. When you are moving records to the request you are asked to associate the record(s) to a sub-request. The system will calculate a disposition for each sub-request, which helps break down how each category of records were processed. This disposition breakdown is then used to calculate the overall request disposition, which is included in the Annual Report.
Can I view and work on more than one request at a time?	Yes. In a search result right click on the Request # and select open in new tab or window. You can open as many as you desire. The same can be done in Document Management.
Can I scan or upload a final response letter signed outside of the system and send it with the document delivery?	Yes. In your request view, click **Correspondence** from the left-hand menu, then click the **Receive Correspondence** tab and scan or upload the letter. Next, click the **Correspondence Log** tab, highlight the letter you just added, and click **Save for Final Response**. Then, on the *Document Delivery* prep screen, check the *Include Final Response Letter* option. The uploaded letter is automatically selected to include in the delivery of responsive records.

Question	Answer
I know a request exists, but it's not coming up in searches. What am I doing wrong?	When searching for a request from **Requests > Search Requests**, be sure that your *Search Option* filter is set to *All.* You can also set your search default by clicking the **User Name** menu at the top right of the application then **Preferences > Request**. Set the *Search Option* field to *All,* then **Save**. Setting your preference to *All* ensures that, in future searches, you're searching the entire application and not only requests assigned to you or your office.
How do I send correspondence from a request?	From a request, click *Correspondence* from the left menu bar. From this screen, you will be able to send emails with attachments and edit/save correspondence templates.
I found a duplicate requester in the database. Can I merge both profiles into one?	Yes. Merging combines two requester profiles into one, usually because they are duplicates. When merging two profiles, the source requester's details will be discarded and their history appended to the target requester's profile. Only users with *Merge Requester* permissions can perform this action. To view merged requesters, click **Administration > Request Management > Merge Requester History**.
What does "Requests I Own" mean?	If the *Request Owner* field is enabled, *Requests I Own* shows you all the requests you are assigned as the Owner. This provides a direct link to all open requests that you own in the application. Request Owner permissions to a request can vary. The Request Owner role is customarily used for workload management.
What is a secondary user?	A secondary user is someone who has also been given access to a request; they will be able to view the request from the *My Work Summary* menu on the home screen. While the primary user is ultimately responsible for meeting the target date of a request, the secondary user role can be used to provide assistance on a request or keep track for reference. The use of these ownership structures can vary depending on permissions and agency processes.
How can I stop the clock on requests?	From your request view, click **Stop the Clock** on the left navigation menu. When stopping the clock because the '*Request is not Perfected*', the application stops tolling and changes the status ofthe request to *On Hold-Need Info/Clarification*. When you restart the clock, the application automatically returns the full processing days of the request and recalculates a new target date. When you stop the clock due to fee-related reasons, the application stops tolling and will change the status of the request to *On Hold Fee-Related.* When you restart the clock, the application resumes counting the remaining processing days where you left off. An organization may configure these Stop Clock features for single use, multiple use, or opt not to use the feature.

Question	Answer
What is the difference between assigning a request and transferring a request?	When you assign a request, you are moving the request ownership from one user or group to another, usually in the same Action Office, and with no change in remaining processing days. To assign a request, open the request and click *Assign Users* from the left menu bar. The request transfer feature is used to transfer the ownership of a request from one Action Office to another. If configured (and transferred within the first ten days of receipt), the receiving Action Office can expect to get all processing days back. To transfer a request, open the request and from the left menu bar, then click **Transfer Request**.
How can I apply an extension on a request?	You can extend the target date of a request by clicking **Extensions** in the left menu pane of a request. When requesting an extension, you must select the reason for the extension, and if you do not have permission to approve/complete the extension you will need to notify a supervisor to review/approve the extension request. The new target date is automatically recalculated on approval of the extension.
Why can't I approve my own extension?	If the *Approve/Deny* button is grayed out, it means that you do not have the permission to approve your own request extensions, so it must be approved by someone else, usually a supervisor. To request approval, highlight your extension from the *Extensions* view of the request and click **Send Email to Supervisor** to notify the supervisor they have an extension pending approval.
In the request description field, what does "Restricted" mean?	When the *Restricted* option is checked, the request description will be replaced with the word "Restricted" in any and all report generated from the system.
Why am I unable to modify the request description field?	To modify an existing request description, you must first check the Modify Description box. Once modifications are complete, click Save to save the new description. The system keeps track of the description changes, along with who made the change and when.
How do I upload correspondence to a request?	First, open the request. Next, click **Correspondence** from the left-hand menu. Click the **Receive Correspondence** tab, then choose (or write in) the type of correspondence you're uploading and how it was received. Finally, browse, scan, or drag and drop the file, then click **Save**. Any correspondence you upload will be viewable and accessible in the *Correspondence Log*.
How do I reopen a request?	First, search and retrieve the request. From the left menu pane, click **More Actions > Amend Request** to reopen a closed request. The system prompts to select a status to apply to the reopened request.
The requesters name on a request has changed, how do I correct this?	In FOIAXpress, requesters are identified by their email. This requester change is likely due to the fact the requester used the same email as someone else in the system (such as a generic office email).

3. Document Management

Question	Answer
I want to print a document, and I noticed it saves as a file to be downloaded. Where did it save?	When you first print a document, you will have the option to download it from the *Job Notification* box once the job is complete. If you need to re-download the document, you can find it on the FOIAXpress Home Screen under **My Work Summary > My Jobs**.
Can I open more than one instance of Document Management and review a different set of documents?	Yes, multiple instances of Document Management can be opened. To open documents in separate windows, from the *Search Results* list select the document(s) you want to open then click the **Open Folders** action button.
Why can't I drag and drop an email from Outlook into the "Drag and Drop" zones of the application?	Outlook does not allow for dragging and dropping directly into your browser. As an alternative, drag and drop an email to your desktop, and then drag and drop it from your desktop into any *Drag and Drop* zone.
When delivering documents, how does the application sanitize the records?	FOIAXpress completely and securely burns in the redaction layer to create a new image of each redacted page and returns a single sanitized document. FOIAXpress uses pixel-to-pixel replacement to remove the pixels of the redacted text and replace them with the pixels of the redaction area.
When redacting, how do I save my edits to ensure sure I do not lose my work?	FOIAXpress automatically saves your redactions and notes on review layers any time you move to another page in the document. When you first move to another page, the application will prompt you to name your review layer. From then on, redactions on subsequent pages will be saved on your layer as you move from page to page.
Can I password protect email deliveries?	Yes, but this feature must first be enabled by an administrator. Once enabled, whenever PDF format is selected as the document format you will see the *Password Protect* option. When **Password Protect** is checked, the application will send two emails to the requester: One with a PDF of the responsive records and another with the password to open the responsive document PDF. A copy of the password email notification will be in the *Correspondence Log* of the request in the event that the requester loses the password and the user needs to resend the email.
I want to combine redactions done across two review layers. Can I merge them?	Yes. Open your folder in *Document Management*. When the application prompts you to load a review layer, click **Yes**. From the *Review Layer* window, click **Merge**. Follow the directions on the *Merge Review Layer Screen*, then click **Merge Review Layers**. Alternatively, if you already have a review layer loaded, right-click on the folder and select the **Merge Review Layers** menu option. You can merge as many review layers as desired at one time.

Question	Answer
How can I quickly identify what has been reviewed in a review layer?	To get a summary of the reviews conducted on document, run a *Document Status Report*. While in *Document Management* and with a review layer loaded, right-click on the folder and select **Document Status Report**. A new window appears with a report that summarizes the page status (*Not Reviewed*, *Disclosed in Part*, etc.) and the redaction codes used on each page. You can export or print this report.
While performing Find and Redact I get a system message saying "No occurrences have been found." What does this mean?	This message can appear for a few reasons. The most likely reason is that the search term you are looking for does not exist in the document. Please check your search term and try again. The message could also mean that the Optical Character Recognition (OCR) process is still running. OCR is the electronic conversion of images of typed or printed text. All documents uploaded to Document Management undergo this process, making uploaded documents searchable. If you get this message, it could mean that OCR is still running and the application has not "found" your search terms yet. To check the OCR progress, right click on the folder and select **Modify Folder Details** from the drop down menu to view the OCR Status. Review the *OCR Information* section to determine if OCR is *Pending*, *Not Complete*, *Still Running*, or *Failed*. If OCR fails, please contact your FOIAXpress administrator.
Can I redeliver responsive records?	Yes, you can redeliver responsive records. From the request menu, click **Deliver Documents > Deliver Documents**. A message displays alerting you that a delivery has already been made. Read the message carefully and click **OK** to proceed. Select the folders, sections or pages you want to redeliver, then click the Deliver Documents icon to move to the *Delivery Prep* screen. From here, select your delivery options and click **Deliver Documents** to complete the redelivery.
I'm trying to make changes to a review layer, but it's locked for editing. How do I unlock it?	Right click on the folder containing the review layer you want to unlock. From the context menu, click **Unlock Review Layer**. If you do not see that option, it means that you do not have the permission to unlock the layer. Contact the user who created the layer (or your system administrator) to unlock the review layer.
How can I administratively close out a request without delivering documents?	To administratively close a request, you must take Final Actions on the request to provide the Disposition as *Other Reasons*. After selecting the appropriate *Other Reason,* you can proceed to the *Close* action in the request. (note: if documents were uploaded to the review log, you must move them to the request folder, and all requests for documents need to be closed to proceed with Final Actions)

Question	Answer
Do I have to convert documents to pdfs before uploading them into Document Management?	No, you don't have to convert documents to PDF before uploading into Document Management. Document Management accepts the following file types and automatically converts to PDF as they are imported into the repository; jpeg, jpg, tif, tiff, pdf, txt, text, htm, html, doc, docx, rtf, xls, xlsx, ppt, pptx, vsd, vsdx, vss, vtx, vdx, vdw, vst, vsx, msg, png, xps, csv, and eml
What does "delivery failed" status indicate and what do I need to do to correct a delivery failure?	If your request is in *Document Delivery - Failed* status, this means the records have not been delivered to the requester and something went wrong in the delivery process. First, check the document delivery log by opening your request and clicking **Deliver Documents > Document Delivery Log**. Highlight the delivery, then click **View Error Description**. The error description will provide details on why the document delivery failed. Depending on the error, you can retry the same delivery or pick a different document delivery mode, or you may have to contact your administrator. The most common document delivery error is when an email delivery is bigger than your agency's maximum allowed attachment size.

4. Reports

Question	Answer
How do I generate a Vaughn Index report?	In order to generate a Vaughn Index Report, there must first be documents in the Request Folder. Open the Request, then from the left hand menu click **Logs/Reports**. The *Log/Reports* screen displays. Here, click **Vaughn Index Report** to generate the report. The report displays and can be exported in various formats.
How do I give a user, users or user group access to my custom request report in FOIAXpress?	By default, the creator of a report and the system administrator are the only users that can view the report. If you need others to access your report, you must give them permission. To give a user, users, or a user group permission to view and generate your report, click the **Reports** tab on the main menu bar. Then click **Custom Report > Request**. Click **Permissions**, then locate the report you would like to share and choose either *Group View* or *User View* to locate the group or users to whom you want to give permission. Check the appropriate boxes and click **Save**. The next time the user or group logs in, they will have access to the report, listed under **Reports> Custom Reports > Requests > Select Saved Report Criteria**.

How can I schedule a report?	There are several reports that can be scheduled; for this example, we will use *Custom Request Reports*. You must first create and save a report. Then from the main menu bar, click **Reports > Custom Reports > Requests**, then click **Report Scheduler > New**. On the displayed *Job Details* tab, give the scheduling job a name, select the saved report you would like to schedule, then set how frequently you would like the request to run. On the *Recipients Information* tab, input the recipient's email, subject, and specify the report format. Finally, add text in the body of the email, then click **Save**. The report is now programmed to run and be delivered to the specified recipients, at the intervals provided.
How can I quickly view a requester's history?	To see if a requester has submitted a previous request and if they have any fees due, click **Requester > Search Requester** from the application menu bar, then search for the requester using any known parameters. When you find the requester, open the requesters details by clicking on the requesters **Last Name**. Once on the Requester Details page, click the **Request History** tab. You will be able to review any existing requests, both open and closed, as well as any fees incurred.

Question	Answer
Is there a way to get a summary of the pages reviewed and exemptions codes applied while working in my review layer?	Yes, while you are redacting and reviewing responsive records you can access the *Document Status Report*. To access the report right click on the folder and select **Document Status Report** from the drop down menu. This is a dynamic report which will give you a page-by-page status and summary of all exemptions applied and pages redacted. This report can be exported or emailed in the following formats: Excel, Acrobat PDF, Tagged Image File Format (TIFF) or web archive.
Can you explain each document delivery output format?	**Multipage TIFF**: A TIFF delivery converts the document to a picture. The picture can be opened using an image editor, such as Microsoft Paint or Photo Viewer. **PDF Image**: A PDF image delivery creates a non-searchable PDF document. **PDF Archive**: A PDF archive delivery creates searchable PDF that is also backwards compatible with older versions of Adobe Acrobat. **PDF Tagged (508 compliant):** delivers a PDF that is compatible with computer screen reader programs, such as those for the visually impaired. **Separate single page files**: A separate single page file delivery will convert each page of the document into an individual PDF. For example, if a document has 15 pages, the requester will receive 15 PDFs.
Why am I unable to add sections to my folder?	You should determine if sections will be needed when first creating a new folder. If a folder is created and pages are added at the folder level, sections cannot be added later. If at least one section is present, then new sections can always be created. When creating Sections, try and predict how many might be needed. This reduces friction and requires fewer steps to have them ready to go versus creating them later.
How do I delete pages?	Pages can be deleted one-by-one by right clicking the individual pages, while multiple pages can be checked then deleted at once by right clicking on the corresponding folder or section.
Why am I unable to add pages to my folder while in the review log?	When working in a folder, pages can only be added or deleted when a Review Layer is not loaded AND if you the appropriate permission. To add more pages, you must first unload the review layer. Note that any pages added will appear in red font when reloading the review layer, signifying these were added after the loaded layer was reviewed.

Question	Answer
I want to deliver all records and letters in one folder. How can I do that?	This can be done by setting your application preferences. From the upper right-hand corner of the application, click the **User Name** menu, then **Preferences > Document**. Under the *Default Format for Delivery/Save* option, change it to **Single Folder**, then **Save**. This change will apply to document deliveries and file downloads under your user profile.

5. Bureau Questions

Question	Answer
The request I closed is not appearing on my dashboard, where can I find it?	Once you close a request, it will be removed from your dashboard and queues. You can search for this request however by request number or by searching your requests in the search feature.
If the Program Office doesn't upload documents, who does?	Once you receive the documents from the Program Office, using the Request for Documents feature you can "Take Action" on the document request and close the item out. From there, you will take the responsive documents from the email you received from the Program Office and upload the documents from the Add/Search/View Documents page.
Can PAL provide links to the Bureau Reading Rooms?	We can include language in PAL to direct users to the Bureau reading rooms, however PAL also has its own reading room that can be utilized.
How long will goFOIA be maintained after FOIAXpress goes live with the Bureaus?	Once our Data Migration from goFOIA to FOIAXpress has been signed off on by all the bureaus, goFOIA will be turned to read-only. Eventually goFOIA will be decommissioned Q4.
How do we move correspondence documents to Appeal cases?	You can download all of a request's correspondence and move them manually to the Appeal case.
How do Record Custodians currently work in FOIAXpress?	Our Record Custodians currently have access to the FOIA requests in FOIAXpress. When the Record Custodian gathers the responsive documents, they search for the request and upload the documents. The Record Custodians also have access to the Redactions feature, if necessary, but it is often not used.
When reporting, do Bureau's send to PTR or PTR pull automatically from everything?	Everything

6. Contact Information

6.1 FOIA - Point of Contact and Resources

If you have any questions related to FOIA processing, please contact the FOIA team at FOIA@treasury.gov.

For all other FOIA-related resources, please visit Treasury's Freedom of Information Act page

6.2 FOIAXpress User Support

- All FOIAXpress training and demonstration related materials are posted on myTreasury's FOIAXpress page

- To request technical support, please submit a Service Desk ticket
  - All access requests require PTR's approval and the completion of *Access Request and Rules of Behavior* forms

- For all other FOIAXpress related inquiries, please contact the support team at FOIAXpressSupportTeam@treasury.gov

Treasury FOIAXpress: FAQs and Helpful Tips 11/2/2020

This is the second guide distributed to answer frequently asked questions and to provide helpful tips related to the use of FOIAXpress. Topics discussed in this guide include closing cases, searching for requestors, addressing new appeals and litigation, mass actions, review flags, deleting pages, and basic reporting.

Frequently Asked Questions (FAQs)

I'm trying to close a request in FOIAXpress, but I receive a warning that the request cannot be closed. What steps should I take to allow me to close my request?

FOIAXpress requires certain functions to be completed before closing a request. If you have trouble closing a request, consider checking the following menus:

- **Final Actions**- ensure that the **Disposition Accepted Date** matches the date for which you are trying to close the request. Also ensure that the **Final Actions** have been properly applied and that the request status is listed as **Disposition Accepted**
- **Fees**- ensure that any fee invoices have been completed and properly updated
- **Fee Waivers/Expedited Processing**- Under the **Request Information** tab, check to ensure that any **Fee Waivers Requested** or **Expedited Requested** have a **start date**, **end date**, and **determination** set
- **Add/Search/View Documents**- ensure that all documents that have been attached to the **Review Log** have been moved to the **Request Folder**
- **Request for Documents**- double check that all search taskers have been completed and all have a **Closed Date** listed

I am searching for a requestor that I recently entered, but I am unable to find them when I search for their name. What should I do?

1. Try searching for the requestor by their e-mail address as opposed to their name
2. Verify the requestor's country associated with their profile. FOIAXpress automatically defaults to searching for requestor information from the United States only. You can manually change the search criteria to **"All"** in order to expand your search

Helpful Tips

Creating FOIA Appeals

When receiving an appeal, please preserve the original FOIA request and <u>do not</u> change the Request Type to Appeal. Instead, create a new appeal linking the original request using the **Reference** feature in the **Create Appeal** screen. This will help to preserve the administrative record for each request type while assigning the request a unique appeal number. Using the **Reference** feature in the **Create Appeal** screen helps to pull the requestor's information into the new appeal case avoiding manual work. Users will receive a warning when attempting to close an appeal or a standard FOIA case that an open request is linked, prompting you to remember to close the other request.

Creating a FOIA Litigation Case

When receiving notice of a new litigation, please preserve the initial request and do not change the Request Type to Litigation. Instead, administratively close the original FOIA request using the **Final Action** code **"Other- Litigation"** (coming soon). Create a new litigation case linking to the original request using the **Link Request(s)** feature. This will help preserve the original FOIA request while using the litigation request for any future work. Ensure that the case citation at a minimum is listed in the **Description** box.

Mass Actions to Pages Uploaded for Redaction

FOIAXpress provides users with the ability to complete mass actions on pages uploaded for processing. Mass actions include adding additional pages, deleting pages, redacting in full, find and redact, applying a review template, assigning Review Flags, etc. A review layer should be applied when attempting to complete all mass actions except for deleting pages. Specific instructions on deleting pages and applying review flags to individual pages are provided in their own sections below. Steps to apply a mass action:

1. Access the documents in the **Review Log**
2. Ensure that the review template is applied
3. **Select** the **checkbox next to each individual page** in the document tree for which you want the mass action to be applied
4. **Right click** on the **folder** containing the pages to select the mass action
5. Complete any necessary prompts
6. Repeat as needed

Using Review Flags

Review flags allow users to code individual pages with a set of preloaded messages. Commonly used review flags include **Duplicate, Non-Responsive, Release After Consultation**. Using these flags helps to provide the reviewer with a message about those pages and gives the user the ability to remove pages containing the flags from the final delivery of the records.

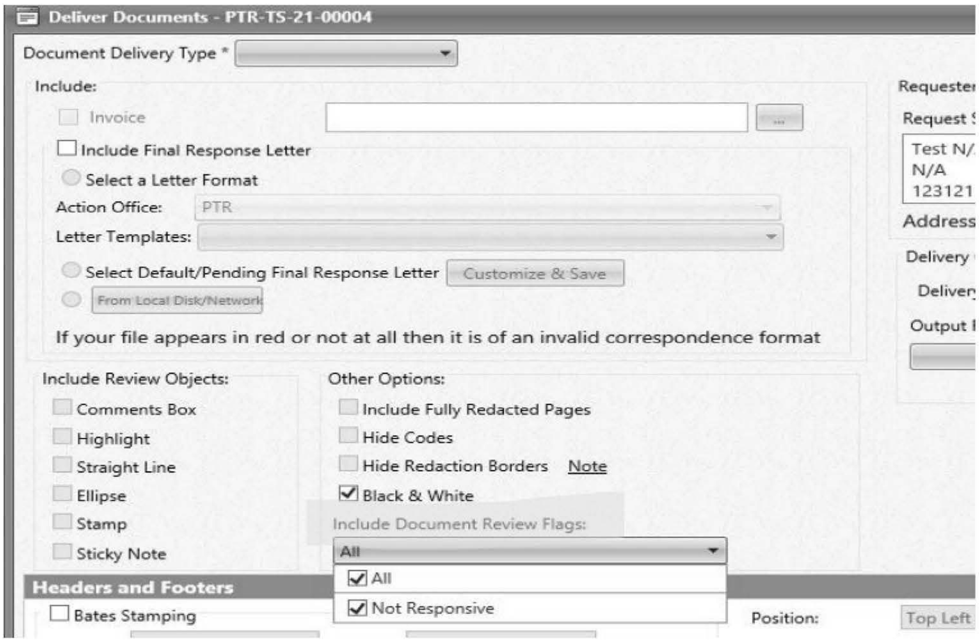
Applying a Review Flag

1. Access the documents in the **Review Log**
2. **Right click** on a page in the document tree and select **Set Review Flag**
3. **Select** the appropriate option
4. You will notice that the review flag appears next to the page in your document tree when you **click on another page**
5. Repeat this process for each individual page requiring a review flag

Removing Pages with a Review Flag During Final Delivery

1. In the **Review Log**, **load** the review layer and ensure that the review flags have been properly applied
2. Move all documents to the **Request Folder**
3. Complete **Final Actions**

4. In the **Document Delivery** screen **select the checkbox** next to the folder containing the uploaded pages. You do not need to manually uncheck pages with the review flag.
5. Next, **click** on the **Deliver Documents** icon
6. When the **Deliver Documents** screen appears look for the menu titled **Include Document Review Flags**



7. **Uncheck** any review flags you wish to be excluded from the final delivery
8. Make any other necessary changes to the Deliver Documents screen and **deliver** the documents

Deleting Pages

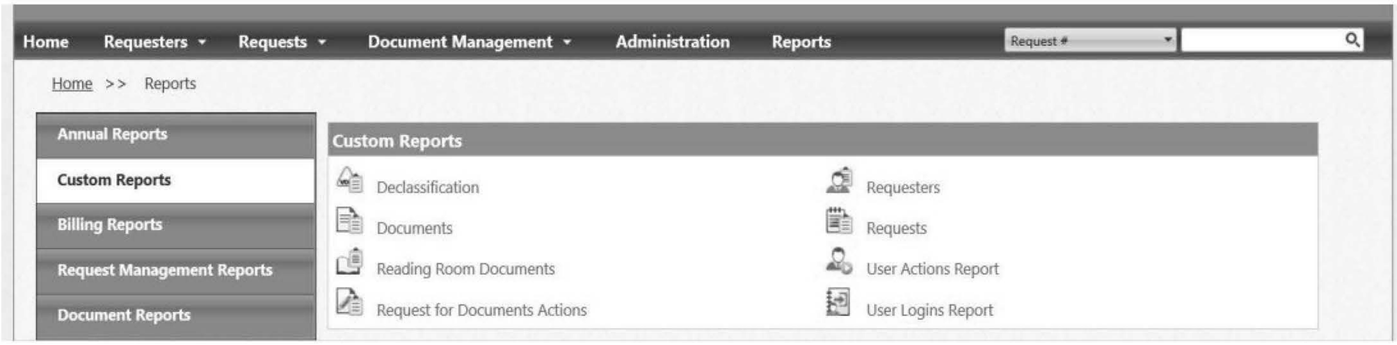
There will be times when you upload pages that you may not want to be included in your final response. Before deleting pages, consider whether to use a review flag to mark them as **"non-responsive"** or **"duplicate"** and remove those from your final delivery per the instructions above.

To delete pages, complete the following steps:

1. **Access** the documents loaded to the **Review Log**. When prompted <u>**do not**</u> load a review layer
2. After ensuring that the review layer has not been loaded, **click** the **individual checkboxes** next to the pages that you wish to delete
3. **Right click** the folder in the document tree that contains the selected pages and choose **Delete Pages**
4. Follow any necessary prompts to delete the pages

Creating a Basic Request Report

FOIAXpress has a multitude of reporting features that can help to manage productivity, accountability, and requests. All reporting functions can be found under the Reports tab when logged into FOIAXpress. Choosing the correct reporting option is essential for obtaining the desired data.



Request Reports

Request reports allow the user to create custom reports and templates to obtain data on request management. This feature is useful when trying to obtain data on open cases, closed cases, pages processed, pages reviewed, requester information, FOIA logs, and others. Before jumping into FOIAXpress, it is helpful to plan and outline the outcome you are trying to obtain from running a report. Planning ahead of time will allow you to utilize FOIAXpress reporting in an efficient manner.

1. To begin creating a requests report, **click** on the **Reports** menu in the **top FX ribbon**. Ensure that the **Custom Reports** menu is selected. Choose **Requests** (see the screen shot above)
2. If you do not already have report criteria saved, click **Next** to create a new report
3. In the **Request Type** dropdown menu select whether you are trying to obtain data on **appeals, consults, FOIA cases, litigation cases**, or any combination thereof
4. Next take a look at the **Request Status** dropdown menu on the right side of the screen. The most common options here are **All Open Requests**, **Closed requests**, and **All Hold Requests**. If you are trying to obtain data on closed requests, you must ensure that only the **Closed checkbox** is marked
5. In the **Requests Assigned To** section you can identify a specific user or user group to obtain data on depending on your reporting requirement. If you are trying to identify a specific user, you must **click** on the **ellipses button** to **search** for their FOIAXpress account
6. In the **Request Date Options** menu, you have the ability to identify date ranges for FX to run it search on. The most useful date options are **Received Between**, **Closed Between**, and **Request Age**

7. Scrolling down to the **Select Fields** section, it is important to check the **Include Advanced Select Fields** ** box before identifying your report fields. This process will provide you with addition reportable fields that can be useful to your report
8. **Select** the fields you would like FOIAXpress to report on by **clicking on the field name** and hitting the **top arrow button** to move the field to the **Selected Fields Box**. You can select multiple fields for FOIAXpress reporting. However, caution should be given to selecting a significant number of fields as FOIAXpress will take longer to run the report and possibly crash your browser. Useful fields include: **Request ID, Received Date, Requester Name, Organization, Multi-Track Type, Request Status, Review Status, Request Age, Request Description, Searching Units, Primary User, Primary User Group, Secondary Users, Processed Days, # of Pages Reviewed, and # of Pages Released**. Any combination of these reportable fields can be used depending on your reporting purpose
9. Once your **Selected Fields** have been identified, you have the ability to change the order of the fields by selecting the **up or down arrows** next to the **Selected Fields** box
10. If you would like to save this report as a template for future use, you can scroll to the top of the screen and **select** the **Save Report Criteria** button. You will be prompted to create a unique name for your report which can be accessed in the dropdown in step #2 of these instructions
11. When you are ready to kick off your report select the **Generate** button
12. Depending on the amount of data you are asking FOIAXpress to recall, it may take some time for the system to generate your report
13. Once the report is generated you can export the file to Excel by selecting the **Export** button
14. You will receive several export options to include **Export in Excel Format, Export in Word Format, and Export in HTML Format**. **Exporting in Excel** is the most useful. Select the desired option and **click Export** and open the file when prompted
15. You will receive a warning message that states "The file format and extension of 'Requests Report.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?" Select **Yes**
16. The Excel spreadsheet will load, allowing you to filter and analyze the data

Treasury FOIAXpress: Setting up Preferences, FAQs, and Helpful Tips

This guide will outline the steps to set up and customize user preferences in FOIAXpress and will answer frequently asked questions related to the use of the system.

Setting Up User Preferences for the First Time

1. From the home screen, navigate to 'Preferences' within the drop down under your name in the top right corner as shown below

2. Select 'General' from the left side menu
   a. Change Records per Page to 50 or any number up to 100
   b. Ensure that the "Receive Job Email Notifications: All Notifications" option has been selected in the dropdown menu
   c. click **Save**
3. Select 'Request' from the left side menu
   a. Set the Send Correspondence Default Email Address to 'Requester Email' or you can keep it at "Other Email"
   b. Set 'Search Option: All'. This will allow you to search for cases that are not assigned to you in the system
   c. Set 'Requester Search by Created Date: Descending'
   d. Set 'Request Search by Created Date: Descending'
   e. At a minimum, move the following fields to Selected Request Fields
      i. Request #
      ii. Requester
      iii. Primary User
      iv. Review Status
      v. Assigned Date
   f. Click **Save**
4. Select 'Document' from the left side menu
   a. Set 'Pages to View at a Time in Document Tree: 100'
   b. Set 'Image zoom factor: 50%' or any size you see fit
   c. Set 'Fill mode for Redactions: Translucent or Transparent'
   d. Set 'Font for Redactions: Arial'
   e. Set 'Font size for Redactions: 8'
   f. Set 'Redaction/Border Color for Redactions: <darker color>'
   g. Set 'Back color for Redactions: <lighter color>'
   h. Set 'Redaction Code Alignment Preference: Top Left'

i. Set 'Default Format for Delivery/Save: Single Folder'
j. Set 'Document Delivery Output Format: PDF Tagged (508 Compliant)'
k. Check all boxes for 'Display Lookup Fields in Document Search Results; Show Review Flags; Draw Redaction Using Double Click'
l. Click **Save**

5. Select 'Review Object' from the left side menu
    a. Change the Straight-Line width to 3 and the color to red
6. click **Save**

Frequently Asked Questions (FAQs)

How do I close a request when FOIAXpress gives me an error message explaining that documents are still in the review log?

In order to close a request containing documents that were uploaded for processing, users must move the documents from the Review Log to the Request Folder. Once this is done users will be able to complete their Final Actions and can close the request without receiving the error message.

I moved documents to the Request Folder, but my redactions aren't showing up. What happened?

It is <u>essential</u> that users load their review layer before they move the documents from the Review Log to the Request Folder. If the review layer isn't loaded before the documents are moved, the user will lose all their redactions and will have to start over with processing the records over again.

I tried to upload documents with unapplied Adobe redaction recommendations into FOIAXpress and now my pages are out of order. I am unable to adjust or change these redactions. What happened?

FOIAXpress does not support documents with unapplied Adobe FOIA redactions. When uploaded, the system will sometimes scramble the pages and redaction boxes cannot be changed. There are two options for handling documents with Adobe redactions:

1. Upload a clean copy of the records without redactions and reapply them using FOIAXpress
2. Apply the redactions in Adobe and then upload the redacted copy into FOIAXpress

I have a request that is stuck "On Hold" and cannot get the clock to start. What should I do?

Requests should be able to be taken off "hold" by selecting "Start the Clock." If for some reason this does not work, you can force the request off "hold" by setting the "Final Actions." Remember to remove the "Final Action" selection afterwards if you do not attend to close the case at the time.

Helpful Tips

Navigation

FOIAXpress has multiple ways of performing the same action. A common way to navigate the system is to select the "Next" button in the top right side of the page. Another way to navigate is to follow the menu options on the left side of your screen. Menu options are listed in sequential order to match the FOIA workflow. So, if you get lost navigating the system, don't worry. Just look to the left-hand menu to check where to go next.

Notes

Any time a user adds a message in the Assignment Notes it will show up in the general "Notes" section of FOIAXpress regardless of whether the user checks the box to send the e-mail to the user.

E-mail Correspondence in FX vs. Outlook

While FOIAXpress has a feature to send e-mails to the requestor or others through the system, it is sometimes best for users to send their e-mails through Outlook depending on the purpose of the e-mail. The FOIAXpress e-mail correspondence feature is best used to send template language or finalized letters to the requestor. Outlook is best used to conversate about the status of their request or about clarification with the requestor or the program office. Please ensure that all Outlook procedural correspondence and communication is uploaded into the Correspondence Log to become a part of the administrative record.

Department of Treasury Pay.gov User Manual

v1.1 **June 2021**

AINS®

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FOIAXpress v10.5 Department of Treasury Pay.gov User Manual

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FOIAXpress®

Version 10.5

Basic Training Guide

V1.0 **March 2020**

AINS®

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FOIAXpress
Dashboard Management

V1.0

September 2020

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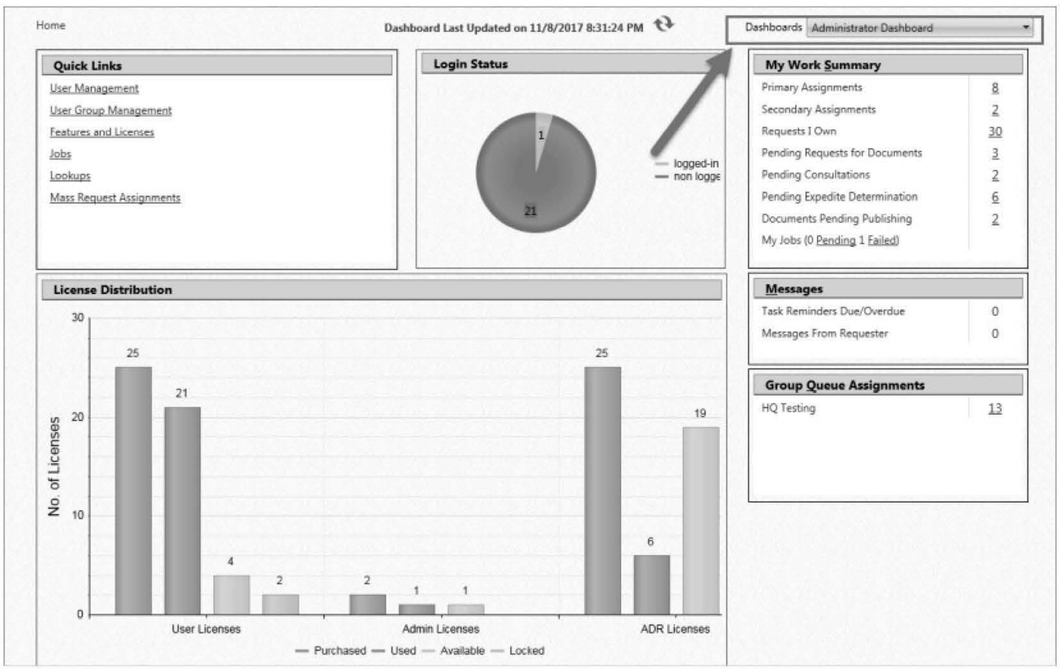
1. Dashboards

The Dashboard is the array of information presented to you when you log in to FOIAXpress. Multiple dashboards are configured in the system to display specific information targeted at different types of users.

Each user will have their own personal dashboards, but may have multiple dashboards based on their roles. However, if you are assigned multiple dashboards, you will have the ability to switch between these from the FOIAXpress Home Page.

The screen below shows an example Administrator dashboard, other types of dashboards include User and FOIA Officer dashboards. Using the dropdown menu highlighted in the sample image, you can choose between any of the dashboards assigned to you.

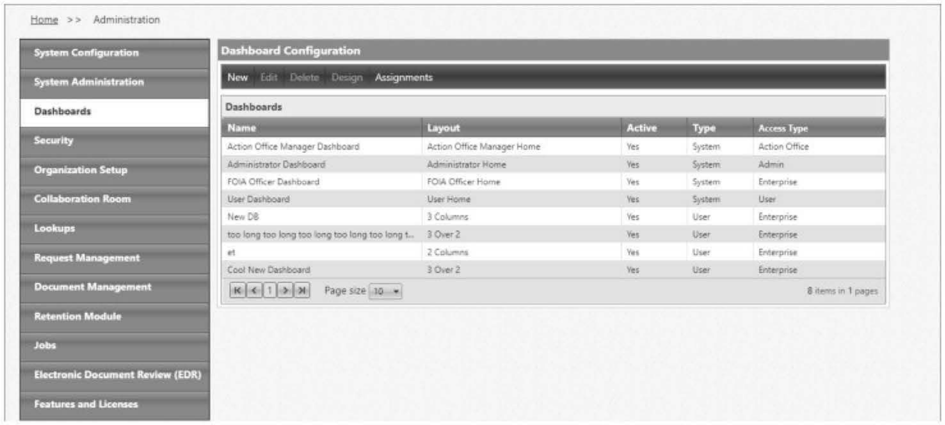


1.1 Dashboards Configuration

The Dashboard Configuration settings allow users with certain roles the ability to create custom Dashboards. These dashboards can be customized to provide easy access to the information and controls users access most frequently.

Dashboards can be created for access via the entire Enterprise, by Action Office, by User, or for Admin users.

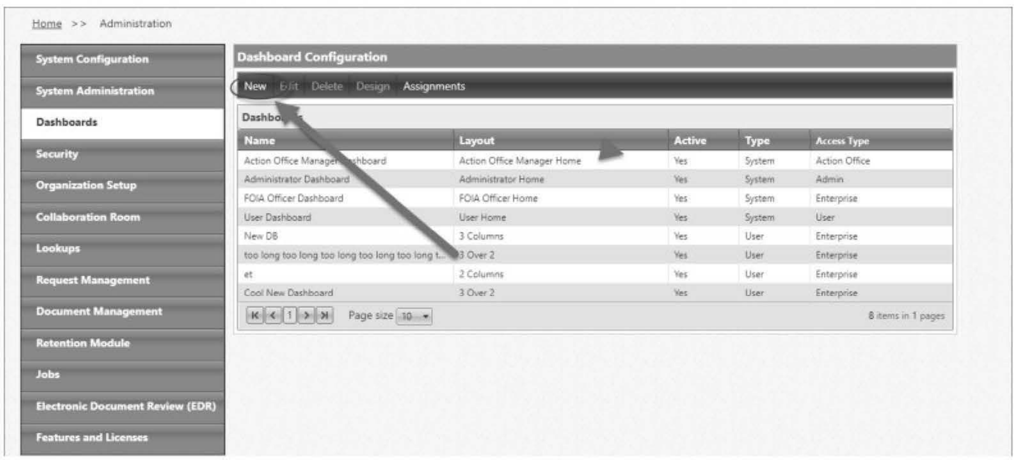
The Dashboard Configuration screen is shown below. Access this screen via **Administration > Dashboards**



1.1.1 Create a Dashboard

Follow the steps below to create a new custom dashboard.

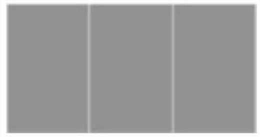
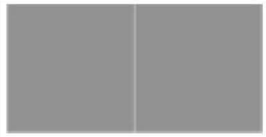
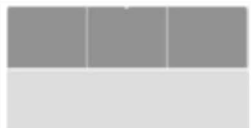
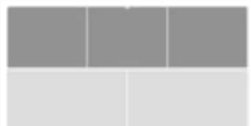
1. Navigate to **Administration> Dashboards**:



2. Click **New**. The New Dashboard screen appears as shown below:

3. Provide a dashboard Name in the Name column (this is required)

4. Select a **Layout** for the dashboard. There are four layouts available, as shown in the following table:

Layout	Example
3 Columns	
2 Columns	
3 over 1	
3 over 2	

5. Determine if the dashboard is **Active** using the checkbox provided.

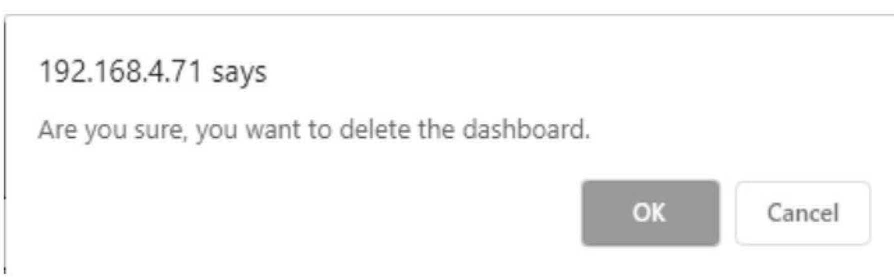
6. Select the *Access Type*. Options are Enterprise, Action Office, User, and Admin… (Access type controls who can access the dashboard, Enterprise covers all users in the system while the other three cover the associated users with that selection)

7. Click **Save** to save the new Dashboard. The screen refreshes to show the Dashboard Configuration with the new Dashboard included on the list.

1.1.2 Delete a Dashboard

To delete an existing dashboard:

1. Navigate to **Administration > Dashboards**
2. Select an existing **Dashboard** from the list
3. Click **Delete**. A confirmation message appears. Click OK to continue and delete the dashboard

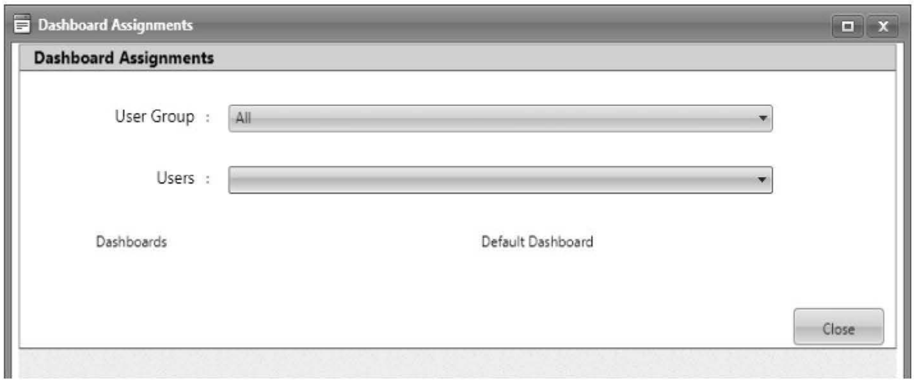


4. After clicking **OK** the dashboard is removed from the list
5. Edit the details as needed. When complete, click **Save** to save the changes

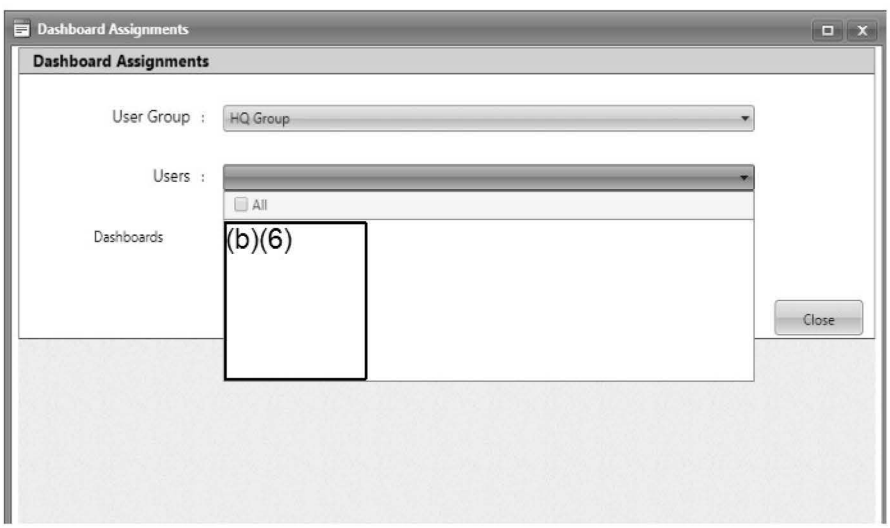
1.1.4 Dashboard Assignments

Follow the steps below to assign a custom dashboard.

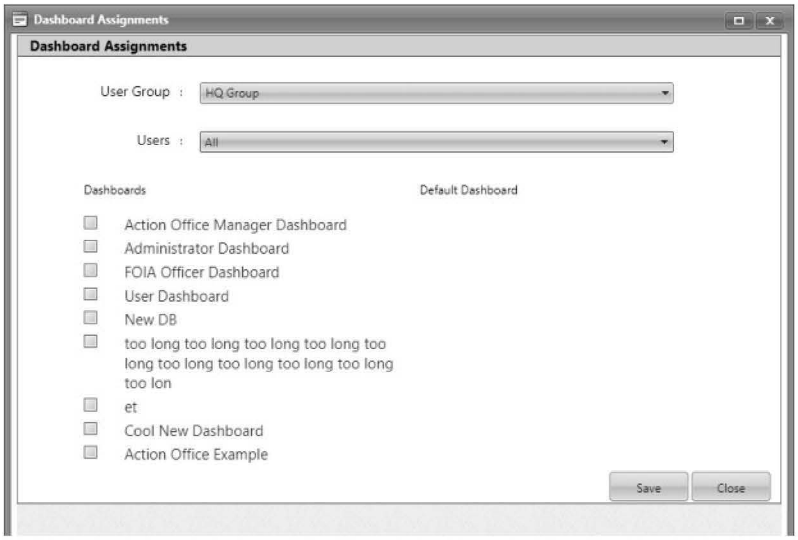
1. Navigate to **Administration > Dashboards**
2. Select the **Dashboard** to be assigned from the list, then click **Assignments**. The *Dashboard Assignments* screen appears as shown below:



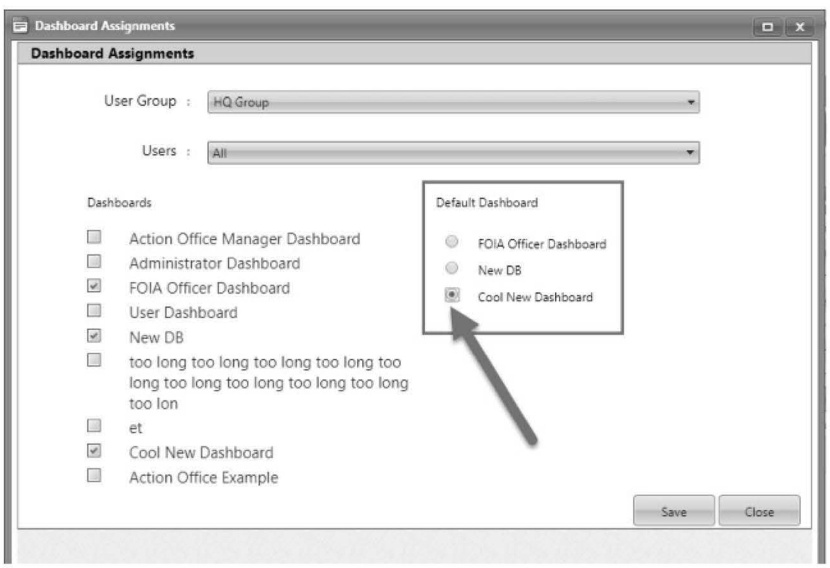
3. Use the *User Group* drop-down to select from users within a group, or select **All** to see all users
4. The *User* drop-down populates with the users from the group selected in the previous step. Use the checkboxes to select all users to be assigned the custom dashboard



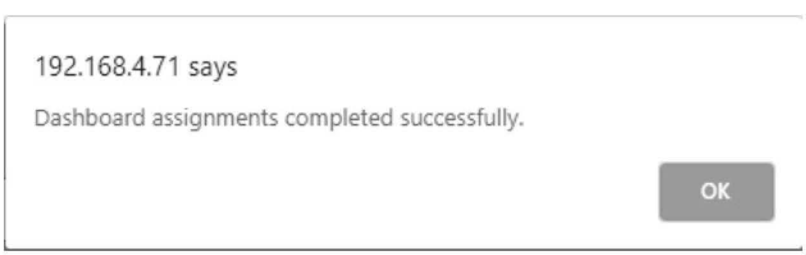
5. When all users are selected, the available Dashboards to assign are listed under *Dashboards* as shown in the following example:



6. Use the checkboxes to select all the dashboards to assign to the selected users. All selected dashboards appear in the Default Dashboard column
7. Under *Default Dashboard,* select one **Dashboard** from the list to serve as the default dashboard for the selected users



8. When complete, click **Save** to save the assignment details. A confirmation message appears as shown below:



2. Contact Information

2.1 FOIA - Point of Contact and Resources

If you have any questions related to FOIA processing, please contact the FOIA team at FOIA@treasury.gov.

For all other FOIA-related resources, please visit Treasury's Freedom of Information Act page

2.2 FOIAXpress User Support

- All FOIAXpress training and demonstration related materials are posted on myTreasury's FOIAXpress page

- To request technical support, please submit a Service Desk ticket
  - All access requests require PTR's approval and the completion of *Access Request and Rules of Behavior* forms

- For all other FOIAXpress related inquiries, please contact the support team at FOIAXpressSupportTeam@treasury.gov