

 The background is a blue-tinted photograph of several people in business attire standing in a modern office or conference room. They appear to be engaged in conversation. The image is overlaid with a semi-transparent blue gradient that darkens towards the bottom.

13th Annual FOIA[®]Xpress[®] User Conference & Technology Summit

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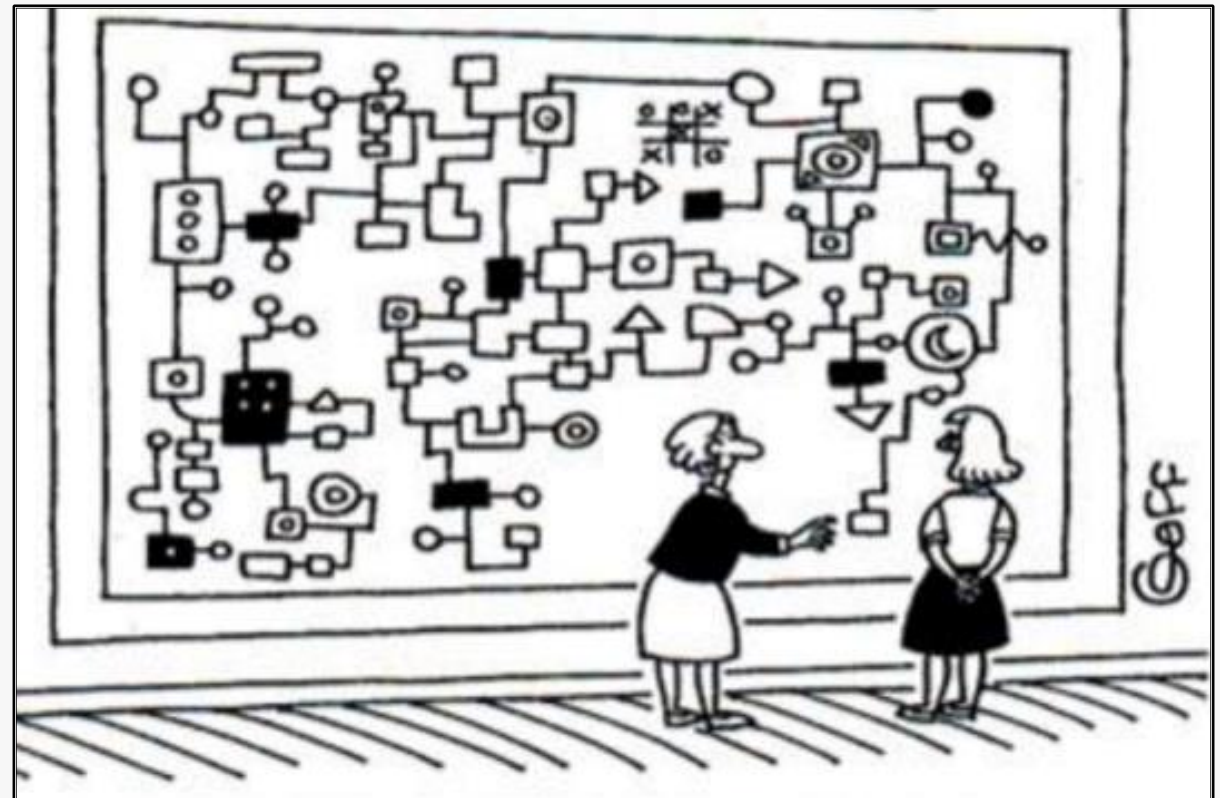
FOIAXpress[®]

- Roadmap
- What's New in v10.3
- Existing Features



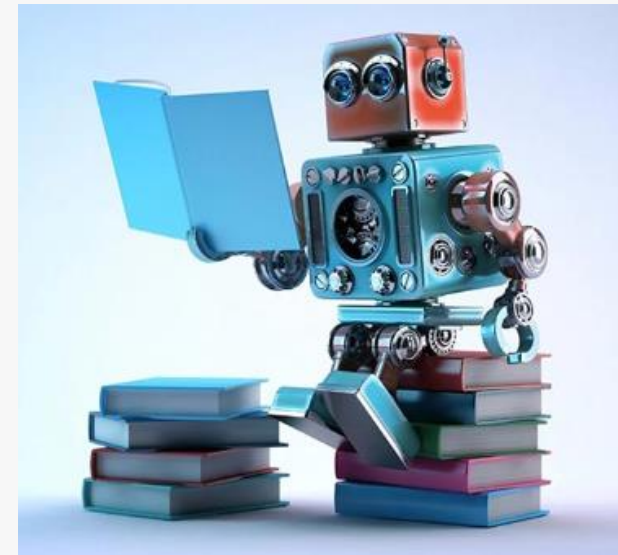
Workflow

- Ad hoc workflow vs. defined workflow
- Replace Assignment feature with custom workflow capabilities
- Define business rules



Artificial Intelligence Features

- **Redaction**
 - History-based redaction suggestions
 - Track corrections from user review
 - **Suggestions → Automatic**
- **Named Entity Recognition**
 - People, location, organization, date, money, percent
 - **Highlight or redact automatically**
- **Custom Pattern Redactions**
 - User-defined custom patterns
- **Real-time Predictive Coding & Clustering Analysis**
 - Train document sets
 - Tag documents automatically
- **Face detection**
- **Handwritten text recognition**
- **Extended machine learning capabilities**



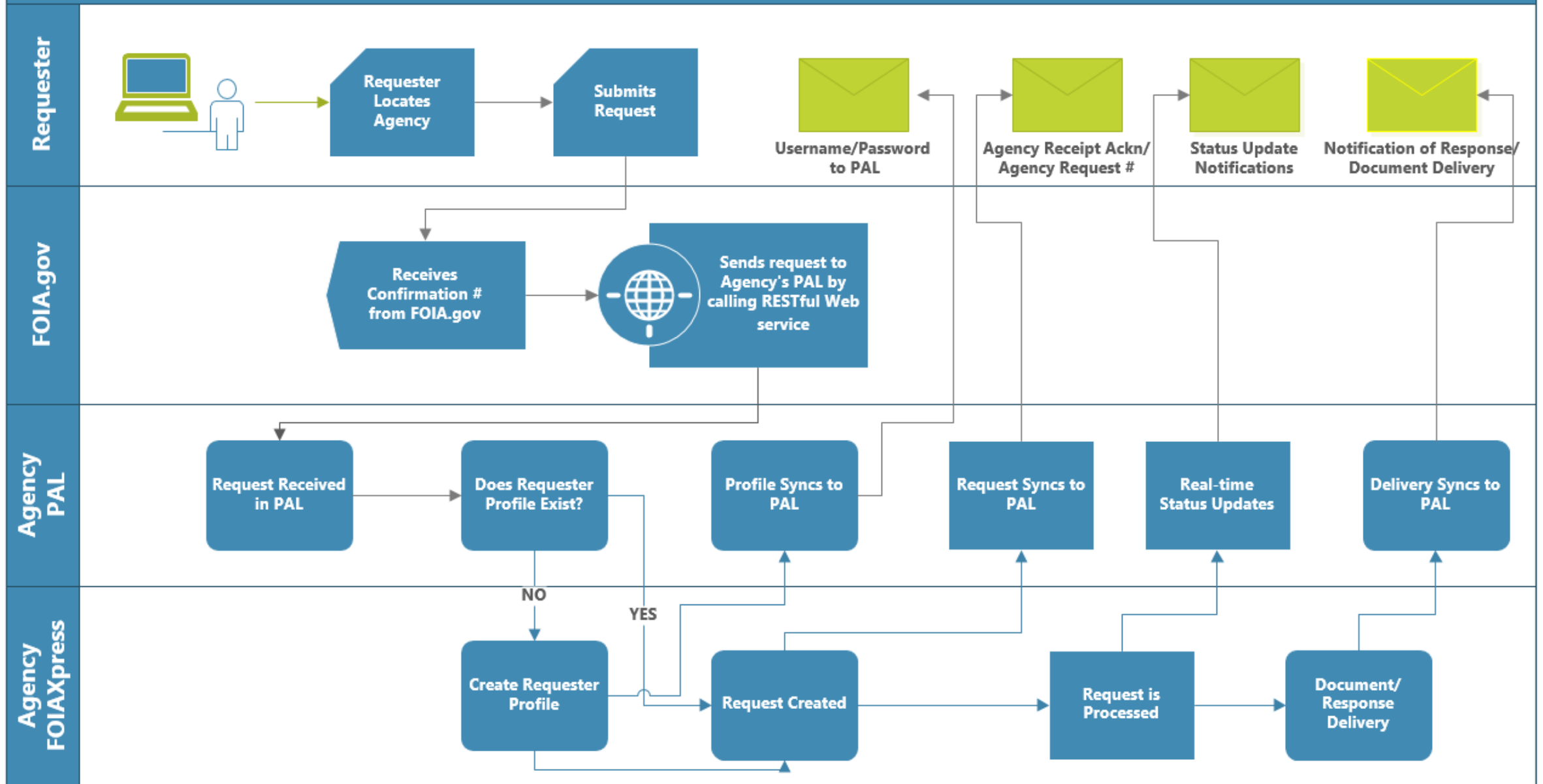
Collaboration Room

- **Request for Documents**
 - Send request for records to record owners
 - Record owners upload records directly to collaboration room and submit to FOIA office
 - FOIA office receives message that records have been uploaded
- **Send/Save for Consultation**
 - Send documents/pages for consultation
 - Third party downloads records for review
 - Third party uploads review or submits message with details of review to FOIA office
- **Common Room Features**
 - System notifies FOIA office that the record location/reviewer has received the request
 - Message feature between reviewer and FOIA office
 - FOIA office can seamlessly move response to request review log, request folder, document management, or correspondence log

Sneak Peek at v10.3

- **Public Access Link (PAL)**
 - National FOIA Portal API
 - Separate Request and Appeal submission form configuration
 - Duplicate search for PAL Requests
 - PAL content search supported on remote file repository
 - User management
 - Security configuration applicable to administrative users
- **Existing PAL Feature Review**
 - Pay.gov integration
 - Withdrawal requests

National FOIA Portal API Integration with FOIAXpress PAL



Sneak Peek at v10.3

- **FOIAXpress**

- **Forgot Password feature**
- **View permission**
 - **No permission data completely hidden**
- **New System Administration tab & permission**
- **Moved to Request Type Configuration**
 - **Duplicate search**
 - **Require response package approval**
- **ADR name change to EDR (Electronic Document Review)**
- **New Word template format (.dotx)**
- **User login ID's hidden**
- **Notes count**
- **Task reminder, option to Go to Request**
- **Add documents directly to Request Folder**
- **Delete range of pages from Review Log**
- **Print/Save: Include only redacted pages**
- **New icon for pages with Review Objects only**

FOIAXpress Existing Feature Review

- **Section 508 compliance & high-contrast themes**
- **Features and licenses**
- **Localization**
- **Dashboards no longer associated to roles**
- **Export Current Roles & Permission Analysis Report**
- **Request type multi-track configuration**
- **Correspondence log redaction feature**
- **Templates with document-related insert fields**
- **PDF document delivery with password-protected documents**
- **Retention**

Thank You!

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Roles and Permissions

Which Role Manages What?

Application Roles	Request Type Roles	File Cabinet Drawer Roles
Navigation Bar Options	Actions to Requests	Actions to Documents
Application Configuration	Special Access	
Reports		
EDR Access		

Tips

- **Users can only belong to one Group but can belong to MULTIPLE roles**
- **Roles can be created to manage individual permissions as well as groups of permissions (i.e., Correspondence Template Editors, Extension Approval, Help Desk)**
- **When to use “Automatically to All” vs “Manual” configuration roles**
 - **Caution when changing from one to the other, all permissions are cleared**
- **How to use Special Access role**
 - **Users not assigned to request have limited access**
- **Creating roles to manage confidential request types and file cabinet drawers**
- **System Request Type Roles: Primary, Secondary, Request Owner Request Type Roles (View Only & Assign, Limited Permissions, Let user get permission from assigned Role)**
- **Create same roles across all 3 role types for ease of assignment**



Thank you,

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