

In This Guide...

Page 2

- Multi-Assignment
- Copy a Request

Page 3

- Specify Record Release Types
- Notification Opt-Out

Page 4

- Direct Release to Requester

There are several new, interesting features now available in FOIAonline. This quick guide serves as an introduction to these features and how they can help FOIA processing in the system.

With these new features, you can:

- **Make an assignment for several requests at once.**
- **Copy existing requester information when entering a new request.**
- **Specify record release types.**
- **Opt out of system emails.**
- **Release records directly to a requester.**

New Feature!

Save Clicks and Assign Multiple Requests Together

Did you know...?

You can now **assign multiple requests** to an organization or individual at the same time?

Make multiple assignments from either the Unassigned Cases dashboard or Custom Report Results using checkboxes under the Assign column and the Make Assignment section.

Unassigned Cases Agency: **NAVY** Filter: **All** Results: **25**

6 items found, displaying all items.

Assign	Tracking Number	Type	Requester	Submitted	Due	Detail
<input checked="" type="checkbox"/>	DON-NAVY-2014-000004	Request	Lauren Lenks	02/04/2014	TBD	
<input type="checkbox"/>	DON-NAVY-2014-000003	Appeal	Margot Overmeyer	01/27/2014	02/25/2014	
<input type="checkbox"/>	DON-NAVY-2014-000001	Request	Margot Overmeyer	01/27/2014	02/27/2014	
<input checked="" type="checkbox"/>	DON-NAVY-2014-000005	Request	Zachary Schoo	11/22/2013	01/08/2014	
<input checked="" type="checkbox"/>	DON-NAVY-2014-000005	Task	Zachary Schoo	11/22/2013	TBD	
<input type="checkbox"/>	DON-NAVY-2013-000001	Request	Thomas Retren	05/14/2013	06/26/2013	

6 items found, displaying all items.

Export options: CSV | Excel

Make Assignment

Note: Depending on the number of items being assigned, assignments may not be made immediately after saving.

Organization Assignment: **DON/NAVY/CNIC - Commander, Navy Installations Command**

Individual Assignment:

SAVE CHANGES **ASSIGN TO ME**

New Feature!

Copy a FOIA Request - Don't Re-Enter Requester Information

Did you know...?

You can now **automatically populate request information** for repeat requesters?

Look for the **new** icon next to the Requester field on *any* request.

Submitted Evaluation Assignment Processing Closed

Tracking Number: DON-NAVY-2014-000005

Requester: Zachary Schoo

Organization: N/A

Requester's Account: No

Sub Details Case File Admin Cost Assigned Tasks Comments Review

Copy Information

Prefix:

* First Name: **Zachary**

Middle Initial:

* Last Name: **Schoo**

Organization:

Email Address:

Phone Number:

Fax Number:

* Mailing Address Location: **Military Address**

* Address Line 1: **312 Main St**

Address Line 2:

Military Branch/Agency:

* Military City: **FPO-Fleet Post Office**

* Military State: **AE-Armed Forces Europe**

* Zip Code / Postal Code: **43280**

New Feature!

Organize Your Responsive and Unresponsive Records

Did you know...?

Did you know.....You can now specify **record release types** in the case file?

Upload batches of the same release type at the same time. This can then be individually modified on the Case File – Records page using the Publish dropdown menu.

Records
Consultations
Correspondence
Appeals
Invoice
Restricted Materials

Case Responsive Records

Publish Options : UU - Unredacted - Unreleasable RR - Redacted - Releasable
UR - Unredacted - Releasable REQ - Release to Requester Only
RU - Redacted - Unreleasable

Filter by Title or Keyword(s) : Results **50**

3 items found, displaying all items.

Publish	Title	Type	Exempt	Retention	Action	Detail
UU <input type="button" value="v"/>	Appendix M	PDF	N/A	Default		

New Feature!

Opt Out of System Notifications

Did you know...?

Did you know...You can now **opt out of system emails**?

Users assigned to a request or FOIA officers receive an email when the **clock auto starts**. Users assigned to a request receive an email when a **task is generated**. Users assigned to a request receive an email when a **task is closed**.

Edit User Account

* indicates a required field.

User Information

* First Name : ? * Address :
Middle Initial : Line 1 :
* Last Name : Address Line 2 :
Organization : * City :
* Email Address : * State/Province :
* Confirm Email : * Zip Code/Postal Code :
Address :
Phone Number :
Fax Number :

Email Preferences

? Check notifications to receive from FOIAonline :
Clock Auto-Start : ☒
? Case File Modification Alerts : ☐
? Case File Items Completed Alerts : ☐

New Feature!

Release Records Directly to the Requester

Did you know...?

You can now **release records directly to the requester** if they have an account?

Select **REQ** from the Publish dropdown menu to make records only available in the system to the registered user.

Agency User View

UU and RU – These records will not be visible by any member of the public.

UR and RR – These records will be visible by the general public.

REQ – These records will only be visible by the requester, if the requester has a registered account.

Records
Consultations
Correspondence
Appeals
Invoice
Restricted Materials

Case Responsive Records

Publish Options : UU - Unredacted - Unreleasable RR - Redacted - Releasable
UR - Unredacted - Releasable REQ - Release to Requester Only
RU - Redacted - Unreleasable

Filter by Title or Keyword(s) : Results **50**

3 items found, displaying all items.

Publish	Title	Type	Exempt	Retention	Action	Detail
UU	Appendix M	PDF	N/A	Default		
UR	Citizens Ranking Executive Summa...	PDF	N/A	Default		
REQ	comm_contact_list_july2010	PDF	N/A	Default		

3 items found, displaying all items.

Registered Requester View

Released Records

Filter by Title : Results **50**

2 records found, displaying all records.

Download	Title	Type	Size (MB)	Release Date	Released With
	Citizens Ranking Executive Summary 12 Mar Rev 1	PDF	0.03	02/04/2014	Request - Public
	comm_contact_list_july2010	PDF	0.05	02/04/2014	Request - Direct

2 records found, displaying all records.

General Public View

Released Records

Filter by Title : Results **50**

One record found.

Download	Title	Type	Size (MB)	Release Date	Released With
	Citizens Ranking Executive Summary 12 Mar Rev 1	PDF	0.03	02/04/2014	Request

One record found.