Treasury Board

Coordination of Access to Information System Version 1

User's Guide

DRAFT

Doc-To-Help Standard Manual

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If You Need Assistance

On-line Help

This document is available via on-line help, which, when running the application, can be accessed by clicking "Help" on the left-hand-side of the screen.

Telephone Help

If you require assistance to access or use the Coordination of Access to Information System please contact the Treasury Board Information and Data Officer at (613) 957-2455.

Introduction

Overview

The Coordination of Access to Information System (CAIR), developed for Treasury Board Secretariat, is a system that will monitor the progress of Access to Information (ATI) requests, help coordinate responses to requests, and allow better communication and consultation between central agencies and institutions.

There are two separate systems. One system is designed to be used by Access to Information and Privacy (ATIP) officers and Treasury Board Secretariat personnel. The other system is designed to be used by the public.

System Requirements

The system is fully Internet-based, and runs within Netscape version 4.06 or later or Internet Explorer 5. These are available without charge. If you do not have one of these browsers, contact your LAN Administrator to obtain it.

A Pentium-class system running Windows 95, 98, 2000 or NT 4 is recommended. The system works best with at least 32 megabytes of main memory.

Within the browser the "Accept Cookies", and "Enable JavaScript" must be turned ON. These are installation defaults, so unless someone has changed these options manually, your browser should work fine.

Terms

Throughout this document, certain terms will be used. This section will describe them.

Field

A field is any place where you can enter data.

Drop-down List

This is a special type of field that allows you to enter data by selecting from a pre-defined list. It is denoted by a downward-pointing arrow to the right of the field.

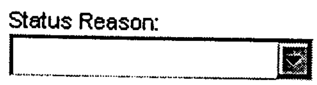

Figure 1 – Status Reason Drop-down List

For example, on the Retrieve Existing Request(s) screen, the reason that a request has been put On Hold must be selected from a drop-down list.

Button

Buttons are used to perform actions on the screen, or to open other screens. You click on them once with your mouse.

For example, on the Retrieve Existing Request(s) screen, to search for a request, you would click once on the "Search" button.

Figure 2 - Example of a Button

Update Bar

The update bar is used where changes to records can be saved.

Save – used to save any changes that have been made.

Insert – used to create a new blank record for data entry.

Delete – used to delete the current record.

Abandon Changes – used to clear any changes made to the record.

Return to Main Screen – used for navigation. Returns you to Retrieve Existing Request unless you are in a pop up window.

Figure 3 – Example of Update Bar

Menu

The menu is used to move from one area of the CAIR application to another. It looks like this:

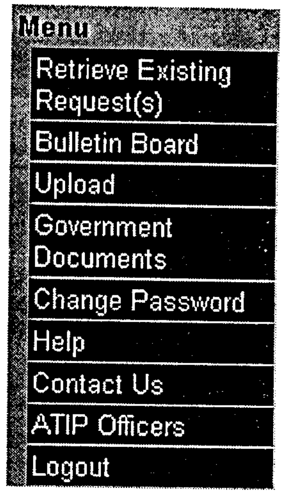

Figure 4 - Menu

You will see this menu on the left hand side of the screens. By clicking on the appropriate entry with your mouse, the screen will move to the associated screen.

The menu will display nine out of the ten items listed below. If you have the first item (Create New Request) showing on your menu then you will not have the fourth one (Upload) and likewise if you have the fourth item you will not have the first one. These items are (in order):

1. Create New Request (if your department does not Upload requests)
2. Retrieve Existing Request(s)
3. Bulletin Board
4. Upload (if your department Uploads requests)
5. Government Documents
6. Change Password
7. Help
8. Contact Us
9. ATIP Officers
10. Logout

Accessing the System

Finding the Application

CAIR can be found through your Netscape browser, at the following address:

Once you have successfully entered the URL, your browser will connect to the CAIR application.

Logging On

To access CAIR, you will require a userid and a password. These can be issued to you by calling the number shown in the section entitled "If You Need Assistance"

Type in your assigned userid and password, and click "English" or "Français".

If you did not enter a correct userid or password you will be shown an "Authorization Failed" window. The following window will pop up:

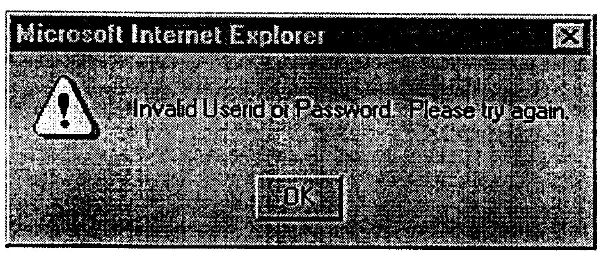

Figure 6 - Incorrect Login Message

If you are sure that you entered everything correctly, and the system still will not give you access, phone the application support number for more help.

If you have entered everything correctly, the opening CAIR screen will appear.

Access Levels

There are three different access levels associated with users within CAIR. They are:

1. ATIP Officers
2. TBS User
3. Administrator

ATIP officers are able to search and view all requests in the system, create, delete and modify their own departments requests (either by uploading or online). They are able to read all bulletin board messages and create, delete and modify their own. If their department is defined as an upload department they are able to upload their requests from their system to CAIR. ATIP officers are able to change their own password, view Government Documents Links, view Help, view Contact Us, lookup contact information for other ATIP Officers and Logout.

TBS users are able to search and view all requests in the system. They are able to read all bulletin board messages and create, delete and modify their own messages. They can upload their requests from their system to CAIR. Change their own password, view Government Documents Links, view Help, view Contact Us, lookup contact information for other ATIP Officers and Logout.

The Administrator is able to search and view all requests in the system, create, delete and modify all departments requests. The Administrator is able to read, create, delete and modify all bulletin board messages. The Administrator is able to upload requests to CAIR. The Administrator is able to change their own password, view and update Government Documents Links, view Help, view Contact Us, lookup contact information for other ATIP Officers and Logout.

Using the System

The Retrieve Existing Request(s) Screen

After successfully logging on, the Retrieve Existing Requests screen will be displayed.

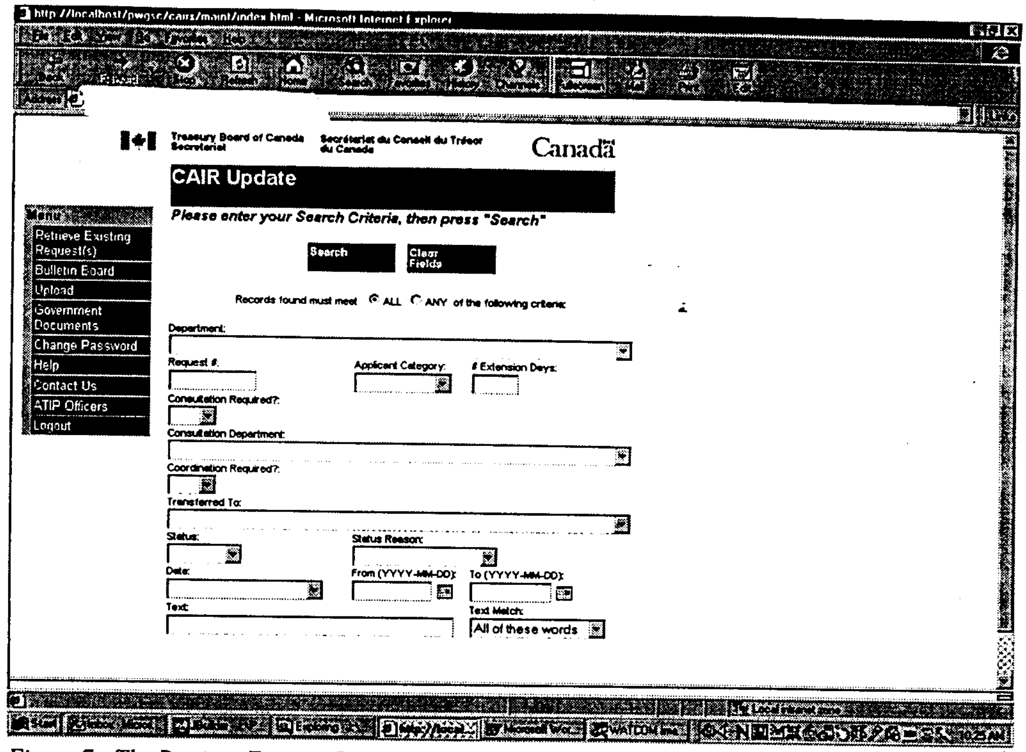

Figure 7 - The Retrieve Existing Request(s) Screen

This screen is used to search for and retrieve requests that are already in the database. Enter your search criteria into the appropriate fields and then move your mouse over the "Search" button and click on it. You can search for all or any of the conditions to be met. Try to be as specific as possible to reduce the waiting time for a response.

Accessing Help

At any point in the application, you can bring up the on-line help file to guide you through a process. Clicking on "Help" on the menu will bring up the Help Table of Contents.

Changing Your Working Language

CAIR is a bilingual application. When you sign on choose the language you would like to work in for this session by clicking on the appropriate language button

Changing Your Password

Once you are signed on, you have the capability of changing your password. This is done by clicking on the "Change Password" menu item.

To change your password, type in your current password, then type in your new password.

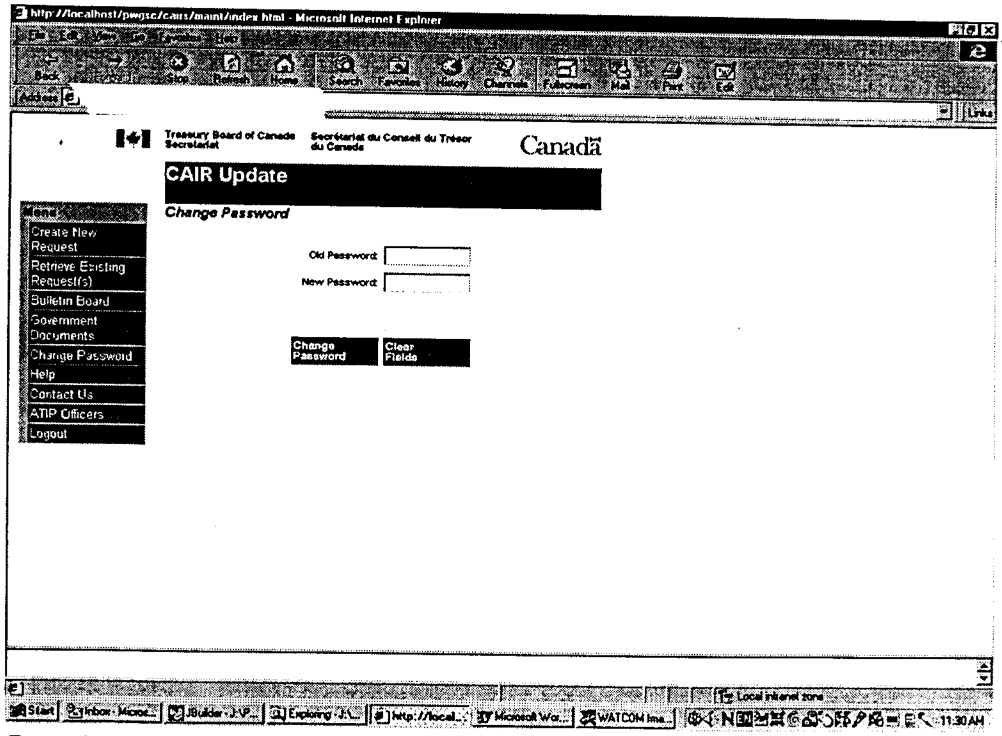

Figure 8 - Change Password Screen

Click "Change Password" to make your changes permanent.
If you have forgotten your password contact the Treasury Board Information and Data Officer at (613) 957-2455 to have your password reset.

Date Fields and the Calendar Utility

All dates in the system are displayed in the format:

YYYY-MM-DD

You can enter the date by typing or using the push-button beside every date field. Clicking on the button will bring up the calendar pop-up window, with which you can select the date.

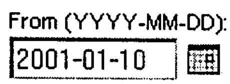

Figure 9- Date Field with Calendar push button

If the field is blank when you invoke the calendar, it will default to the current month/year. If there is already a date in the field, it will default to that month/year.

You can move from year to year by clicking the "<<" and ">>" buttons. Move from month to month by clicking the "<" and ">" buttons. When you have the proper month displayed, clicking on the day of the month will close this window and put that date in the field.

If you would like to remove a date from a field, click on its related Date button, then click on "Clear Field". The calendar will close, and the date will be removed.

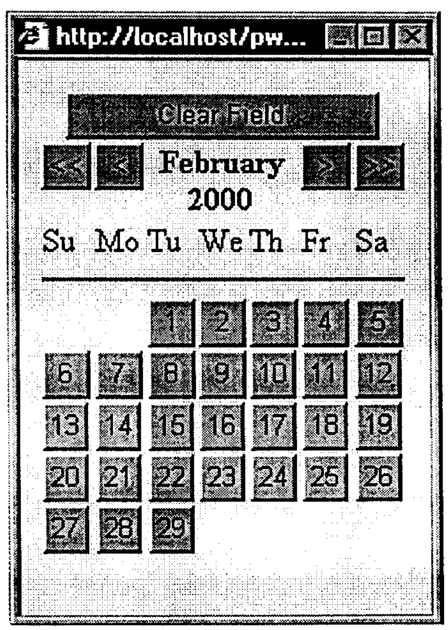

Figure 10 – Calendar Utility Screen

Working with Requests

Creating a New Request

Only departments that do not upload their requests are able to create new requests online. Requests are tracked by Request Number, in the format:

DDDYYYYNNNN

Where:

- DDD is the three-letter department acronym
- YYYY is the four-digit year
- NNNNNN is a uniquely generated six digit sequence number

Clicking on "Create New Request" from the menu on the left side of the screen will display the screen used to input the new request.

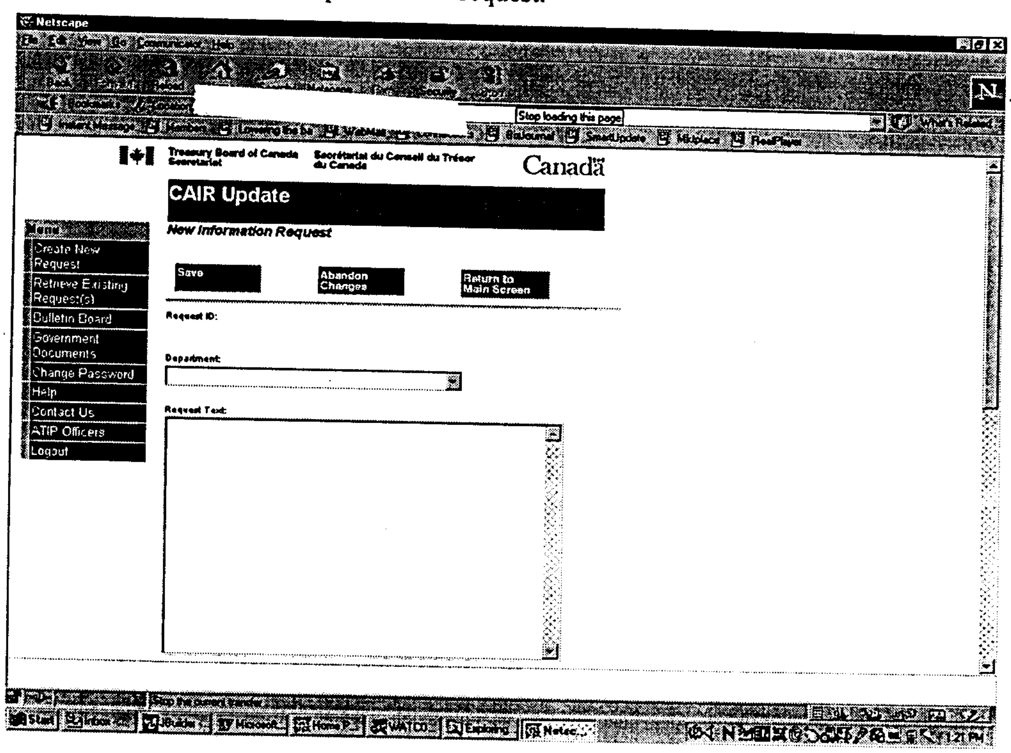

Figure 11 – Create Request Screen

Request ID is automatically generated, and you cannot change it.

Department is a mandatory field. The dropdown will only have your department to choose from.

Request Text is a mandatory field. The text of the request should be typed in as received in the ATIP office; some requests may need to be edited to eliminate personal identifiers in accordance with the Privacy Act, or to eliminate other information which may be exempted or excluded under the Access to Information and Privacy Acts.

Departments are allowed to strip off administrative information such as the confirmation of right of access or a request for fee waiver. In addition, Departments can strip off historical information and request justification on very long requests, but only if the information is not deemed to be relevant.

Status is a mandatory field that identifies the status of the request. The following statuses are valid:

a) Opened

b) Refused

c) Closed

d) On Hold

Status Reason is a mandatory field if the Status is On Hold. The following status reasons are valid:

a) Cost Estimate

b) Other

c) Request Clarification

Applicant Category is a mandatory field that identifies the group the applicant falls in to. The following categories are valid:

a) Academic

b) Business

c) Media

d) Organization

e) Parliament

f) Public

g) Unknown

Coordination Required is a mandatory yes/no field which indicates whether or not coordination with Treasury Board is required.

Yes - Coordination is required

No - No coordination is required

Consultation Required is a mandatory yes/no field which indicates whether or not consultation with other departments is required.

Yes - Consultation is required

No - No consultation is required

Consultation Departments is a button used to pop up a new window to enter all of the departments that are being consulted. This button cannot be used until the request is saved. Once the request is saved, click on the button and add the consultation departments. See figure 12.

Transferred to is an optional field used to identify the department the request has been transferred to.

Number of Extension Days is an optional field that holds the number of extension days that have been approved. The due date for answering the request is 30 calendar days after the date that the request is received (final) plus any extension days that may be approved.

Date Received Initial is a mandatory field used to hold the date that the ATIP Office first sees the request.

Date Received Final is an optional field used to record the last date a revision or amendment was received for a particular request. It can also be used to readjust the due date if a request was put on hold for any reason.

Date Due Initial is a calculated field that holds the initial due date and is calculated by adding 30 days to the request received date (either initial received date or final received date, whichever is later).

Date Due Final is a calculated field that holds the final due date and is calculated by taking the date due initial and adding the extension days.

Date Completed is an optional field that holds the date that the request is completed. Once the request is completed it is a mandatory field.

Date Added to CAIR is a generated field that holds the date the request was first added to the CAIR system.

Date Modified is a generated field that holds the date the request was last changed.

Once you click on the "Consultation Departments" button, the following screen will appear:

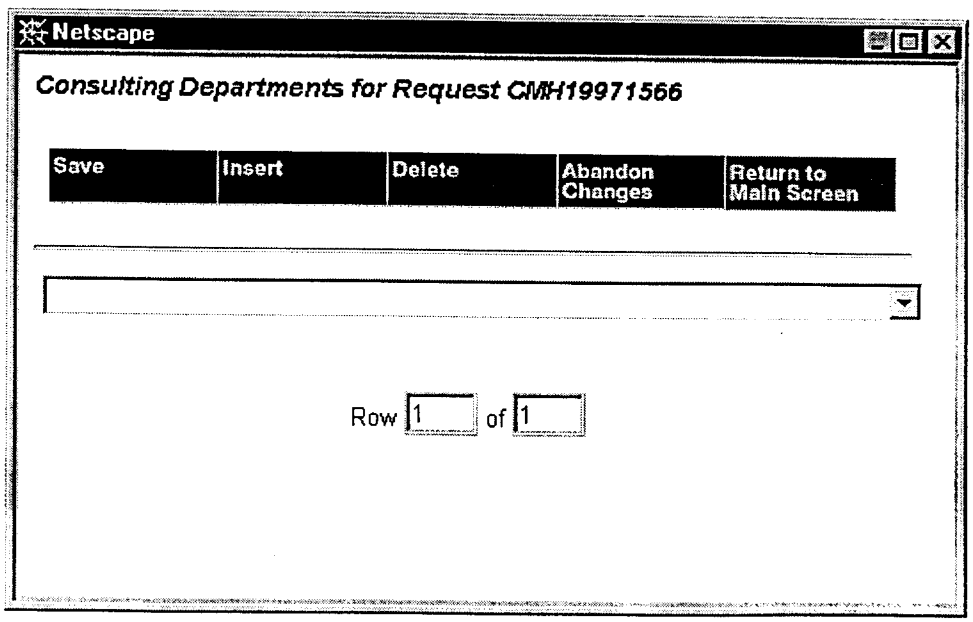

Figure 12 – Consultation Departments Screen

Saving the Request

When you first create a Request and information is entered into the system, you

must click the save button yourself to save the new information to the database. If you leave the screen (either by shutting down Netscape, or by navigating to another page) some of the information you entered may not be saved.

Future versions of browsers will determine if you are moving off the screen without saving your changes. When those versions has been made available, you will be informed. Until then, it is important that you click "Save Request" to make the entered data permanent.

When you click the "Save" button, a message informing you that the save was completed will be displayed.

Deleting the Request

Users have the ability to delete their own departments Requests from the system at any time

Clicking on the "Delete Request" button will display a confirmation message asking you if the Request should really be deleted, and if you answer "OK", it will be removed. The Retrieve Existing Request(s) screen will appear, at which point you can select another function from the left-hand side of the screen.

Once a Request has been deleted, it cannot be restored. All information must be manually reentered.

Retrieving Existing Requests

This option is available to all ATIP Officers but only the users that do not upload their transactions will be able to update the records.

The request search screen looks like this:

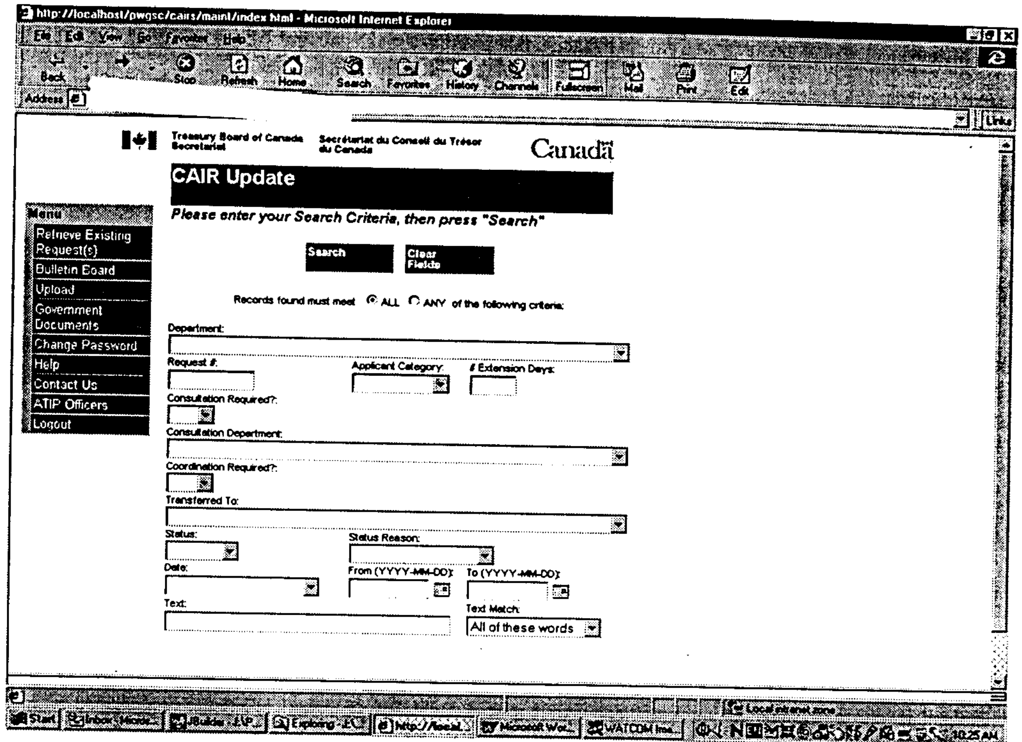

Figure 13 – Request Search Screen

This screen will allow you to search for requests based on the following criteria:

- Department
- Request Number
- Applicant Category
- Number of Extension Days
- Consultation Required
- Consultation Department
- Transferred To
- Status
- Status Reason
- Date Received Initial
- Date Received Final
- Date Due Initial
- Date Due Final
- Date Completed

- CAIRS Received Date
- Request Text

To search for a particular request, choose whether you would like to match all or any of the criteria via the radio button. Enter your search criteria and click the "Search" button. The system will then search the CAIR database.

If you are searching by date, you can choose one of the dates from the dropdown list and then enter a time period.

If you are searching by request text, you can enter words to search on and then choose to search for a request that has all of the words in the text, any of the words or the exact phrase.

Note that all searches are case insensitive.

When the Search button is pressed the results will be at the bottom of the screen. You may have to scroll down to see the results.

The results will be formatted with an underlined request number, the department, a short text summary and a purple arrow. If you click on the request number it will show the whole record.

If you click on the purple arrow it will take you back to the top of the screen.

Upload

For those departments that have their own Request Tracking software, CAIR allows you to upload your request files. When you have downloaded a file from your tracking software and are ready to upload your requests click on the Upload item in the menu bar.

The following screen will pop up:

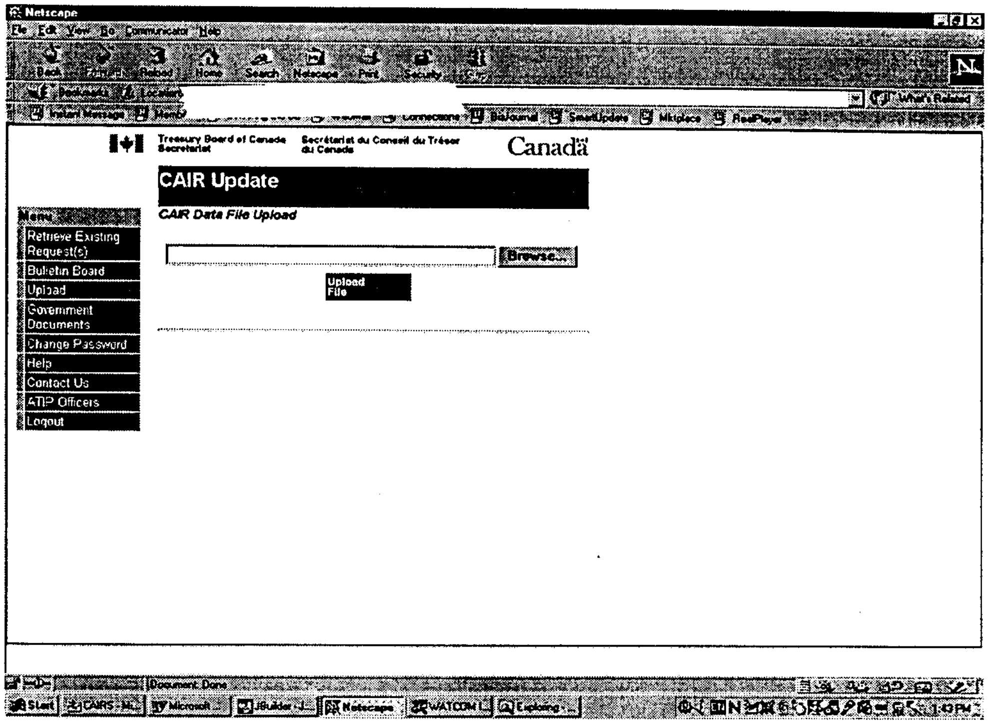

Figure 14 - File Upload Screen

First, you must specify the file to upload to the database. You can either do this by manually entering the filename, or by clicking "Browse" and selecting the filename using a Windows pop-up screen.

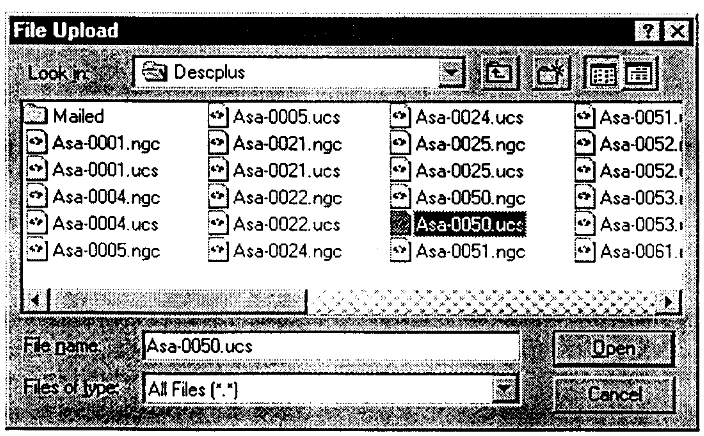

Figure 15 - Selecting a File to Upload using the Browse Button

Due to a limitation in the Netscape browser, the default type will always show as "HTML Files". In order to see other types of files, you must change this to "All Files (*.*)".

Double clicking on the file will place the name of that file in the field. Clicking "Upload File" will import the file into the database. If the file was successfully uploaded, you will receive a confirmation message.

Once the file has been uploaded you will receive an email confirming the upload and detailing any warnings or errors. Only records that have no errors will be saved to the database. The records that have errors will need to be corrected on your tracking software database and uploaded again.

You may upload files as many times as you like in a day.

Bulletin Board

This screen allows you to post information bulletins to share with other ATIP Officers.

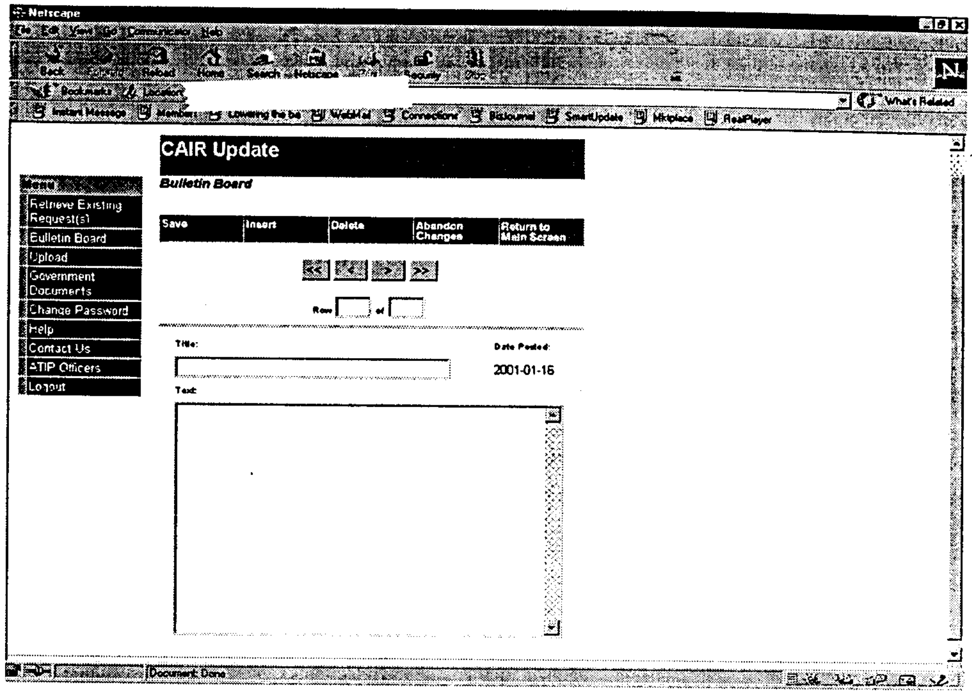

Figure 16 – Bulletin Board Screen

When the bulletin board is open the first message will be showing. To navigate through the messages use the arrow buttons below the update bar:

go to first message,

go to previous message,

go to next message, and

go to last message.

ATIP Officers are allowed to create messages and delete their own messages. Any messages that have been on the bulletin board for 30 days will be deleted automatically.

Government Documents

This screen contains links to Government of Canada Acts, Regulations, Treasury Board guidelines, court case judgements and legal opinions related to either Access to Information or Privacy issues. Clicking on a link will bring you to that document.

Contact Us

This screen contains the mailing address, phone number, fax number and email address for two contacts.

One contact is Treasury Board for any policy issues or other non-technical issues.

The other contact is the System Administrator for any technical problems.

ATIP Officers

This screen provides a means to contact other ATIP Officers.

Choose the department you would like to find the ATIP Officer for from the drop down and click on the Search button.

The departmental contact c shows the name, mailing address, phone number, fax number and email address. The email address can be clicked on to send an email.