

MERP FOIA Solution



Business Challenges:



There are delays and lack of response to citizen's request for information (privacy act information and FOIA information) due to current Government and States use of a manual process, emails, spreadsheet, or antiquated system to handle and distribute the information.

In addition, there is an FOIA/PA law mandated by the US Government - more info available at FOIA.gov.

Solution Benefits:

The FOIA solution from MERP based on CRM Dynamics platform which helps to overcome your agency's most complex processing challenges with following benefits:



- Automates the process for Government or States to validate requests from citizens, collect the information, redact any sensitive information, perform the legal review, process payment, and distribute the information.
- Provides annual, quarterly, Monthly reporting, audit, and records management.
- Correspondence to the Requester are listed in the Activities Timeline for future verification.
- Automatic SLA timers with auto-pause, resume, expire and cancel for specific days of a timeline.
- Supports automated workflows to streamline business processes.
- Automatic request assignment, task scheduling and reminders.
- Auto calculate the submissions based on working days, working hours and defined business closures.
- Auto calculate the expedite request fee-based on fee category and resource utilization
- Centralized processing from various request channels: web, Email, Postal Email, Online.
- Simplified uploads of documents, photos, and videos directly to the SharePoint.
- System is mobile and tablet friendly and cloud-ready module.
- Reduced risk of information lost as automatic backup is taken every day.

- Sort through active and archived requests, appeals, and documents with a quick and advanced integrated search engine
- Compare metrics, gain actionable insights, and improve your efficiency through interactive, role-based dashboards and analytic tools
- Give users access to only the information they need to see.

Simplify the management of Complex FOIA requests

Several difficulties surround handling a request including receiving a request, capturing, assignment and processing. Manual processing is very difficult, time-consuming, costly, and frustrating for your team members. To get rid of this The MERP FOIA solution simplifies the collection of FOIA requests and the management of response communications. Constituent intakes, acknowledgment letters, invoices, executive reviews, and responses are just a click away, improving staff efficiency and advancing decision making. Instant access enables collaboration across departments in real-time and facilitates faster processing and constituent response.

Accelerate FOIA Request Processing

The MERP FOIA solution is customizable based on the way your agency processes FOIA requests. Whether yours is a federal, state or local agency, MERP technology helps your staff efficiently manage the intake, processing, and response of requests. With MERP, you can:

Simplify the collection of FOIA requests regardless of how they are received (phone call, Postal Email, email or from Web)

Route the FOIA request to the dedicated FOIA worker or processor, with notifications to Executive Officers as needed

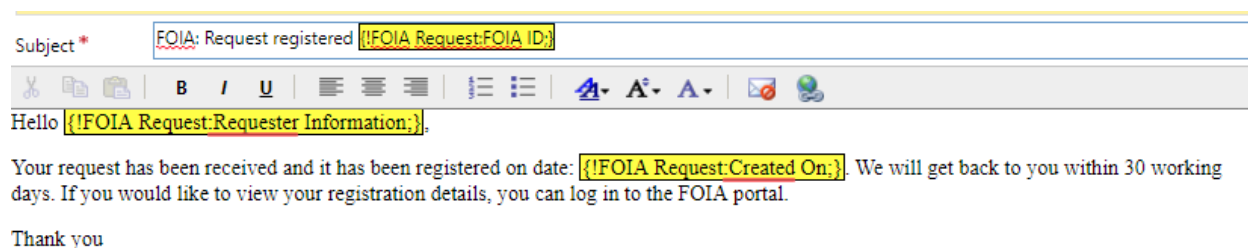
Automate the creation and delivery of customized communications including confirmations, requests for information and statements of anticipated costs—all without time-consuming data gathering or manual assembly

Leverage enterprise search functionality to quickly search across disparate data repositories, identify important pieces of information and make them instantly actionable. Analyze and explore relationships between disparate pieces of information, to gain valuable insight beyond basic key terms Access Information Anytime, anywhere with the MERP FOIA solution, your staff can instantly access a requester's file and completes all the needed processing steps electronically. A secure, central repository enables easy and controlled access for key agency stakeholders.

Features

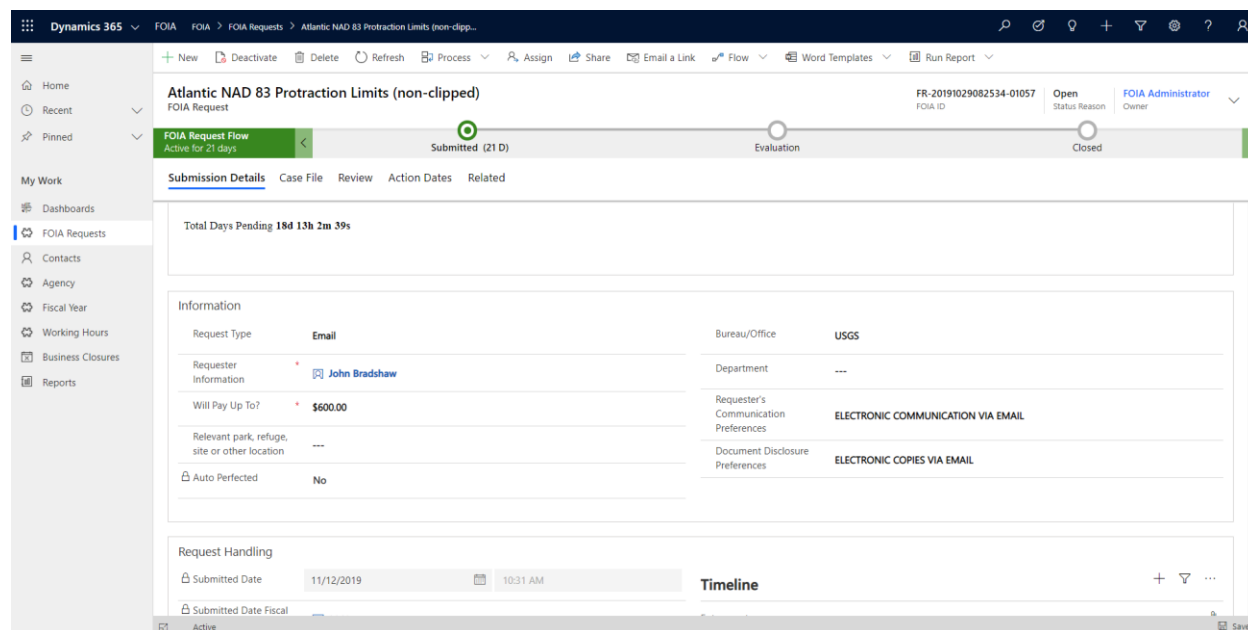
Email Templates

MERP FOIA Solution uses dynamic email templates for notifications and reminders which can be easily customized by anyone.



Email to request

A request can be automatically created when an email is received on a specific mailbox with specific text contains into the subject.



Reporting

Preconfigured and ad hoc reports provide a 360-degree view of the entire system, including simplified creation of the annual and Quarterly FOIA Report. The resulting view can be exported to word, pdf, Excel, PowerPoint, CSV, XML etc. formats.

File
Help

Fiscal Year: 2019
View Report

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V.B.(1). DISPOSITION OF FOIA REQUESTS -- ALL PROCESSES

Agency / Component	Number of Full Grants	Number of Partial Grants / Partial Denials	Number of Full Denials Based on Exemptions	Number of Full Denials Based on Reasons						Improper FOIA Request for Other Reason	TOTAL
				No Records	All Records Referred to Another Component or Agency	Request Withdrawn	Fee-Related Reason	Records not Reasonably Described			
BLM	0	0	0	0	1	0	0	0		1	
BOEM	0	0	0	0	0	0	0	0		0	
BOR	0	0	1	0	0	0	0	0		1	
BSEE	0	0	0	1	0	0	0	0		1	
FOIA/PA Appeals	0	0	0	0	0	0	0	0		0	
FWS	0	0	0	0	0	0	0	0		1	
NPS	0	1	1	0	0	0	0	0		3	
SOL	0	0	0	0	0	0	0	0		0	
USGS	0	0	1	0	0	0	0	0	0	1	
AGENCY OVERALL	0	1	3	1	1	0	0	0	1	8	

Word

Excel

PowerPoint

Acrobat (PDF) file

TIFF File

MHTML (web archive)

CSV (comma delimited)

XML file with report data

Data Feed

Audit Log

One of these is the auditing feature, which allows you to track changes made to data in the system. It also tracks each time a user logs into your system. Audit history is maintained on record level as well as field level to track who changed record and when the record gets updated.

Audit History

Filter on: All Fields

DELETED CHANGE HISTORY

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
12/11/2019 11:06 AM	FOIA Administrator	Update	Perfected Date Fiscal Year	2019	2020
12/11/2019 11:06 AM	FOIA Administrator	Update	Total Days Pending Date	11/29/2019 4:19 PM	12/31/2019 11:06 AM
12/11/2019 11:06 AM	FOIA Administrator	Update	Perfected Date slatrigger	11/2/2019	12/11/2019
12/11/2019 11:06 AM	FOIA Administrator	Activate	Status	No	Yes
12/11/2019 11:06 AM	FOIA Administrator	Activate	Status Reason	Active	Active
12/11/2019 11:06 AM	FOIA Administrator	Update	Request Perfected	Assigned	Perfected
12/11/2019 11:05 AM	FOIA Administrator	Update	Paper Print Out	No	Yes
12/11/2019 11:05 AM	FOIA Administrator	Update	Pre-Printed Publications	0	10
12/11/2019 11:05 AM	FOIA Administrator	Update	5 Day Notifications	0	25
12/11/2019 11:05 AM	FOIA Administrator	Update	Assignment Comment	No	Yes
12/11/2019 11:04 AM	FOIA Administrator	Update	Bureau/Office	BOR	Please review the request
12/11/2019 11:02 AM	FOIA Administrator	Update	Entity Audit Star...	BIA	

Document Management

The solution uses SharePoint for document management which is very easy to use, productive, efficient way to store and manage the documents. The documents are visible into the sub-grid of related records.

Dynamics 365 > FOIA > FOIA Requests > Request for Reclamation policy information

Request for Reclamation policy information
FOIA Request
FR-20191101055202-01071
Perfected
Status Reason
Request Owner

FOIA Request Flow
Active for 21 days

Submitted Evaluation Assignment Processing (48 Hrs) Closed

Submission Details Case File Review Admin Cost Make Assignment Appeal Action Dates Documents Related

Document Associated Grid

Documents on Default Site 1

Name	Modified	Modified by	Location	Path	Source
FOIA Annual Report (19).pdf	12/11/2019 11:10 AM	FOIA Admin	Documents on Default Site 1	Request for Reclamation policy info...	SharePoint
FOIA Document.docx	12/11/2019 11:10 AM	FOIA Admin	Documents on Default Site 1	Request for Reclamation policy info...	SharePoint
foia problems.png	12/11/2019 11:09 AM	FOIA Admin	Documents on Default Site 1	Request for Reclamation policy info...	SharePoint
queries.txt	12/11/2019 11:09 AM	FOIA Admin	Documents on Default Site 1	Request for Reclamation policy info...	SharePoint
Report Processing Queries (1).xlsx	12/11/2019 11:10 AM	FOIA Admin	Documents on Default Site 1	Request for Reclamation policy info...	SharePoint

1 - 5 of 5 (0 selected)

Active Save

Role-based Permissions

Give users access to only the information and part of the request which they need to see.

PowerApps

File Save and Close Actions

Security Role: Send email as another user Working on solution: FOIA

Entity	Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Estimate											
Estimate Line											
Expense											
Expense Category											
Expense Receipt											
External Identity											
Fact											
Field Computation											
Field Service Price List Item											
Field Service Setting											
Field Service SLA Configuration											
Field Service System Job											
Filter											
Find Work Event (Deprecated in v3.0)											
Fiscal Year											
Flow Session											
flowcardtype											
FOIA Request											
Forecast											
Forecast Configuration											
Forecast definition											
Forecast recurrence											
Forms Pro survey											
Forms Pro survey email template											
Forms Pro survey question											
Forms Pro survey question response											
Forms Pro unsubscribed recipient											
Forum											

Key

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization

SLA

Automatic SLA timers start when any action needs to be performed by the officer or requester in specific timeframe with auto paused, resume, expire and cancel for specific days of the timeline.

Request for Reclamation policy information
FOIA Request

FR-20191101055202-01071
FOIA ID

Perfected
Status Reason

Request Owner
Owner

FOIA Request Flow
Active for 21 days

Submitted Evaluation Assignment Processing (48 Hrs) Closed

Submission Details Case File Review Admin Cost Make Assignment Appeal Action Dates Documents Related

Total Days Pending 19d 23h 53m 26s

Business Closures and Working Hours

Can add days of business closures and working hours of the organization dynamically. So the request which comes in non-working days or after working hours will automatically be transferred to the next working day.

☑ Show Chart + New 🗑 Delete | Refresh 📧 Email a Link | ⚙ Flow | 📄 Run Report | 📄 Excel Templates | 📄 Export to Excel | 📄 Import from Excel | 📄 Create view

Active Working Days Search for records 🔍

✓ Day	↑ Start Hours	Start Minutes	End Hours	End Minutes
Friday	9	0	17	0
Monday	9	0	17	0
Thursday	8	0	16	0
Tuesday	9	0	17	0
Wednesday	9	0	17	0

☑ Show Chart + New Refresh 📧 Email a Link | ⚙ Flow | 📄 Run Report | 📄 Export to Excel | 📄 Import from Excel | 📄 Create view ☑ Show As

Business Closures Search for records 🔍

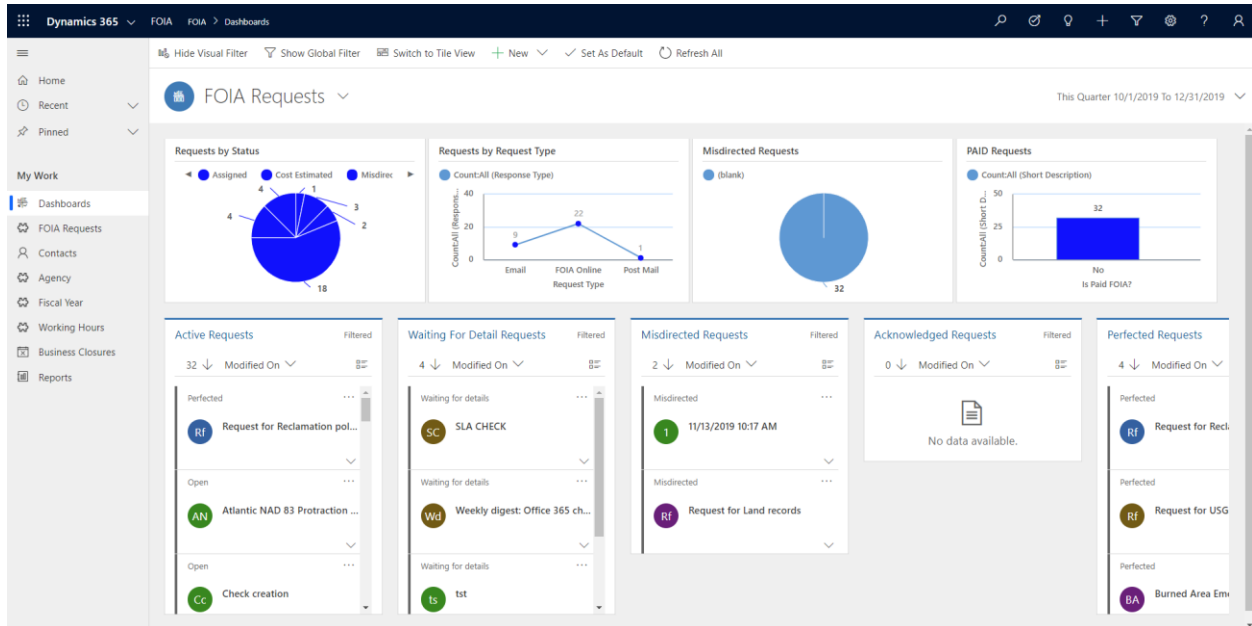
< 2019 >

+ New Refresh 📧 Email a Link | ⚙ Flow | ...

✓ Name	Start Time	End Time	Duration
31st and New Year Holidays	12/31/2019 5:30 AM	1/2/2020 5:30 AM	2 days
Christmas holiday	12/25/2019 5:30 AM	12/26/2019 5:30 AM	1 day

Real-Time Dashboards & Analytics

Interactive dashboards which show real-time data like Pending, Acknowledged, Perfected, Estimated, etc. requests. It offers deep and actionable insights into all of these requests on a real-time basis within one Screen and at your fingertips. These analytics and dashboards are accessible on mobile phones and tablets.



Quick/Advanced Search

Search the requests, appeals, and documents with a quick and advanced integrated search engine and can export the data in excel or CSV.

This screenshot shows the 'ADVANCED FIND' interface in Dynamics 365. The top navigation bar includes 'FILE' and 'ADVANCED FIND'. The ribbon contains various actions: Query, Saved Views, Results, New, Save, Save As, Edit Columns, Edit Properties, Clear, Group AND, Group OR, Details, and Download Fetch XML. Below the ribbon, the search criteria are set to 'Look for: FOIA Requests' and 'Use Saved View: [new]'. The search results are displayed in a tree view with the following structure:

- Short Description (Contains request)
 - Select
- Requester Information (Contains Data)
 - Contact (Equals Abraham McC)
 - Select

This screenshot shows the 'Search Results' view in Dynamics 365. The search criteria are 'request'. The results are displayed in a table with the following data:

Short Description	Created On
Request for Land records	11/19/2019 4:02 PM
Request for Land Records	11/19/2019 4:02 PM
Request for Legal Information	11/19/2019 4:00 PM
Request for Reclamation policy information	11/19/2019 4:18 PM
Request for Regulation information	11/19/2019 4:15 PM
Request for USGS	11/19/2019 4:18 PM

The interface also includes a navigation pane on the left with options like Home, Recent, Pinned, My Work, Dashboards, FOIA Requests, Contacts, Agency, Fiscal Year, Working Hours, Business Closures, and Reports. At the bottom, there is a column selection bar with letters A through Z, and a status bar indicating '1 - 6 of 6 (0 selected)'.

Data Backup and Recovery

Automated, unlimited backups of CRM data up to four times a day which minimize data loss, downtime, and restore times while satisfying aggressive Service Level Agreements. Data can be Restored and accessed on-demand with full-fidelity recovery.

Microsoft | Dynamics 365 Office 365 FOIA Administrator (foi...)

Dynamics 365 Administration Center

There's a better way to manage your instances. Try the new Admin center

INSTANCES UPDATES SERVICE HEALTH BACKUP & RESTORE APPLICATIONS

Manage backups

Backups for: merpfoia

LABEL	DATE (UTC)	CREATED BY	STATUS	STORED ON	EXPIRES ON (UTC)
	12/11/2019 5:48:42 AM	System	Creating	Dynamics 365	12/14/2019 5:48:42 AM
	12/10/2019 8:00:00 AM	System	Available	Dynamics 365	12/13/2019 8:00:00 AM
	12/9/2019 8:00:00 AM	System	Available	Dynamics 365	12/12/2019 8:00:00 AM
	12/8/2019 8:00:00 AM	System	Available	Dynamics 365	12/11/2019 8:00:00 AM
	12/7/2019 8:00:00 AM	System	Available	Dynamics 365	12/10/2019 8:00:00 AM
	12/6/2019 8:00:00 AM	System	Available	Dynamics 365	12/9/2019 8:00:00 AM
	12/5/2019 8:00:00 AM	System	Available	Dynamics 365	12/8/2019 8:00:00 AM
	12/4/2019 8:00:00 AM	System	Available	Dynamics 365	12/7/2019 8:00:00 AM

Dynamics 365

Source organization: merpfoia
Type: Production
Version: 9

Quick Help

Backup Instance
To create a backup of the selected instance, click New Backup.
[Learn more](#)

Restore Instance
To reset your organization to a restore point, select a backup and then click Restore.
[Learn more](#)

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